



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/11/17

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

Emails must have the csea 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.

04/27/17-05/08lc/lh/lc

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0700812

CASE NAME: TESSIE M RATLEY

HEARING:

Probate status report filed.

COUNSEL:

CATRINA RATLEY

(TP)...MILES & HATCHER

RALPH L RATLEY

(PET)...DIANE E ROBBINS

TESSIE M RATLEY

(DEC)...

GENERAL INFORMATION

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 Ralph Ratley, son, on 11/07/13; limited authority, no bond.
2. Petitioner seeks an additional year to close the estate as the Claim for Reassessment Exclusion has not yet been resolved with the County Assessor.
3. ~Proposed Order: 03/01/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **04/25/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300893

CASE NAME: Francena Marie Johnston

HEARING:

Probate status report filed.

COUNSEL:

FRANCENA MARIE JOHNSTON (DEC)...
JEFFREY PETERSON (PET)...MITCHELLWEILER LAW
KEITH HANSEN (PET)...MITCHELLWEILER LAW

GENERAL INFORMATION

Continued from 02/09/17.

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters Testamentary issued to Jeffrey Peterson & Keith Hansen on 04/30/14, full authority no bond.
2. Petitioners seek an additional 3 months to close the estate in order to administer the ancillary Arizona property.
3. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Matter appears moot as final Account has been filed; hearing **06/20/17**.

(lc)

Future Hearing: 06/20/17 Final account and report etc.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400813

CASE NAME: SCOTT WILLIAM JOHNSON

SEE ALSO 4

HEARING:

Hearing Re: ACCOUNT STATUS REVIEW

COUNSEL:

JOHANNA HAMES	(APP)...PRO/PER
JOHANNA HAMES	(OBJ)...PRO/PER
KAREN PETERS	(PET)...JAMES B CHURCH
SCOTT WILLIAM JOHNSON	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters testamentary issued to Karen Peters, sister, on 10/30/14, full authority no bond.
2. Previous status report approved on 12/08/16.
3. Need accounting or next status report.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400813

CASE NAME: SCOTT WILLIAM JOHNSON

SEE ALSO 3

HEARING:

Accounting Review

COUNSEL:

JOHANNA HAMES	(APP)...PRO/PER
JOHANNA HAMES	(OBJ)...PRO/PER
KAREN PETERS	(PET)...JAMES B CHURCH
SCOTT WILLIAM JOHNSON	(DEC)...

See notes on other matter. Appears to be duplicate setting.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500530

CASE NAME: RICHARD ERIK GAVARRETE

SEE ALSO 6

HEARING:

Hearing Re: OSC RE CONTEMPT FOR FAILURE TO APPEAR

COUNSEL:

DONNA J THAYER	(PRO/PER
GIOVANA V GAVARETTE	(PET)...RONALD Z BERKI
RICHARD ERIK GAVARETTE	(DEC)...
ROBERTA E. MARTINEZ	(OBJ)...PRO/PER

GENERAL INFORMATION

Continued from 01/19/17. Attorney Ronald Berki to personally appear.

OSC set on 03/30/17 when there was no appearance. Telephonic message received from Counsel Berki indicating he was ill.

THIS CASE SET FOR HEARING ON **OSC re Contempt/FTA/Accounting review/Status.**

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

1. Letters of Administration issued to Giovana Gavarrete, mother, on 01/12/16; full authority, \$200,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Court's discretion re OSC. Clerk to notice bonding company. Inquire status.

(lc)

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: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500530

CASE NAME: RICHARD ERIK GAVARRETE

SEE ALSO 5

HEARING:

Accounting Review

COUNSEL:

DONNA J THAYER	(PRO/PER
GIOVANA V GAVARETTE	(PET)...RONALD Z BERKI
RICHARD ERIK GAVARETTE	(DEC)...
ROBERTA E. MARTINEZ	(OBJ)...PRO/PER

See notes on previous matter.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501041

CASE NAME: MTR OF BETTY GENE SLATER

HEARING: FIRST Account and Report of GREGORY BACHMAN and Petition for allowance of fees filed.

