



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/09/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

04/23/18lh; 05/04/18lh

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CIVIL**

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: CIV DS1609597

CASE NAME: JESUS AGUILAR -V- JASON JENO

HEARING:

Hearing Re: STATUS OF COMPLETION OF AGREEMENT

COUNSEL:

AND ALL PERSONS CLAIMING ANY L	()...
DAVID AARON JENO	()...
JASON JENO	(DEF)...	CKB VIENNA, LLP
JESUS AGUILAR	(PLA)...	FARHAT LAW FIRM, APC
TERESA WILLOUGHBY	()...

GENERAL INFORMATION

Continued from 03/14/18. Hearing continued at request of Counsel. Counsel represent property needs to be refinanced and requests a continuance. Notice to be given by M. Stephen Cho.

THIS CASE IS SET FOR HEARING ON STATUS OF COMPLETION OF AGREEMENT

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

1. Matter set on 11/08/17, wherein, Court was informed an agreement had been reached addressing both PROPS1500161 and CIVDS1609597. Terms of Settlement Agreement recited into the record. Counsel and parties stated their consent into the record.
2. Signed Order after settlement received and forwarded to Civil for processing on 12/13/17.

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400081

CASE NAME: FRANK CARL MORROW

HEARING:

Hearing re Final Discharge

COUNSEL:

FRANK CARL MORROW	(DEC)...
GLORIE MORROW	(PET)...GREGORY L ZUMBRUNN
JEANNE E KENNEDY	(TP)...CALDWELL, KENNEDY & PORTER, .
RAYMOND MORROW	(PET)...HORSPOOL & HORSPOOL
ROB SASLOW	(PET)...JEFFREY A COLEMAN
ROB SASLOW	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 01/11/17, 04/26/17 and 06/28/17.

Continued from 09/27/17 at request of Counsel. Missing 1099 tax form that has been requested. Notice given by Attorney Zumbrunn.

Continued from 02/07/18 at request of Counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution approved on 01/06/16.
2. Receipts filed.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C. §11753(b).

RECOMMENDATION

Inquire status of order.

(lc/ww/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600112

VACATED

CASE NAME: REMEDIOS LIM TESLA

HEARING:

Hearing re Final Discharge

COUNSEL:

GEORGIA FALLS

(PET)...THOMAS G MARTIN

REMEDIOS LIM TESLA

(DEC)...

Signed Order for Final Discharge forwarded to clerk's office on 04/20/18.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600543

CASE NAME: MTR OF DAVID C HOFF

HEARING:

First & Final Account and Report of DOUGLAS P HOFF and Petition
for allowance of fees filed.

COUNSEL:

DAVID C HOFF (DEC)...
DOUGLAS P HOFF (PET)...KULKARNI

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Report of Executor and Waiver
of Account and Petition for Fees, Reimbursement and Final Distribution.

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

1. Assets on hand: \$617,714.81, consisting of \$10,714.81 in cash and remaining in real property, vehicle, and furnishings.
2. Petitioner is sole beneficiary and waives accounting.
3. Petitioner requests reimbursement for advanced costs in the amount of **\$252.00** for costs advanced by attorney Stodden Parker. Itemized. [Acct, 03/15/18, LFpg6]. **JTD**
4. Petitioner requests approval of **\$16,089.75** in statutory attorney fees to be divided as follows:
 - a. Attorney Laura Stodden, prior counsel for petitioner, passed away on 06/04/17 and is entitled to 75% of fees at \$12,067.31 to be paid to *Laura Stodden Parker Revocable Trust*.
 - b. Attorney Deepa A. Kulkarni, current counsel for petitioner, is to receive 25% at \$4,022.44.
 - c. Question if there is a written agreement as to fees? **JTD**
5. **Need** bank/investment statements verifying date of death balances and final ending balance per Local Rule 20-908.
6. ~Proposed order: 04/09/18

RECOMMENDATION:

Need to clear note #5 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **05/15/19**.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601112

VACATED

CASE NAME: BILL RAYMOND JACOBS

HEARING:

Accounting Review

COUNSEL:

BILL RAYMOND JACOBS

(DEC)...

JAMES L LEESTMA

(TP)...PRO/PER

MARCELLO JACOBS

(PET)...HORSPOOL & HORSPOOL

XREF: PROPS1601154 (The Clarence Lavon & Agnes Marguerite Jacobs family)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700481

CASE NAME: YU HSIN CHIEN

HEARING:

FIRST AND FINAL REPORT ON WAIVER OF Account and Report of HSIU
LIN CHIEN and Petition for allowance of fees filed.

COUNSEL:

HSIU LIN CHIEN
YU HSIN CHIEN

(PET)...LAW OFFICES OF YVONNE HS U
(DEC)...

GENERAL INFORMATION:

Continued from 03/28/18.

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account and Report
and Petition for Fees and Final Distribution by Hsiu Lin Chien, (spouse/administrator)

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

1. Assets on hand: \$534,595.91, consisting of \$24,595.91 cash and remaining
in real property.
2. Petitioner waives statutory fees.
3. Attorney requests statutory fees of **\$13,691.92** requested. Calculated.
4. Estate consists entirely of community property of petitioner and decedent.
Petitioner proposes 100% distribution to herself as the surviving spouse.
Supp 04/20/18 includes assignments of interest signed by issue.
5. Petitioner requests reserve of **\$10,000**. *Note: if approved, need informal
account/declaration for reserves per Local Rule 20-911 prior to filing ex parte
petition for final discharge. JTD*
6. Notice was given.
7. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final
discharge to include informal account re reserves for **05/15/19**.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700493

CASE NAME: LUZ MARIA RODRIGUEZ

HEARING:

First and Final Account and Report of MARIA ELIZABETH QUIROZ and
Petition for allowance of fees

COUNSEL:

LUZ MARIA RODRIGUEZ (DEC)...
MARIA ELIZABETH QUIROZ (PET)...MICHAEL C MADDUX

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of
Executor; Petition for Fees and Final Distribution by Maria Quiroz, executor

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

1. Assets on hand: \$145,110.07, cash
2. Statutory fees of **\$8,740.00**, each, requested by petitioner and attorney.
However, calculation does not include losses on sale of \$37,000. **Need
verified supplement with proper calculation of fee base.**
3. Attorney requests extraordinary fees of **\$1,725** at 5 hours at \$325/hour
regarding sale of real property. Itemized. [Acct, 3/19/18, LFpg10-11]. **JTD**
4. Attorney requests reimbursement of costs at **\$58.50** for court fees. Itemized.
[Acct, 3/19/18, LFpg11].
5. Petitioner reimbursed **\$7,725.15** to a Maria Gudino for funeral and
miscellaneous expenses, and reimbursed herself **\$4,878.36** for decedent's
debts. **Need verified supplement with complete itemization of expenses,
including dates.**
6. **Need** bank statement verifying final ending balance per Local Rule 20-908.
7. Waivers of notice of proposed action filed; however, none filed on behalf of
minor beneficiaries. **Need** Notice of Proposed Action or waiver by minors'
parent/legal guardian.
8. **Need** Notice of Hearing and proof of service as to minors. Note: service
requirements to minors in CRC 7.51(d) to include direct notice to minors, as
well as to persons having legal custody with whom the minor resides.

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

9. Petitioner requests court authorization to establish a California 529 Plan with a recognized and licensed investment firm on behalf of beneficiary minors: Zion, Dominic, and Aidan Sepulveda per terms of will. **Request re: 529 Plan under review by Legal Research.**
10. Petitioner requests reserve of \$1,500 for closing expenses. **JTD**
11. Proposed order submitted 03/19/18. Need corrected statutory fees.

RECOMMENDATION:

Need to clear notes #2, 5-9 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **05/15/19.**

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701182

CASE NAME: Theodore A Wright Jr

HEARING:

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

COUNSEL:

TAHIRA WRIGHT (PET)...MICHAEL C MADDUX
THEODORE A WRIGHT (DEC)...

GENERAL INFORMATION:

Continued from 01/10/18 and 02/28/18 at request of counsel to clear probate notes.
Continued from 03/28/18. Court notes that proof of publication has the incorrect case number on it; Counsel to republish with correct case number.

