



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 05/09/17**

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](mailto: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.

nb0424/0504

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1100863

CASE NAME: LOGAN HECTOR SPECIAL NEEDS TRUST

**SEE ALSO 2**

HEARING:

Hearing Re: STATUS OF SPECIAL NEEDS TRUST

COUNSEL:

THE LOGAN HECTOR SPECIAL NEEDS(TRU)...

Currently under review by Legal Research.  
(LR)

NOTICE

1. Court's discretion as to notice, since this is a status hearing. The Co-trustees have reportedly moved to Arizona, and the Court has ordered them to personally appear at the hearing. - JTD
2. This is a trust created by the Court per minute order of 02/15/12 (order filed 02/15/12), following a minor's compromise of a claim filed in Los Angeles Superior Court, case #KC058279.
3. Initial Co-Trustees are parents: Kimberley Hector (GAL) and Matthew Hector.
4. Initial Trust Protector is: Pete Hector.
5. Income beneficiary is: Logan Hector.
6. Remainder beneficiaries are: Kimberley Hector and Matthew Hector, else Melvin Hector and Lora Hector (PGPs), else Lori Kirchnavy (aunt), else Cameron Hector, else Pete Hector, else Jammie Colbry, else Logan Hector's heirs at law.
7. Copy of trust attached to Petition filed 12/06/11 (LF pages 24 – 83).

(jm)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1100863

CASE NAME: LOGAN HECTOR SPECIAL NEEDS TRUST

**SEE ALSO 1**

HEARING:

Order to Show Cause RE: Sanctions for Failure to Obey Court Order

COUNSEL:

THE LOGAN HECTOR SPECIAL NEEDS(TRU)...

Currently under review by Legal Research.  
(LR)

NOTICE

1. Court's discretion as to notice, since this is an OSC. The Co-trustees have reportedly moved to Arizona, and the Court has ordered them to personally appear at the hearing. - JTD
2. This is a trust created by the Court per minute order of 02/15/12 (order filed 02/15/12), following a minor's compromise of a claim filed in Los Angeles Superior Court, case #KC058279.
3. Initial Co-Trustees are parents: Kimberley Hector (GAL) and Matthew Hector.
4. Initial Trust Protector is: Pete Hector.
5. Income beneficiary is: Logan Hector.
6. Remainder beneficiaries are: Kimberley Hector and Matthew Hector, else Melvin Hector and Lora Hector (PGPs), else Lori Kirchnavy (aunt), else Cameron Hector, else Pete Hector, else Jammie Colbry, else Logan Hector's heirs at law.
7. Copy of trust attached to Petition filed 12/06/11 (LF pages 24 – 83).

(jm)

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500853

CASE NAME: Raymond S.G. Pryke

HEARING:

First and Final Account and Report of LINDA L. GARBER, CHARLES  
S. GARBER and Petition for allowance of fees filed.

COUNSEL:

CHARLES S GARBER (PET)...MIRAU, EDWARDS, CANNON, LEWIN  
LINDA L. GARBER (PET)...MIRAU, EDWARDS, CANNON, LEWIN  
RAYMOND S.G. PRYKE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Co-Executors, Linda L. Garber and Charles S. Garber ["Petitioners"].

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

1. Accounting period 02/07/15 to 03/15/17.
2. Assets on hand \$965,718.71 consisting of \$935,718.71 in cash and remaining in real properties.
3. Statutory fees of \$22,987.56 requested. Calculated.
4. The will conditionally incorporates decedent's Trust. Certification of trust that meets the requirements in Pr.C.§18100.5 [LF, p. 28] and copy of decedent's Trust affixed to initial petition filed 09/11/15 [LF, pgs. 38-124].
5. Petition indicates that Linda L. Garber, Charles S. Garber, Derek S. Rindt, Argelia Deluna, Raquel M. Rodrigues and the UCI Foundation have all received their full distribution from the Survivor's Trust [receipts affixed to initial petition filed 09/11/15 [LF, pgs. 16-27]. Therefore, the estate in the possession of the Co-Executors remaining for distribution, as set forth in Schedule F [see account filed 04/04/17, LF, p. 27] should be distributed 100% to Linda L. Garber and Charles S. Garber, as trustees of the Survivor's Trust created under the Pryke Family Living Trust, dated March 3, 1992.
6. Notice given.
7. Proposed Order 04/04/17 does not include address of parties receiving real property and does not have 3 lines of content before signature.

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge on **05/15/18.**

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3A ADD ON

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501030

CASE NAME: GEORGE A. PANASOVICH AKA ETC

HEARING:  
Accounting Review

COUNSEL:  
GEORGE A PANASOVICH (DEC)...  
STACEY PANASOVICH (PET)...MCCLELLAN & WILSON

GENERAL INFORMATION:  
**Continued from 02/28/17 and 04/11/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:  
1. Letters of Administration issued 12/28/16, full authority, no bond.  
2. No accounting or status report of administration. Need same.

RECOMMENDATION:  
When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601133

CASE NAME: THE BERRY J SLATER LIVING TRUST

**SEE ALSO 5, 6**

HEARING:

Petition for TO DETERMINE QUESTIONS OF CONSTRUCTION OF THE TRUST  
INSTRUMENT, TO DETERMINE THE ETC

COUNSEL:

BRANDY M HUNT	(PET)...PRO/PER
THE BERRY J SLATER LIVING TRUS	(TRU)...
VIRGINIA MCDOLE	(PET)...SUZANNE M GRAVES
VIRGINIA MCDOLE	(STE)...SUZANNE M GRAVES
YAAJA LACHAUN BREWER-DRAPER	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by BRANDY M HUNT is GRANTED

Request for Waiver of Court Fees and Costs filed by YAAJA LACHAUN BREWER-DRAPER is GRANTED

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601133

CASE NAME: THE BERRY J SLATER LIVING TRUST

**SEE ALSO 4, 6**

HEARING:

Petition for TO TRANSFER PROPERTY INTO LIVING TRUST AND  
MEMORANDUM OF POINTS AND AUTHORITIES ETC

COUNSEL:

BRANDY M HUNT	(PET)...PRO/PER
THE BERRY J SLATER LIVING TRUS	(TRU)...
VIRGINIA MCDOLE	(PET)...SUZANNE M GRAVES
VIRGINIA MCDOLE	(STE)...SUZANNE M GRAVES
YAAJA LACHAUN BREWER-DRAPER	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by BRANDY M HUNT is GRANTED

Request for Waiver of Court Fees and Costs filed by YAAJA LACHAUN BREWER-DRAPER is GRANTED

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601133

CASE NAME: THE BERRY J SLATER LIVING TRUST

**SEE ALSO 4, 5**

HEARING:

Petition for TO ADD MICHAEL ROBERTS II AS A BENEFICIARY FOR  
COLLEGE TRUST

COUNSEL:

BRANDY M HUNT	(PET)...PRO/PER
THE BERRY J SLATER LIVING TRUS	(TRU)...
VIRGINIA MCDOLE	(PET)...SUZANNE M GRAVES
VIRGINIA MCDOLE	(STE)...SUZANNE M GRAVES
YAAJA LACHAUN BREWER-DRAPER	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by BRANDY M HUNT is GRANTED

Request for Waiver of Court Fees and Costs filed by YAAJA LACHAUN BREWER-DRAPER is GRANTED

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700093

CASE NAME: MTR OF VIRGINIA L ESPINOSA

HEARING:

Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/FULL IAEA

COUNSEL:

CARRIE STRADELLA (PET)...RODRIGO LAW FIRM  
VIRGINIA L ESPINOSA (DEC)...

GENERAL INFORMATION:

**Continued from 04/04/17.**

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Carrie Stradella (executor/granddaughter)

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

1. Will waives bond. Estimated value of estate is \$401,000. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. **Proof of Publication filed.**
3. **Objections by Carol Lee Hyder (daughter) and Proof of Service filed 04/17/17.**
4. ~Proposed form Order: 02/01/17

RECOMMENDATION:

Matter is contested. If approved, set future hearing for Accounting/Status Review on **07/17/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601181

CASE NAME: MTR OF RUTH CUSHING LIVING TRUST

**SEE ALSO 7B**

HEARING:

Hearing Re: STATUS OF TRANSFER TO ORANGE COUNTY

COUNSEL:

PAULA COLE (PET)...BRIAN J HOLOHAN  
RANDY MAY (PET)...GIFFORD, DEARING &  
RUTH CUSHING LIVING TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

Page: 7B ADD ON

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601181

CASE NAME: MTR OF RUTH CUSHING LIVING TRUST

**SEE ALSO 7A**

HEARING:

Hearing Re: ISSUE OF CONFIRMING COUNTY FOR TRANSFER

COUNSEL:

PAULA COLE (PET)...BRIAN J HOLOHAN  
RUTH CUSHING LIVING TRUS T (TRU)...  
RANDY MAY (PET)...GIFFORD, DEARING & ABERNATHY,

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

Page: 7C ADD ON

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601181

CASE NAME: MTR OF RUTH CUSHING LIVING TRUST

**SEE ALSO 7A**

HEARING:

Hearing Re: PETITION TO DETERMINE VALIDITY OF PURPORTED TRUST  
RESTATMENT APPOINT OF SUCCESSOR TRUSTEE

COUNSEL:

PAULA COLE (PET)...BRIAN J HOLOHAN  
RUTH CUSHING LIVING TRUS T (TRU)...  
RANDY MAY (PET)...GIFFORD, DEARING & ABERNATHY,

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700161

CASE NAME: MARTINEZ FAMILY TRUST

HEARING:

Hearing Re: COUNSEL'S COMPLIANCE FILING DEADLINES FOR REMOVAL

COUNSEL:

MARTINEZ FAMILY TRUST DATED JU (TRU)...PRO/PER  
PHYLLIS MARTINEZ (PET)...ROSE C ROSADO

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700210

CASE NAME: MTR OF HYEON TAE BAEK

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION  
W/WILL ANNEXED W/FULL AUTH TO ADMIN IAEA

COUNSEL:

HYEON TAE BAEK (DEC)...  
IN HO BEAK (PET)...JAMES C LEE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for **Ancillary** Probate of Will and for Letters of Administration w/ Will Annexed, w/ Full IAEA, by In Ho Beak (son)

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

1. Decedent was a nonresident of California and left and estate in this county located in Phelan, California.
2. Both beneficiaries waive bond; however, as petitioner is a non-resident, the court may require bond if the proposed personal representative resides outside of California per Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Does court wish to require minimum bond of \$20,000 or alternatively based on real property assets of \$300,000? JTD
3. **Proof of Holographic Instrument filed 04/26/17 includes translation of will and notary page. Need certification under oath by a qualified interpreter per CRC 3.1110(g).**
4. It appears decedent's will was drafted in South Korea. As such, need verified supplement establishing validity of will under South Korean law at the time will was drafted in compliance with Pr. C. §6113.
5. Need receipt for lodging of Will.
6. **Question if BEAK INHO named in will is the same as IN HO BEAK (Petitioner)? Need verified supplement.**
7. ~Proposed form Order: 03/03/17

