



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 04/30/18

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.

(04/16/18 ww) (04/16/18 & 04/24 cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CIVIL**

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

CASE#: CIV DS1722271

CASE NAME: TUMANG VS BEAUMONT

HEARING:
Readiness Calendar

COUNSEL:

MIMOSA TIU TUMANG (PLA)...ZIPRICK & CRAMER
BARBARA A BEAUMONT (DEF)...
ROBERT WILLIAM HAVEY
DEBRA M RAYNOR
NANCY HAVEY
ALL PERSONS UNKNOWN, CLAIMING

No Notes-Readiness- JTD.

(ww)

Future Hearings:
6/01/18 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 **PROBATE**

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

CASE#: PRO PS1400134
CASE NAME: Vicki R. Lister
HEARING: Accounting Review by ***

COUNSEL:

YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL
VICKI R LISTER	(DEC)...
KARIMI SUTTON SR,	(OBJ)...PRO/PER
SHANIKA LISTER	(PRO/PER)
CARMELA JOHNSON	(PRO/PER)

XREF: CONDS1000281 SHANIKA LISTER
CIVDS1309039 HARTNELL-V-LISTER

GENERAL INFORMATION:

Continued from **09/12/16** and **04/10/17**. Bryan Hartnell is relieves as counsel.
Continued from 01/22/18. Matter is continued to April 30, 2018; accounting to be filed by 4pm March 26, 2018. Clerk's office is ordered to set the accounting for April 30, 2018 at 8:30am in department S35 (or an earlier date if available) if the accounting is filed by the deadline of 4pm March 26, 2018. Probate examiners are ordered to review accounting and have probate notes available for the date of the accounting.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Terry Allen, son-in-law, was appointed as conservator of person and estate on 1128/01. Petition for resignation approved on 06/29/15. Final accounting approved on 04/10/17; however, order on final accounting and Ex Parte Petition for Final Discharge and Order were returned for corrections on 04/18/17.
 - a. **Need** order on Amended Final Accounting by Terry Allen.
 - b. **Need** Ex Parte Petition for Final Discharge and Order by Terry Allen.
2. Partial Inventory and Appraisals filed 06/11/14, 09/02/14, and 02/05/18.
3. PG appointed as successor conservator of the person and estate on 06/29/15.
4. **Need** accounting or waiver of account by PG filed.

RECOMMENDATION:

Inquire status of accounting.
(sa/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: 04/30/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400663

CASE NAME: ERWIN B. KOWALSKI

HEARING:

Hearing Re: 2nd Amended First Account Current for Estate of

COUNSEL:

MICHAEL J. KOWALSKI (PET)...PRO/PER
ERWIN B. KOWALSKI (DEC)...

Waiver of Court Fees and Costs filed by MICHAEL J. KOWALSKI is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **Second Amended** [filed 03/02/18] on First Account Current, by executor, Michael Kowalski, son/Petitioner

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

1. **Need** amended account report, and schedule in compliance with Pr. C. §1060-1064 et seq.
2. Assets on hand at end of accounting period do not match Summary of Account.
3. Schedule G indicates there is outstanding debt to be paid. Question if the estate is ready to be closed. **Need** verified supplement.
4. Schedule C Disbursements contains payment to Chase, Synchrony Bank, and Affiliate Assets. **Need** receipts.
5. **Need** findings regarding sole and separate property, per Local Rule 20-906.
6. **Need** manner of asset distribution per Local Rule 20-907.
7. **Need** bank statements supporting balance as of date of death, and supporting ending balance per Local Rule 20-908.
8. **Need** statement regarding notice to Director of Health Care Services or notice per Pr. C. §9202(a).
9. **Need** Statement regarding notice to Director of California Victim's Compensation Board Pr.C. § 9202(b).
10. **Need** statement regarding notice to Franchise Tax Board or notice per Pr.C.§9202(c)(1).
11. **Need** statement regarding creditor's claims.
12. **Need** verification of administrator per Pr. C. §1021.
13. **Need** Notice of Hearing and proof of service on Rosemary Kowalski.

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.

14. **Petitioner may wish to seek Counsel to produce a proper accounting.**

15. No proposed Order. Submit after hearing

RECOMMENDATION

Need proper, amended accounting per Pr. C. § 1060 et seq. to be set on first check calendar no sooner than **05/28/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rule 20-901.

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

CASE#: PRO PS1500682

CASE NAME: JAYANTILAL DAHYABHAI MORAR

HEARING:
Hearing re Final Discharge

COUNSEL:
CHRISTOPHER J MORAR (PET)...J BENJAMIN SELTERS III
JAYANTILAL DAHYABHAI MORAR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Christopher Morar, son, approved on 04/24/17.
2. No receipts needed as only real property remains.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(ww)

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

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

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

HEARING:

Hearing Re: CONTROL DATE FOR SETTLEMENT AGREEMENT

COUNSEL:

GARY S WARD	(PET)...FRIDLEY LAW FIRM
LUPE G FLIN	(DEC)...
SHARLEEN MALDONADO-WARD	(PET)...MICHAEL C MADDUX
CARMEN HERNANDEZ	(OBJ)...GILBERT M GUTIERREZ

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Control Date for Settlement Agreement

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

1. Matter set on 02/26/18 during trial, wherein, counsel reported that full agreement was reached by the parties.
2. Court notes: Upon the signature of the Court on the Settlement agreement, the control date of 04/30/18 will go off calendar.
3. Need status of agreement.

RECOMMENDATION:

Court's discretion.

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

CASE#: PRO PS1600010

CASE NAME: MICHAEL SLOAN LOGAN

HEARING:

Probate status report filed.

COUNSEL:

LISA DELATORRE (PET)...BETTY S CHAIN
MICHAEL SLOAN LOGAN (DEC)...
BASELINE FINANCIAL SERVICES (PET)...PAUL R KRAFT

THIS CASE IS SET FOR HEARING ON Status Report (filed 02/15/18).

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

1. Letters of Administration issued to Lisa Delatorre, daughter, on 05/09/16; limited authority, no bond.
2. Petitioner requests an additional 6 months to close the estate.
3. Estate is not in a condition to close due to the buyer backing out of the purchase of the real property located in Wrightwood. It is the only asset of the estate and is currently listed for sale
4. **Need** Notice of Hearing and proof of service 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. No proposed order.

RECOMMENDATION:

Need to clear note 3. Court may wish to vacate Status Report hearing on **06/26/18** as this matter was an updated status report. If approved, set next hearing for Accounting Review for **10/29/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Future Hearing: 6/26/18 Probate Status Report (**filed 08/15/17**)

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

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

CASE#: PRO PS1601123

CASE NAME: MTR OF LINDA MARIE SMITH

HEARING:

First Account and Report of CHANEEN SMITH, CARA SMITH and
Petition for allowance of fees filed.

COUNSEL:

CHANEEN SMITH	(PET)...PRO/PER
CARA SMITH	(PET)...PRO/PER
LINDA MARIE SMITH	(DEC)...
DEPT OF HEALTH CARE SRVCS	(TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account by Chaneen and Cara Smith, daughters

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

- 1 Accounting period: 01/18/17-02/28/18
- 2 Assets on hand: \$309,902.52 of which \$7,402.52 is cash.
- 3 Petitioners' do not make a request for fees or reserve of funds.
 - a. Petitioners' indicate within the proposed order that the estate is not in a condition t to be closed as the real property has not been sold. They are requesting for an additional year to close the estate. **JTD**
- 4 Petition is not verified by petitioners. **Need** verification per Pr.C. § 1021.
- 5 **Need** petition for approval and prayer per Pr.C. § 1064.
- 6 **Need** list of assets on hand.
- 7 **Need** findings re: sole and separate property via verified supplement.
- 8 **Need** statement regarding taxes paid via verified supplement.
- 9 **Need** bank statement in support of end date of accounting period per Local Rule 20-908.
- 10 **Need** vehicle identification number and description via verified supplement.
- 11 **Need** to file verified supplement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4).
- 12 **Need** to file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).

- 13 **Need** statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a) via verified supplement.
- 14 **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b) via verified supplement.
- 15 **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1). via verified supplement.
- 16 **Need** to file proper accounting to comply with Pr.C. § 1060.
- 17 Proposed Order: 03/19/18 same deficiencies as above.

RECOMMENDATION:

Accounting appears to be incomplete. Need to clear notes 4-16 then Court's discretion. If approved, Court to set hearing on final accounting on **05/06/19**.

(ww)

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

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

CASE#: PRO PS1700231

CASE NAME: CHARLES DAVID PEREZ

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARGARET L PEREZ	(PET)...PRO/PER
BRIANA PEREZ RICE	(PET)...PRO/PER
CHARLES DAVID PEREZ	(DEC)...

GENERAL INFORMATION:

Continued from **05/15/17, 08/07/17, 10/02/17 and 02/26/18**

THIS CASE IS SET FOR HEARING ON **[AMENDED 05/01/17]** Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by Margaret Perez and Briana Perez Rice, daughters/Petitioners.

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

1. Petitioners seeks 100% interest, ½ each, in decedent's 100% interest; in real property per intestate succession.
2. ~Proposed Form Order 03/08/17.

RECOMMENDATION:

Court's discretion.

(nb/ww/cs)

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

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

CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

HEARING:
Readiness Calendar

COUNSEL:
BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP
ROBERT WARREN HAVEY (DEC)...

No Notes-Readiness- JTD.

(ww)

Future Hearings:
6/01/18 Court Trial
6/01/18 Petition for Letters of Administration w/ Full IAEA

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1800131

CASE NAME: ALLINE BAZILIUS

HEARING:

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

COUNSEL:

MICHAEL PAUL BAZILIUS (PET)...PRO/PER

ALLINE BAZILIUS (DEC)...