COUNSEL:

BETTY GENE SLATER	(DEC)...
DAVID L WALLER	(PET)...HARTNELL LAW GROUP
GREGORY BACHMAN	(PET)...CRAIG E WILSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees and Costs by Gregory Bachman, nephew

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

1. Accounting period 09/03/15 – 09/19/16.
2. Assets on hand \$2,198,365.80.
3. Petitioner and attorney reserve the right to statutory fees when estate is ready to close.
4. Attorney requests reimbursement of costs totaling \$3,601.15. Itemized [Acct.03/08 LFpg7].
5. Inventory and Appraisal filed 04/26/16.
 - a. Vehicles to be appraised by probate referee.
 - b. Corrected partial Inventory and Appraisal filed 05/02/17; need amended accounting.
6. Current Bond is \$1,285,000. Does court wish to require an increase of bond as assets are \$2,198,365.80. JTD
7. Proposed order submitted 03/08/17; however, 3 lines of content must appear above judge's signature local rule 20-614(d).

RECOMMENDATION

Need to clear notes 5a,b. If approved, set Accounting/Status Review for **05/17/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future Hearing: 05/24/17 Petition for determination of heirship etc.by David Waller

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600041

CASE NAME: DANIEL B GIELLA

HEARING:
Accounting Review

COUNSEL:

DANIEL B GIELLA	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
GOOD DEEDS, INC	(JEFFREY A COLEMAN
MELODIE Z SCOTT	(PET)...BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Melodie Scott, PPF, on 03/04/16; full authority, \$40,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

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: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600243

CASE NAME: LIDIA CERIAN

HEARING:
Accounting Review

	COUNSEL:
DANIEL CERIAN	(PET)...PRO/PER
ION CEREAN	(PET)...PRO/PER
LIDIA CERIAN	(DEC)...

GENERAL INFORMATION

Continued from 02/02/17 and 03/30/17. No appearance; Daniel and Ion Cerean ordered to appear.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Letters of Administration issued to Daniel and Ion Cerean, sons, on 06/30/16, full authority no bond.
2. Need final Inventory and Appraisal.
3. Accounting/status was filed 06/22/16; prior to petitioner's appointment which was premature.
4. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

HEARING: FIRST Account and Report of KEVIN STUOT and Petition for allowance of fees filed.

COUNSEL:

KEVIN STUOT	(PET)...GUAY P WILSON
KEVIN STUOT	(TEE)...GUAY P WILSON
KRAIG STOUT	(PET)...FULLERTON LEMANN SCHAEFER & DO
STOUT TRUST	(TRU)...

GENERAL INFORMATION:

Continued from 11/29/16. Objections to be filed in writing by 4pm.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Trustee, Kevin Stout.

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

1. Accounting period 02/19/12 to 07/31/16.
2. Assets on Hand \$373,512.00 consisting of \$23,512 in cash and \$350,000 remaining in real property.
3. Summary of Account values real property at \$300,000. However, LF, p. 3 reflects real property at \$350,000. Need further clarification via verified supplement and affected schedule(s).
4. Account does not include cash and non-cash schedules reflecting assets on hand at the end of the account period. Need same via verified supplement.
5. Need copies of bank/financial statements per Local Rule 20-908.
- 6. Objections filed by Kraig Stout, beneficiary, on 11/29/16.**
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 3-5; matter is contested. If approved, set next hearing for Accounting Review for **10/03/17**.

(nb/lc)

Future Hearing: **05/22/17 Court Trial 05/23/17 Court Trial 05/24/17 Court Trial**

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600831

CASE NAME: STEPHEN GORTON TRACEY

VACATED

HEARING: Spousal Property Petition hearing.