## RECOMMENDATION

Need to clear notes 3-5. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb)



Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700211

CASE NAME: MTR OF FORTINO MAGANA TOVAR

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ADAN F MAGANA (PET)...KOKO B OFFIONG ESQ  
FORTINO MAGANA TOVAR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Adan Magana (son)

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

1. Petition indicates all heirs waive bond; however, need bond waiver from Adan Magana. Estimated net value of estate is \$734,413.00. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Need Notice of Petition to Administer Estate.
3. Need Proof of Publication.
4. ~Proposed form Order: 03/01/17

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules 20.901 and 20.908.  
(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700212

CASE NAME: MTR OF CARALOTTA KAY BEASLEY

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:

CARALOTTA KAY BEASLEY (DEC)...  
WINIFRED MCPHERSON (PET)...JASON L GAUDY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Winnifred McPherson (sister)

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

1. All heirs waive bond. However, as petitioner is a non-resident, the court may require bond if the proposed personal representative resides outside of California per Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Does court wish to require minimum bond of \$20,000 or alternatively based on real property assets of \$300,000? JTD
2. Petition, section 8, is incomplete as to relatives' ages, and relation to decedent as to Terry Beasley and Othia "Otha" Walker.
3. Need verified supplement clarifying name of heir, "Othia" Walker. Bond waiver filed 03/24/17 indicates "Otha" Walker.
4. ~Proposed form Order: 03/03/17

RECOMMENDATION:

RFA subject to notes 2-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700213

CASE NAME: MTR OF GEORGE PATRICK AMBURGEY

HEARING:

Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/FULL IAEA

COUNSEL:

FRANCINE J DE TAR (PET)...LAW OFFICE OF JEFF GROTKE  
GEORGE PATRICK AMBURGEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Francine J. De Tar (executor/niece)

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

1. Will waives bond. Estimated net value of estate is \$481,523. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Petition is incomplete at item 3(c) as to decedent's residence at time of death. Need verified supplement.
3. Petition is incomplete at item 8 as to listed beneficiaries' relation to decedent. Also, item 8 is missing beneficiaries, Robert A. Neri, Jr., and Claire E. De Tar. Need verified supplement.
4. Notice of Hearing filed 04/10/17 is an improper form. Need Notice of Petition to Administer Estate with proof of service (form DE-121) per Pr. C. §8003, §8100.
5. Need Proof of Publication.
6. ~Proposed form Order/Letters:

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0900063

CASE NAME: ALEJANDRO C. RAZO

HEARING:

TENTH Account and Report of CHRISTINA ERICKSON-TAUBE and  
Petition for allowance of fees filed.

COUNSEL:

ALEJANDRO RAZO (CTE)..  
ALEJANDRO RAZO (CTP)..  
CHRISTINA ERICKSON-TAUBE (CE )...ALEX R BORDEN  
CHRISTINA ERICKSON-TAUBE (CP )...ALEX R BORDEN  
CHRISTINA ERICKSON-TAUBE (CPE)...ALEX R BORDEN  
CHRISTINA ERICKSON-TAUBE (PET)...HORSPOOL & PARKER  
JENNIE RAZO (PCR)...CRAIG WILLFORD  
ROSA GOMEZ (PCR)...CRAIG WILLFORD  
SOUTHERN CALIFORNIA BONDING SE ( )...  
VETERANS ADMINISTRATION REGION (TP )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Tenth Account Current and Report of Conservator  
of the Estate and Petition for Allowance of Fees by Christina Erickson-Taube/PPF.

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

1. Accounting covers 01/01/16 to 12/31/16.
2. Assets on hand: \$321,123.43 (of which \$97,903.10 is cash, real property with a carry value of \$182,850 and the balance in personal property).
3. Current bond filed in the amount of \$242,000. Petitioner requests a decrease in the amount of \$8,000 for a total bond in the sum of \$234,000. Appears sufficient. JTD
4. Petitioner requests fees for services during this accounting period in the amount of \$10,261.25. Billed at various rates for various services not exceeding \$115/hour. Itemized [LF, pgs. 22-35]. JTD.
5. Attorney requests fees of \$5,938.00 for services during this accounting period. Billed at \$350-\$390/hour for 14.2 hours' attorney time and \$135/hour for 4.6 hours' paralegal time. Itemized [LF, pgs. 39-41]. JTD.
6. Attorney requests reimbursement of costs advanced of \$344.00. Itemized.

7. Petitioner has paid Rosa Razo-Gomez for Caregiver Services and Lance Riley for Case Management Expenses during this accounting period. Need verified declarations to verify dates of service, performance of services and that payment has been received per Local Rule 20-1406(c).
8. Need Notice of Hearing with proof of service.
9. ~Proposed Order submitted 03/24/17

#### RECOMMENDATION

Need to clear notes 7-8 then Court's discretion re fees and bond. If approved, set hearing on next accounting review for **02/27/18** (if one year) or **02/26/19** (if two years). Account to be filed 30 days in advance.

(nb)

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400343

CASE NAME: CYNTHIA SNOWDEN

HEARING:

FIRST AND FINAL Account and Report of LYNN SNOWDEN and Petition  
for allowance of fees filed.

COUNSEL:

CYNTHIA SNOWDEN (CTE)...KARIN E HORSPOOL  
LYNN SNOWDEN (CPE)...PRISCILLA C SOLARIO

**XREF: PROPS1400742**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; Petition for Fees; and Termination [Estate Only] Due to Exhaustion of Estate by Conservator of the Person and Estate, Lynn Snowden (brother).

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

1. Accounting period 02/24/15 to 03/31/17.
2. Assets on Hand \$0.00
3. Current bond of \$201,000.
4. Petitioner waives compensation.
5. Attorney does not request fees due to the lack of assets.
6. Petition indicates the assets belonging to the conservatorship estate consisted of the conservatee's 50% interest in her father's estate consisting of real property, only. Said property was sold during the probate administration and the conservatee's share was distributed to the trustee of her SNT. Petition indicates that all expenses of the conservatorship have been paid from funds outside the conservatorship estate and there are no assets belonging to the conservatorship estate. Petitioner requests that the conservatorship of the estate, only, be terminated and amended letters be issued. JTD
7. Petitioner requests to be discharged of his duties as the conservator of the estate and his bond be exonerated. However, bond exoneration and discharge do not occur until entry of final discharge order. JTD.
8. Notice filed 04/18/17 does not include Trustee to SNT. Need proper service.
9. No proposed order/letters. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear note 8 then Court's discretion. If approved, set next hearing for receipts and final distribution on **05/15/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600243

CASE NAME: JOSEPH PATRICK PILIERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of BARBARA JANE TYLER

COUNSEL:

BARBARA JANE TYLER (PET)...PRO/PER  
JOSEPH PATRICK PILIERO (PCE)...MITCHELL I ROTH

Request for Waiver of Court Fees and Costs filed by JOSEPH PATRICK PILIERO, BARBARA JANE TYLER is  
GRANTED

#### GENERAL INFORMATION

Order appointing Barbara Jane Tyler LIMITED Conservator of the person entered  
12/06/16.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

- 1 Notification of Conservatee's Rights and Care Plan filed.
- 2 Determination of Conservatee's Appropriate Level of Care filed 04/03/17 is not dated. Court to determine if sufficient.

RECOMMENDATION:

Court's discretion

(nb)



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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700113  
CASE NAME: MTR OF CYNTHIA MORALES

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
CYNTHIA MORALES (CTP)...  
FRANCISCA SORIA (CP)...PRO/PER

#### GENERAL INFORMATION

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

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

1. Petitioner seeks order for powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, and make medical decisions. JTD.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed.**
5. Proposed conservatee is developmentally disabled. Need report of Counsel E. Joan Nelms.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Need Confidential Screening Form.
8. **Citation returned served.**
9. **Notice filed 04/27/17 does not include step-father, Raul Gonzalez. Need proper service.**
  - a. **Due diligence declarations filed 04/27/17 as to father, Alberto Morales, paternal grandmother (unidentified), and maternal grandmother, Francisca Valenzuela. JTD.**
10. Need Court Investigator report.
11. Certificate of Completion of the Conservatorship Training Class filed 04/6/17.
12. No proposed form Order.

## RECOMMENDATION

Need to clear notes 5, 6 & 10 then Court's discretion. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: OC RS142

CASE NAME: MARILYN KAY JACKSON

**SEE ALSO 18**

HEARING:

Petition for APPOINTING CONSERVATOR OF PERSON AND ESTATE

COUNSEL:

CATHLEEN ALICE THOMAS (PET)...PRO/PER  
MARILYN KAY JACKSON (PCE)...MITCHELL I ROTH  
PATRICIA N JACKSON (PET)...PRO/PER

#### GENERAL INFORMATION

Temporary orders denied 12/27/16.

Conservatorship established on 03/02/72. Prior conservator, Patricia N. Jackson (mother), passed away on 08/27/16.

**Continued from 02/07/17. Probate note 5 cleared as to Citation as conservatee is present in court. Matter continued to clear probate notes. Attorney Mitchell I Roth is appointed for conservatee.**

THIS CASE IS SET FOR HEARING ON **AMENDED** (01/30/17) Petition for Appointment of Successor Conservatorship of the **person, only**, by Cathleen A. Thomas (sister).

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

- 1 No bond- person only.
- 2 Petitioner seeks medical powers. **Medical Capacity Declaration filed.**
- 3 Proposed Conservatee is developmentally disabled. **Need report of Counsel, Mitchell I. Roth.**
- 4 Court Investigator's Report filed 01/23/17.
- 5 **Proof of completion of Conservatorship Class filed 03/08/17.**
- 6 ~Proposed Form Order/Letters 01/30/17.

RECOMMENDATION:

Need to clear notes 3. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

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.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: OC RS142

CASE NAME: MARILYN KAY JACKSON

**SEE ALSO 17**

HEARING:  
Accounting Review

COUNSEL:

CATHLEEN ALICE THOMAS	(PET)...PRO/PER
MARILYN KAY JACKSON	(PCE)...MITCHELL I ROTH
PATRICIA N JACKSON	(PET)...PRO/PER

GENERAL INFORMATION

**Continued from 11/28/16.** No appearance. Matter is continued for Patricia Jackson to be present if accounting is not filed by next hearing date. Notice by Judicial Assistant.  
**Continued from 03/13/17. Attorney Mitchell Roth present for Marilyn Jackson.**  
**Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Ex-Parte Petition to Dispense with Accounting and Order entered 05/08/15; accounting or waiver of account now due beginning period 12/01/14.
- 2 No accounting or waiver. Need same.
- 3 **Prior Conservator, Patricia Jackson, passed away in August 2016 per minute order dated 12/27/16.**
- 4 **Need report by court-appointed counsel, Mitchell Roth.**

RECOMMENDATION:  
Need to clear note 4.  
(nb/lh)

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: RC RS00582

CASE NAME: MARY ELIZABETH HOLLOWAY

HEARING:

FIFTH AND FINAL Account and Report of PAULA D HOLLOWAY and  
Petition for allowance of fees filed.