GENERAL INFORMATION

Continued from 03/19/18. Court reviews documentation as to the proof of publication-court returns the documentation and clears the probate note as to proof of publication. Court clears probate note as to notice to administer estate filed march 8, 2018- court deems the date to be march 8, 2018. matter is continued for petitioner to notice Renee Simmons.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Limited Authority under IAEA by Michael Bazilius, son/Petitioner

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

1. **Petitioner requests bond not be required as limited authority is being requested [LF p. 6].** Net estate consists of \$237,231.40 of which \$5,432.40 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: 02/13/18

RECOMMENDATION

RFA Court's discretion re bond. If approved, set Accounting/Status Review **07/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

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

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

CASE#: PRO PS1800230
CASE NAME: MTR OF RICHARD K HAMAMURA

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

COUNSEL:

NONI S PATCHETT (PET)...DENNIS B HANSEN
RICHARD K HAMAMURA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Noni Patchett, nominee/petitioner.

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

1. Will waives bond; however, petitioner is not named in the will therefore bond is not waived as to petitioner. The estate consists of \$200,000.00 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(b).
 - a. The will conditionally incorporates decedent's Trust. **Need** copy of Trust filed. Copy may be filed confidentially. .Local Rule 20-1502.
2. Declinations to act and nominations filed by named executor Ruth. **Need** declination to act by Shari Patchett, alternate named executor.
3. **Need** Duties and liabilities form.
4. Petition is marked as Letters Testamentary but it appears that it should be Letters of Administration with Will Annexed. Does Court wish for an amended petition be filed? **JTD**
5. No Form Order Provided.

RECOMMENDATION

Need to clear notes 1-3 then Court's discretion re bond and remaining notes. If approved, set Accounting/Status Review for **07/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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

CASE#: PRO PS1800261

CASE NAME: Mtr of Lillie Louise Beasley

HEARING:

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

COUNSEL:

SAUNDRA GAY (PET)...SERGIO RODRIGUEZ
LILLIE LOUISE BEASLEY (DEC)...

GENERAL INFORMATION

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

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

1. This appears to be an ancillary probate; decedent was domiciled in Michigan.
2. Petitioner is an out of state resident and requests \$20,000 bond. Estate value consists of \$200,000 in real property. The Court in its discretion may require a non-resident personal representative to give a bond in an amount determined by the Court. per Pr.C. §8571. JTD
3. Section 8 to petition [LF, p. 5] does not specify relationships of Alicia Reves and Ralford Beasley. **Need** verified supplement.
4. ~Proposed Form Order: 03/16/18

RECOMMENDATION

RFA subject to note 3. Court's discretion re bond. If approved, set Accounting/Status Review for **07/08/19**. 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: 04/30/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800271

CASE NAME: MTR OF MINNIE TONG

HEARING:

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

COUNSEL:

DAVID LARA (PET)...PRO/PER
MINNIE TONG (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner appears to be sole heir and waives bond. Net value of the estate consists of \$30,000.00 of which \$5,000.00 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. **Need** proof of publication
3. ~Proposed Form Order: 03/21/18

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review **07/08/19**. 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: 04/30/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS01021

VACATED

CASE NAME: IN THE MATTER OF DAVID RYAN CAMAIONI

HEARING:

Accounting Review by ***

COUNSEL:

DAVID RYAN CAMAIONI REVOCABLE TRUST (TRU)...

DAVID RYAN CAMAIONI (PET)...DONNASUE ORTIZ

RON OLUND (PET)...E. JOAN NELMS

DONNASUE SMITH ORTIZ (PET)...DONNASUE ORTIZ

RON OLUND (PET)...HORSPOOL & HORSPOOL

CARLYN ANNE CAMAIONI (STE)...PRO/PER

WESTERN SURETY COMPANY (LEWIS D'AMATO BRISBOIS & BISGA)

JERE L. FOX (JERE L FOX)

XREF: SCSS02388 *MTTR OF DAVID RYAN CAMAIONI*

(ww)

Future Hearing: 5/08/18 9th Account & Report

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

TRUSTS

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

CASE#: TRU PS1800061

CASE NAME: SHEEHAN FAMILY TRUST

HEARING:

Petition for order transferring asset to revocable trust

COUNSEL:

ANTHONY SHEEHAN

(PET)...BENARI & NGUYEN LLP

SHEEHAN FAMILY TRUST

(TRU)...

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to Anthony Sheehan, Timothy Sheehan, and Jennifer Sheehan.

(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: 04/30/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1400142

CASE NAME: LYNN W AND MARGUERITE F KLOEPFER TRUST

HEARING:

Petition for ACCOUNT, TO REVIEW REASONABLENESS OF TRUSTEES FEES
, ETC

COUNSEL:

ROBERT A KLOEPFER (PET)...BRUNICK, MCELHANEY & KENNEDY P
WILLIAM L KLOEPFER (PET)...BRUNICK, MCELHANEY & KENNEDY P
LYNN W AND MARGUERITE F KLOEPFER TRUST(TRU)...
KENNETH KLOEPFER (PET)...RANDAL P. HANNAH

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to parties listed at LF, pgs. 5-6 of petition to include the United Kingdom Consulate.

(ww)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 18, 19

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANELY ARGUELLES

COUNSEL:

ANELY ARGUELLES	(PCE)...
RAMON ARGUELLES JR	(PCE)...PRO/PER
RAMON ARGUELLES	(CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from **12/04/17** for conservator to clear notes.

Continued from **02/26/18** Matter is continued and Court sets OSC re Sanctions on the conservators in amount of \$500.00 for failure to appear and OSC re Suspension of powers of conservator for the date of March 19, 2018. Court orders conservators to be personally present in court at 9:30am in Department S35 on March 19, 2018.

Continued from 03/19/18. Prior to matter being called, judicial assistant received message that conservator unable to appear for hearing- Matter is continued to April 30, 2018- Mitchell Roth will give notice.

THIS CASE SET FOR HEARING ON Compliance Review.

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

- 1 Anely and Ramon Arguelles Jr., parents, appointed as limited co-conservators of the person only on 05/01/17.
- 2 **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
- 3 **Need** Care Plan in accord with Pr.C.§2352.5.
- 4 Notification of Conservatee's rights per Pr.C.§1830(c) filed 05/02/17; however, paternal and maternal grandparents must be noticed also. **Need** completed notice to Maria Vargas & Filomeno Ortiz (maternal grandparents) and Maria & Ramon Arguelles Sr. (paternal grandparents).

RECOMMENDATION

Need to clear notes 2-4.

(ww/cs/ww)

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

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

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 17, 19

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON CONSERVATORS

COUNSEL:

ANELY ARGUELLES (PCE)...
RAMON ARGUELLES JR (PCE)...PRO/PER
RAMON ARGUELLES (CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 03/19/18. Prior to matter being called, judicial assistant received message that conservator unable to appear for hearing- Matter is continued to April 30, 2018- Mitchell Roth will give notice.

THIS CASE SET FOR HEARING ON OSC re Sanctions of \$500.00 on Conservators.

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

1. OSC set on 02/26/18 when both conservators did not appear at the Conservatorship Compliance Review hearing.
2. Anely and Ramon Arguelles, Jr., co-conservators/parents, are to be personally present.
3. Court set a sanction of \$500.00 for the conservators.

RECOMMENDATION

Court's discretion re OSC and sanctions.

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

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

SEE ALSO 17, 18

HEARING:

Hearing Re: OSC RE SUSPENSION OF POWERS OF CONSERVATORS

COUNSEL:

ANELY ARGUELLES	(PCE)...
RAMON ARGUELLES JR	(PCE)...PRO/PER
RAMON ARGUELLES	(CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 03/19/18. Prior to matter being called, judicial assistant received message that conservator unable to appear for hearing- Matter is continued to April 30, 2018- Mitchell Roth will give notice.

THIS CASE SET FOR HEARING ON OSC re Suspension of Powers of Conservators

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

1. OSC set on 02/26/18 when both conservators did not appear at the Conservatorship Compliance Review hearing.
2. Anely and Ramon Arguelles, Jr., co-conservators/parents, are to be personally present.
3. Court has discretion to suspend the co-conservators powers and appoint a replacement conservator.

RECOMMENDATION

Court's discretion re OSC.

(ww)

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

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

CASE#: CON PS1800093

CASE NAME: MTR OF DORIS A TORRES

HEARING: Petition for Appointment of Conservator

COUNSEL:

LORRAINE BROWN	(CPE)...GARY M RUTTENBERG
RYAN BROWN	(CPE)...GARY M RUTTENBERG
DORIS A TORRES	(CEP)...
RAY HERNANDEZ	(CPE)...GARY M RUTTENBERG

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate, by Lorraine Brown (daughter/Petitioner) and Ryan Brown (grandson/Petitioner) appointing Ray Hernandez (brother) and Lorraine Brown (daughter).

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

1. Petitioners request no bond as assets consist of limited pension, social security benefits and possible benefits from the 2014 Torres Family Trusts. **Supp. filed 04/23/18 indicates trust value may consist of at least one piece of real property with estimated worth of \$690,000 and petitioners request bond of \$690,000. Need total value of estate's yearly income to determine bond amount. JTD**
2. Petitioners report Deanne Salerno, daughter, is agent under various powers of attorney and has access to bank accounts of proposed conservatee. [Court to see Petition, LF p. 6]. **Declaration of Mary Jarrett, Notary indicates Deanne Salerno has been removed as agent for proposed conservatee.**
3. Nomination by proposed conservatee filed 03/22/18 via witness signature. **Declaration of Mary Jarrett, Notary re witnessing proposed conservatee's signature on nomination. JTD**
4. Citation with proof of service filed 04/23/18.
5. Petitioners seek medical powers. **Supp. filed 04/23/18 indicates petitioners recently were able to obtain physician's information and are awaiting a response re Capacity Declaration. Need Capacity Declaration with attachment(s).**
6. Petitioner seeks dementia powers. **Need appointment of counsel for report.**

7. **Need** notice of hearing and proof of service.
8. **Need** Certificates of Completion of the Conservatorship Training Class. **Supp. filed 04/23/18 indicates petitioners are scheduled to take the next available class next month.**
9. Court Investigator report filed 04/24/18.
10. ~Proposed Form Order: 03/22/18

RECOMMENDATION

Need to clear notes 1 & 5-8, then Court's discretion re Bond. If approved, set hearing for Compliance Review for **12/03/18** 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 **07/08/19**. Any accounting to be filed 30 days in advance.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800136

CASE NAME: OLGA M MILLER

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
OLGA MILLER

(CPE)...COUNTY COUNSEL
(CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION

Continued from 07/11/16, 03/13/17 and 11/13/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Notice of Conservatee's death filed 02/01/18.
2. 3rd and current account approved on 07/07/14.
3. **Need** 4th and final account for pre and post death accounting periods beginning with date of 01/11/14.