THIS CASE IS SET FOR HEARING ON THIS CASE IS SET FOR HEARING ON
Petition for Probate of Will, with Will Annexed, and for Letters of Administration with
full authority under IAEA by Tahira Wright (daughter)

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

1. Petition requests Court waive bond; however, bond waivers by beneficiaries, Zyana Wright and Addie W. Wright, have not been filed. Also, petitioner Tahira Wright a non-resident of New Jersey; Court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571.
Suggested bond \$124,000. JTD
2. **Need** Proof of Publication.
3. ~Proposed form Order: 11/27/17

RECOMMENDATION:

Need to clear note #2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800252

See also 10

CASE NAME: Mtr of Maria J Perez

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BLANCA P MUNIZ

(PET)...THE ELDER & DISABILITY LAW FIR

MARIA J PEREZ

(DEC)...

OLGA R PEREZ

(PET)...THE ELDER & DISABILITY LAW FIR

X ref matter: PROPS1800254 (In Re Juan Perez-Gutierrez)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Olga R. Perez and Blanca P. Muniz (daughters)

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

1. Petitioner seeks 100% interest, 50% each, in decedent's 33.33% interest in real property per intestate succession.
2. ~Proposed Form Order: 03/15/18

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800254

See also 9

CASE NAME: Mtr of Juan Perez Gutierrez

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BLANCA P MUNIZ	(PET)...THE ELDER & DISABILITY LAW FIR
JUAN PEREZ GUTIERREZ	(DEC)...
OLGA R PEREZ	(PET)...THE ELDER & DISABILITY LAW FIR

X ref matter: PROPS1800254 (In Re Maria J Perez)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Olga R. Perez and Blanca P. Muniz (daughters)

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

1. Petitioner seeks 100% interest, 50% each, in decedent's 33.33% interest in real property per intestate succession.
2. ~Proposed Form Order: 03/15/18

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800323

CASE NAME: BETTY FURLONG

HEARING:

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

COUNSEL:

BETTY FURLONG (DEC)...
RAYMOND LINK (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Raymond Link, caregiver/nonrelative

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

1. Petitioner seeks waiver of bond; however, **need** bond waivers from Angie and Cricket Furlong, daughters. Estimated estate assets \$117,000, real property.
2. **Need** Notice of Petition to Administer Estate with proof of service. *Note: Notice returned by Clerk's Office on 05/03/18.*
3. **Need** Proof of Publication.
4. No proposed Order submitted.

RECOMMENDATION

Need to clear notes 1-3. If approved, set Accounting/Status Review for **07/17/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/09/18 TIME: 8:30 DEPT: S35P

CASE#: TRU PS1800062

CASE NAME: MTR OF EDWARD SEGURA AND CONCEPTION SEGURA
FAMILY TRUST

HEARING:

Petition for Determination that personal property be found to
belong to the estate etc.

COUNSEL:

EDWARD SEGURA AND CONCEPTION S(TRU)...

GABRIEL L SEGURA

(PET)...VOORHEES & RATZLAFF

Currently under review by legal research.

(LR)

Need notice of hearing and proof of service as to Gabriel Segura, Denise Segura,
Ruben Segura, Bernadette Snelick, and Alexander Segura.

*Note: copy of trust not attached to petition as alleged. Noticed individuals subject to
change upon examination of trust.*

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23, 2011

HEARING:

Hearing Re: Petition for TRUST CLAIM TO REAL PROPERTY

COUNSEL:

GARY WOOD	(OBJ)...SHARON M ANDERSON
NORMA RUDAMETKIN	(PET)...CHRISTOPHER B JOHNSON
OLGA RUDAMETKIN	(CHANDLER LAW FIRM
THE NINA WOOD IRREVOCABLE TRUS	(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Future Hearing:
08/29/18 Readiness calendar
10/01/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800012

CASE NAME: IN RE: MARIA V. SOTO REVOCABLE LIVING TRUST

HEARING:

Petition for ORDER REQUIRING REIMBURSEMENT OF THE TRUST AND FOR
REMOVAL OF TRUSTEE

COUNSEL:

MARIA V SOTO REVOCABLE LIVING	(TRU)...
NORMA VELOZ SOTO	(OBJ)...WILLIAM M NASSAR &
RUBEN NAVARRO	(PET)...PRO/PER

Currently under review by Legal Research.

(LR)

Need notice of hearing and proof of service as to Ruben Navarro (as co-trustee),
Arlene Rodriguez, Richard Soto, Carmelo Soto, Rosemary Soto, Arlene Rodriguez.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/09/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1200063

CASE NAME: IN MATTER RE JUAN JOSE CUEVAS

HEARING:

Hearing re Final Discharge

COUNSEL:

DAWN MILLS

JUAN JOSE CUEVAS

KATHRYN J BLACK

NORINE BOEHMER

(CPE)...TAMILA C JENSEN

(CEP)...JEANNE E KENNEDY

(TP)...KATHYRN J BLACK

(CPE)...TAMILA C JENSEN

GENERAL INFORMATION

Continued from 03/14/18.

THIS CASE IS SET FOR HEARING ON Final Discharge of Norine Boehmer and Dawn Mills

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

1. Fourth and Final Account approved 08/31/16; Order signed entered 02/17/17 approving distribution to Boehmer & Mills Fiduciary Services, Inc. .
2. Receipt signed by Norine Boehmer and Dawn Mills as successor trustees filed 03/14/18.
3. **Need** Ex Parte Petition for Final Discharge and Order of Norine Boehmer and Dawn Mills.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 05/09/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500202

CASE NAME: RUBY B. HAALAND

HEARING:

Petition for Attorney's Fees and For Order Directing Payment to
Court Appointed Counsel

COUNSEL:

ALICE EVANS	(PET)...PATRICIA A LOBELLO
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
RUBY B HAALAND	(CEE)...DONNASUE ORTIZ

XREF: CONPS1601154 (Oscar J Haaland Jr)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Donnasue Smith
Ortiz

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

1. Petitioner, Donnasue Smith Ortiz was appointed Counsel for Ruby Haaland on 08/06/15.
2. Petitioner requests fees of **\$12,111.50** for 34.40 hours at \$395-375 per hour for attorney services and \$125/hour for paralegal services. Itemized [Petition, 3/21/18, LFpg7-9].
3. ~Proposed Order: 03/21/18

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 05/09/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800030

CASE NAME: MTR OF PATRICK RAMSEY

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MICHELLE RAMSEY (CP)...CHRISTOPHER A POULOS
PATRICK RAMSEY (CTP)...MARIVEL M ZIALCITA
STEPHEN RAMSEY (CP)...CHRISTOPHER A POULOS

GENERAL INFORMATION
Continued from 03/28/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Stephen and Michelle Ramsey, parents

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

1. Proposed conservatee will not reach age of majority until 04/01/18. **JTD**
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re education. **JTD**
3. Petitioner seeks to limit all civil rights listed in note #1. **JTD**
4. Petitioner seeks medical powers. Capacity Declaration filed 02/13/18.
5. Proposed conservatee is purportedly developmentally disabled. **Need** report of appointed Counsel Marivel Zialcita.
6. Proposed conservatee is developmentally disabled. **Letter from IRC filed 04/25/18. JTD**
7. CI Report filed 03/23/18.
8. Proof of Completion of the Conservatorship Training Class from Patrick Ramsey filed 03/13/18.
9. Return of Citation filed 02/27/18.
10. Notice was given.

11. ~Proposed Form Order: 02/21/18

RECOMMENDATION

Need to clear note #5. If approved, set hearing for Compliance Review for **12/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 05/09/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700434

CASE NAME: Sue Han

SEE ALSO 19

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL - SAN BERNARDIN

SUE HAN

(CEP)...SANDRA TURNER

Court trial—no notes—JTD

Future Hearing:

05/10/18 *Court Trial*

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

DATE: 05/09/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700434

CASE NAME: Sue Han

SEE ALSO 18

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL - SAN BERNARDIN
SUE HAN (CEP)...SANDRA TURNER

GENERAL INFORMATION

Public guardian appointed temporary conservator on 12/11/17.