COUNSEL:

MARY ELIZABETH HOLLOWAY (CEP)...  
MARY ELIZABETH HOLLOWAY (PCE)...MAUREEN MURATORE  
PAULA D HOLLOWAY (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by PAULA D HOLLOWAY is GRANTED

Request for Waiver of Court Fees and Costs filed by PAULA D HOLLOWAY is GRANTED

Fee waiver amount due \$2530.00

\$320.00 for conservatorship filing fees on 02/10/06

\$450.00 for CI fees on 01/12/10

\$395.00 for third report and waiver of account on 02/18/12

\$900.00 for CI fees for 2012 and 2013 on 10/15/13

\$465.00 for waiver of accounting on 04/04/14

Request for Waiver of Court Fees and Costs filed by MARY ELIZABETH HOLLOWAY is GRANTED

Fee waiver amount due \$930.00

\$465.00 for fifth and final report on 05/12/16

\$465.00 for petition for attorney's fees on 09/06/16

Request for Waiver of Court Fees and Costs filed by MARY ELIZABETH HOLLOWAY is GRANTED

Fee waiver amount due \$930.00

\$465.00 for fifth and final report on 05/12/16

\$465.00 for petition for attorney's fees on 09/06/16

**X-REF: PROPS 1500581**

GENERAL INFORMATION

Continued from **06/29/16 and 09/13/16**. Counsel indicates that the conservatee is now deceased.

Continued from **10/18/16** at request of conservator.

**Continued from 02/07/17 at request of counsel. Note #1, note #2 and note #3 are cleared after a status is provided by counsel.**

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

THIS CASE IS SET FOR HEARING ON **Amended** (03/10/17) Waiver of Account and Petition for Fees and Final Distribution

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

1. **Accounting period 01/14/1 to 02/10/17.**
2. **Assets on Hand \$424,500 consisting of real property.**
3. Petitioner requests a waiver of accounting as assets are less than \$15,000 and income was less than \$2,000 exclusive of public benefits.
4. **Petitioner waives compensation.**
5. **Need full legal description and APN number for real property per Local Rule 20-610.**
6. Notice given.
7. Proposed Order 03/10/17 does not include full legal description and APN number for real property and does not include address of party receiving real property.

RECOMMENDATION:

Need to clear note 5 then Court's discretion. If approved, set next hearing for receipts and final discharge on **05/15/18**.

(sa/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS01172

CASE NAME: IN THE MATTER OF JOSHUA ERIC JONES

HEARING:

Accounting Review

COUNSEL:

DAVID JONES	(CPE)...	HARTNELL LAW GROUP
DAVID JONES	(TEE)...	BRYAN C HARTNELL
JOSHUA ERIC JON	(CEP)...	
JOSHUA JONES SPECIAL NEEDS TRU	(TRU)...	

**VACATE** – Fourth Account filed and set for 06/07/17.

(nb)



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

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DATE: 05/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS01913

CASE NAME: MTR RE GUY G STOBART

HEARING:

FIFTH Account and Report of VERLENE CAMERON and Petition for allowance of fees filed.

COUNSEL:

GUY G STOBART	(CEP)...EDWARD B FISCHER
GUY G STOBART	(PRO/PER
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
ROBIN L SANCHEZ	(CPE)...PRO/PER
ROBIN L. SANCHEZ	(PRO/PER
TONY SANCHEZ	(CPE)...PRO/PER
US DEPT OF VETERANS AFFAIRS (TP )...	ALAN K ACHEN
VERLENE CAMERON	(CE )...JOHN D MICKUS
VERLENE CAMERON	(CPE)...JOHN D MICKUS

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Fifth Account Current; Petition for Fees; and for Reduced Bond by Conservator of the Person and Estate, PPF, Verlene Cameron ["Petitioner"].

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

1. PPF license expired on 03/31/17. Question if license has been renewed? Need verified supplement.
2. Accounting covers 02/01/16 to 01/31/17.
3. Assets on hand: \$90,603.44 consisting of cash.
4. Current bond of \$177,100. Petitioner requests bond be reduced in the amount of \$17,600 for a total bond of \$159,500. Appears sufficient. JTD.
5. Petitioner requests fees in the amount of \$3,281.25 for 26.75 hours billed at \$125/hr. Itemized [LF, pgs. 22-23]. JTD.
6. Attorney requests fees of \$2,555 for 10.80 hours billed at \$350/hour for attorney time and \$105/hour for paralegal time. Itemized [LF, pgs. 25-26]. JTD.
7. Petitioner alleges the current bond of \$154,000 is insufficient and requests a bond increase by \$23,100 for a total bond of \$177,100. Appears adequate. JTD.

8. Board and Care payments reflected at Disbursements – Schedule C [LF, p. 10], reflects varying back pay amounts for July, December 2016 and January 2017. Need further clarification via verified supplement.
9. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
10. Notice given.
11. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 1 & 8-9 then Court's discretion re: fees and bond. If approved, Court to set the next hearing re Accounting Review for **03/27/18** or a biennial Accounting Review for **03/26/19** per Pr.C. §2620(a). Any account to be filed at least 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **P/PG**

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DATE: 05/09/17 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1400698

CASE NAME: BARBARA JEAN EVANS

HEARING:  
Accounting Review

COUNSEL:

BARBARA JEAN EVANS	(DEC)...
DAVID EVANS	(PET)...LENITA A SKORETZ
HEATHER EVANS THOMAS	(PET)...JOHN
JOHN R RONGE	(PRO/PER
PUBLIC ADMINISTRATOR	(ADM)...CRAIG M PARKER

GENERAL INFORMATION:

Continued from **10/03/16**. The Court recommends Mr. Evans consult with counsel regarding the filing of the accounting. Account to be filed 30 days prior to next hearing. **Continued from 12/12/16** for accounting to be filed. **Continued from 03/13/17. Hearing continued at request of Counsel. Matter to be heard on the Public Administrator calendar.**

THIS CASE IS SET FOR HEARING ON Accounting Review (by PG)

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

1. Letters of Administration issued 01/15/16, full authority, no bond.
2. No accounting or status report of administration.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.  
(nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**PROBATE**

-----  
DATE: 05/09/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS0700798

CASE NAME: WALTER FLOWERS JR.

**SEE ALSO 2**

HEARING:

Hearing re Final Discharge

COUNSEL:

FRANCES FLOWERS

(PET)...JO ANN MCDOLE

WALTER FLOWERS JR

(DEC)...

WANDA ROGERS

(OBJ)...PRO/PER

See next matter.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS0700798

CASE NAME: WALTER FLOWERS JR.

**SEE ALSO 1**

HEARING:

OSC re: Sanctions for FTA/Failure to file documents filed by  
FRANCES FLOWERS

COUNSEL:

FRANCES FLOWERS	(PET)...JO ANN MCDOLE
WALTER FLOWERS JR	(DEC)...
WANDA ROGERS	(OBJ)...PRO/PER

GENERAL INFORMATION:

Continued from **2/10/14 and on 3/20/14** Court indicates that there will be no further continuances granted on this hearing.

Continued from **04/28/14 and 11/09/15**. No appearances. Matter referred to Public Administrator. Notice by Judicial Assistant.

Continued from **12/22/15**. Court orders Frances Flowers, Jo Ann McDole are ordered to be personally present in court on 02/23/16. Court sets OSC re Sanctions. Notice by Judicial Assistant.

Continued from **02/23/16**. Court orders administrator removed and public administrator is appointed as successor administrator. Frances Flowers to turn over all records/assets. Frances Flowers to file accounting before next hearing date; Frances Flowers and Jo Ann Mc Dole to be personally present in court on 05/03/16.

Continued from **05/03/16**. The Court notes that a First Amended Accounting was filed on 4/7/16. Oral report given by Attorney Craig Parker. The Court is informed that the amount of \$1,144.88 determined owed by the Former Administrator was sent to the Public Administrator for distribution to the three beneficiary heirs. The Court is informed that the only issue remaining is the payment on the Land Sale Contract. Frances Flowers, Former Administrator is Ordered to obtain itemized receipts from all of the beneficiaries as to what has been distributed to them to file with the Court. Frances Flowers, Former Administrator is Ordered to turn over all records as to what has been collected to the Public Administrator.

Continued from **07/19/16**. Court orders Jo Ann McDole to be personally present. Notice by Judicial Assistant.

Continued from **08/30/16**. Court orders Frances Flowers and Jo Ann McDole to be personally present at next hearing of October 1, 2016. Court orders case to remain in department S36.

Continued from **10/11/16**. Matter will be continued to clear probate notes and for further review of receipts/supplemental accounting.

Continued from **11/10/16**. The court directs personal representative and counsel to submit a complete accounting that shows all assets, income and expenditures; a table of distribution before taking into account assignments of beneficial interest made to personal representative, a clear list of expenses, and reimbursements requested by personal administrator; copies of the alleged assignments of beneficial interest to personal representative. Notice by Judicial Assistant.

Continued from **12/20/16**. Matter is continued for Attorney McDole to file a second amended final account. Court orders it to be filed by 02/01/17. Court vacates order on amended first and final account entered 2/4/13.

**Matter set on 03/07/17. Court orders Attorney Jo Ann McDole to personally Be present at the 05/09/17. Court re orders the personal representative and Counsel to submit a complete accounting that shows all assets, income and expenditures; a table of distribution before taking into account assignments of beneficial interest made to personal representative, a clear list of expenses, and reimbursements requested by personal administrator; copies of the alleged assignments of beneficial interest to personal representative. Notice by Judicial Assistant. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for FTA/Failure to file documents** on Final Discharge

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

1. Order on Amended First and Final Account entered 2/4/13. **Court vacates order on amended first and final account entered 2/4/13 and orders second amended final account to be filed by 02/01/17. Need same.**
2. Supplement to Amended First Account filed 04/07/16.
3. **Response by former Personal Representative, Frances Flowers, filed 12/14/16 indicates amended first and final account filed on 01/03/13 and supplement to amended first account filed 04/07/16, along with inventory and appraisal filed 07/30/08 include all assets and income and expenditures. Response filed 12/14/16 includes a table of distribution [LF, p. 3] but does not include alleged assignments to Personal Representative. Need same.**
4. Ex-parte petition for final discharge order 09/29/16 is not dated and premature.

RECOMMENDATION:

Need second, amended final account to be set via noticed hearing no sooner than **06/13/17**.