RECOMMENDATION:

Inquire status of accounting. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(sa/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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300143

CASE NAME: SONYA S PEREZ

SEE ALSO 23

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
SONYA S PEREZ (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 07/21/18

Continued from 01/22/18

THIS CASE IS SET FOR HEARING ON accounting review

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

1. PG re-appointed LPS conservator on 01/06/17.
2. Ex Parte Order that Conservator need not present 3rd by PG approved on 01/19/17.
3. **On 11/03/17 a Petition for Rehearing was granted and LPS terminated.**
4. **Need 4th** and final accounting beginning with date of 10/01/16.

RECOMMENDATION:

Inquire status of accounting.

(ww/cs)

Future Hearing: 4/30/18: Accounting Review (**Vacate**)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300143

CASE NAME: SONYA S PEREZ

SEE ALSO 22

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

SONYA S PEREZ

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

VACATE - It appears a duplicate setting set for accounting review. Matter already on calendar. See notes on previous matter #22.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300321

CASE NAME: Clifford E. Robinson

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CLIFFORD E ROBINSON (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 01/08/19

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. First Account by PG approved on 05/01/17.
2. Need Second account current beginning with 08/05/15.

RECOMMENDATION:

Inquire status.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400178

CASE NAME: MATTHEW B HERNANDEZ

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MATTHEW B HERNANDEZ (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 **05/04/19**.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600079

CASE NAME: DAVID T HUANG

SEE ALSO 26A, 26B, 27, 27A, 27B

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID T HUANG (CEP)...SANDY L. TURNER

XREF: CONPS1600080 GERALDINE HUANG

GENERAL INFORMATION

Continued from 10/30/18 at request of County Counsel to file accounting court directs county counsel to file accounting within 60 days of the sale of the house. Deadline for filing of accounting is 30 days before April 30, 2018.

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 06/15/16, no bond; first account current now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.
(nb/cs).

Superior Court of Calif, County of San Bernardino
Page: 26A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600079

CASE NAME: DAVID T HUANG
SEE ALSO 26, 26B, 27, 27A, 27B
HEARING:
Hearing Re: STATUS RE DISTRIBUTION OF SALE PROCEEDS

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID T HUANG (CEP)...SANDY L. TURNER

XREF: CONPS1600080 GERALDINE HUANG

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Status Re Distribution of Sale Proceeds

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

1. Matter set on 04/02/18 during OSC re status of sale of house, wherein, matter was trailed to 04/09/18. See notes on next matter number 26B.
2. Order confirming sale signed 04/09/18.
3. Public Guardian to give notice.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 26B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600079

CASE NAME: DAVID T HUANG
SEE ALSO 26, 26A, 27, 27A, 27B
HEARING:
Hearing Re: ISSUE OF DISTRIBUTION OF SALE PROCEEDS

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID T HUANG (CEP)...SANDY L. TURNER

XREF: CONPS1600080 GERALDINE HUANG

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Issue of Distribution of Sale Proceeds

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

1. Matter set on 04/09/18 during OSC hearing re status of sale of house, wherein, Court signed order on sale of the house and ordered that County Counsel email conformed copy of the order on sale of the house to all counsel by 04/13/18 4pm. Court permits the electronic service only as to this court document.
2. Court orders that County counsel serve all counsel with a copy of the escrow closing statement 5 court days after the close of escrow.

RECOMMENDATION:

Court's discretion.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

SEE ALSO 26, 26A, 26B, 27A, 27B

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GERALDINE HUANG

(CEP)...MITCHELL I ROTH

GERALDINE HUANG

(PET)...SHERRI L KASTILAHN

ARCHANGEL ESTATE PLANNING (TP)...ARCHANGEL ESTATE PLANNING &

XREF: CONPS1600079 DAVID T HUANG

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

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

1. PG was appointed as temporary conservator of the person and estate on 07/28/16 and then general conservator of the person and estate on 04/14/17.
2. Final Inventory and Appraisal filed 09/21/17 and 09/28/17. Supplemental Inventory and Appraisal filed 01/25/18.
3. **Need** accounting or waiver of accounting beginning with 07/28/16.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 27A

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

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

SEE ALSO 26, 26A, 26B, 27, 27B

HEARING:

Hearing Re: ISSUE OF DISTRIBUTION OF SALE PROCEEDS

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
GERALDINE HUANG (CEP)...MITCHELL I ROTH
GERALDINE HUANG (PET)...SHERRI L KASTILAHN
ARCHANGEL ESTATE PLANNING (TP)...ARCHANGEL ESTATE PLANNING &

XREF: CONPS1600079 DAVID T HUANG

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Issue of Distribution of Sale Proceeds

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

1. Matter set on 04/09/18 at the OSC hearing re: Status of Sale of House.
2. Court signed the order for sale of the house on 04/09/18.
3. Court ordered that by 4pm April 13, 2018: County Counsel is to email conformed copy of the order on sale of the house to all counsel - Court permits the electronic service only as to this document.
4. Court further ordered that by 4pm 5 Court days after the close of escrow, County Counsel is to serve on all counsel a copy of the escrow closing statement.

RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 27B

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

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

SEE ALSO 26, 26A, 26B, 27, 27A

HEARING:

Hearing Re: STATUS RE DISTRIBUTION OF SALE PROCEEDS

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
GERALDINE HUANG (CEP)...MITCHELL I ROTH
GERALDINE HUANG (PET)...SHERRI L KASTILAHN
ARCHANGEL ESTATE PLANNING (TP)...ARCHANGEL ESTATE PLANNING &

XREF: CONPS1600079 DAVID T HUANG

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status re Distribution of Sale Proceeds

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

1. Matter set on 04/02/18 at the OSC hearing re: Status of Sale of House.
2. Court signed the order for sale of the house on 04/09/18.
3. Court ordered that by 4pm April 13, 2018: County Counsel is to email conformed copy of the order on sale of the house to all counsel - Court permits the electronic service only as to this document.
4. Court further ordered that by 4pm 5 Court days after the close of escrow, County Counsel is to serve on all counsel a copy of the escrow closing statement.

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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600306

CASE NAME: MTR OF OLETA RUTH BELANGER

HEARING:

Petition for APPOINTMENT OF THE PUBLIC GUARDIAN AS SUCCESSOR
TRUSTEE

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
OLETA RUTH BELANGER (CEP)...

Currently under review by Legal Research.
(LR)

Notice:

1. Notice of hearing on Amended petition filed 01/18/18; however, notice only allowed 16 days' notice. Need proper notice.
2. Need notice of Amended to conservatee. Need copy of trust to and list of beneficiaries to determine if notice is complete.

(ww/cs)

Future Hearing: 6/11/18 Accounting Review

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

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

SEE ALSO 30

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
KATHLEEN SCHAEFFER (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

Ex Parte held 04/18/17 and trailed to this date. Court appoints Sherri Kastilahn as Guardian ad litem for proposed conservatee.

Continued from **06/05/17**. Court orders that any competing petition for conservatorship is to be filed by 4pm June 16, 2017. If the competing petitioner files by this deadline, if they file with that general petition a temporary conservatorship petition, it may be set for June 19, 2017 at 10:00am.

Continued from 06/19/17. Court notes that the temporary conservatorship petition was denied- after review of previous minute order. Matter is set contested; time estimate is three half days. County Counsel for Public Guardian is to file either capacity declaration or status re capacity declaration by 4pm September 5, 2017. written report received from Sherri Kastilahn. Court set hearing re status of IHSS report & capacity declaration for September 18, 2017.

On 10/23/17 PG was appointed temporary conservator of the person & estate, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Public Guardian ["Petitioner"].

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less as the cost to the estate to arrange and consummate a sale of such personal property would exceed the value of said property.

4. Petitioner seeks medical powers. Medical Capacity declaration filed 04/03/17.
5. Petitioner requests dementia powers; **Need** report of counsel, Mitchell Roth.
6. Report by GAL, Sherri L. Kastilahn, filed 08/19/17.
7. CI report filed 06/02/17.
8. Citation returned served.
9. APS involvement noted [see Confidential Supplemental Information filed 04/03/17, LF, p. 4]
10. Declaration [filed 04/03/17, LF, p. 4] indicates conservatee opposes the appointment of PG.
11. **Objections filed 06/12/17 by Attorney for Conservatee, Mitchell I. Roth.**
12. ~Proposed Form Order: 04/03/17.

RECOMMENDATION:

Matter is contested. Need Report of Counsel then Court's discretion. If approved, set hearing for Compliance Review for **12/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **07/08/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww)

Future Hearings

- 5/29/18 Court Trial (Day 1)
- 5/30/18 Court Trial (Day 2)
- 5/31/18 Court Trial (Day 3)
- 6/01/18 Court Trial (Day 4)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

SEE ALSO 29

HEARING:

Readiness Calendar

COUNSEL:

PUBLIC GUARDIAN

KATHLEEN SCHAEFFER

(PET)...COUNTY COUNSEL

(CEP)...MITCHELL I ROTH

No Notes-Readiness- JTD.