COUNSEL:

DARLENE MARY TRACEY	(PET)...VARNER & BRANDT
JENNIFER E JACKSON	(BRYAN C HARTNELL
LAURA J TRACEY	(OBJ)...BRYAN C HARTNELL
STEPHEN GORTON TRACEY	(DEC)...

Hearing reset.

Future hearing dates: 06/15/17 Spousal Property Petition

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: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601024

CASE NAME: WENDELL LEYERLY

SEE ALSO 13

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

RUBY MEININGER	(PET)...	RICHARD SAMUEL
STATE OF CALIFORNIA FRANCHISE	(TP)...	
TOMMY LEYERLY	(PET)...	JAMES B CHURCH
WENDELL LEYERLY	(DEC)...	

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge STANFORD E. REICHERT for all purposes.

GENERAL INFORMATION

Public Administrator appointed special administrator on 11/08/16.

Continued from 12/08/16.

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Letters of Administration with full authority under IAEA by Tommy Leyerly, son.
- Petition 2 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by Ruby Meininger, daughter

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

Petitioner 1 – Tommy Leyerly, son.

1. Petitioner requests bond of \$50,000; however, petitioner is seeking full authority. Court may wish to require bond of \$841,000; real property is \$800,000. See competing petition. JTD
2. **Objection filed by Ruby Meininger on 10/21/16.**
3. ~Proposed Form Order: 10/13/16.

Petitioner 2 - Ruby Meininger, daughter.

4. Will is holographic.
5. Petitioner requests bond of \$50,000; however, petitioner is seeking full authority. Court may wish to require bond of \$4,300,000; all real property. JTD
6. ~Proposed Form Order: 10/21/16.

RECOMMENDATION

Matter is contested. Petitioner 2 appears to have higher priority Pr.C. § 8420. If approved, set Accounting/Status Review for **07/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601024

CASE NAME: WENDELL LEYERLY

SEE ALSO 12

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
IAEA

COUNSEL:

RUBY MEININGER	(PET)... RICHARD SAMUEL
STATE OF CALIFORNIA FRANCHISE	(TP)...
TOMMY LEYERLY	(PET)...JAMES B CHURCH
WENDELL LEYERLY	(DEC)...

***CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned
to Judge STANFORD E. REICHERT for all purposes.***

See notes on previous matter.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700220

CASE NAME: ALLEN F. GRAEFE AND JOAN W. GRAEFE TRUST

HEARING:
Petition for ORDER INSTRUCTING TRUSTEE

COUNSEL:
LANA JANSSEN (PET)...HARTNELL LAW GROUP

Currently under review by legal research

(LR)

NOTICE:

1. Trust beneficiaries mailed noticed.

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/11/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601091

CASE NAME: THE JOE B MELTON & MONICA T MELTON TRUST

HEARING:

Petition for TO COMPEL THE TRUSTEE TO REPORT INFORMATION ABOUT
THE TRUST TO THE BENEFICIARIES

COUNSEL:

CORA A BENIQUEZ

JOSEPH B MELTON

THE JOE B MELTON & MONICA T ME

(OBJ)...PHILIP M FLANIGAN

(PET)...DIANA J CARLONI

(TRU)...

Currently under review by legal research

(LR)

Continued matter Notice not re-reviewed.

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/11/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600142

CASE NAME: MTR OF BERNICE GRISSOM

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LOYCE WILLIS

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Loyce Willis, daughter, appointed conservator of the person and estate on 10/06/16, \$220,000 bond; \$360,000 in blocked account. Need Receipt for Deposit of Monies into Blocked Account [Judicial Council Form MC-356].
2. Need final Inventory & Appraisal per Pr.C.§2610.
3. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
4. 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.
5. **Notice of Death of Conservatee filed 04/10/17 indicating conservatee passed away January 2, 2017.**

RECOMMENDATION

Need to clear notes. Court may wish to advance the 12/14/17 Accounting review as the conservatee passed away.