(kra/vet/kra/cbr/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400364

CASE NAME: PEDRO M. SANCHEZ

HEARING:  
Accounting Review

COUNSEL:  
PEDRO M SANCHEZ (DEC)...  
RAYMOND M SANCHEZ (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RAYMOND M SANCHEZ is GRANTED

GENERAL INFORMATION:

Continued from **09/22/15**. Court signs order for administration

**Continued from 11/29/16**. Raymond Sanchez appeared by court requesting a continuance until July. Court will not grant continuance. Court wishes to refer the matter to the Public Administrator and requests Raymond Sanchez to stay on the line. Craig Parker is now present for the Public Administrator but Raymond Sanchez is no longer on the line. Court suspends the powers of Raymond Sanchez as the administrator. The Public Administrator is appointed the special administrator. Notice by Judicial Assistant.

**Continued from 03/07/17 for accounting to be filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Raymond Sanchez appointed Administrator on 07/15/14, full authority, no bond.
2. Need final inventory and appraisal.
3. No accounting or status report. Need same.

RECOMMENDATION:

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

(nb/lh)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500460

CASE NAME: CHARLES RICHARD WERNER

HEARING:

FIRST & FINAL Account and Report of LORRAINE WARREN and Petition  
for allowance of fees filed.

COUNSEL:

CHARLES RICHARD WERNER (DEC)...  
LORRAINE WARREN (PET)...LENITA SKORETZ  
SHIRLEY E WERNER (PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Executrix, Lorraine Warren ["Petitioner"].

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

1. Accounting period 12/24/14 to 03/01/17.
2. Assets on Hand \$105,664.41
3. Summary of Account [LF, p. 4] Total Credits is incomplete. Need complete summary of account via verified supplement.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fee of \$5,350.00. Calculated. However, need recalculation of fees as inventory does not include personal property or receipts of \$141.00 as reflected on Schedule A [LF, p. 13].
6. Petitioner requests reimbursement for costs totaling \$1,038.13. Itemized [LF, p. 7].
7. Disbursements – Schedule C [LF, p.13] reflects a discrepancy in accounting of \$9.82. Does Court wish to deem this a de minimus amount? JTD.
8. Need proof of service to Notice of Proposed Action re: sale of real property.
9. Need Cash Assets on Hand at End of Account Period and Non-Cash Assets on Hand at End of Account Period Schedules via verified supplement.
10. Need statement regarding notice to Franchise Tax Board or alternatively, notice per Pr. C. § 9202(c)(1).
11. Petition indicates a Stipulated Settlement dated 10/19/16 was entered into with decedent's surviving spouse, Shirley Werner. Suggest Court require a copy of executed settlement. JTD.



12. Proposed distribution [LF, pgs. 7-8] includes interest in Patina Oil & Gas Corporation mineral deposits in WLD County, Colorado. However, this asset is not included in Partial #1 - Inventory and Appraisal filed on 12/15/15, nor was Decedent's personal property inventoried. Further, it appears subject mineral rights are not Decedent's assets but belonged to his prior, pre-deceased spouse [see will affixed to petition filed on 05/19/15 – LF, p. 8].
13. Need complete, final inventory and appraisal that includes personal property, appraised by probate referee; and amended schedules.
14. Notice given.
15. Proposed Order 03/01/17 does not include Balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614); findings re: sole and separate property; and distributes mineral rights not a part of this estate.

**RECOMMENDATION:**

Need amended accounting to be set on first check calendar no sooner than **06/20/17**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(nb)

**Future Hearing:**

05/24/17 Petition for order setting apart omitted spouse's etc. .

05/24/17 Accounting Review. (If approved, Court to take matter off calendar).

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600194

CASE NAME: WILLIAM J VANCAMP

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

RICHARD H ANDERSON (PET)...PRO/PER  
ROSE CHUNCHICK (PET)...D M DAVIS  
WILLIAM J VANCAMP (DEC)...

Request for Waiver of Court Fees and Costs filed by RICHARD H ANDERSON is GRANTED

GENERAL INFORMATION:

Letters of Administration issued to Rose Chunchick (sister of decedent), with LIMITED authority, no bond.

THIS CASE IS SET FOR HEARING ON Report of Sale for Order Confirming Sale of Real Property and Sale of Other Property Sold as a Unit by Purchaser, Richard H. Anderson ["Petitioner"].

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

1. Petition incorrectly indicates Petitioner is the Personal Representative.
2. Petition indicates 30 days have passed since the sale. Need supporting declaration. Pr. C. § 10308 (b).
3. Petition, 5b, indicates a written contract for commission was entered into with an unnamed person/entity. Copy of Real Estate Purchase Contract affixed at [LF, p.7-10] includes Petitioner's spouse, Roberta E. Anderson, who is not included in petition or signed by same. Need amended petition.

Address: 2439 Booth Road, Landers, CA 92285

Appraised Value: \$44,000 per reappraisal filed 12/15/16

Sale price: \$30,000. **However, sale must be 90% (\$39,600) of appraised value per Pr. C. § 10309(3).**

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

First overbid: **Incomplete as formula for overbid, sections 10 & 11, are incomplete.**

Deposit: **\$0.00. Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed**

Commission: None.

Additional bond: **Currently no bond. Section 6c, indicates proceeds to be deposited in Escrow with Liberty Escrow of Palm Springs, CA. Suggest monies be placed into blocked account. JTD.**

Reason for Sale: Necessary to pay expenses of administration.

Exposure to Market: Listed with real estate broker for 6 months resulting with no acceptable offers.

Notice: Clerk's Certificate of Posting filed 03/09/17. **Need Notice of Hearing with proof of service, to include real estate brokers, administrator, buyers and proof of publication.**

No proposed order. Submit Order after Hearing.

Future Hearing Dates: 06/29/17 Accounting Review

RECOMMENDATION:  
Need amended petition.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600596

CASE NAME: NELLIE V ORTIZ

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

IRENE VEGA WALKER (PET)...TREVOR  
NELLIE V ORTIZ (DEC)...

Address: 1245 Columbia St., Redlands, CA 92374

Appraised Value: \$260,000

Sale price: \$257,000

First overbid: \$270,350

Deposit: \$ 25,700

Commission: 5% = \$12,850

Additional bond: Current bond of \$20,000. Petitioner requests proceeds to be deposited in a blocked account. JTD.

Reason for Sale: Necessary to pay debts, devise, family allowance, expenses of administration and taxes.

Exposure to Market: Engaged services of broker; listed on MLS; entertained competing offers from Investors.

Notice: Mailed notice given and published. **Need proof of posting by clerk.**

~Proposed Form Order 03/03/17

Future Hearing: 01/08/18 Accounting Review.

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601040

CASE NAME: ROBERT AND EVELYN VANNIX FAMILY TRUST

HEARING:

Petition for DETERMINING CONSTRUCTION OF TRUST; ORDER INSTRUCTI  
NG TRUSTEE TO DISTRIBUTE FUNDS

COUNSEL:

DAVID L VANNIX	(OBJ)...PALERMO, BARBARO, CHINEN &
HEATHER GAIN	(PET)...HORSPPOOL & HORSPPOOL
KELLEY SHAFFER	(PET)...HORSPPOOL & HORSPPOOL
LINDA WILEY-ENGBERG	(PALERMO, BARBARO, CHINEN &
MACKENZIE VANNIX	(PET)...HORSPPOOL & HORSPPOOL

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601284

CASE NAME: Carolyn Ann McCormick

HEARING:

Petition to determine succession to Real Property

COUNSEL:

CAROLYN ANN MCCORMICK (DEC)...  
DEMA MOTA (PET)...PATRICIA L. ANDEL

GENERAL INFORMATION:

**Continued from 03/14/17 to clear notes.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by daughter, Dema Mota, second named Executor and Trustee.

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

1. Petition indicates proceedings for the administration of decedent's estate in another jurisdiction have been commenced and completed in Nevada. Need exemplified documents. **Supp. (04/10/17) affixes Exemplified Order form Nye County, Nevada [LF, p. 5].**
2. Petitioner, Dema Mota, requests a determination that decedent's interest in real property located at Hesperia and El Mirage, CA in San Bernardino County, pass to petitioner without administration. Petitioner is Decedent's daughter, second named executrix and Trustee. Petitioner attaches a copy of Decedent's pour-over will [LF, p7], reflecting trust is the devisee under Decedent's will.
3. Notice given.
4. ~Proposed Form Order12/28/16.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601285

CASE NAME: SALDANA -V- SALDANA

HEARING:

Hearing Re: PETITION TO SUSPEND AND REMOVE TRUSTEE

COUNSEL:

OLIVIA SALDANA (RES)...  
RICHARD SALDANA (PET)...PRO/PER

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**TRUSTS AND MOTIONS**

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DATE: 05/09/17 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1401136

CASE NAME: Deanda Family Trust

HEARING:

Motion Re: ATTORNEY'S FEES AND COSTS Filed by Petitioner RAUL DEANDA, ANTONIA NIEVES, BLANCA E. DEANDA, LORENA DEANDA, OSCAR DEANDA

COUNSEL:

ANTONIA NIEVES	(PET)...THE LAW OFFICES OF MIKE N. VO
BLANCA E. DEANDA	(PET)...THE LAW OFFICES OF MIKE N. VO
DEANDA FAMILY TRUST	(TRU)...
GUADALUPE MARIA DEANDA	(APP)...GARCIA LAW FIRM
GUADALUPE MARIA DEANDA	(OBJ)...GARCIA LAW FIRM
LORENA DEANDA	(PET)...THE LAW OFFICES OF MIKE N. VO
OSCAR DEANDA	(PET)...THE LAW OFFICES OF MIKE N. VO
RAUL DEANDA	(PET)...THE LAW OFFICES OF MIKE N. VO

**XREF: CIVDS1409293**

Currently under review by Legal Research.  
(LR)

Future Hearing:

06/20/17 First and final account etc.



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1601235

CASE NAME: THE ANITA DI ANTONIO LIVING TRUST

HEARING:

Petition for ORDR DETERMINING TRUST'S TITLE TO REAL PROPERTY &  
FOR ORDR DIRECTING PERSONAL REPRESENTATIVE

COUNSEL:

DAVID DI ANTONIO (PET)...PRISCILLA C SOLARIO  
THE ANITA DI ANTONIO LIVING TR (TRU)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIP**

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DATE: 05/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300175

CASE NAME: Margaret Mary Dyer

HEARING:

Accounting Review

COUNSEL:

KARL F SCHMIDT (CPE)...PRO/PER

MARGARET MARY (CEP)...

MICHAEL A DYER (CPE)...PRO/PER

SHIRLEY R EARL (PET)...FULLERTON LEMANN SCHAEFER & DO

SHIRLEY R. EARL (OBJ)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION

Conservatee passed away in Orange County on 11/10/16.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order approving First Account entered 03/04/16; second and final account now due to include pre and post death account periods.
2. No accounting. Need same..

RECOMMENDATION:

Inquire status.

(nb)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600316  
CASE NAME: DERL W SULLIVAN  
HEARING:  
Petition for Appointment of Conservator

COUNSEL:

DERL W SULLIVAN (CEE)...WALTER T. MOORE  
RACHEL A SULLIVAN (PET)...PRO/PER

GENERAL INFORMATION

**Ex parte orders entered on 11/10/16** appointing Rachel Sullivan temporary conservator.  
Oral report given by Walter Moore.