Continued from **03/12/18**. Court clears note re duties & liabilities- Court does not require Public Guardian to file duties & liabilities form. Court sets hearing for trial setting conference.

Continued from 03/19/18. Trial set. Court orders that personal appearance of counsel is required for the readiness hearing. Court orders that transportation to be arranged for Sue Han to attend trial at 9:30am on April 13, 2018.

Continued from 04/02/18. Ex parte orders granted to continue trial date.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate, by Public Guardian, Petitioner

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

1. No bond – Public Guardian.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5000 in an irrevocable burial trust and purchase cemetery commodities. Also seeks authority to abandon and/or donate personal property with value of \$300 or less; as a sale would be a burden on the estate.
4. Petitioner seeks medical powers. Capacity Declaration filed 11/29/17.
5. Citation with proof of service filed 12/07/17.
6. Petitioner seeks dementia powers. Report of Court appointed counsel, Sandy Turner filed 03/05/18.
7. Court Investigator report filed 02/28/18.

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

8. ~Proposed Form Order: 11/29/17.

RECOMMENDATION

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

Set hearing re Accounting Review for **07/17/19**. Any accounting to be filed 30 days in advance.

(cs/ww/lh)

Future Hearing:

05/10/18 *Court Trial*

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300354

CASE NAME: TIMOTHY F NOLAND

HEARING:

First and Final Account and Report of AMBER DAWN NOLAND and
Petition for allowance of fees

COUNSEL:

AMBER DAWN NOLAND (PET)...LOEB & LOEB LLP
CAROL NOLAND (PET)...BEST BEST & KRIEGER
TIMOTHY F NOLAND (DEC)...

GENERAL INFORMATION:

**Continued from 04/04/18. No appearance. Hearing continued at request of
Counsel via telephone to clear probate notes.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Report and
Petition for Final Distribution by Amber Dawn Noland, Executor/Trustee

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

1. Assets on hand: \$306,583.70, consisting of \$267,078.70 cash and remaining
in real property.
2. Statutory fees of \$9,131.67 are *waived* by petitioner and Counsel.
3. Notice was given.
4. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final
discharge for **05/15/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400624

CASE NAME: Lucretia May Medley

HEARING:

Petition for Partition of Real Property

COUNSEL:

ELMER FRED GREEN jr	(OBJ)...KYLE A PATRICK
ELMER FRED GREEN JR.	(PET)...RYAN GALLANT
LOUIS SCOTT YOUNG	(PET)...KEITH S WALKER
LUCRETIA MAY MEDLEY	(DEC)...

Currently under review by legal research.

(LR)

Future Hearing:

02/21/19 *Accounting Review.*

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500386

CASE NAME: OLIVE SADIE MITTELSDORF

HEARING:

Motion Re: NTC OF MOTION AND MOTION TO BE RELIEVED AS COUNSEL
Filed by Petitioner APRIL MAY

COUNSEL:

APRIL MAY	(PET)...SHERRI L KASTILAHN
OLIVE SADIE MITTELSDORF	(DEC)...
RICHARD SAYLES	(PET)...JAMES B CHURCH
SURETEC INSURANCE CO	(TP)...

XREF: CONPS1400294 (Olive S Mittelsdorf)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Motion to be Relieved as Counsel by Sherri Kastilahn ["Petitioner"].

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

1. Petitioner, Sherri Kastilahn, makes this motion to be relieved as counsel under Code of Civil Procedure section 284(2) instead of filing consent under section 284(1) due to a complete breakdown in communication with client despite numerous requests for documents to complete accounting.
2. **Need** Notice of Hearing with proof of service as to bonding company, Suretec Insurance Co, per Pr. C. §1213.
3. ~Proposed Form Order: 03/14/18

RECOMMENDATION:

Need notice then Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500840

CASE NAME: MUSGROVE FAMILY TRUST

SEE ALSO 5, 6

HEARING:
Case Management Conference

COUNSEL:

BEVERLY RANDOLPH	(PET)...LIONHEART LEGAL
FRANK J. PRAINITO	(PET)...FRANK J PRAINITO
HERBERT MUSGROVE JR	(OBJ)...FRANK J PRAINITO
THE MUSGROVE FAMILY TRUST	(TRU)...PRO/PER

No notes—JTD

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500840

CASE NAME: MUSGROVE FAMILY TRUST

SEE ALSO 4, 6

HEARING:

Petition for Attorney fees and costs etc

COUNSEL:

BEVERLY RANDOLPH (PET)...LIONHEART LEGAL
FRANK J. PRAINITO (PET)...FRANK J PRAINITO
HERBERT MUSGROVE JR (OBJ)...FRANK J PRAINITO
THE MUSGROVE FAMILY TRUST (TRU)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Reimbursement of Attorney's Fees and for Order of Sale of Real Property by Herbert Musgrove, J, co-trustee

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

1. Petitioner, Herbert Musgrove, Jr, is the nominated and acting co-trustee of the Musgrove Family Trust since 01/20/99.
2. Petitioner requests reimbursement of costs of **\$16,983.05** for payment of attorney fees and costs paid during period 11/11/15 to 02/06/18 for defense of trust. It is estimated another \$15,000 will be needed to conclude matter. Billing statements attached at LFpgs914; however, need complete itemization of fees with separate subtotals of hours charged at different rates of attorney/paralegal/secretary fees, and costs. **Need verified supplement.**
3. **Need** verified supplement with qualifications of paralegals per requirements of CRC 7.703(e)(1)(c) which show the completion of mandatory continuing education per Business & Professions Code 6450(d).
4. Petitioner seeks additional order to sell rental properties as trustor, Geneva Musgrove, passed away 12/29/17 and there is no need to hold rental properties. Co-trustees, Beverly Randolph and Herbert Musgrove, Jr, to agree on a licensed realtor and accept any reasonable offer within 60 days of listing. Proceeds to be deposited into interest bearing account and held until two parties reach agreement for payment of expenses and final division. Note:

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

Caption does not reflect reference to code section or statutory authority authorizing relief requested per Local Rule 20-601. **JTD**

5. **Need** Notice of Hearing and Proof of Service as to Beverly Randolph.
6. ~Proposed Order:

RECOMMENDATION

Need to clear notes #2, 3, & 5 then Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500840

CASE NAME: MUSGROVE FAMILY TRUST

SEE ALSO 4, 5

HEARING:

FIRST Account and Report of BEVERLY RANDOLPH and Petition for allowance of fees filed.

COUNSEL:

BEVERLY RANDOLPH (PET)...LIONHEART LEGAL
FRANK J. PRAINITO (PET)...FRANK J PRAINITO
HERBERT MUSGROVE JR (OBJ)...FRANK J PRAINITO
THE MUSGROVE FAMILY TRUST (TRU)...PRO/PER

GENERAL INFORMATION

Continued from 12/28/17 Attorney Frank Prainito waives CART reporter for this hearing. The Court notes an objection was filed on 12/15/17. The Court inquires of counsel regarding the possibility of setting a Voluntary Mediation Session. Oral arguments by counsel are heard regarding setting a Voluntary Mediation Session. The Court sets a Case Management Conference on 4/9/18 at 8:30am in department S36. Counsel is to advise the court of the status of discovery in this matter.

Continued from 04/09/18 at request of Counsel. Parties to attend mediation as agreed. Trustor is deceased and both parties are equal beneficiaries.