(ww)

Future Hearings

5/29/18 Court Trial (Day 1)

5/30/18 Court Trial (Day 2)

5/31/18 Court Trial (Day 3)

6/01/18 Court Trial (Day 4)

Superior Court of Calif, County of San Bernardino

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

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700229

CASE NAME: GABRIEL SILVA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN
GABRIEL SILVA

(PET)...COUNTY COUNSEL
(CTP)...EDWARD B FISCHER

GENERAL INFORMATION:

Continued from 03/12/18

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. PG appointed conservator of the person and estate on 08/07/17, No bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/22/18..
3. Final Inventory & Appraisal filed.
4. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
5. **Need** Care Plan in accord with Pr.C.§2352.5.
6. If the conservatorship estate holds interest in real property, **need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes .4-6.

(ww/cs)

Future Hearing: 10/15/18: Accounting Review

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

DATE: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300192
CASE NAME: MATTHEW FLOREZ SPECIAL NEEDS TRUST

HEARING: Petition for accept resignation, trustee and appt. of Successor Trustee

COUNSEL:

MATTHEW FLOREZ	(PET)...PRO/PER
MATTHEW FLOREZ S.N. TRUST	(TRU)...
RAQUEL FLOREZ	(PET/TEE)...JOHN F WEBER

GENERAL INFORMATION

Continued from **03/14/18**. Sherri Kastilahn appointed as counsel for Matthew Florez. The Court notes Matthew Florez does not object to the Petition to Accept Resignation of Trustee and Appointment of Public Guardian. The Court advises Matthew Florez, Raquel Florez remains trustee until further order of the Court. Matter referred to the Public Guardian. Matter is trailed to the public guardian calendar on 3/19/18.

Continued from 03/19/18. Clerk's office to provide a copy of the file to Public Guardian.

THIS CASE IS SET FOR HEARING ON Petition to Accept Resignation of Trustee and Appointment of Public Guardian by Raquel Florez, Trustee

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

1. Petitioner, Raquel Florez, seeks Court approval to resign as Trustee and appoint Public Guardian.
2. Petitioner alleges the Order Establishing Special Needs Trust signed 03/28/13 provides that the Trustee may only resign pursuant to petition and order thereon with the right to nominate a successor trustee.
3. Petitioner alleges the current balance on hand for Trust is \$31,215.27, with a current bond of \$45,000.
4. Notice was given.
5. ~Proposed Order: 12/06/17

RECOMMENDATION

Court's discretion.

(lh/ww)

Future Hearing: 6/26/18 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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1601089

CASE NAME: Dean Revocable Living Trust

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DEAN REVOCABLE LIVING TRUST (TRU)...

XREF: CONPS1600290 OGIS DEAN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review by Public Guardian

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

- 1 Public Guardian was appointed Successor Trustee of the Dean Revocable Living Trust on 01/30/17.
- 2 No accounting or waiver of account. **Need** same.
- 3 Inventory and Appraisal filed 08/21/17.

RECOMMENDATION:

Inquire status of accounting.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700232

CASE NAME: THE BLUME FAMILY TRUST

HEARING:

Petition for allowance of compensation to consrvtr and to his attorney

COUNSEL:
PUBLIC GUARDIAN (PET)...COUNTY COUNSEL

THIS CASE IS SET FOR HEARING ON Petition for Allowance of Compensation to Conservator and to his Attorney by PG

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

1. Petitioner alleges that services have been rendered for which petitioner and counsel has not been compensated.
2. Petitioner and County Counsel request fees of \$495.00, each. Generally described.
3. Notice given.
4. ~Proposed Order: 03/13/18

RECOMMENDATION:

Court's discretion.

(ww)

Future Hearing: 9/17/18 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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01445

CASE NAME: MATTER OF LAURELYNN KIRBY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
LAURELYN KIRBY

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

GENERAL INFORMATION

Letters expire 12/29/18.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 04/03/17, Court approved the 11th account; 12th accounting now due.
2. Need accounting.

RECOMMENDATION

Inquire status.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03041

CASE NAME: MTR RE JENNIFER WILSON

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JENNY WILSON (CEP)...HARTNELL LAW GROUP

XREF: SLCSS01345 MTR RE JENNIFER WILSON

Ex Parte Order that Conservator need not present 4th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **06/24/19**.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3248

CASE NAME: IN THE MATTER OF CLINTON STROUD

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CLINTON STROUD (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/16/19.

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. Ex Parte Order that Conservator need not present 21st Account entered 06/26/17;
22nd 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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3626

CASE NAME: IN THE MATTER OF MARK ANTHONY KIRK

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARK A. KIRK (CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 12th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **06/24/19**.

(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4153

CASE NAME: IN THE MATTER OF JOSEPH CAMP

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
JOSEPH CAMP Jr.

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

GENERAL INFORMATION:

Letters expire: 04/09/18

Continued from 03/26/18

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 19th Account filed 03/01/18 covering the period of 01/01/16–12/31/18. **Need** verified supplement clarifying correct ending period for this accounting.
2. Proposed order: 03/01/18 rejected. **Need** corrected accounting period.

RECOMMENDATION:

Inquire status
(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: 04/30/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5677

CASE NAME: IN THE MATTER OF MAX ERNEST MANIG

HEARING:

Hearing Re: STATUS OF NEXT SPECIAL NEEDS TRUST ACCOUNTING

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
BRYAN C HARTNELL	(PET)...HARTNELL LAW GROUP
MAX E MANIG	(CTP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 03/16/19

THIS CASE SET FOR HEARING ON Status of Next Special Needs Trust Accounting

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

1. 2nd SNT accounting by PG approved on 10/30/17.
2. **Need** 3rd SNT accounting beginning with date of 04/01/15.

RECOMMENDATION

Inquire status.

(ww)

Future Hearing: 10/22/18 Accounting Review **re: conservatorship**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

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

CASE#: PRO PS1500166

CASE NAME: ESTATE OF ARTURO GUTIERREZ

HEARING:

Hearing re Final Discharge

COUNSEL:

PAMELA GUTIERREZ

(PET)...HOWARD R HAWKINS

ARTURO GUTIERREZ

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Pamela Gutierrez, spouse, approved on 04/24/17.
2. No receipt required as petitioner is sole heir by assignment.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

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

CASE#: PRO PS1600124

CASE NAME: MTR OF HELGA MARIE HARDERS

HEARING:

Accounting Review by ***

COUNSEL:

CEASAR A ORTIZ (PET)...PRO/PER
HELGA MARIE HARDERS (DEC)...

GENERAL INFORMATION

Continued from **10/23/17**. Administrator states the property was lost to foreclosure. Matter is continued for a status report to be filed.

Continued from **01/08/18**. A letter filed by the administrator regarding the status.

Administrator needs to file a petition to terminate the estate for lack of assets.

Continued from 03/19/18. No appearance. Court orders Caesar Ortiz to personally be present at the next hearing.

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 Caesar Ortiz, son, on 08/16/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

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

CASE#: PRO PS1600250

CASE NAME: ELLSWORTH TROMBLEY

HEARING:

Motion Re: NOTICE AND MOTION TO BE RELIEVED AS ATTORNEY OF
RECORD Filed by Petitioner CHRIS BURKHARDT

COUNSEL:

CHRIS BURKHARDT (PET)...CARL LARSON
ELLSWORTH TROMBLEY (DEC)...

GENERAL INFORMATION

Continued from 03/19/18.

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Carl Larson,
attorney for personal representative, Chris Burkhardt.

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

1. Petitioner Carl Larson seeks to be relieved as counsel for Chris Burkhardt,
executor.
2. Notice of Hearing and proof of service in compliance with Rules of Court, rule
3.1362(d), including service of Notice of Motion, Declaration and Proposed Order,
filed 04/17/18; however, only 13 days' notice provided. **JTD**
3. Proposed form order: 02/21/18; however, Court address is incorrect in caption.

RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 9/17/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1601114

CASE NAME: MTR OF FRED ABILA

HEARING:

Accounting Review by ***

COUNSEL:

MICHAEL ABILA	(PET)...PRO/PER
FRED ABILA	(DEC)...

GENERAL INFORMATION

Continued from 03/19/18.

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 Michael Abila, son, on 01/26/17; full authority, \$170,000.00 bond.
2. Final Inventory and Appraisal filed 11/27/17 and duplicate filed 03/19/18; however, **need** bank/financial statements to support date of death balances per Local Rule 20-908.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear note 2-3.

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

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 6, 6A, 13A

HEARING:

Motion Re: SUMMARY JUDGMENT Filed by Petitioner PENISHA
MCFARLAND

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND (DEC)...
TONYA MICHAELS (PET)...PRO/PER
MICHAEL MICHAELS (OBJ/PET)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Currently under review by Legal Research

LR

(ww)

Future hearing dates: 05/24/18 First Amended Petition to Determine Title to Real Property
etc

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 5, 6A, 13A

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND (DEC)...
TONYA MICHAELS (PET)...PRO/PER
MICHAEL MICHAELS (OBJ/PET)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

GENERAL INFORMATION

Letters of Special Administration issued to Penisha McFarland, daughter, on 01/31/17, no bond.

Continued from **03/21/17**. Michael Michaels to retain counsel and file a competing petition. Court amends powers of the Special Administrator and removes the right to evict and removes the power to evict or access bank accounts or sell real property. Bond required \$50,000. Court notifies the Public Administrator of possible appointment. No bond or competing petition filed as of the review of this matter.

Continued from **06/13/17** to be heard with competing petition.

Continued from **09/18/17** for matter to be heard by Judge Welch. Deadline of 11/03/17 for Counsel Maddux to file/serve supplement.

Continued from **11/27/17**. Matter is contested. Parties to attend mediation.

Continued from **01/24/18** and **03/21/18** at request of Counsel.