(lc/lh/lc)

Future Hearing: 12/14/17 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **MISC.**

DATE: 05/11/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1601271

CASE NAME: SHERMAN LEE MITCHELL

VACATED

HEARING:

Hearing Re: COURT TRIAL ON PTN FOR PROBATE OF WILL (2ND DAY)

COUNSEL:

RHYAN MITCHELL	(PRO/PER
RIANNE MITCHELL	(OBJ)...
SHERMAN LEE MITCHELL	(DEC)...
SHERMAN LEE MITCHELL II	(PET)...PRO/PER

Trial – No notes – JTD

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600185

CASE NAME: MTR OF PAULINE LINDENMAN

HEARING:

Hearing re Final Discharge

COUNSEL:

DOUGLAS HOULTON	(TP)...PRO/PER
JAMES H PICKNER	(PRO/PER
PAULINE LINDENMAN	(DEC)...
SUSAN ANN BOWMAN	(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from 09/19/16, 11/10/16, 01/19/17 and 03/02/17. Counsel stated there is one more receipt needed.

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 09/14/15.
2. Need 12 receipts.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100414

CASE NAME: RICHARD F. HARDING

HEARING:

Hearing Re: RESULTS/STATUS OF BINDING ARBITRATION

COUNSEL:

FAYE VEGA	(OBJ)...HARTNELL LAW GROUP
RICHARD F HARDING	(DEC)...
RICHARD K HARDING	(PET)...JEFFORD C DAVIS

Status – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200064

CASE NAME: LOUIS KARL MATHES

HEARING:
Accounting Review

COUNSEL:
ANNA-ELISABETH BARBIER (TP)...PABLO BLESSING
LOUIS KARL MATHES (DEC)...
WANDA TAYLOR (PET)...CHARLES R SUTTON

GENERAL INFORMATION

Continued from 03/02/17. Detailed report to be submitted as to when this estate will close. If not completed, then Court will appoint Public Administrator.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to by Wanda Taylor, friend, on 06/04/12; full authority, no bond.
2. Previous status report approved on 10/06/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400685

CASE NAME: BETTEANNE BURCHELL

HEARING:
Accounting Review

COUNSEL:

BETTEANNE BURCHELL	(DEC)...
DENNIS SHOGREN	(PET)...E JOAN NELMS
DENNIS SHOGREN	(PET)...JAMES B CHURCH
MELVIN L FRIEDLAND	(PET)...MELVIN L FRIEDLAND

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Dennis Shogren, PPF, on 10/08/14; limited authority, \$20,000 bond.
2. Previous account approved on 10/06/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400940

Vacated

CASE NAME: Jack A Duncan

HEARING:
Hearing re Final Discharge

COUNSEL:
DEPT. OF CHILD SUPPORT SERVICE (TP)...ALAN SKIDMORE
GARY E DUNCAN (PET)...EDWARD B FISCHER &
JACK AARON DUNCAN (DEC)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500924

CASE NAME: The Lu Visi Living Trust

HEARING: Petition for ORDER CONFIRMING TRUSTEE & CONFIRMING ASSETS
OF THE TRUST

COUNSEL:

BONNIE SUE SMITH	(PET)...HARTNELL LAW GROUP
JEFF HALEY	(OBJ)...PRO/PER
THE LU VISI LIVING TRUST	(TRU)...

GENERAL INFORMATION:

Continued from 01/07/16. Objections to be filed in writing by 01/19/16.

Continued from 02/25/16 at request of counsel for review of objections and discovery.

Continued from 05/02/16, 09/19/16, 11/10/16, 01/26/17 and 03/16/17. Settlement reached and out for signature.