THIS CASE SET FOR HEARING ON 1st Trust Account Current and Petition for Allowance of Fees by ***De Facto Trustee Beverly Randolph.***

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

1. **NOTE:** court to clarify if an Accounting review should be set for co-trustee Herbert Musgrove, Jr.
2. Accounting period 06/26/10 – 10/28/16.
3. Assets on hand \$414,978.05 of which \$1,478.05 is cash, remainder real property.
4. Beverly seeks trustee fees of \$22,830 for services at \$30 per hour for an average of 10 hours a month. No itemization. JTD
5. Beverly seeks fees for caregiving services of \$158,880, reduced from \$211,840, for 8 hours a day at \$10 per hour. No Itemization. JTD

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

6. Beverly seeks reimbursement of attorney's fees paid of \$8,085 at \$125/300 per hour for paralegal and attorney services and costs of \$788. [Acct. 10/11/17 LFpg 95-97]. JTD
7. Beverly Randolph is daughter/co-Trustee and power of attorney for Geneva Musgrove; Trustor. Herbert Musgrove Jr. resigned as POA simultaneously at appointment as power of attorney.
8. Real property in Fontana was purchased by Beverly and her spouse in 2008; two years prior to Trustor's incapacity. Herbert Jr. allegedly accused Beverly for wrongful taking of funds to purchase said property.
9. Payments were made for Beverly's Fontana property when Geneva resided at the Fontana residence. Geneva allegedly lived alone at Fontana address prior to Geneva becoming incapacitated. Geneva moved into Beverly's home in 2015.
10. Beverly states that Trustor's tax preparer created "CBRAND, Inc." to provide liability protection for Geneva and Trust whereas Geneva's caregivers were paid directly from CBRAND, Inc. and later dissolved as trust income was unable to cover Geneva's monthly expenses.
11. Beverly seeks reimbursement of expenses of \$31,408.02 to assist with Geneva's living expenses. [Acct. 10/11/17 LFpg 86]. JTD
12. Beverly seeks reimbursement of costs of \$33,816.68 for repairs and maintenance. [Acct. 10/11/17 LFpg 87-88]. JTD
13. **Objections filed by Herbert Musgrove Jr on 12/15/17.**
14. No proposed order. Submit after hearing.

RECOMMENDATION

Matter is contested. *If* court retains jurisdiction of trust set next Accounting review for **06/20/19**.

(lc/cs/lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501036

CASE NAME: MTR OF FRECIA FRESNIDO SICILIA

HEARING:

Probate status report filed.

COUNSEL:

FRECIA FRESNIDO SICILIA	(DEC)...
MARK GIUSEPPE SICILIA	(PET)...CANDICE A GARCIA-
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Second Status Report of Mark Giuseppe Sicilia, Administrator

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

1. Estate is not in a condition as the estate is currently a no asset estate. The sole purpose of estate administration was to continue litigation pending in federal court. Said litigation is still pending.
2. Petitioner requests an additional 12 months to close the estate.
3. Notice is complete.
4. ~Proposed Order: 03/29/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **05/29/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600386

CASE NAME: MTR OF JACK J HALL

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

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

Address: 19123 Outer Hwy #18, Apple Valley, San Bernardino, CA
92307

Appraised Value: \$760,000 per reappraisal

Sale price: \$700,000

First overbid: \$735,000

Deposit: \$70,000

Commission: 6%

Additional bond: None; proceeds to be placed in blocked account.

Reason for Sale: To pay debts, administration expenses, and taxes

Exposure to Market: MLS, website advertising, mail solicitation, printed ads

Notice: **Need** proof of publication

Future Hearing Dates: 10/17/18 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600626

CASE NAME: MTR OF MICHAEL DAVID CUNNINGHAM

HEARING:
Accounting Review

COUNSEL:
MARGARET LOUISE CUNNINGHAM (PET)...PRO/PER
MICHAEL DAVID CUNNINGHAM (DEC)...

GENERAL INFORMATION

Continued from 01/10/18. No appearance, nor has an account been filed.
Continued from 03/14/18. No appearance. Citation issued to Margaret Louise Cunningham who is cited and required to appear on 05/09/18.

THIS CASE IS SET FOR HEARING ON Accounting Review re: Margaret Cunningham

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

1. Letter Testamentary issued to Margaret Louise Cunningham on 10/26/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need same.**
4. **Need return of Citation as to Margaret Louise Cunningham.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600905

CASE NAME: THOMAS EDWARD WILSON

HEARING:

Waiver of Account and Report of LAWRENCE PAUL WOLFF and Petition for allowance of fees filed.

COUNSEL:

LAWRENCE PAUL WOLFF (PET)...CURTIS R AIJALA
THOMAS EDWARD WILSON (DEC)...

GENERAL INFORMATION:

Continued from 03/21/18 at request of Counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report of Lawrence Paul Wolff and Petition for Allowance of Fees by Lawrence Paul Wolff, executor

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

1. Assets on hand: \$0
2. Petitioner made a 100% preliminary distribution of \$175,190.23 to beneficiaries, Sandra Lee Cardin and Judith Marie Wolff, 50% each, on 03/07/17 without prior Court authorization. Receipts filed 01/23/18.
3. Petitioner waives statutory compensation and reimbursements.
4. Attorney does not request statutory compensation.
5. Both beneficiaries waive accounting.
6. Notice was given.
7. ~Proposed order: 01/23/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **07/17/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601246

CASE NAME: Joyce Ann Shaw

VACATED

HEARING:
Accounting Review

COUNSEL:

JOYCE ANN SHAW (DEC)...
RONNIE FEEMSTER (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Ronnie Feemster

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

1. Ronnie Feemster was appointed administrator with limited IAEA on 03/01/17, letter issued same date.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700160

CASE NAME: MTR OF DEBRA JACKSON SYLVESTER

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST CONFIRM
TRUSTEE AND CONFIRM ASSETS TO REVOCABLE TR

COUNSEL:

CALIFORNIA PUBLIC EMPLOYEE'S R	(TP)...CALIFORNIA PUBLIC
DEBRA JACKSON SYLVESTER	(DEC)...
DELONZA SYLVESTER	(PET)...PRO/PER
RHONDA ANTHONY	(PET)...PRO/PER
SBCO PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER
WHARLEST I.S. JACKSON	(PET)...JASON L GAUDY

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to include beneficiaries Nikita N. Jackson; Rhonda N. Jackson; David Ford; Jeremy Vanison, Cheryl D. Scott; Diedre Townsend; Stella Bland; and Delonza Sylvester.
(nb)

Future Hearing:

07/18/18 Accounting Review.

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701116

CASE NAME: MTR OF GLORIA FERRO

SEE ALSO 14

HEARING:

Petition for probate of will and for letters testamentary w/full IAEA

COUNSEL:

DENNIS ANTHONY FERRO	(PET)...	FULLERTON LEMANN SCHAEFER
GLORIA FERRO	(DEC)...	
THOMAS PAUL FERRO	(PET)...	JEANNE KENNEDY

GENERAL INFORMATION

Continued from 12/20/17 for possible objections to this petition. Counsel come to agreement that Thomas Paul Ferro is appointed Special Administrator who may list and sell the property with proceeds to be placed into Jeanne Kennedy trust account. Counsel to submit order for signature.

Continued from 02/07/18.

Continued from 04/04/18. Objections to be filed.

THIS CASE IS SET FOR HEARING ON

- **Petition #1** [filed 11/08/17] for Probate of Will, Letters Testamentary with Full Authority under IAEA by Thomas Ferro (son/executor)
- **Petition #2** [filed 04/06/18] for Probate of Will, Letters Testamentary with Full Authority under IAEA by Dennis Ferro (son/executor)

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

Petition #1 by Thomas Ferro

1. Will waives bond. Estimated net value of estate is \$300,000, real property only.
2. **Objection and Will Contest by filed 04/06/18 by Dennis Ferro. Notice and Acknowledgment of Receipt of Summons signed by Jeanne Kennedy and Linda Ferro filed 04/18/18.**
3. ~Proposed form Order: 11/08/17

Petition #2 by Dennis Ferro

4. Will waives bond. Estimated net value of estate is \$300,000, real property only.
5. **Need** receipt of lodged will dated 06/20/08.
6. **Need** Proof of Publication.
7. ~Proposed form Order: 04/06/18

RECOMMENDATION: **Matter is contested.**

Need to clear notes 5-6. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/17/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701116

CASE NAME: MTR OF GLORIA FERRO

SEE ALSO 13

HEARING:

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

COUNSEL:

DENNIS ANTHONY FERRO

(PET)...FULLERTON LEMANN SCHAEFER

GLORIA FERRO

(DEC)...