On 04/06/18 Letters of administrator with full IAEA issued to the Public Administrator, no bond.

THIS CASE IS SET FOR HEARING ON

- Petition 1 Petition for Letters of Administration with full IAEA by **Penisha McFarland, daughter**
- Petition 2 Petition for Letters of Administration with full IAEA by **Tonya and Michael Michaels, niece and nephew-in-law**

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

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.

Petitioner 1 Penisha McFarland, daughter

1. Bond waived by Penisha McFarland (sole heir); Court has discretion to require bond per Pr. C. §8481(b). – **JTD**. General petition shows an estimated estate value of \$303,072, whereas Special petition alleges value unknown. Estate assets include real property. Court ordered \$50,000 bond as Special Administrator on 03/21/17; bond filed.
2. Final Inventory and Appraisal filed 10/10/17 showing all assets are real properties valued at a total of \$785,000.00
3. **Objections filed 03/13/17** by Michael Michaels.
4. **Reply to Objection filed 04/03/17** by Penisha McFarland.
5. **Objections filed 06/06/17** by Tonya Michaels.
6. **Objections and opposition to Penisha's objections (Reply) filed 09/11/17;** however, need verification per Pr.C. § 1021. **JTD**.
7. **Objections to Creditor's Claims and Final Appraisal by Tonya and Michael Michaels filed 11/15/17;** however, need verification and proof of service.
8. ~Proposed form Order: 04/03/17

Petitioner 2 Tonya and Michael Michaels, niece and nephew-in-law

9. Petitioner requests bond of \$50,000. Estate value is currently unknown and will be determined.
10. Section 5a2 is incomplete as to spouse's status. Need verified supplement. (**Supp. 09/15/17**) does not indicate whether no spouse due to divorce, never married or if spouse is deceased. Need amended verified supplement. (**Supp. 11/15/17**) has the same issue as above. **Court may wish to clarify if decedent was ever married or if spouse is deceased. JTD**
11. Notice to Petition to Administer Estate and proof of service filed 06/08/17; however, section 10 is missing the names of the petitioners. Need corrected notice. (**Supp. 11/15/17**) **indicates that their names should be in section 10. (See note 12). JTD**
12. Notice of Petition to Administer Estate and proof of service filed on 11/15/17; however, section 3 is missing petitioners' names and section 10 indicates that address and telephone of petitioners are "same as above" when the party information in the caption heading does not publish on the proof of publication. **Need** completed notice.
13. **Objection by Penisha McFarland, special administrator, filed on 06/29/17;** however, need verification by Penisha and proper proof of service of objections.
14. ~Proposed Form Order: 06/06/17

RECOMMENDATION

Matter is contested. Need to clear notes 6-7, 12 & 13 then Court's discretion re bond and remaining notes. If approved, set Accounting/Status Review for **05/29/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/nb/lh/nb/ww/lh/ww)

Future hearing dates: 05/24/18 First Amended Petition to Determine Title to Real Property
etc

Superior Court of Calif, County of San Bernardino

Page: 6A Add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 5, 6, 13A

HEARING:

Motion Re: NOTICE OF EXPARTE MOTION AND EXPARTE MOTION TO IMPOSE
TENT ON TONYA MICHAELS ETC Filed by Petitioner PENISHA MCFARLAND

COUNSEL:

PENISHA MCFARLAND

(PET)...MICHAEL C MADDUX

PECOLIA MCFARLAND

(DEC)...

TONYA MICHAELS

(PET)...PRO/PER

MICHAEL MICHAELS

(OBJ/PET)...MANSOUR LAW GROUP, APLC

STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Currently under review by Legal Research

LR

(ww)

Future hearing dates: 05/24/18 First Amended Petition to Determine Title to Real Property
etc

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700494

CASE NAME: MTR OF MARIA CASTELLANOS

HEARING:

First and final Account and Report of DONALD W WALLDREN SR and
Petition for allowance of fees filed.

COUNSEL:

DONALD W WALLDREN SR (PET)...TREVOR D. MARTIN
MARIA CASTELLANOS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account and Petition for
Fees and for Final Distribution and Discharge by Donald Walldren, Sr., nominee

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

- 1 Assets on hand: \$53,449.98 in cash.
- 2 Petitioner and Attorney request statutory fees of \$8,299.52 each. Calculated.
- 3 Attorney request extraordinary fees of \$1,195.50 for 3.7 hours at 315/hour in
connection with sale of real property, retrieval of vehicle and drafting of small estate
affidavit and letter to U.S. Bank. Itemized. [LF pgs. 11-12] **JTD**
- 4 Petitioner requests a reserve of \$2,000.00 for closing expenses of administration.
JTD
6. Notice is complete.
7. Proposed Order:03/12/18 department number is incorrect,

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge
for **05/06/19**.

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

CASE#: PRO PS1701305

CASE NAME: MTR OF WILBUR LEROY HEMMINGER

HEARING:

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

COUNSEL:

MARIE MAY HODGES (PET)...HUNSBERGER DUNN & ASSOC
WILBUR LEROY HEMMINGER (DEC)...

GENERAL INFORMATION:

Continued from **01/30/18** at request of Court. Petitioner ordered to be present.
Continued from 03/26/18.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA by Executrix, Marie M. Hodges ["Petitioner"-niece].

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

1. Non-resident Petitioner requests bond of \$211,000 to be fixed. Appears sufficient.
The estate consists of \$211,000.00 of which \$1,000.00 is personal property.
2. Proof of Holographic Instrument (DE-135) filed 04/04/18.
3. The petition for probate is on an outdated form. **JTD**
4. ~Proposed Form Letters 12/27/17.

RECOMMENDATION:

Court's discretion. \$211,000 bond. If approved, set future hearing for Accounting/Status
Review on **07/08/19**. Any account to be filed 30 days in advance of hearing. Note
requirements of Local Rules.

(nb/cs/ww)

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

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

CASE#: PRO PS1800025

CASE NAME: Paul Angle

SEE ALSO 9A

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

COUNSEL:

LAURA PFEIFER (PET)...PRO/PER
PAUL ANGLE (DEC)...

GENERAL INFORMATION:

Continued from **02/13/18** at request of petitioner to clear notes.

Continued from 03/26/18. Petitioner Laura Pfeifer represents she sent by mail the items needed to clear all probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Executrix, Laura Pfeifer ["Petitioner"-daughter].

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

1. **Note: Amended petition filed 04/11/18; however, hearing was set on this same date instead of a future date. See notes on matter 9A.**
2. Petitioner submits a type-written document dated 09/22/07 purportedly signed by decedent. It would appear to be a purported Will. However, the 09/22/07 document is not witnessed and thus, does not meet the requirements of Pr.C. §6110. Will is however, notarized. Question the validity of the 09/22/07 document? **Need** verified supplement with points and authorities to prove the 09/22/07 document is a valid testamentary document.
3. Will waives bond. Estimated estate valued at \$76,000. 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.**
4. Proof of publication filed 03/12/18 as to the initial hearing date of 02/13/18; however, the proposed personal representatives' name found in section 2 & 3 of Notice of Petition to Administer Estate is missing in the publication. **JTD.**
5. Notice of Petition to Administer Estate with proof of service filed 04/11/18; however section 3 as to the proposed personal representatives' name is not completed. **JTD**
6. No proposed order.

RECOMMENDATION:

Need to clear note 1 then Court's discretion re: remaining notes and bond. If approved, set future hearing for Accounting/Status Review on **07/08/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules. (nb/cs/ww)

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

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

CASE#: PRO PS1800025

CASE NAME: Paul Angle

SEE ALSO 9

HEARING: Hearing Re: Amended petition for letters of administration

COUNSEL:

LAURA PFEIFER (PET)...PRO/PER
PAUL ANGLE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **[Amended 04/11/18]** Petition for Letters of Administration with Full Authority under IAEA by Laura Pfeifer ["Petitioner"-daughter].

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

1. Bond is not addressed in section 2d or 3e. Court may wish to inquire, or in alternative, need verified supplement. **JTD**
2. Net value of the estate consists of \$78,000.00 of which \$1,000.00 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) or per Pr. C. § 8571 as petitioner is a non-resident.
3. Petition indicates that decedent was not survived by a stepchild that would have been adopted but for a legal barrier in section 5b; however, lists Bonnie Brusko and Dawn Knaus as step-daughters of decedent who were not adopted. **JTD**
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication
6. No Form Order Provided.

RECOMMENDATION

Need to clear notes 4 & 5. Court's discretion re bond. If approved, set Accounting/Status Review **07/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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

CASE#: PRO PS1800256

CASE NAME: MTR OF VICTORIA DARLENE STINSON

HEARING:

Petition for Probate of Will and for Letters of Administration
w/will annexed w/ full IAEA

COUNSEL:

DANA LAMAR DUNN (PET)...PRO/PER
VICTORIA DARLENE STINSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Dana Dunn, nephew

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

1. All beneficiaries waive bond. The estate consists of \$205,500.00 of which \$5,500.00 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. Duties and Liabilities form is incomplete as to address and phone number in section 2; however, the address is in the caption and his phone number can be found on other filed forms. **JTD**
3. Notice to Petition to Administer Estate and proof of service filed 04/09/18; however, **need** Notice to Precious Williams, estranged half-sister.
4. ~Proposed Form Order: 03/16/18

RECOMMENDATION

Need to clear note 3 then Court's discretion. If approved, set Accounting/Status Review for **07/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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

CASE#: PRO PS1800275

CASE NAME: Raphael Gabriel Gonzalez

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

COUNSEL:

FRUMEH LABOW (PET)...OLDMAN COOLEY SALLUS BIRNBERG
RAPHAEL GABRIEL GONZALEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Limited Authority under IAEA by Frumeh Labow, PPF

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

1. Bond in the amount of \$650,000.00 is being requested. Suggest bond of \$656,500.00. The estate consists of \$656,500.00 in personal property. **(Supp. 04/24/18 indicates that suggested bond of \$656,500.00 is acceptable)**
2. Section 5 is incomplete as to whether there was or was not issue of a predeceased child. Court may wish to clarify on record or in alternative; need verified supplement. **(Supp. 04/24/18 indicates that there is no issue of a predeceased child.)**
3. Petitioner is nominated act by Myrna Gonzalez, decedent's grandmother.
4. Petitioner indicates that she is trustee of the Raphael Gabriel Gonzalez Special Needs Trust in Los Angeles County, case BP092132. [Pet. LF pg. 6]
 - a. Does Court wish for a Notice of Related Cases be filed? **JTD**
 - b. Does Court wish for a copy of said trust be filed? **JTD**
5. ~Proposed Form Order: 03/23/18

RECOMMENDATION

Court's discretion. \$656,500.00 bond. If approved, set Accounting/Status Review **07/08/19**. 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: JAMES MICHAEL WELCH

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

CASE#: PRO PS1800286

CASE NAME: MTR OF JENNIE E GONZALES

HEARING:

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

COUNSEL:

RUDY GONZALES (PET)...VARNER & BRANDT
JENNIE E GONZALES (DEC)...