THIS CASE IS SET FOR HEARING ON Petition to Determine Title and to Require Transfer of Personal Property

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

1. Petitioner alleges that she is the successor trustee of the Lu Visi Living Trust, UDT 6/6/12, which was amended on 9/25/13 (the Trust). Question whether the settlor, Billie Laverne Lu Visi, is living. **Supp 11/12/15: Billie Laverne Lu Visi, settlor, is living and allegedly suffers from dementia.** Section 6.18 of the Trust states Successor Trustee must receive written and signed opinion from licensed physician that Settlor does not have capacity [LFpg16 of trust filed 10/06/15]. **Need same.**
2. Petitioner alleges that respondents, Jeff Haley and J.N. Haley, are in wrongful possession of several vehicles as follows:
 - a. 1967 Ford Mustang Lic #4LBH656.
 - b. 1969 Chevrolet Corvette (listed on the schedule A as a 1992 Corvette) Lic #4RWN645.
 - c. 1973 Chevrolet Corvette Lic #CAP530
 - d. 1975 Chevrolet Corvette Lic #560MNZ
3. The vehicles were kept on the respondents property for safekeeping and convenience purposes. Petitioner asserts that the vehicles are Trust property as they are listed on the Trust's Schedule A. Petitioner has demanded that the vehicles be returned, however, respondents have refused to comply.

4. Petitioner requests a court order determining that the vehicles are Trust property and that the respondents be directed to transfer the vehicles to the Trust. Petitioner further requests the imposition of a constructive trust and double damages.
5. **Objection filed on 01/20/16 by Jeff Haley. Proof of service filed 02/25/16 appears to have been served by objector, himself.**
6. **Confidential physician letter filed on 05/09/16.**
7. ~Proposed Order: 10/06/15.

RECOMMENDATION

Need signed settlement.

(tax/lc/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600045

CASE NAME: MTR OF ALLAN BLAKE DICKINSON

HEARING:
Accounting Review

COUNSEL:
ALLAN BLAKE DICKINSON (DEC)...
SHELLI DICKINSON (PET)...CARL G EHMANN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Shelli Dickinson, daughter, on 03/03/16; full authority, \$150,000 bond.
2. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600584

Vacated

CASE NAME: JEANNETTE C SCHROEDER REVOCABLE TRUST
HEARING: Petition for CONFIRMING APPOINTMENT OF SUCCESSOR
TRUSTEE; PETITION TO COMPEL DELIVERY OF ASSETS TO THE TRUST

COUNSEL:

DAVID SCHROEDER	(PET)...MARIELLEN ROSS
JEANNETTE C SCHROEDER REVOCABL (TRU)...PRO/PER	
KARI SANTI	(PET)...DAVID L RICE

Request for dismissal approved.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600785

CASE NAME: MTR OF JOSE HUMBERTO SANDOVAL IRIBE
HEARING: Petition for (VERIFIED) FOR AUTHORITY FOR PERSONAL REP TO
PURCHASE AND REFINANCE DECEDENT'S REAL PROP

COUNSEL:

JESUS B SANDOVAL	(PET)...BRIGGS LAW
JOSE HUMBERTO SANDOVAL IRIBE	(DEC)...
JOSE JULIAN SANDOVAL	(BEN)...
PAOLA DANIELA SANDOVAL	(BEN)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Authority to Purchased and Refinance the decedent's real property by Jesus Sandoval, brother Pr.C. §§ 9881, 9883, 10501.

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

1. Petitioner seeks an order to purchase and refinance decedent's residence. The real property is valued at \$300,000 per Inventory and Appraisal with an encumbrance of \$196,000. The sole heirs of the estate are two minor children, 8 & 12, who currently live in the residence with their mother. Petitioner has been paying the mortgage of \$1,619. Petitioner proposes to refinance the existing loan for \$196,000 at 4.5% for 30 years. Payments would be reduced to \$1,230 in order to assist with minor's mother paying mortgage. Two options provided.
 - a. Petitioner and mother of the children as co-owners.
 - b. Petitioner as sole owner at terms of 5.125% for 30 years with approximate payments of \$1,304, paid by estate.
2. Petitioner states that the deed of trust shall name GAL as Trustee. Petitioner states that on minors' 18th birthday, lump sum payment equal to half of current equity will be paid. GAL Craig Parker consents [Pet. 03/07 LFpg9]. Question how equity will be paid if house is not sold at 18th birthday and why a final accounting distributing the real property has not yet been filed as this is main asset? Need verified supplement.
3. There does not appear to be a guardianship of the estate.
4. ~Proposed Order: 03/07/17; only as to form and content.