THOMAS PAUL FERRO

(PET)...JEANNE KENNEDY

See notes on prior matter #13.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

DATE: 05/09/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701258

CASE NAME: The Reverend Od Vanision and Exerlena Vanison Fami
SEE ALSO 16

HEARING:
Petition for ord to conf valid of tru conf trustee;and to conf
assets to rev tru by RHONDA ANTHONY

COUNSEL:
DENISE FORD (PET)...PRO/PER
RHONDA ANTHONY (PET)...PRO/PER
THE REVEREND VANISION & EXERLE (TRU)...

Currently under review by Legal Research.
(LR)

Notice:
Need Notice of Hearing with proof of service to Petitioner/Beneficiary Rhonda Anthony in her individual capacity; former beneficiaries, Delonza Sylvester; David Ford, Cheryl Denise Scott; Diedra Townsend; Jeremy Vanison; and beneficiary Nikita Nichelle Jackson. **Notice of Hearing filed 04/09/18 does not comply with Pr. C. §851. Need proper notice and proof of service.**

Objections filed by Public Administrator. Matter is contested.

(nb/lh)

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1701258

CASE NAME: The Reverend Od Vanision and Exerlena Vanison Fami
SEE ALSO 15

HEARING:

Petition for an Order to confirm validity of Trustee; and to
confirm assests to revocable trust by DENISE FORD

COUNSEL:

DENISE FORD (PET)...PRO/PER
RHONDA ANTHONY (PET)...PRO/PER
THE REVEREND VANISION & EXERLE (TRU)...

Request for Waiver of Court Fees and Costs filed by RHONDA ANTHONY is GRANTED

Notice

Notice of Hearing filed 04/09/18 does not comply with Pr. C. §851.

Need proper notice and proof of service as to Rhonda Anthony (trustee); former beneficiaries, Delonza Sylvester; David Ford, Cheryl Denise Scott; Diedra Townsend; Jeremy Vanison; and beneficiary Nikita Nichelle Jackson.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800075

CASE NAME: WELT FAMILY TRUST 2002

HEARING:

Petition for For Order Confirming Trust Assets Probate Code
Section 850(3)(b)

COUNSEL:

THOMAS R WELT

(PET)...GLENN M NAKATANI

WELT FAMILY TRUST 2002 DATED O

(TRU)...PRO/PER

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300145

CASE NAME: **MASTERFILE** PRIMO GILBERT GALLEGOS
SEE ALSO 19

HEARING:
Petition for Appointment of Conservator

COUNSEL:
GILBERT R LOPEZ (CPE)...PRO/PER
MELINDA S RIOS (CP)...PRO/PER
PRIMO GILBERT GALLEGOS (CTP)...
REYMUENDO S RIOS (PCR)...PRO/PER

GENERAL INFORMATION

Ex Parte order denied on 01/18/18.

Court consolidates this case into CONPS1300145. Court vacates hearing set for 02/28/18 and sets it for 01/31/18.

Continued from 01/31/18. Court suspended powers of Reymundo Rios. Melinda Rios is deceased. Gilbert R. Lopez appointed temporary conservator of the person and estate. Order to be submitted. Gilbert R. Lopez to file a petition to remove Reymundo Rios as conservator. Matter continued to 5/9/18.

On 3/28/18, Court granted supplemental petition for conservatorship of the Gilbert R. Lopez. Notice of Hearing and proof of service as to Reymundo Rios is not required. Order signed this date. All temporary orders to remain in effect until 05/09/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of [Successor] Conservator person and estate by Gilbert R. Lopez (uncle)

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

1. Melinda Rios (mother) and Reymundo S. Rios were appointed limited co-conservators of the person only on 08/07/13. Reymundo S. Rios was removed as conservator on 03/28/17.
2. Petitioner seeks no bond. It appears estate qualifies for bond waiver under Pr. C. §2628.

3. As proposed conservatee is developmentally disabled, it appears a limited conservatorship is appropriate. Also, it appears proposed conservatee's assets consist of \$810. Question need for estate powers? **Does Court wish to deem this a petition for limited conservatorship of the person only?**
4. Report of Appointed Counsel, Jeanne Kennedy, filed 01/18/18.
5. Petitioner does not request medical powers; however, indicates in item #9 that proposed conservatee lacks capacity to give informed consent to medical treatment.
6. Confidential Screening form is incomplete at item #6(b) as to whether proposed conservatee owes money to petitioner. **Court to inquire.**
7. **Need** notice of hearing and proof of service as to Dolores Ortega (maternal grandmother), Jazmyn Sanchez (sister), Mike Gallegos (father), and Kathleen McCollum (aunt).
8. **Need** Certificate of Completion of the Conservatorship Training Class.
9. **CI Report filed 04/30/18.**
10. ~Proposed Form Order: 01/11/18

RECOMMENDATION

Need to clear notes 7-8. If approved, set hearing for Compliance Review for **12/12/18** for the filing of the required documents and hearing re Accounting Review for **07/17/19**. Any accounting to be filed 30 days in advance.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300145

CASE NAME: **MASTERFILE** PRIMO GILBERT GALLEGOS

SEE ALSO 18

HEARING:

Hearing Re: Status

COUNSEL:

GILBERT R LOPEZ	(CPE)...PRO/PER
MELINDA S RIOS	(CP)...PRO/PER
PRIMO GILBERT GALLEGOS	(CTP)...
REYMUNDO S RIOS	(PCR)...PRO/PER

Status only—JTD

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

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700326

CASE NAME: MTR OF PATRICK MYHRE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROXANNE MYHRE

COUNSEL:

PATRICK MYHRE (CEP)...CRAIG M PARKER
ROXANNE MYHRE (CPE)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Roxanne Myhre, mother, appointed Conservator of the person on 10/04/17.
2. Notification of Conservatee's Rights filed.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan filed.

RECOMMENDATION

None.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700426

CASE NAME: ELEANOR G RHEA

SEE ALSO 22

HEARING:

Hearing Re: TSC/Proof of Posting of Bonds

COUNSEL:

ELEANOR G RHEA

GERALD RHEA

TYRIE MCCULLEY

(CTP)...MARK J. ANDREW FLORY

(OBJ)...JENNIFER M DANIEL

(PET)...SHERRI L KASTILAHN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON TSC/Proof of Posting of Bonds

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

1. Court appointed Christie Davidson as successor temporary conservator of the person and estate and the successor temporary trustee. Court overruled objections of Eleanor Rhea. Gerald Rhea resigned as trustee. Eleanor Rhea suspended as the trustee. Bond required \$80,000 as to conservatorship; \$1,800,000 bond as to trust. Counsel to submit order.
2. Proof of bond filed 02/02/18.

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700426

CASE NAME: ELEANOR G RHEA

SEE ALSO 21

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ELEANOR G RHEA	(CTP)...MARK J. ANDREW FLORY
GERALD RHEA	(OBJ)...JENNIFER M DANIEL
TYRIE MCCULLEY	(PET)...SHERRI L KASTILAHN

GENERAL INFORMATION

Tyrie McCulley and Gerald Rhea, daughter & spouse, appointed temporary guardian of person and estate on 12/14/17; no bond. Proposed conservatee appeared at temporary hearing.

Continued from 01/18/18. Attorney Mark Flory appointed Counsel.

Continued from 01/31/18. An oral motion is made to appoint Christie Davidson as successor temporary conservator of the person and estate and the successor temporary trustee. Court overruled objections of Eleanor Rhea at this time.

Geralh Rhea resigns as trustee. Eleanor Rhea suspended as the trustee. Bond required \$80,000 as to conservatorship; \$1,800,000 bond as to trust. Counsel to submit order.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Tyrie McCulley, daughter.

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

1. Petitioner seeks bond of \$259,775 and \$650,000 to be deposited in blocked account. Appears adequate.
2. No medical powers or other powers sought.
3. Capacity Declaration filed 01/31/18.
4. Confidential Supplemental form is not dated. **Need** same.
5. Stepson Craig is allegedly homeless. **Need** due diligence declaration.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need report of Counsel Mark Flory.**
8. Report of Dr. Charles Leed filed 01/18/18.