GENERAL INFORMATION

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

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

1. All heirs waive bond. The estate consists of \$350,000.00 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. Petitioner failed to date petition at signature line. **JTD**
3. ~Proposed Form Order: 03/27/18

RECOMMENDATION

Court's discretion re note 2 and bond. If approved, set Accounting/Status Review **07/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 12A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

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

CASE#: PRO PS1800274

CASE NAME: MTR OF SHANN MCELVAIN

HEARING:
Petition to determine succession to Real Property.

COUNSEL:
SOMER MCELVAIN (PET)...PRO/PER
MALOREE HANKS (PET)...PET
SHANN MCELVAIN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property and Personal Property by Somer McElvain and Maloree Hanks, son and daughter

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

1. Petitioners seek interest in decedent's manufactured house and real property per intestate succession.
 - a. Section 13 is incomplete as to petitioner's interest. **Need** verified supplement indicating the specific property interest claimed by each petitioner in the real and personal property.
 - b. Petitioners provide an APN number on attachment 11; however, **need** common address of property.
2. The petition is missing the required attachment of the Final Inventory and Appraisal. **Need** same.
3. ~Proposed Form Order: 03/28/18

RECOMMENDATION

Need to clear notes 1 & 2 then Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

TRUSTS

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

CASE#: TRU PS1800056

CASE NAME: DINWIDDIE FAMILY TRUST

HEARING:

Petition for Transfer Assets to the Dinwiddie Family Trust (Probate Code 850)

COUNSEL:

DAVID R DINWIDDIE

(PET)...PRO/PER

DINWIDDIE FAMILY TRUST

(TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice of hearing to Kimberly Leisgang; David Dinwiddie, II; Christian Dinwiddie c/o David Dinwiddie (petitioner); Noah & Riley Leisgang c/o Kimberly Leisgang; William Dinwiddie; and Kirk Dinwiddie filed 04/05/18; however, **need** corrected Notice to include 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

Page: 13A Add-on

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

DATE: 04/30/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 5, 6, 6A

HEARING:

Petition for DETERMINE TITLE TO REAL PROPERTY; OR IN THE ALTERNATIVE FOR UNJUST ENRICHMENT

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND (DEC)...
TONYA MICHAELS (PET)...PRO/PER
MICHAEL MICHAELS (OBJ/PET)...MANSOUR LAW GROUP, APLC
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Currently under review by legal research.

(LR)

Notice:

Need return of served Summons per Pr. C. § 851 as to Respondent, Penisha McFarland.

Note: Amended petition has been filed and is set on 05/24/18.

(nb/ww/lh/ww)

Future hearing dates: 05/24/18 **First Amended** Petition to Determine Title to Real Property etc

Superior Court of Calif, County of San Bernardino

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

DATE: 04/30/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800055

CASE NAME: MTR OF THE PHILLIPS 1998 FAMILY TRUST

HEARING:

Petition for REDRESS OF BREACH OF TRUST AND SURCHARGE
REMOVAL OF TRUSTEE ETC

COUNSEL:

DONALD SCOTT PHILLIPS (PET)...ROSS LAW GROUP APC
THE PHILLIPS 1998 FAMILY TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice filed 03/23/18; however, server failed to sign on proof of service and still need notice to Joseph Phillips (son); Scotty Phillips (successor trustee). **Need** corrected notice.

Notice filed 04/24/18; however, still need notice to Joseph Phillips (son); Scotty Phillips (successor trustee). **Need** corrected notice.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

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

CASE#: CON PS1400006

CASE NAME: Velma Preciado

HEARING:

Hearing re Final Discharge

COUNSEL:

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

Waiver of Court Fees and Costs filed by VELMA PRECIADO is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. First and Final Account by Rodric Pacheco, son/former conservator of the person and estate, approved on 08/14/17.
 - a. **Need** Order on First and Final account submitted for signature.
2. **Need** receipt of Denis Dickinson, successor conservator.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(ww)

Future hearing dates: 05/23/18 Petition for atty fees
01/29/19 Accounting Review

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

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

CASE#: CON PS1600305

CASE NAME: MTR OF VANESSA HERNANDEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALEJANDRA MIRAMONTES

COUNSEL:

ALEJANDRA MIRAMONTES (CP)...PRO/PER
JOSE CARLOS HERNANDEZ (CP)...PRO/PER
VANESSA HERNANDEZ (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION

Continued from **09/11/17** and **11/06/17**. Attorney Kastilahn to contact her clients and file required documents.

Continued from **01/22/18**.

Continued from 03/05/18. No appearance. All parties and counsel are order to appear at next hearing date.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alejandra and Jose Carlos Hernandez, parents, appointed as limited co-conservators of the person only on 02/06/17.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 11/06/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 02/16/17.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear note 4.

(ww)

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

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

CASE#: CON PS1700045

CASE NAME: CHINA NIKEL ARKADIE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of NICOLE L ARKADIE

COUNSEL:

NICOLE L ARKADIE	(PET)...PRO/PER
ORLANDO ARKADIE	(PET)...PRO/PER
CHINA NIKEL ARKADIE	(CTP)...E JOAN NELMS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Nicole and Orlando Arkadie, parents, appointed limited co-conservators of the person only on 09/25/17, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/26/18; however, section 5 is incomplete as to service of order. **Need** completed notice.
3. Care Plan filed 02/26/18 however, petitioners failed to date at signature. **JTD**
4. Level of Care form filed 02/26/18.

RECOMMENDATION

Need to clear notes 2 then Court's discretion re: note 3.

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

CASE#: CON PS1700194

CASE NAME: JASMINE WILCOX

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANGELA WILCOX

COUNSEL:

ANGELA WILCOX (PET)...JAMES L HEYWOOD AND ASSOCIATES
JASMINE WILCOX (CTP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Angela Wilcox, mother, appointed conservator of the person only on 09/25/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: CON PS1700216

CASE NAME: MTR OF DAVID C HARRINGTON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of BLANE A HARRINGTON

COUNSEL:

BLANE A HARRINGTON	(CP)...GISSELLE M AMINI
JUDITH G HARRINGTON	(CP)...GISSELLE M AMINI
DAVID C HARRINGTON	(CTP)...LAW OFFICES OF SANDY TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Blane and Judith Harrington, parents, appointed limited co-conservators of the person only on 09/25/17, no bond.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care form, and Care Plan filed 11/30/17.

RECOMMENDATION

None.

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

CASE#: CON PS1700306

CASE NAME: MTR OF APRIL GUZMAN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA E GUZMAN

COUNSEL:

MARIA E GUZMAN (CP)...PRO/PER
APRIL GUZMAN (CTP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Guzman, mother, appointed limited conservator of the person only on 09/25/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

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

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

CASE#: CON PS1700450

CASE NAME: MONICA GAZANFARI

HEARING:
Petition for Appointment of Conservator

COUNSEL:
YADIE GAZANFARI (CP)...PRO/PER
MINA ASKARI (CP)...PRO/PER
MONICA GAZANFARI (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from **01/17/18**. Donnasue Ortiz appointed for Monica.

Continued from 03/05/18. Counsel has not had an opportunity to meet with her client.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Yadie Gazanfari and Mina Askari, parents

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, make and consent to all medical decisions, and limit right to contract. **JTD**
2. Petitioner seeks medical powers. Capacity Declaration filed 12/13/17.
3. Proposed conservatee is developmentally disabled. Donnasue Ortiz appointed as counsel. Report of Counsel filed 04/09/18..
4. Proposed conservatee is developmentally disabled.
 - a. Court to see Letter from IRC filed 02/22/18. IRC report filed 04/20/18..
5. **Need** return of citation.
6. Notice of hearing and proof of service filed 04/04/18; however, **need** notice of Due Diligence Declarations as to Vali Gazanfari (paternal grandfather) and Khanem Sagdie (paternal grandmother).
7. Certificate of Completion of the Conservatorship Training Class filed 12/15/17.
8. CI report filed 01/11/18.
9. ~Proposed Form Order: 12/13/17

RECOMMENDATION

Need to clear notes 5 & 6. If approved, set hearing for Compliance Review for **10/15/18** 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/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

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

CASE#: PRO PS1100318

CASE NAME: ANNA MAE L ALBARRAN

HEARING:
Hearing re Final Discharge

COUNSEL:

JOE PADILLA (PET)...HARTNELL LAW GROUP
ANNA MAE L. ALBARRAN (DEC)...

GENERAL INFORMATION:

Continued from **03/06/17 and 05/08/17** at request of counsel.

Continued from **07/17/17**. Waiting for final receipt.