**Continued from 12/06/16** to clear notes. Counsel advises date of birth of conservatee is incorrect. Court will advise court investigator office of correction.

**Continued from 03/14/17.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Rachel Sullivan (spouse).

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

1. Need notice of hearing and proof of service.
2. Petitioner seeks bond waiver; no legal basis provided in Attachment 1c. As annual income is less than \$15,000/year, appears to qualify under Pr. C. §2323, §2628. JTD.
3. Petitioner seeks dementia powers. Report of Counsel Walter Moore filed 12/06/16.
4. Petitioner seeks medical powers. Capacity Declaration filed on 10/31/16 is incomplete at section 4b as to whether proposed conservatee is a patient under continuing treatment. Need verified supplement.
5. Need return of Citation.
6. **Certificate of Completion of the Conservatorship Training Class filed 03/13/17.**
7. Court Investigator Report filed on 11/08/16. **Addendum Report filed 12/08/16.**
8. ~Proposed Form Order: 10/31/16

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the required documents and hearing re Accounting Review for **07/17/18**  
Accounting to be filed 30 days in advance of hearing date. Note requirements of Local Rules 20-901 and 20-908 concerning account statements or verification letters. (lh)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700026

CASE NAME: MTR OF BRYCE YOUNGQUIST

HEARING:

OSC re: Dismissal of Appointment of Conservator filed by ERIC  
YOUNGQUIST, LA SHAWN YOUNGQUIST

COUNSEL:

BRYCE YOUNGQUIST	(CTP)...
ERIC YOUNGQUIST	(CP )...LAVONNA G HAYASHI
LA SHAWN YOUNGQUIST	(CP )...LAVONNA G HAYASHI

GENERAL INFORMATION

Ex Parte Orders denied on 01/31/17. General petition needs to be filled out completely.

**Continued from 03/07/17. No appearance. OSC re Dismissal set.**

**On 03/21/17, Court dismissed Petition for Appointment of Temporary Conservator at request of opposing counsel. Craig Parker relieved as court-appointed counsel for Bryce Youngquist.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Appointment of Conservatorship of person and estate by Eric Youngquist and La Shawn Youngquist (parents).

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

1. Petitioners request bond be set at \$10,000 on an estate valued at 1,000. Question the need for estate powers? Court to inquire.
2. Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
3. Petitioner seeks medical powers. Need Medical Capacity Declaration.
4. Petition, item #2 re conservatee's address and phone number is incomplete. Need verified supplement.
5. Need Duties of Conservatorship form.
6. Need Confidential Conservator Screening form.
7. Need Confidential Supplemental Information form.
8. Need Notification to Court of Address on Conservatorship form.

9. Need List of Required Contacts.
10. Need Court Investigator's Report. Report of no report filed 03/02/17.
11. Need return of Citation.
12. Need Certificates of Completion re Conservatorship Class.
13. Need Notice of Hearing with Proof of Service.
14. Report of No Report filed by Court Investigator on 03/02/17.

RECOMMENDATION: Court's discretion

Need to clear notes. If approved, set hearing for Compliance Review for **12/12/17** 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 **07/17/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700096

CASE NAME: MTR OF CASTULO SANABIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CASTULO SANABIA (PET)...PRO/PER  
FAUSTO SANABIA (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Fausto Sanabia (brother)

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

1. Petitioner seeks medical powers. Need Capacity Declaration.
2. Petitioner requests other orders but did not provide attachment 1I specifying orders. Need verified supplement.
3. Petition, item #11 identifies Castulo Sanabia (proposed conservatee) as a "brother." Question if petitioner inadvertently listed his own relatives in this section. List of relatives appears to be missing Maria Sanabia (wife), Oscar Sanabina (son), Carlos Sanabia (son), Valeria Sanabia (daughter). Need verified supplement clarifying proposed conservatee's relatives within the second degree.
4. List of required contacts (Local form SB-12224) is missing all relatives listed in Petition, item #11. Need completed form.
5. **Court Investigator report filed**
6. Notice of Hearing filed 03/28/17; however, need notice to Maria Sanabia (wife), Valeria Sanabia (daughter), Oscar Sanabia (son), and Carlos Sanabia (son).
7. Return of Citation filed 03/28/17.
8. Certificate of Completion of the Conservatorship Training Class filed 04/06/17.
9. ~Proposed Form Order: 03/21/17

RECOMMENDATION

Need to clear notes 1-4 & 6. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh/nb)

CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS00435

CASE NAME: FREDESVINDA THORNE

HEARING:

SEVENTH Account and Report of ARTHUR A CAPPILLA and Petition for allowance of fees filed.

COUNSEL:

ARTHUR A CAPPILLA (CPE)...BARBARA E BOWERSOCK  
ARTHUR A CAPPILLA (CPE)...JOHN D MICKUS  
ARTHUR A CAPPILLA (PET)...BARBARA E BOWERSOCK  
FREDESVINDA THORNE (CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Seventh Account Current and Report of Conservator of the Person and Estate/PPF, Arthur A. Cappilla; for Reduced Bond; for Approval of Fees and Periodic Payments of Fees; and for Authorization to Continue Support of Daughter who is no longer a minor.

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

1. Accounting covers 12/03/14 to 12/02/16.
2. Assets on hand: \$28,933.37 (cash)
3. Current bond in the amount of \$90,500. Petitioner requests a reduction in bond of \$8,000 for a total bond of \$82,500. Appears sufficient. JTD
4. Petitioner has been providing monthly support to the conservatee's daughter, Gloria Thorne, in the amount of \$500/month pursuant to court approval. Petitioner requests that the support authorization continue.
5. Petitioner requests fees of \$7,185.00, of which \$6,000 has been paid in periodic payments, however, due to the size of the estate, petitioner is accepting \$6,000 as full payment of his fees for this accounting period. Fees are billed at various rates for various services not exceeding \$125/hour. Itemized [LF, pgs. 26-28]. JTD
6. Petitioner requests authority to continue periodic payments of compensation for services at the rate of \$250/month for a period not exceeding 30 months commencing 01/01/17. JTD

7. Attorney requests fees of \$4,060.00, however, in view of the small estate, attorney reduces his fee request to \$3,000. Billed at \$350/hour for 10.70 hours' attorney time and \$105/hour for 3.0 hours' paralegal time. Itemized [LF, pgs. 30-31]. JTD.
  - a. Question whether qualifications of paralegal meets the requirements of CRC 7.703(e)(1)(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d)? Need verified supplement.
8. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
9. Notice given.
10. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Need to clear notes 7a & 8 then Court's discretion. If approved, set next accounting review for **02/06/18** (if one year) or **02/05/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS0701087

CASE NAME: CHARLES WAYNE MAGBY

HEARING:

Probate status report filed.

COUNSEL:

CHARLES WAYNE MAGBY	(DEC)...
DEPT. OF HEALTH CARE SERVICES	(TP )...PRO/PER
MICHAEL E MAGBY	(PET)...JAMIE P GELBER

**X-REF: PROPS 1400678**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Michael E. Magby ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as this estate is a beneficiary of the related case. Petition alleges once Ms. Magby's estate is settled, any funds received will be included in a final account.
2. Petitioner requests an additional 12 months to close the estate.
3. Notice given.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/15/18**.

(nb)

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS0800367

CASE NAME: JOHN JOSEPH MCCARTHY

**SEE ALSO 2A**

HEARING:

Probate status report filed.

COUNSEL:

GWENDOLENE MCCARTHY	(PET)...WILLIAM ERDMIER
GWENDOLY MCCARTHY, AS ADMINIST	(DEF)...ANNE ZIMMERMAN
GWENDOLYN MCCARTHY	(PET)...ANNE ZIMMERMAN
JOHN JOSEPH MCCARTHY	(DEC)...
MARY IRENE MCCARTHY	(PLA)...SCHREIBER & SCHREIBER
ROBERT MCCARTHY	(PET)...SCHREIBER & SCHREIBER,

**X-REF: UDBS1601523, CIVDS1105659**

GENERAL INFORMATION

Continued from **10/26/16** for partition action to be filed. Request to sell property will be filed. Counsel will accept service on behalf of his client.

Continued from **12/13/16** at request of counsel. Notice waived

Continued from **01/10/17**. No appearances. Gwendolene McCarthy and/or Counsel are ordered to be present at next hearing and to file a further status report. Notice by Judicial Assistant.

**Continued from 03/07/17 and 04/11/17 on court's motion. No appearances. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Status Report (filed 08/08/16)

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

1. Letters of Successor Administration issued to Robert McCarthy, son, on 04/10/15; limited authority \$20,000 bond.
2. Second Status Report filed 10/20/16 indicates surviving spouse, Gwendolene McCarthy has been locked out of the real property; Administrator is now in possession of the Property; and requests the Court to permit the sale of the Property, "as is," subject to Court confirmation as the Administrator only has limited powers.
3. Petitioner does not set forth time to close the estate.

## RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/13/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rules.

(lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 2A ADD ON

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS0800367

CASE NAME: JOHN JOSEPH MCCARTHY

**SEE ALSO 2**

HEARING:

Probate status report filed.

COUNSEL:

GWENDOLENE MCCARTHY	(PET)...WILLIAM ERDMIER
GWENDOLY MCCARTHY, AS ADMINIST	(DEF)...ANNE ZIMMERMAN
GWENDOLYN MCCARTHY	(PET)...ANNE ZIMMERMAN
JOHN JOSEPH MCCARTHY	(DEC)...
MARY IRENE MCCARTHY	(PLA)...SCHREIBER & SCHREIBER
ROBERT MCCARTHY	(PET)...SCHREIBER & SCHREIBER,

**X-REF: UDBS1601523**

**VACATE** - Duplicate setting

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS0900337

## **VACATE**

CASE NAME: ISAAC PRUDHOLME S.N. TRUST

HEARING:

Accounting Review

### COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (	)...
ISAAC PRUDHOLME SPECIAL NEEDS (TRU)...	PRO/PER
KATIE HERNANDEZ	(PET)...HARTNELL LAW GROUP
LOS ANGELES COUNTY PUBLIC GUAR (	)...
MELODIE SCOTT	(TEE)...SHERRI L KASTILAHN
RICKY PRUDHOLME	(PRO/PER

Request for Waiver of Court Fees and Costs filed by RICKY PRUDHOLME is GRANTED

**XREF: SCVSS18171**

Future hearing date: 07/03/17 Fifth and Final Accounting and Report

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400118

CASE NAME: Frank Roe

**SEE ALSO 5**

HEARING:

FIRST Account and Report of WILLIAM ROE, CONNIE SCHUBERT and  
Petition for allowance of fees filed.