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

9. Supplemental GAL report by Mitchell I Roth filed 01/31/18.
10. Court Investigator report filed 01/09/18 and 01/30/18
11. Post move notice filed on 01/08/18.
12. **Objection filed by Gerald Rhea, spouse, on 12/08/17.**
13. ~Proposed Form Order: 11/20/17.

RECOMMENDATION

Need to clear notes 4-7, Court's discretion re bond/blocked account. If approved, set hearing for Compliance Review for **12/12/18** for the filing of the required documents and hearing re Accounting Review for **07/17/19**. Any accounting to be filed 30 days in advance.

(lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800094

CASE NAME: MTR OF EDUARDO FELIX

HEARING:

Petition for Appointment of Conservator

COUNSEL:

EDUARDO FELIX

(CTP)...

MARIA AGUIRRE

(CP)...PRO/PER

GENERAL INFORMATION

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

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

1. Proposed conservatee's civil rights not be limited without court order.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make/consent to all medical decisions. **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 03/27/18.
4. **CI Report filed 05/02/18.**
5. Proposed conservatee is developmentally disabled. **Need** report of appointed Counsel Jennifer Daniel.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. List of required contact information is missing all relatives listed in item #11 of petition. **Need completed form.**
9. **Need** Due Diligence Declarations as to Jose Guadalupe (father) and Rito Felix (paternal grandfather).
10. Return of Citation filed 04/19/18.
11. ~Proposed Form Order: 03/27/18

RECOMMENDATION

Need to clear notes #5-9. If approved, set hearing for Compliance Review for **12/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS00422

CASE NAME: MTR OF JOY RISSER

HEARING:

Tenth Account and Report of MARTHA G DRAGOO and Petition for allowance of fees filed.

COUNSEL:

DIANE HERMAN	(PCR)...WATKINS & CLARK
JOY RISSER	(CEP)... NOLAN E CLARK
JOY RISSER	(CEP)...ROBERTA L. TAYLOR &
JOY RISSER	(DEC)...
JOY RISSER REVOCABLE TRUST (TRU)...	
MARTHA DRAGOO	(CP)...JEANNE E KENNEDY
MARTHA G DRAGOO	(CP)...JEANNE E KENNEDY
MARTHA G DRAGOO	(CPE)...CALDWELL, KENNEDY & PORTER,

GENERAL INFORMATION:

Continued from 03/21/18 at request of Counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON Tenth Account Current and Report of Conservator and Trustee; Petition for Allowance of Fees

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

1. Accounting covers period: 09/01/15 to 08/31/17
2. Assets on hand: \$1,109,283.19, cash
3. Petitioner requests fees of **\$6,798.75** for 194.25 at \$35 per hour. This is based on an average of 9 hours per month. No itemization appears to be provided.

JTD

4. Petitioner appears to have reimbursed herself for lodging, mileage, meals, and mailing for trips visiting conservatee: **\$938.73** for 11/16/15 to 11/17/15; **\$1,206.90** for 03/19/16 to 03/23/16; **\$1,407.67** for 03/19/16 to 03/23/16; **\$1,415.37** for 05/19/16 to 05/21/16. These are generally not reimbursable expenses, unless conservator is waiving her fees per Local Rule 20-1406(d). Itemized. [Acct, 02/13/18, LFpg27]. *Note: similar reimbursements made in prior accounting were denied by Court.* **JTD**

5. Attorney requests fees of \$6,928.75 for 40.9 hours at \$\$300/\$275/\$150 per hour for attorney and paralegal services. Itemized [Acct, 02/13/18, LFpgs9-11]. **JTD**
6. **Need** verification signed by caregivers regarding services performed and payment received per Local Rule 20-1406(c).
7. Current bond is \$1,330,000. Appears ok.
8. ~Proposed Order: 02/13/18

RECOMMENDATION

Need to clear note 6. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 05/09/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS255

CASE NAME: IN THE MATTER OF DANIELLE KAY LUCIA

HEARING:

Hearing Re: Proof of Blocked Account/Transfer Case

COUNSEL:

DANIELLE KAY LUCIA	(CEP)...
DEBORAH J LUCIA	(PET)...JANET M HERRING
DEBORAH J LUCIA	(SC)...JEANNE E KENNEDY
DEBORAH LUCIA	(CPE)...CALDWELL, KENNEDY & PORTER,
LOUIS E LUCIA	(CPE)...PRO/PER
PATRICIA A FREITAS	(SC)...JEANNE E KENNEDY
PATRICIA ANN FREITAS	(CPE)...CALDWELL, KENNEDY & PORTER,
PATRICIA ANN FREITAS	(PET)...JANET M HERRING

GENERAL INFORMATION

Continued from 01/17/18 and 03/21/18 at request of Counsel.

THIS CASE IS SET FOR HEARING ON Proof of Blocked Account/ Transfer Case

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

1. Matter set on 10/11/17, wherein, Court approved 13th Account Current.
2. Post Move Notice of Change of Address filed 10/11/17 indicates conservatee now resides in Novato, California, Marin County.
3. **Need** proof of blocked account.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 9/11/19: Accounting Review

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY **PROBATE**

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500429

CASE NAME: LOUIS VALVERDE

SEE ALSO 2

HEARING:

Petition for Order Releasing All Liens and Encumbrances On
Estate Real Property

COUNSEL:

LOUIS VALVERDE (DEC)...
MERCY A GALBAN (PET)...HORSPOOL & HORSPOOL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Order Releasing All Liens and
Encumbrances on Estate Real Property by Mercy A. Galban, administrator

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

1. Petitioner, Mercy A. Galban, was appointed administrator of the estate, letters issued 08/10/15.
2. Petitioner alleges the sole asset of the estate is real property in Barstow, California held in title as "Luis Valverde, a conservatee."
3. Jessica Mesa, granddaughter of decedent, has been a longtime tenant of property, has used her own funds to make improvements, paid property taxes and insurance since 01/03/11.
4. Administrator and Ms. Mesa have agreed to a sale price of \$20,000 which reflects the date of death appraisal. Said amount of \$20,000 has been deposited in Horspool trust account.
5. Liens have been discovered against property: Department of Healthcare Services for \$101,454.91; Caldwell, Kennedy & Porter for \$6,325 for unpaid attorneys' fees.
6. Petitioner seeks Court order to release all liens and encumbrances on real property, alleging if counsel attempted to work on each lien with Title Company, the amount of fees incurred would outweigh value of estate.
7. No civil actions are pending, nor have any requests for special notice been filed.
8. ~Proposed Order: 04/02/18

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

RECOMMENDATION
Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500429

CASE NAME: LOUIS VALVERDE

SEE ALSO 1

HEARING:

Probate status report filed.

COUNSEL:

LOUIS VALVERDE (DEC)...
MERCY A GALBAN (PET)...HORSPOOL & HORSPOOL

GENERAL INFORMATION

**Continued from 01/26/17, 07/20/17, 01/18/18, and 04/05/18 to trail future hearing.
Notice to be given by Mr. Martin.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Mercy Galban, daughter, on 06/22/15; full authority, \$20,000 bond.
2. Petitioner requests an additional six months to close the estate in order to clear up title issues.
3. Notice filed 03/26/18; however, only 13 days' notice.
4. ~Proposed Order: 11/10/16.

RECOMMENDATION

Need proper notice. If approved, set Accounting/Status Review for **06/28/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800297

CASE NAME: Mtr of Sheila A Gipson

HEARING:

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

COUNSEL:

SHARON GRIFFIN (PET)...RICHARD F NEVINS
SHEILA A GIPSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Sharon Griffin, sister

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

1. Petitioner alleges all heirs waive bond; however, bond waivers from issue,
Nathan Gipson and Lynette Gipson, are not attached. Estimated value of estate
is \$224,000, based on real property only. **JTD**
2. **Need** Proof of Publication.
3. ~Proposed Form Order:

RECOMMENDATION

Need to clear notes #1-2. If approved, set Accounting/Status Review for **07/17/19**.
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of
local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800307

CASE NAME: MTR OF DANIEL GUZMAN PEREZ

HEARING:

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

COUNSEL:

DANIEL GUZMAN PEREZ (DEC)...
HECTOR PEREZ (PET)...LEAH LARKIN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Hector Perez, brother/nominee

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

1. Sole heir, Maria Perez, waives bond. Estimated value of estate is \$150,000, real
property only. The court may for good cause require that a bond be given, either
before or after issuance of letters. (Prob. Code, § 8481(b) **JTD**
2. ~Proposed Form Order: 04/05/18

RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **07/17/19**.
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of
local rule 20-908.