Continued from **10/02/17 and 12/04/17**

Continued from 02/26/18 Hearing continued at request of Counsel for one receipt needed/declaration may be filed.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Amended Judgment Settling First and Final Account entered 12/05/16.
2. **Need** receipt.
3. **Need** informal account re \$2,000 reserve per Local Rule 20-911.
4. **Need** Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

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

(nb/lh/cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1400590

CASE NAME: MTR OF ALEXANDER OLEA DOTEN JR

HEARING:
Hearing re Final Discharge

COUNSEL:
CATHY DOTEN ROONEY (PET)...VELASCO LAW GROUP
ALEXANDER OLEA DOTEN JR (DEC)...

GENERAL INFORMATION:

Continued from 02/21/18 at request of court to clear probate notes.

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator Cathy Doten Rooney

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

1. Order settling First and Final account approved on 02/15/17. Order signed 03/24/17.
2. **Need** receipts from Cathy Doten Rooney and Diane Espinoza.
3. **Need** informal account re \$5,000 reserve per Local Rule 20-911.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.
(lh/cs)

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

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

CASE#: PRO PS1400598

CASE NAME: WILLIE D WRIGHT

HEARING: FIRST AND FINAL Account and Report of JILL TERRELL and Petition for allowance of fees filed.

COUNSEL:

JILL TERRELL	(PET)...RAVEN C VILTZ
WILLIE D WRIGHT	(DEC)...
OUIDA HARTLEY	(PET)...LAW OFFICE OF ADRIAN T WOODWAR

GENERAL INFORMATION:

Continued from 02/21/18 at request of Court to review supplement filed.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Jill Terrell, executor

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

1. Assets on hand: \$1,784,868.38 consists of \$106,163.55 cash and remaining in mutual funds, stock, and real property.
2. Total charges and total credits do not match by \$73.84. Does court wish to considered this as de minimis? JTD
3. Statutory fees of \$31,828.34, each, requested. Calculated.
4. Schedule "C" Disbursements include unapproved preliminary distributions to Melody Cooley, William T. Walls and Sean Ingram in various increments totaling \$37,192.40. [Acct, 12/18/17, LFpg12]. **Supp. filed 02/13/18 indicates individuals are beneficiaries of the trust. Third Supp. filed 04/19/18 indicates additional preliminary distribution totaling \$3,407.51. JTD**
5. Petitioner requests reserve of **\$37,000** for filing 2017 estate income taxes. Note: if approved, need informal account for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge. **JTD**
6. Consent to serve as trustee filed 02/21/18 by Jill Terrell.
7. **Need** Notice to Ouida Hartley and Leslie Smith.
8. Proposed Order submitted 04/19/18 does not indicate assets on hand, findings re sole and separate property, findings re creditors, findings re taxes paid, and findings re notice.

RECOMMENDATION:

Need to clear note 7, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **05/06/19**. (lh/cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1500528

CASE NAME: MTR OF DANIEL RAY SHAFFER

HEARING: Spousal Property Petition hearing.

COUNSEL:

LISA SHAFFER (PET)...TREVOR
DANIEL RAY SHAFFER (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Spousal Property Petition hearing.

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

1. Petitioner, Lisa Shaffer was appointed Administrator of decedent's estate on 07/23/15. On 08/31/17 Court suspended letters of Administration as to Lisa Shaffer for failure to file accounting and appointed Public Administrator as successor.
2. Petitioner 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 San Bernardino, CA.
3. Petitioner alleges decedent purchased property in 1984. Parties were married in 1993, and remained married until the passing of decedent in 2006. From the period of 1993-2006 the mortgage as well as improvement and maintenance were paid with community property earnings. From the period of 2006 until 2015 the mortgage was paid by petitioner with her separate earnings. There is no longer a mortgage on the property. A copy of deed affixed, [LF p. 7].
4. Petitioner alleges the majority of the mortgage was paid off by way community earnings, as well as separate earnings of petitioner, she believes there is a community property interest in the property.
5. Decedent's surviving children have assigned all right, title and interest in the estate of the decedent including the subject real property to petitioner.
6. Notice given and filed 03/16/18.
7. ~Proposed Form Order: 03/14/18

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearings: 6/26/18 Accounting Review (Lisa Shaffer);
4/15/19 Accounting Review (Public Administrator)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1600137

CASE NAME: MICHAEL E SODERBERG

SEE ALSO 6

HEARING: Petition for termination of further proceedings & for discharge of the etc

COUNSEL:

KRISTEN MARIE SODERBERG
MICHAEL E SODERBERG

(PET)...LINDA K ROSS
(DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition for Termination of Probate & Discharge of Personal Representative by daughter, Kristen Soderberg, [Executor/Petitioner]

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

1. Petitioner Kristen Soderberg was appointed Executor of decedent's estate on 04/05/16, full authority, no bond.
2. Probate was commenced to allow the petitioner as personal representative to complete the property issues in a pending dissolution action that the decedent and ex-spouse were involved in at the time of his death. Said action has now been completed and there are no assets from that action subject to this probate.
3. Inventory and appraisal not filed as it has been determined that there are no assets subject to this probate administration.
4. Petitioner request an order for administration of the estate be terminated for lack of assets to administer and for petitioner to be discharged. JTD
5. Notice given.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1600137

CASE NAME: MICHAEL E SODERBERG

SEE ALSO 5

HEARING: Petition for final distribution on waiver of Account and Report of
KRISTEN MARIE SODERBERG and Petition for allowance of fees filed.

COUNSEL:

KRISTEN MARIE SODERBERG (PET)...LINDA K ROSS
MICHAEL E SODERBERG (DEC)...

X-ref matter: FAMRS903772

GENERAL INFORMATION:

Continued from 02/21/18 at request of Court to file Pr.C. § 12251 Petition to terminate.

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account and Petition for Distribution by Kristen Marie Soderberg, trustee, administrator.

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

1. **Pr.C. §12251 Petitioner filed see notes on previous matter #5.**
2. Assets on hand: \$0
3. The estate was opened for the sole purpose of completing a dissolution action of the decedent and his former spouse. There was a small amount of money still in dispute when decedent died. Dissolution proceeding [FAMRS903772] was completed, and there are no assets requiring probate. Petitioner requests the Inventory and Appraisal not be required.
4. **Petition to terminate further proceedings filed. See notes on previous matter.**
5. Statutory fees were waived by petitioner and attorney as there are no assets to administer.
6. Notice was given.
7. No proposed Order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on final discharge for **02/27/19**.
(lh/cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700138

CASE NAME: THE NERKOWSKI FAMILY REVOCABLE TRUST

VACATED

HEARING: re Final Discharge

COUNSEL:

ALFRED E NERKOWSKI (PET)...EDWARD B FISCHER & ASSOCIATES
THE NERKOWSKI FAMILY REVOCABLE TRUST (TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge and informal reserves accounting, by Alfred Nerkowski, by [Sucessor Trustee/Petitioner]

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

1. Amended First and Final Account of Successor trustee was approved on 09/07/17.
2. Receipt by Cheyenne Nerkowski in the amount of \$14,542.26 was reduced by \$31.59 for time spent by trustee and additional expenses in obtaining receipt.
3. Reserves Accounting period: 01/31/17 – 02/14/18
4. Asset on hand for distribution \$3,980.44
5. Contingency Reserves Worksheet indicates the following distribution:
 - a. Trustee fees of \$3,093.25 for 123.73 hours' time spent at \$25/hour. **Need** itemization.
 - b. Trustee reimbursement of \$92.27 for costs advanced. **Need** itemization.
 - c. CPA Final Trust Tax Return prep. **Need** receipt.
 - d. Final Attorney fees of \$190.32. **Need** itemization.
6. Reserves balance sheet, under Credits shows the following:
 - a. Several postage fees which are not allowed per Local Rule 20-909. JTD
 - b. Payment to Charles Schwab fee. **Need** verified supplement.
 - c. Payments to Attorney. **Need** verified supplement.
7. Ex Parte Petition for Final Discharge and Order filed: 04/02/18

RECOMMENDATION:

Need to clear notes 5-6, then Courts discretion.

(cs)

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

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

CASE#: PRO PS1701080

CASE NAME: KENNETH G PATRICK

HEARING: Petition to determine succession to Real Property

COUNSEL:

MARTHA J MORGAN LUNSFORD (PET)...PRO/PER
KENNETH G PATRICK (DEC)...

GENERAL INFORMATION

Continued from 02/21/18 at request of court to clear probate notes. Court orders the Petitioner to pay the creditor's claims prior to next hearing or the Petition to determine succession will not go forward.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Martha J. Morgan Lunsford, friend/Petitioner

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

1. Petitioner seeks 100% interest in decedent's 50% interest in real property per holographic will.
2. Proof of Holographic Instrument filed 04/17/18.
3. **Declaration filed 04/17/18 by Petitioner, Martha Morgan requesting that Court declare estate as insolvent. JTD**
4. Petition is incomplete at item #10 regarding next of kin. **Supp. filed 04/17/18 indicates decedent was survived by 3 children. Need notice to decedent's 3 children.**
5. **Supp. filed 04/17/18 indicates there are 5 outstanding creditors. Need rejection or allowance of claims.**
6. ~Proposed Form Order: 10/30/17

RECOMMENDATION

Need to clear note 4 & 5, then Court's discretion.

(lh/cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1701090

CASE NAME: MTR OF DAVID HUERTA BARCENAS

SEE ALSO 9A

HEARING:

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

COUNSEL:

JOSE NICHOLAS ESPINAL (PET)...EDWARD G OPERINI
DAVID HUERTA BARCENAS (DEC)...

XREF: PROPS1800245 DAVID HUERTA BARCENAS

Currently under review by Legal Research.
(LR)

GENERAL INFORMATION:

Continued from **02/21/18** Matter is contested. Written objections or competing Petition to
be filed.