COUNSEL:

CONNIE SCHUBERT	(PET)...PRO/PER
FRANK ROE	(DEC)...
WELLS FARGO BANK, N.A.	(TP )...PRO/PER
WILLIAM ROE	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Second Supplement to Report of Status of Administration by Co-Administrators, William Roe and Connie Shubert ["Petitioners"].

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

1. Petitioners request appointment of Burdette M. Garvin as probate referee as a supplemental Inventory and Appraisal is needed.
2. Accounting period 04/02/14 to 02/20/17.
3. Assets on hand \$400,000 consisting of real property.
4. Summary of Account [LF, p. 3] does not reflect receipt of monies from sale of 2 vehicles and disbursements for repair of real property. Further, Total Charges and Total Credits do not match. It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060 et seq. and using the proper forms.
5. Need amended receipt and disbursement schedules.
6. Need copy of escrow closing statements per Local Rule 20-910.
7. Notice given.
8. ~Proposed Order 02/27/17 is not complete in and of itself. Local Rule 20-614.

**RECOMMENDATION:**

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

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400118

CASE NAME: Frank Roe

**SEE ALSO 4**

HEARING:

Probate status report filed.

COUNSEL:

CONNIE SCHUBERT	(PET)...PRO/PER
FRANK ROE	(DEC)...
WELLS FARGO BANK, N.A.	(TP )...PRO/PER
WILLIAM ROE	(PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 08/29/16, 11/02/16 and 03/02/17 at request of Petitioner. Notice to be given by Mr. Roe.**

THIS CASE IS SET FOR HEARING ON Status Report (filed 07/06/16).

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

1. Letters of Administration issued to William Roe & Connie Schubert father & sister, on 04/02/14; full authority, no bond. William Roe, father, appears to be sole heir; therefore, notice is not required.
2. Petitioner requests an additional 12 months to close the estate in order to sell the real property. Petitioner alleges the estate is not in a condition to be closed as repairs on real property located in Alta Loma, CA, need to be completed.
3. ~Proposed Order: 10/31/16.

RECOMMENDATION:

Court's discretion. Set hearing for the next Account Review for **09/11/17**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(/lc/nb)



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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500787

CASE NAME: MTR OF PAUL R HANLEY(MASTERFILE)

HEARING:

Probate status report filed.

COUNSEL:

ALEXANDRIA TOPPING	(OBJ)...PECCORINI & PECCORINI
PAUL R HANLEY	(DEC)...
TRACY LYN COX	(PET)...JANIS B MARTINDALE
TYLER TOPPING	(PECCORINI & PECCORINI)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report [filed 03/07/17] by Co-Administrators, Tracy L. Cox and Alexandria Topping ["Petitioners"].

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

1. **Supplement filed 05/02/17 indicates a partial inventory will be filed prior to hearing and a final inventory will be filed once assets have been located.**  
Need complete, final inventory with supporting bank/financial statements per Local Rule 20-908.
2. Petitioner alleges the estate is not in a condition to be closed as the co-administrators are in the process of locating and identifying assets in order to file an Inventory and Appraisal and need additional time to evict current tenant in decedent's home.
3. Petitioners request an additional 12 months to allow time to evict the current tenant and file an accounting.
4. Notice given.
5. ~Proposed Order 05/02/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **05/15/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500900

CASE NAME: ALFREDO ESPINOZA ROMERO

HEARING:

FIRST AND FINAL Account and Report of MANUEL ESPINOZA and  
Petition for allowance of fees filed.

COUNSEL:

ALFREDO ESPINOZA ROMERO (DEC)...  
MANUEL ESPINOZA (PET)...FULLERTON LEMANN SCHAEFER  
SOLEDAD ZUNIGA LOPEZ (OBJ)...  
SOLEDAD ZUNIGA LOPEZ (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SOLEDAD ZUNIGA LOPEZ is GRANTED  
Fee waiver amount due \$435.00 for objection filed on 11/05/15.

GENERAL INFORMATION:

**Continued from 03/07/17 at request of counsel to file accounting and recalculate  
statutory fees.**

THIS CASE IS SET FOR HEARING ON First and Final Report and Petition for Fees by  
Administrator, Manuel Espinoza (brother).

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

1. Accounting period **03/30/16** to 11/16/16.
2. Assets on Hand \$102,106.64 consisting of cash.
3. **Suppl. (03/21/17) does not recalculate statutory fees and prayer does not  
request same. Need verified supplement.**
4. Attorney requests extraordinary fees of \$8,977.55 for services rendered in  
connection with the real properties. Billed at \$300/hour for attorney time and \$110-  
\$125/hour for paralegal time, totaling 66.0 hours. Itemized [LF, pgs. 21-27]. JTD.  
**Attorney request for extraordinary fees is granted in the amount of \$6,661.00  
per minute order dated 03/07/17.**
5. Attorney requests reimbursement of costs advanced of \$1,112.80. Itemized [LF, p.  
9-10].

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

6. Petitioner prays that surviving spouse's share be offset by the amount of damage caused by her intentional actions (losses in excess of \$246,500) and proposes distribution to decedent's 9 siblings. JTD.
7. Petitioner requests authority to withhold a reserve of \$9,000.
8. **Need proof of service to supplement.**
9. Proposed Order 12/21/16 reflects incorrect statutory and extraordinary fees.

RECOMMENDATION:

Need to clear notes 3 & 8 then Court's discretion. If approved, set next hearing for receipts and final discharge for **05/15/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501039

CASE NAME: MTR OF RUTILIA OLVERA

HEARING:  
Accounting Review

COUNSEL:  
IRMA OLVERA (PET)...GARY H BLAYLOCK  
RUTILIA OLVERA (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 03/07/16, full authority, no bond.
2. No accounting or status report of administration.

#### RECOMMENDATION:

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

(lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601027

**VACATE**

CASE NAME: MARIA ELENA FLORES GUERRERO

HEARING:

Hearing Re: Receipt of Bond

COUNSEL:

MARIN FLORES AVILA

MARIA ELENA FLORES GUERRERO

(PET)...GEORGINA LEPE

(DEC)...

**Proof of \$75,000 bond filed 03/21/17.**

Future Hearing:

05/15/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601208

CASE NAME: WUNSCHEL FAMILY TRUST DAT JANUARY 13,1993

HEARING:

Petition for OF STEVEN FRAZIER TO VALIDATE PURPORTED 5TH  
AMENDMENT OF THE TRUST BASED ON UNDUE INFLUENCE

COUNSEL:

LUANN CUNNINGHAM	(PET)...MORRILL LAW FIRM
STEVEN FRAZIER	(PET)...JAIME
WUNSCHEL FAMILY TRUST DA TED	(TRU)...

**VACATED** per register of actions.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

Joshua Tree District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 05/09/17    TIME: 9:30    DEPT: S37P  
-----

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

**SEE ALSO 12**

HEARING:

Hearing Re: Elder Abuse Restraining Order

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

JUDITH KATHLEEN PARK

(RP )...LENITA A SKORETZ

PATRICIA MAE LAWRENCE PARK

(PP )...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

**XREF: CONPS1600269**

No notes – Judge to decide.

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

Joshua Tree District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 05/09/17    TIME: 9:30    DEPT: S37P  
-----

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

**SEE ALSO 11**

HEARING:

Motion Re: OSC CONTEMPT Filed by Petitioner JANICE LYNN PARK

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

JUDITH KATHLEEN PARK

(RP )...LENITA A SKORETZ

PATRICIA MAE LAWRENCE PARK

(PP )...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

**XREF: CONPS1600269**

No notes – Judge to decide.



Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

-----  
DATE: 05/09/17    TIME: 9:30    DEPT: S37P  
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CASE#: CON PS0700239

CASE NAME: DEBRA MORETTA

**SEE ALSO 14**

HEARING:

Hearing Re: Fourth Accounting

COUNSEL:

DEBRA MORETTA

(CEP)...JEANNE KENNEDY

DEBRA MORETTA

(CEP)...PRO/PER

DEBRA MORETTA

(INC)...

NICHOLAS MORETTA

(PET)...HODES MILMAN, LLP

NICK MORETTA

(CPE)...JENNIFER M DANIEL

GENERAL INFORMATION:

Matter set on **09/13/16** due to non-appearances. Notice by Judicial Assistant.

Continued from **11/14/16**. Petitioner reports conservatee, his wife, passed away.

Petitioner is ordered to file a final accounting.

Continued from **01/30/17**. No appearances. Court orders Nicholas Moretta and/or counsel to appear at the next hearing. Notice by Judicial Assistant.

**Continued from 04/04/17. The Court approves a partial reimbursement to conservator for 1/2 the cost of construction, funeral and burial expenses and other expenses cited into the record. Fourth accounting is approved in part. The Court finds there is sufficient evidence shown to establish the conservator is entitled to partial reimbursement today. The Court orders the account unblocked to release funds for reimbursement to conservator. Amended orders signed. Counsel report they are of the belief that a probate action does not need to be filed in this matter. The Court does not want waivers from the children to be filed, as this is not a probate action. Supplemental declaration to be filed as to conservator's request for compensation.**

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees

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

1. Accounting covers 04/01/14 to 03/31/16.

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

2. Assets on hand: \$799,717.92 (of which \$759,299.62 is cash in a blocked account and the balance in carry value of personal property).
3. Petitioner requests an annual fee of \$80,000 for his 24-hour, 7 day/week service to the Conservatee for the period of the Fourth Account. Not itemized. JTD.
4. Last CI report filed 12/30/15.
5. Account does not include Non-Cash Assets at End of Account Period. Need same via verified supplement.
6. Brokerage Account Statement does not indicate account is blocked. Need proof of blocked account via verified supplement. **Supp. (03/21/17)** indicates account is partially blocked and allows Conservatee to only direct investments with the assistance of the broker/manager. Petition alleges it would be futile for the Court to order that the account be completely blocked, as the Conservatee is deceased; the Petitioner must access funds in this account for the purpose of paying fees and costs; and requests a Court Order that Petitioner's fees may be paid from the Royal Alliance Account. JTD.
7. Declaration by Attorney Daniel filed 03/021/17 requests fees be reserved and an inclusive billing statement will be pled in the related fifth account.
8. **Supp. (03/21/17)** requests that the Royal Alliance Account may be "unblocked" for the purpose of paying the approved fees.
9. **Receipts filed 03/29/17, in support of partial reimbursement to conservator, are comprised of 180 pages which are not itemized, totaled or verified. Need itemization and totals via verified supplement.**
10. Notice given.
11. ~Proposed Order 06/27/19 has incorrect hearing date and property on hand.

#### RECOMMENDATION

Need to clear notes 5 & 9 then Court's discretion.

(nb)

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS0700239

CASE NAME: DEBRA MORETTA

**SEE ALSO 13**

HEARING:

AMENDED FIFTH AND FINAL Account and Report of NICK MORETTA and  
Petition for allowance of fees filed.