(lh)

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

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800308

CASE NAME: MTR OF ROLF JOHAN MAROLT

HEARING:

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

COUNSEL:

MAREN FITZGIBBONS (PET)...BATTAGLIA & WALTARI
ROLF JOHAN MAROLT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Maren Fitzgibbons, former spouse

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

1. Sole heir, Matthew Marolt, waives bond. Estimated value of estate is \$191,700
based on \$53,000 in personal property and remaining in real property. The court
may for good cause require that a bond be given, either before or after issuance
of letters. (Prob. Code, § 8481(b) **JTD**
2. ~Proposed Form Order: 04/02/18

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for
07/17/19. Any accounting to be filed 30 days in advance local rule 20-901. Note
requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 05/09/18 TIME: 8:30 DEPT: S37P

CASE#: TRU PS1800068

CASE NAME: The James Larry Duggan Jr Revocable Living Trust

HEARING:

Petition for Ptn to determind Invalidity of Proported Trust

COUNSEL:

JENNIFER DAVIS

(CON)...DAVID A SHAPIRO

THE JAMES LARRY DUGGAN JR REVO (TRU)...

Currently under review by legal research.

(LR)

Notice is complete. Matter is contested.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800038

CASE NAME: CHARLES D. GLADISH

HEARING:

Hearing re Final Discharge

COUNSEL:

CHARLES DANIEL GLADISH	(CEP)... MITCHELL I ROTH
CHERIE PETERSON	(CPE)...PRO/PER
DANA CALHOUN	(CPE)...PRO/PER
DON HOUSTON GLADISH	(SC)...JACK B OSBORN
DONN HOUSTON GLADISH	(CPE)...HARTNELL
SKY LUNDY	(CPE)...MICHAEL POLLOCK

XREF: CONPS0800095 (Gaye Sims)

GENERAL INFORMATION

Continued from 12/10/13, 1/28/14, 3/18/14, 6/23/14, 8/25/14, 10/09/14, 01/08/15, 2/24/15 and 5/4/15. Court notes a petition for surcharge to be filed.

On 6/23/14 hearing re ORAP -- Examination of Judgment Debtor: Off-Calendar.

Reason: Don Gladish is deceased.

Continued from **7/6/15 and 8/19/15** for bond company to be present. Court previously signs order to place funds of conservatorship estate in attorney trust account.

Continued from **09/21/15**. Bond company to personally appear on 10/29/15.

Continued from **10/29/15**. Court refers this case to Public Administrator. Public Administrator to determine if estates of conservatee, Charles D. Gladish, and conservator, Don Houston Gladish, need to be opened by the public administrator to distribute the estate on conservatorship of Charles D Gladish.

Continued from **01/05/16** at request of counsel. Bond company will be excused from next hearing if it has been determined that there are enough funds to address notes.

Continued from 02/22/16, 04/25/16, 07/12/16, 09/20/16 and 11/30/16. Conservatee and Conservator have both passed away [per minute order] and there are no funds left to pay bills as ordered in acc. Court requests that counsel check where Conservator resided before his death to see if any funds remain. Mr. Theios reports petition to surcharge will be filed.

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

Continued from 02/22/17. Conservator has not passed away.
Continued from **05/03/17 and 07/05/17** to determine what funds are left in conservatorship estate.

Continued from 09/13/17, 11/08/17, and 02/22/18.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Don Gladish, son, approved on 12/04/12.
2. **Need** receipts for attorney's fees.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Need to clear notes 2 – 3. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with C.C.P. §§ 128 & 1209.

(lc/sa/tax/lc/sg/sa/sg/lc/nb/dl/nb/lc/lh/lc/lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900067

CASE NAME: GAYE SIMS

HEARING:

Second Verified Account and Report of LINDA ROGERS and Petition
for allowance of fees

COUNSEL:

GAYE SIMS	(CEP)...MITCHELL I ROTH
LINDA ROGERS	(PET)...CHERYL L WALSH
LINDA ROGERS	(SC)...CHERYL L WALSH
LINDA ROGERS	(TC)... CHERYL L WALSH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
MOUNTAIN AREA REGIONAL TRANSIT	(TP)...CIHIGOYENETCHE
RONALD B OLUND	(CPE)...HORSPOOL & PARKER
STEVE A HOOKER	(CPE)...HORSPOOL & PARKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd Trust Account of Linda Rogers Trustee and
Petition for Allowance of Fees

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

1. Accounting period 12/01/17 to 01/31/18
2. Assets on hand \$475,470.23 of which \$3,057.53 is cash and remaining in real property, mutual funds, and vehicle
3. Trustee requests fees of **\$3,938.75** for 42.91 hours at \$75/125 per hour. Itemized [Acct.4/2/18, LFpg35-43]. JTD
4. Attorney requests fees of **\$5,162.50** for 14 hours at \$400/300 per hour for attorney services and \$175/hour for paralegal services. *Various invoices attached; however, need verified supplement with itemization of services with subtotals at each hourly rate. Supp 5/3/18 itemization attached LFpg3. JTD*
5. Attorney requests reimbursement of costs totaling \$774.47. *Need itemization of costs totaled separately via verified supplement. Supp 5/3/18 includes \$107.49 for copies/postage and \$34.98 for travel which are not generally allowed per Local Rule 20-909. JTD*

6. Gaye Sims, beneficiary/former conservatee, currently resides in her residence located in Virginia, purchased by trustee on 4/17/17 for \$395,000 per Court order entered 03/01/17. [Acct, 4/2/18, LFpg14].
7. Current bond is \$600,630. Petitioner requests a bond decrease of \$231,850. Calculated. Appears ok.
8. Notice was given.
9. **Note:** Order approving 4th [and final] conservatorship was entered 11/30/15. Conservatorship has been terminated, but not discharged. Court to set Final Discharge hearing.
10. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set Accounting review for **Trust** on **03/27/19**.

Court to set hearing re final discharge of conservator for **07/11/18**

(lh)

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

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400253

CASE NAME: Rosalyn Y Braxton

SEE ALSO 14

HEARING:

Nineteenth Account and Report of HAROLD D BRAXTON and Petition for allowance of fees filed.

COUNSEL:

HAROLD D BRAXTON	(CPE)...SELTERS & SELTERS
JUANITA BRAXTON	(CPE)...SELTERS & SELTERS
ROSALYN Y BRAXTON	(CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 03/14/18. Court approved all requests in this accounting except various issues on Schedule C. Court requests information on gifts and loans to family members. Ms. Ortiz to discuss with her client what these gifts and loans were for and if she approved them. Mr. Braxton may start receiving his increased payment prior to next hearing.

THIS CASE SET FOR HEARING ON 19th Account and Petition for Allowance of Fees for Harold Braxton.