**Continued from 04/23/18 Court orders this case consolidated into the older probate
case, PROPS1701090. Case consolidated with Case(s) PROPS1701090 for all
purposes MASTER FILE PROPS1701090.**

THIS CASE IS SET FOR HEARING ON

Petition -1: Petition for Probate, Letters Testamentary with Full Authority under IAEA
by friend, Jose Espinal, [Executor/Petitioner]

Petition -2: 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:

Petitioner 1 - by friend, Jose Espinal, [Executor/Petitioner]:

1. Requested bond \$100,000. Appears sufficient.
2. Notice is complete.
3. **Objection filed 04/25/18 by.**

4. **Objection and will contest filed on 04/25/18 by Monique Castaneda, niece of decedent. However, Will Contest and Summons must be served in the manner required in a civil action generally. Pr.C. §_§8250; CCP §§412.10–417.40. Clerk notified re separate hearing required.**
5. ~Proposed form Order: 10/31/17

Petitioner 2 – by sister, Ramona Castaneda, appointing niece Monique Castaneda, [Administrator].

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

RECOMMENDATION:

Matter is contested. If approved, set future hearing for Accounting/Status Review on **07/15/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1701107

CASE NAME: MTR OF ROBERT O LAWSON

VACATED

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

ROBERT O LAWSON

(DEC)...

CHARLES LAWSON

(ADM)...VIRGINIA MARSH

VACATE – Proof of bond filed. Letters issued on 04/20/18

(CS)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1800269

CASE NAME: MTR OF HELEN LOUISE LEWIS

HEARING:

Petition for Letters of administration w/full IAEA

COUNSEL:

RENE ARROYO (PET)...FULLERTON LEMANN SCHAEFER & DO
HELEN LOUISE LEWIS (DEC)...

GENERAL INFORMATION

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

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

1. Bond amount not stated and section 3e not completed. Estate value is \$351, 000 with \$211,000 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). Suggest bond of \$351,000. JTD
2. ~Proposed Form Order: 03/21/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **07/08/19**. 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: TARA REILLY

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

CASE#: PRO PS1800277

CASE NAME: MTR OF MARY ALICE BYARS

HEARING:

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

COUNSEL:

PATRICIA BYARS CISNEROS (PET)...PRO/PER
MARY ALICE BYARS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary W/WA, and Full Authority under IAEA, by daughter Patricia Byars [Administrator/Petitioner]

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

1. Beneficiaries waive bond. Net estate value consists of \$90,800 with \$35,800 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. Notice of petition to Administer estate and publication indicate decedent had an aka [Mary Alice Shaughnessy]; however, petition does not reflect aka. Does court wish to require amended petition. JTD
3. Section 8 of petition does not list Daniel Cronin deceased named executor.
4. ~Proposed Form Order: 03/23/18

RECOMMENDATION

RFA subject to note 2, then Court's discretion re bond . If approved, set Accounting/Status Review for **07/08/19**. 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: TARA REILLY

DATE: 04/30/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

HEARING:

Motion Re: To strike Deblyn Delman's secon set of objections etc
Filed by Petitioner WAYNE FAWCETT

COUNSEL:

WAYNE FAWCETT	(PET)...J. PETER WAKEMAN
MARILYN MILLER	(DEC)...
DEBBIE DELMAN	(PET)...RODNUSKY & ASSOCIATES
CARLTON T LARRABEE	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by CARLTON T LARRABEE is GRANTED

Currently under review by Legal Research.
(LR)

(CS)

Future Hearing: 6/06/18 1st & Final Accounting

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

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

CASE#: CON PS1700198

CASE NAME: LOUIS PRADO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ORFELINDA SALAS

COUNSEL:

ORFELINDA SALAS

(CP)...PRO/PER

LOUIS PRADO

(CTP)...BRYAN C. HARTNELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Orfelinda Salas, mother, was appointed Limited Conservator, of the person on 09/25/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 08/09/17; however, section 5 is incomplete as to service of order. Also need notice to siblings Celia Prado and Beatriz Salas. **Need** completed notice.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4. Inquire Status

(cs)

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

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

CASE#: RC RS00511

CASE NAME: DEBRA SUE CARLSON

HEARING:

Petition for to Dispense with Accounting

COUNSEL:

MICHAEL CARLSON (PET)...VARNER & BRANDT, LLP
MICHAEL CARLSON (PET)...R ERIC SIEGFRIED
MICHAEL CARLSON (PET)...LINDA J GLADSON
DEBRA SUE CARLSON (PCE/CEP)...DONNASUE ORTIZ
INLAND COUNTIES REG CNTR (AGN)...PRO/PER
DEBRA SUE CARLSON SPECIAL NEED TRUST (TRU)...

XREF: RFLRS037448 MICHAEL CARLSON-N-DEBRA SUE CARLSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Dispense with Accounting, by former spouse, Michael Carlson [Trustee/conservator/Petitioner].

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

1. SNT resulting from a civil settlement was approved by the court on 01/15/08.
2. Account period 12/01/15-11/30/17
3. Estate asset consist of one-half interest in real property located in Ontario, CA and approximately \$10,748.64 in social security benefits.
4. Petitioner requests an order dispensing with accounting on the basis that the only SNT asset is the real property and there are no funds to account for.
5. Trustee owns the other half-interest. Trustee is also the conservator of beneficiary.
6. Petitioner requests that the court allow him to seek reimbursement of expenses at a future date as the trust has no income and petitioner pays all expenses for the trust property, including property taxes, insurance, maintenance and upkeep. JTD
7. Attorney seeks fees of \$6,375.00. Billed at \$375-\$400/hour for 15.8 hours attorney time and \$125/hour for .08 hours paralegal time. Itemized [LFp9-12]. Since there is no cash in the estate, Petitioner has agreed to pay the attorney fees from his personal funds and requests that the court approve a credit to him for the fees to be paid at a later time. JTD

8. Notice given; however, only 17 days' notice given. Need proper notice.
9. ~Proposed Order submitted: 03/05/18

RECOMMENDATION

Need to clear notes 8, then Court's discretion. If approved, Court may wish to set the next hearing re Accounting Review for **03/12/19**. Any accounting to be filed 30 days' in advance.

(cs)

Future Hearing: 6/20/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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

CASE#: VC VS00310

CASE NAME: MATTER OF WILLIAM JOSEPH PRUSINSKI

HEARING:

Hearing Re: MTN TO TERM CONSERVATORSHIP AND APPT PUBLIC GUARDI

COUNSEL:

LINDA PRUSINSKI (PET)...LUTHI, GARY & APPEL
WILLIAM JOSEPH PRUSINSKI (CEP)...WALTER T. MOORE

GENERAL INFORMATION:

Continued from **08/14/17**. Parties report William Prusinski is still missing. Matter continued for William Prusinski to be found. Public Guardian need not be present until they are notified he has been found.

Continued from 10/30/17 Counsel reports conservatee is still missing. Matter continued for conservatee to be found. Notice to be given by Mr. Moore.

THIS CASE IS SET FOR HEARING ON Motion to Terminate Conservatorship and Appoint Public Guardian

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

1. Matter set on 07/24/17, wherein, the Court was informed conservatee's home burned down and conservatee is missing. Arson investigation has returned inconclusive. A missing person report has been filed with law enforcement.
2. CI Special Report filed 05/22/17.
3. Need Notice.

RECOMMENDATION:

Court's discretion
(nb/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: VC VS249

CASE NAME: IN THE MATTER OF JOHN P JOSEPH

HEARING: Petition for Amended Appointment of Successor Conservator of the Person

COUNSEL:

JOHN PAUL JOSEPH

(PLA)...JENNIFER M DANIEL

MICHAEL A JOSEPH

(PET)...THE LAW OFFICES OF SCOTT M SHI

PUBLIC GUARDIAN

(TC)...COUNTY COUNSEL

GENERAL INFORMATION:

Michael Joseph, brother, was appointed temporary conservator of the person on 02/27/18. **Petition for conservatorship set for 07/17/18 along with CI Report hearing. Minute order indicates continued for an updated medical capacity declaration to be filed and for a referral to the Court Investigator. All existing orders to remain in full force and effect. Matter was referred to Court Investigator and Court requested report be completed by 04/30/18.**

THIS CASE IS SET FOR HEARING ON **Amended [filed 03/22/18]** Petition for Appointment of Successor Conservator of person by brother, Michael A. Joseph ["Petitioner"].

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

1. Dorothy H. Joseph, mother, was appointed conservator of the person on 02/23/88.
2. Petitioner is requesting to be successor conservator due to prior Conservator passed away on 10/22/17.
3. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Jennifer Daniel, filed 01/08/18.
4. Report from IRC filed 04/06/18.
5. Capacity Declaration filed 04/19/18.
6. Petitioner is indicates he is a nominee, however, attachment 3c(1) is not attached.
7. CI Reports filed 04/25/18.
8. Certificate of Completion re Conservatorship Class filed 04/05/18.
9. Notice given.
10. **Need** return of Citation
11. All supporting documents have been filed with previous petition.

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.

12. Amended petition appears to supersede petition filed 02/03/18. Does Court wish to trail matter to the regular petition hearing set on 07/17/18, or in the alternative, Court may wish to vacate hearing set on 07/17/18. JTD
13. ~Proposed Form Order/Letters 03/22/18.

RECOMMENDATION: Trail to 04/30/18

Need to clear note 10, then Court's discretion. If approved, set hearing for Compliance Review for **12/10/18** 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)

Future Hearings:

7/17/18 Hearing Re: Court Investigator Report

7/18/18 Petition for Appointment of Successor Conservator

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1400470

CASE NAME: Forrest E Spitler, Jr Living Trust

HEARING:

Court Trial set for PETITION TO COMPEL ACCOUNTING of MARK ST JOHN

COUNSEL:

FORREST E SPITLER, JR LIVING T

(TRU)...

KATHERINE WALDRON

(PET)...PRO/PER

MARK ST JOHN

(PET/OBJ)...GEORGE S THEIOS

No notes – Trial. JTD