COUNSEL:

DEBRA MORETTA	(CEP)...JEANNE KENNEDY
DEBRA MORETTA	(CEP)...PRO/PER
DEBRA MORETTA	(INC)...
NICHOLAS MORETTA	(PET)...HODES MILMAN, LLP
NICK MORETTA	(CPE)...JENNIFER M DANIEL

**\*\*\*Court to rule on prior matter before addressing this hearing.\*\*\***

GENERAL INFORMATION:

Conservatee passed away on 10/26/16.

**Continued from 02/14/17 to clear probate notes. Conservator urged to seek legal advice. Attorney Jeanne Kennedy re-appointed to conservatee to assist conservator with accountings. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **Amended (03/29/17)** Fifth and Final Account Current and Petition for Fees by Conservator of the Person and Estate, spouse, Nick Moretta ["Petitioner"].

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

1. Accounting covers 04/01/16 to 10/31/16. Need post-death accounting per Pr. C. § 2620. **Accounting period exceeds date of death by 5 days, for which amended account, claims to be a post-death accounting. Does Court wish to require the post-death account be brought current or deem the accounting period, by 5 days, a post-death accounting? JTD.**
2. Assets on hand: \$822,811.74 (of which \$782,393.44 is cash in a blocked account and the balance in carry value of personal property).
3. **Petitioner requests fees of \$160,000 for account period 2008-2011; Petitioner requests fees of \$ 80,000 for account period 2011-2012;**

- Petitioner requests fees of \$ 80,000 for account period 2013-2014;  
Petitioner requests fees of \$ 72,500 for account period 2016-2017.  
Petitioner requests fees of \$392,500 for the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, and 5<sup>th</sup> account periods. Not itemized. Need same via verified supplement.
4. **Attorney Daniel requests fees of \$5,672.50. Billed at \$300/hour for 16.2 hours' attorney time and \$125/hour for 6.5 hours' paralegal time. Itemized [LF, pgs. 20-22]. JTD.**
    - a. **Question if qualifications of paralegal meets the requirements of CRC 7.703(e)(1)(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d). Need verified supplement.**
  5. **Court-Appointed Counsel, Jeanne E. Kennedy requests fees of \$2,527.50 for services from 02/14/17 to 04/18/17. Billed at \$300/ hour for 6.3 hour's attorney time and \$150/hour for 4.25 hours' paralegal time. Itemized [see supp. filed 04/19/15, LF, pgs. 4-5]. JTD.**
  6. **Summary of Account [LF, p. 13 to amended 5<sup>th</sup> account] Total Credits is blank. Need complete summary via verified supplement.**
  7. **Petitioner proposes to distribute remaining property on hand to the beneficiaries of the estate without further Court Order instead of to Personal Representative of Decedent's estate. Question if a probate has been commenced? At hearing held on 04/04/17 on fourth account, Counsel reported they are of the belief that a probate action does not need to be filed in this matter. Amended fifth account filed 03/29/17 alleges Petitioner, as surviving spouse, is entitled to the residue of the estate as community property. However, petition indicates assets are decedent's separate property. Question authority to distribute separate property directly to spouse as community property? Need points & authorities via verified supplement.**
  8. **Judgment after Hearing on Fourth Account entered 04/04/17, partially approving reimbursements, totaling \$169,867.64, to Petitioner.**
  9. **Petitioner requests authorization to withhold the sum of \$2,000 as a reserve for closing expenses. JTD.**
  10. **Notice given.**
  11. **Proposed Order 12/05/16 distributes directly to unnamed beneficiaries; and does not comply with Local Rule 20-614. Need corrected order.**

#### RECOMMENDATION

Need to clear notes 4a, 6-7 then Court's discretion re: notes 1, 3, 5, & 9. If approved, set next hearing for receipts and final discharge on **05/15/18**.

(nb)

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0800317

CASE NAME: AARON EDGAR CALDERON

HEARING:

Hearing Re: TRANSFER TO RIVERSIDE

COUNSEL:

AARON EDGAR CALDERON (PCE)...KARIN HORSPOOL  
MILAGROS MARTINEZ (PCR)...PRO/PER

GENERAL INFORMATION:

**Continued from 12/16/16. No appearances. Notice by Judicial Assistant.  
Continued from 03/07/17 on Court's motion. No appearance. Court order Milagros  
Martinez to appear at the next hearing dated 5/9/17. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Transfer to Riverside

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

1. Matter set upon review and receipt by CI that Conservatee now resides in Riverside, CA.
2. CI report filed 12/07/16.
3. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear note 3 then Court's discretion.

(nb)

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

**SEE ALSO 15B, 15C, 15D**

HEARING:

Hearing Re: SIGNING OF QUIT CLIAM DEED

COUNSEL:

ARCELIA GARCIA	(CE )...PRO/PER
ARCELIA GARCIA	(CPE)...PRO/PER
COSME EQUIHUA	(PRO/PER
MARIA DE JESUS EQUIHUA	(CTP)...MATTHEW E. SHEASBY
MATTHEW E SHEASBY	(PET)...MATTHEW E. SHEASBY
NELIDA MILLAN	(PET)...PRO/PER
ROBERT EQUIHUA	(CPE)...PRO/PER
ROBERT EQUIHUA	(OBJ)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NELIDA MILLAN is GRANTED

Request for Waiver of Court Fees and Costs filed by ROBERT EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by MARIA DE JESUS EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by ARCELIA GARCIA is GRANTED

GENERAL INFORMATION:

**Continued from 04/25/17. Arcelia Garcia agrees to sign the quit claim deed putting the home in the trust. Ms. Millan, Ms. Torres and Ms. Garcia are to sign the quit claim deed within two weeks. Arcelia Garcia is ordered to pay LeeAnn Hefner prior to next hearing.**

THIS CASE IS SET FOR HEARING ON Quit Claim Decision

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

1. Matter set at 04/11/16 hearing, wherein, Arcelia Garcia requested a continuance to decide whether or not she will agree to transfer her interest in her mother's property back to her mother's trust. The Court determines that should she deed her

interest in the property back to the trust, any conflict of interest will be resolved but the issue of surcharge may remain.

2. Arecelia Garcia ordered to file an accounting by 6/30/17. (Ms. Ortiz was previously retained to assist on a prior accounting and may be retained again for that purpose.)  
Need same.

**RECOMMENDATION:**

Need accounting as directed by Court on 04/11/16.

(nb)

**Future Hearing:**

08/08/17 Accounting Review.

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

**SEE ALSO 15A, 15C, 15D**

HEARING:

Hearing Re: PTN RET REAL PROP/PC850 CONSTRUC TRST/QUIET TITLE

COUNSEL:

ARCELIA GARCIA	(CE )...PRO/PER
ARCELIA GARCIA	(CPE)...PRO/PER
COSME EQUIHUA	(PRO/PER
MARIA DE JESUS EQUIHUA	(CTP)...MATTHEW E. SHEASBY
MATTHEW E SHEASBY	(PET)...MATTHEW E. SHEASBY
NELIDA MILLAN	(PET)...PRO/PER
ROBERT EQUIHUA	(CPE)...PRO/PER
ROBERT EQUIHUA	(OBJ)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NELIDA MILLAN is GRANTED

Request for Waiver of Court Fees and Costs filed by ROBERT EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by MARIA DE JESUS EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by ARCELIA GARCIA is GRANTED

Currently under review by Legal Research.

(LR)

Continued matter – notice not re-reviewed.

(nb)

Future Hearing:

08/08/17 Accounting Review.



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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

**SEE ALSO 15A, 15B, 15D**

HEARING:

Petition for REMOVAL OF CONSERVATOR OF THE ESTATE DUE TO CONFLICT OF INTEREST

COUNSEL:

ARCELIA GARCIA	(CE )...PRO/PER
ARCELIA GARCIA	(CPE)...PRO/PER
COSME EQUIHUA	(PRO/PER
MARIA DE JESUS EQUIHUA	(CTP)...MATTHEW E. SHEASBY
MATTHEW E SHEASBY	(PET)...MATTHEW E. SHEASBY
NELIDA MILLAN	(PET)...PRO/PER
ROBERT EQUIHUA	(CPE)...PRO/PER
ROBERT EQUIHUA	(OBJ)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NELIDA MILLAN is GRANTED

Request for Waiver of Court Fees and Costs filed by ROBERT EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by MARIA DE JESUS EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by ARCELIA GARCIA is GRANTED

GENERAL INFORMATION

**Continued from 02/15/17 and 03/15/17.** The Court tentatively grants request for removal of conservator of the estate. Mr. Sheasby clarifies that the request at this time is that Maria Equihua's home be re-placed in the trust. Mr. Sheasby to arrange for a professional to do an assessment of conservatee's needs prior to next hearing. Cosme Equihua to hire a licensed, insured and bonded contractor to provide an estimate for repairs to the home and a realtor to provide information regarding fair market rent for the home. Robert Equihua to assist Cosme Equihua in acquiring information for the Court. The Court orders accounts frozen immediately.

Any and all monies received are to be deposited weekly into Mr. Sheasby's client trust account to be held pending further order of the court. Response to petition has been filed and is served on Mr. Sheasby this morning. MSC will be set at next hearing.

Continued from **04/11/17**. Oral report given by Ms. Hefner. The Court authorizes the purchase of the items on Ms. Hefner's list from the estate of the conservatorship in an amount not exceeding \$2,500. Conservator to confer with her brother regarding the purchase of those items. The Court authorizes the payment of \$1,079 released from the estate to pay the fee for Ms. LeeAnn Hefner. The Court orders that twice a week Ms. Millan schedule a break where another person takes care of her mother's needs. That person could be a sibling or child of Ms. Millan's. Visitation orders made. The Court approves repairs in the amount of \$7,790 of the home in the amount of \$7,790. If Counsel are provided the formal estimate prior to next hearing and agree that that amount is reasonable, funds up to the amount of \$7,790 may be released for repairs prior to next hearing. Nelida Millan and Victoria Torres have both agreed to sign quit claim deeds deeding their interest in the property back to Maria Equihua's trust. Mr. Sheasby to prepare the quit claim deeds.

**Continued from 04/25/17. The Court requires Arcelia Garcia continue pursuing the homeowners claim for water damage and check on co-pay for claim. Counsel to prepare attorney fee petitions to be filed with the court and to assist Arcelia Garcia in arranging a HELOC to pay those fees. Ms. Garcia to be informed to requested fees as soon as possible.**

**Ms. Millan is ordered to get estimates and arrange repairs on the home. Windows to be fixed as soon as possible. Estimate on flooring to be gotten as soon as possible. Her brothers are ordered to fully cooperate in allowing access to the home for repairs. Ms. Millan's brothers are no longer authorized to handle the home repairs.**

**Arcelia Garcia agrees to sign the quit claim deed putting the home in the trust. Ms. Millan, Ms. Torres and Ms. Garcia are to sign the quit claim within two weeks.**

**Arcelia Garcia is ordered to pay LeeAnn Hefner prior to next hearing.**

**- The Court orders that all telephone contact with conservatee is to be private. All other visitation orders are to remain.**

THIS CASE SET FOR HEARING ON Petition for Removal of Conservator of the Estate, Appointment of Successor, Sale of Real Property and Surcharge by **GAL Matthew Sheasby** Pr.C. §§ 2681,2650,2650,2682.