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

1. Accounting period **10/31/16 to 11/30/17**. Note: accounting lapses by one day.
2. Assets on hand \$2,395,710.89
3. Conservator paid himself periodic payments of **\$1,191.66** plus travel of **\$250/month** per court order.
 - a. Petitioner seeks court approve payments and for *Court to increase periodic payments to \$1,250, equating to \$25/hour*, and to confirm travel expenses of \$250/month. **JTD**
 - b. Travel includes an additional \$60 fee for driving time per trip. JTD [Acct, 01/30/18, LFpg4].
4. **Need** verified supplement clarifying Schedule C disbursements regarding gifts and loans to family members. **Supp. 04/10/18 addresses \$1,000 loan to Craig Moss on 10/31/16 was made at his request due to an "emergency." Said amount loaned was less than initial request. Prior to conservatorship,**

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

Juanita Braxton normally gave \$500 birthday gifts/\$1,000 Christmas gifts to her grandsons. Said amount was withheld from birthday, and Christmas gift was reduced. Similar arrangement was made with the other grandson, Tevell for \$1,500 on 11/23/16 where his Christmas gift was reduced to \$120. Petitioner alleges although the gifts have not previously been authorized, they have been reported for years. Petitioner will accept reduction of his fees for the two Christmas gifts. JTD

5. Conservatee's sister, Linda Braxton, receives a court-approved stipend of \$200 per month for conservatee's grooming and toiletries, and requests the amount to continue. **JTD**
6. Attorney Selters requests fees of **\$8,520** for 28.4 hours at \$300/hour. Itemized. [Acct.01/30/18,LF pgs11-12].
7. Attorney requests reimbursement of costs of **\$957** for petitions filed. Itemized. [Acct.01/30/18 LFpg9].
8. Bank statements and residential receipts attached to Supplement filed 01/30/18.
9. Petitioner requests court order a release of **\$150,000** from the blocked Wells Fargo Investment account to supplement the conservatorship cash. The care expenses are allegedly using all of the conservatorship available cash. **JTD**
10. Bond is \$900,000 with \$1,837,841.20 in blocked account. Appears sufficient.
11. Notice was given.
12. ~Proposed Order: 01/30/18

RECOMMENDATION

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

(lh)

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

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

HEARING:

First Account and Report of MIGUELITO DECASAS and Petition for allowance of fees filed.

COUNSEL:

MARIA DE CASAS	(CPE)...SHEASBY AND ASSOCIATES
MIGUELITO DECASAS	(PET)...DUANE P BOOTH
TOMASA DE CASAS	(CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Trust Account of Linda Rogers Trustee and Petition for Allowance of Fees.

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

1. Accounting period 02/08/17 to 02/07/18
2. Assets on hand \$185,764.37, cash
3. Current bond is \$200,000. Suggest bond increase of \$25,000 for total bond of \$225,000. **JTD**
4. Attorney requests fees of **\$1,200** for 3 hours at \$400 per hour. Itemized [Acct.4/2/18, LFpg7-8]. **JTD**
5. Trustee requests fees of **\$1,200**. **Need** itemization of services via verified supplement.
6. **Need** Notice of Hearing and Proof of Service as to Tomasa De Casas, Theresa DeAnda, Irene Odonos, Francisco DeCasas, Carmen Veloz, Carlos and DeCasas.
7. ~Proposed Order: 04/02/18

RECOMMENDATION

Need to clear note #5-6. Set Accounting review re Trust for **04/10/19**.

(lh)

Future hearing date: 07/11/18: Compliance review hearing
01/17/19: Accounting Review re Trust by Miguelito De Casas

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700080

CASE NAME: KOBE JAY BEGLEY

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHARLOTTE BEGLEY

COUNSEL:

CHARLOTTE BEGLEY	(CPE)...PRO/PER
JAY BEGLEY	(CPE)...PRO/PER
KOBE JAY BEGLEY	(CEE)...SHERRI L KASTILAHN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

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

- 1 Charlotte and Jay Begley were appointed co-conservators of the person and estate on 10/04/17.
- 2 Notification of Conservatee's Rights; Care Plan filed 11/01/17.
- 3 **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
- 4 **Need** final Inventory & Appraisal per Pr.C. §2610.
- 5 **Need** Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
- 6 If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Inquire status.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800098

CASE NAME: Mtr of Arthur E Pirtle III

HEARING:
Petition for Appointment of Conservator

COUNSEL:
APRIL SHOULDERS (CP)...PRO/PER
ARTHUR E PIRTLE III (CTE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by April Shoulders, mother

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

1. It appears proposed conservatee is developmentally disabled although petition does not specify at item #5(f). Court to determine whether a limited conservatorship is appropriate. **JTD**
2. As proposed conservatee appears to be developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
4. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re education. **JTD**
5. Petitioner seeks medical powers. Capacity Declaration filed 04/02/18.
6. Petition indicates mother and father are only relatives within second degree. Court to clarify.
7. **CI Report filed 05/02/18.**
8. **Need** Certificate of Completion of the Conservatorship Training Class.

9. Notice of Hearing and Proof of Service filed; however, only 29 days' notice given as to Inland Regional Center. **Need** proper service to include at least 30 days.
10. Return of Citation filed 04/12/18.
11. ~Proposed Form Order: 04/02/18

RECOMMENDATION

Need to clear notes #8-9. If approved, set hearing for Compliance Review for **07/17/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/09/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS00536

CASE NAME: MICHAEL M MORETTA

HEARING:

Petition for Authority to Sell Real Property Owned by
Conservatee, etc.

COUNSEL:

CHRISTINA FERRANTE	(PET)...PRO/PER
KENNETH ALLISON	(CPE)...MAUREEN MURATORE
MICHAEL MORETTA	(CEP).. CHRISTINA FERRANTE.
PENELOPE WILLIAMS	(PET)...MAUREEN MURATORE

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Authority to Sell Real Property
Owned by Conservatee

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

1. Petitioner, Kenneth Allison, was appointed conservator of the estate of Michael M. Moretta, and petitioner, Penelope Williams, was appointed conservator of the person on 04/03/07.
2. Conservatee, Michael Moretta, inherited a residence in Chino, CA, from the estate of his mother, Pamela Moretta, in 2009. Penelope Williams and her spouse moved into the residence to care for conservatee in his home. The residence is a 4-bedroom, 2-bathroom, 1,352 square foot home, which Penelope Williams and her spouse allege are no longer able to clean and maintain due the lot size of 7,519 and backyard Jacuzzi.
3. Petitioners seek to relocate conservatee to a residence with 2 bedrooms, 1 bathroom, and a 6,987 square foot lot owned by Kenneth Allison, which is of sufficient size for Mr. and Mrs. Williams and conservatee. Said property is located in Alta Loma and is in close proximity to Kenneth Allison, who alleges he would be of greater assistance. **JTD**

4. Petitioners seek court order to charge \$1,800 for rent, conservatee to pay paying \$900 based on number of rooms occupied. Payments to start retroactively from date of sale of Chino residence. **JTD**
5. Petitioners seek court order authorizing sale of conservatee's Chino residence as there is little cash in the estate, and the sale would provide additional funds needed to enhance conservatee's life. **JTD**
6. Petitioners seek Court order for reimbursement for costs advanced by conservator regarding necessary repairs and renovations made to the Chino residence totaling **\$21,563.63** to be paid upon sale of residence. Itemized. [Petition, 04/02/18, LFpg14]. **JTD**
7. Petitioner Penelope Williams seeks court order authorizing payment in the reduced amount of **\$3,500 per month for caregiver fees** calculated at minimum wage rate of \$11/hour, 14 hours/day at \$154 per day, or \$4,620 per month. Ms. Williams alleges she has never received compensation for services as conservator of the person or as conservatee's caregiver. Services itemized. [Petition, 04/02/18, LFpg5-6]. **JTD**
8. Petitioner seeks Court to create and fund a Revocable Trust and Will for conservatee who currently has no estate plan to avoid probate costs upon conservatee's death. Said trust has been drafted to distribute estate to Penelope Williams upon conservatee's death, with Kenneth Allison as contingent beneficiary. Court appointed GAL, Mitchell Roth, to state position on proposed action. [Proposed trust attached. Petition, 4/2/18, LFpg16-26]. **JTD**
9. Notice was given.
10. Proposed Order submitted 04/02/18; however, a copy of trust is attached after judge's signature. Need revised Order in compliance with Local Rule 20-614

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing:

08/19/19 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 05/09/18 TIME: 9:35 DEPT: S37P

CASE#: CON PS1400253

CASE NAME: Rosalyn Y Braxton

SEE ALSO 9

HEARING:

Petition for SUBSTITUTED JUDGMENT TO ESTABLISH A LIVING TRU
filed by ATTORNEY FOR HAROLD D BRAXTON

COUNSEL:

HAROLD D BRAXTON	(CPE)...SELTERS & SELTERS
JUANITA BRAXTON	(CPE)...SELTERS & SELTERS
ROSALYN Y BRAXTON	(CEP)...DONNASUE ORTIZ

Currently under review by legal research.

(LR)

Notice was given.