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

1. Petitioner is petitioning on behalf of conservatee. Nelida Millan, daughter, is Conservator of person only; Arcelia Garcia, daughter/Conservator of estate only
2. Petitioner seeks court surcharge Arcelia Garcia for not collecting reasonable rents. Deed for real property in Fontana appears to be titled in Conservatee's name and her children Victoria, Nelida and Arcelia [Pet.12/13 LFpg21]. This Pr.C. § 850 matter appears to also be on calendar. Petitioner further discovered that Arcelia also failed to collect rents and allegedly took advantage of the conservatee's diminished capacity, before and after the conservatorship.
3. Petitioner seeks removal of Conservator Arcelia per Pr.C. § 2650 for alleged failure of to use ordinary care and diligent management of the conservatee's estate. Petitioner alleges that Arcelia is actively under charging for rents of siblings residing

in the conservatee's home. Reasonable rents appear to be \$1,650-1,800, not the \$890 being charged.

4. Petitioner seeks surcharge for failure to collect rents.
5. Petitioner requests an order of the sale of conservatee's real property located on Tokay Ave in Fontana and for escrow to make a disbursement of \$10,000 for depositions and trial experts.
6. Petitioner requests compensation for his services totaling \$25,823.48. No itemization provided. Court may wish to require.
7. **Confidential Report of Lee Ann Hefner, Senior Advocate, filed 04/10/17 by GAL, Matthew E. Sheasby.**
8. **Objections filed by Conservator of the Estate, Maria De Jesus Equihua, on 04/06/17. Need proof of service.**

#### RECOMMENDATION

Set for contested hearing.

(lc/nb)

Future Hearing:

08/08/17 Accounting Review.

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

**SEE ALSO 15A, 15B, 15C**

HEARING:

Trial Setting Conference

COUNSEL:

ARCELIA GARCIA	(CE )...PRO/PER
ARCELIA GARCIA	(CPE)...PRO/PER
COSME EQUIHUA	(PRO/PER
MARIA DE JESUS EQUIHUA	(CTP)...MATTHEW E. SHEASBY
MATTHEW E SHEASBY	(PET)...MATTHEW E. SHEASBY
NELIDA MILLAN	(PET)...PRO/PER
ROBERT EQUIHUA	(CPE)...PRO/PER
ROBERT EQUIHUA	(OBJ)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NELIDA MILLAN is GRANTED

Request for Waiver of Court Fees and Costs filed by ROBERT EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by MARIA DE JESUS EQUIHUA is GRANTED

Request for Waiver of Court Fees and Costs filed by ARCELIA GARCIA is GRANTED

No notes – TSC.

(nb)

Future Hearing:

08/08/17 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400019

CASE NAME: TERESA L MURPHY

HEARING:  
Accounting Review

COUNSEL:  
SHARON K SCOTT (CPE)...PAMELA Y VALENCIA  
TERESA L MURPHY (CTE)...LENITA A SKORETZ

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex-Parte Petition to Dispense with Accounting and Order entered 05/25/16; accounting now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:  
Inquire status.  
(nb).

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK

**SEE ALSO 17A**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JANICE L PARK (CP)...PRO/PER  
PATRICIA MAE LAWRENCE PARK (CTP)...JENNIFER M DANIEL

**XREF: CIFMS1600004**

GENERAL INFORMATION

Ex Parte orders denied on **09/12/16**. Referred to Court Investigator for investigation and report. Attorney Jennifer M. Daniel appointed for proposed conservatee. Notice by Judicial Assistant.

**Continued from 10/03/16.** Parties report Patricia Park has moved into Judith Park's home. Parties note that in a related action, CIFNS1600004, Judith Park is restrained from removing Patricia Park for her placement and from being financially connected to Patricia Park. Ms. Daniel is ordered to go to Patricia Park's bank to ensure that there is no comingling of funds and that Judith Park has no access to Patricia Park's funds. The Court appoints Walter Moore as guardian ad litem for Patricia Park. Notice by Judicial Assistant.

**Continued form 11/15/16.** Court finds CIFMS1600004 should be heard in probate court. Court orders Judith Park to provide all bank records from 01/01/16 to 10/21/16 to Mr. Moore by 11/30/16. Court is concerned about Patricia Park's living and financial arrangements, and medical capacity declaration filed by Patricia Park. Janice Park intends to file a contempt action in related matter for Judith Kathleen's violation of court order. Court appoints Robert Sawicky as 730 expert in this matter. Mr. Moore to prepare order appointing Dr. Sawicky.

**Continued from 02/28/17.** Janice L. Park is ordered temporary conservator of Patricia Mae Lawrence Park, no bond. Order signed this date. Dr. Sawicky is working on 730 report waiting for subpoena documents.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by non-resident, daughter.

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

- 1 Proposed Conservatee admitted 08/27/16 to a Rehab Center in Palm Springs (Riverside County).
- 2 Petitioner requests no bond be required but does not include Attachment 1c explaining why. However, review of the estimated value of property reflects income consisting of only Social Security and does not include estimated value of conservatee's real property. Need verified supplement with reasons to support why bond should not be required and estimated value of real property in order to determine a bond amount.
- 3 Petitioner seeks Pr. C. § 2590 powers. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
- 4 Need proper completion of Section 3b to petition, sections (1)(2)(4) and (7) via verified supplement.
- 5 Petitioner requests dementia powers; Need report of court-appointed counsel, Jennifer Daniel.
- 6 Petition, Section 1g, seeking medical powers is incomplete. Need completed Capacity Declaration (see note 6).
- 7 Capacity Declaration filed 11/10/16 is incomplete at item 5 and declarant's initials on page 3. Need same.
- 8 Need return of Citation.
- 9 Need Notice of Hearing with proof of service.
- 10 Need Certificate of Completion re Conservatorship Class.
- 11 Court to review Confidential Conservator Screening Form, #8. Need Attachment 8 to Confidential Conservator Screening Form.
- 12 Need 730 Report of Dr. Robert Sawicky.
- 13 Oral report presented by GAL, Walter Moore, on 10/17/16.
- 14 CI Report filed 11/09/16. **CI Special Report filed 04/27/17.**
- 15 **Objections filed 10/03/16 on behalf of proposed conservatee by Court-Appointed Attorney Daniel.**
- 16 ~Proposed Form Order/Letters 09/02/16.

RECOMMENDATION:

Need to clear notes 2, 4-12, bond to be determined. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr. C. §2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **07/17/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 17A ADD ON

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

-----  
DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK

**SEE ALSO 17**

HEARING:

Ex parte hearing re: MOTION FOR EMERGENCY HEARING

COUNSEL:

JANICE L PARK (CP )...PRO/PER  
PATRICIA MAE LAWRENCE PARK (CTP)...JENNIFER M DANIEL

**XREF: CIFMS1600004**

No notes – Judge to decide.



Superior Court of Calif, County of San Bernardino

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700107

CASE NAME: TIMOTHY J RENSTROM

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

MICHAEL KRUGER	(PET)...LAW OFFICES ALBIRGHT & JONES
RAYMOND JOHN RENSTROM	(PET)...PRO/PER
SANDRA RENSTROM	(PET)...PRO/PER
TIMOTHY G RENSTROM	(PET)...DENNIS D ALBRIGHT
TIMOTHY J RENSTROM	(CTP)...

**XREF: VCVS00022**

GENERAL INFORMATION:

Michael Kruger appointed Successor Conservator of the person, on 03/30/15.

THIS CASE IS SET FOR HEARING ON CMC re Transfer in from Tehama County.

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

1. Need updated letters.
2. Need CI report.
3. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear notes.

(nb)

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700117

CASE NAME: MTR OF ALEJANDRO RUDY VASQUEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALEJANDRO RUDY VASQUEZ	(CTP)...
ANISSA M VASQUEZ	(CP )...VOORHEES LAW GROUP
LISA VASQUEZ	(CP )...VOORHEES LAW GROUP
RUDY VASQUEZ	(CP )...VOORHEES LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Lisa Vasquez (mother), Rudy Vasquez (father) and Anissa Vasquez (sister)

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

1. Petition requests powers under Pr. C. §2351.5 to fix residence access confidential records, control right to contract, withhold medical treatment, and make educations regarding education. JTD.
2. Petitioner requests court limit civil rights of proposed conservatee, including right to choice of residence, right to access confidential records, right to contract, consent to medical treatment and decisions regarding education. JTD.
3. Petitioner seeks medical powers. Capacity Declaration filed 03/23/17.
4. Petitioner requests medical powers; however, item 9 of petition re medical treatment is incomplete. Need verified supplement.
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. **Court Investigator report filed.**
8. Need Certificate of Completion of the Conservatorship Training **Class for Rudy Vasquez**
9. Need return of Citation.
10. No proposed form Order.

## RECOMMENDATION

Need to clear notes 4-6 & 9. If approved, set hearing for Compliance Review for **12/12/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.  
(lh/nb)

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

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DATE: 05/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS02839

CASE NAME: MTR RE DANIEL P MADRID

HEARING:

SEVENTH Account and Report of CHRISTINA ERICKSON-TAUBE and  
Petition for allowance of fees filed.

COUNSEL:

AMERICAN CON TRACTORS IND EMNI	( )...
CHRISTINA ERICKSON-TAUBE	(CPE)...ALEX R BORDEN
DANIEL P MADRID	(CEP)...EDWARD B FISCHER &
DANIEL P MADRID	(PCE)...
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
ESMERALDA MADRID	(CE )...
MELODIE Z SCOTT	(CPE)...KARIN HORSPOOL
MELODIE Z SCOTT	(TP )...PRO/PER

GENERAL INFORMATION

**Continued from 02/22/17. Verified supplement to be filed. No supplement filed as of the review of this matter.**

THIS CASE SET FOR HEARING ON 7<sup>th</sup> Account Current and Petition for Allowance of Fees.

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

1. Accounting period 08/01/15 – 07/31/16.
2. Assets on hand \$2,144.78 cash.
3. Petitioner is requesting fees of \$13,288.75 billing not to exceed \$115 per hour. Itemized [Acct.12/05 LFpg23-27]. Court to inquire why phone calls to book hotel reservations, or calls regarding birthday money with conservatee is billed at \$115 per hour.
4. Attorney is requesting fees of \$3,551.00 of which \$172 is costs, at \$135/390 per hour for paralegal and attorney services. Itemized [Acct.12/05 LFpg40-41].
5. Current bond is \$57,000. Petitioner is requesting bond decrease of \$4,000 for a total bond of \$53,000. Ok.
6. ~Proposed Order: 12/05/16.

## RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **09/28/17** (if one year) or **09/27/18** (if two years). Accounting to be filed 30 days in advance.  
(lc/nb)