RECOMMENDATION

Need to clear note 2. If approved, set hearing re proof of promissory note and deed of trust in **60 days**.

(lc)

Future Hearing: 12/05/17 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600925

CASE NAME: MTR OF JOAN S HUGHES

HEARING:

PETITION FOR SETTLEMENT OF FIRST & FINAL Account and Report of
CHARLES W MILLSAP and Petition for allowance of fees filed.

COUNSEL:

CHARLES W MILLSAP (PET)...GEORGE S THEIOS
JOAN S HUGHES (DEC)...

Request for Waiver of Court Fees and Costs filed by CHARLES W MILLSAP is GRANTED
Fee waiver amount due \$465.00 for petition for probate on 09/15/16

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Waiver of
Compensation by Charles Millsap, executor/companion.

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

1. Petitioner is sole beneficiary and waives statutory compensation.
2. Attorney waives statutory fees.
3. Only real property remains in estate.
4. ~Proposed Order: 03/08/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **05/17/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 10A ADD ON

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

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700205

CASE NAME: MTR OF JOSE G ARNAL

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

SANDRA ARNAL (PET)...MARIVEL M ZIALCITA
JOSE G ARNAL (DEC)...

GENERAL INFORMATION:

Continued from 05/08/17 as court's system is down.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Sandra Arnal (daughter)

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

1. Requested bond \$250,000. Appears sufficient.
2. Petition section 5a indicated deceased spouse. Need verified supplement with date of death of deceased spouse, and whether issue are natural or adopted/natural adopted by a third party.
3. Notice of Petition to Administer Estate with Proof of Service filed 03/13/17
 - a. Proof of Service does not include date of mailing. Need amended proof of service.
 - b. Also, need verified supplement clarifying if deceased son, Henry C. Arnal, is the same person as Henry Arnal, both listed in proof of service. If not, include relationship to decedent.
4. Need Proof of Publication.
5. ~Proposed form Order: 03/02/17

RECOMMENDATION:

Need to clear notes 2-4. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/19/18**. 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
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 05/11/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700214

CASE NAME: MTR OF JIMMY LEO HOUSLEY

HEARING:

Petition for LETTERS TESTAMENTARY W/FULL IAEA

COUNSEL:

JAMES B HOUSLEY (PET)...PRO/PER
JIMMY LEO HOUSLEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by James Housley (son/executor)

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

1. Will waives bond. Estimated net value of estate is \$66,000, real property. Court also has discretion to require bond per Pr. C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Need Certification of Trust that meets the requirements in Pr. C. § 18100.5, and additionally includes list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD.
3. Trustee of James Housley Trust is not named in section 8. Need verified supplement.
4. ~Proposed form Order: 03/06/17

RECOMMENDATION:

Need to clear notes 2-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/19/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:31 DEPT: S36P

CASE#: PRO PS1600345

CASE NAME: MTR OF SANG IN LEE

HEARING:
Readiness Calendar

COUNSEL:
ROY HOWELL (PET)...BRIAN W. SMETHURST
SANG IN LEE (DEC)...
WAN JUNG LEE GARCIA (OBJ)...RUSSAKOW & TAN, LLP

Readiness – No notes – JTD

Future Hearing:
06/14/17 Motion re: to continue trial

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**

DATE: 05/11/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600064

CASE NAME: ARMANDO OLAZABA

HEARING:

Motion Re: NTC OF MTN & MTN FOR JUDGMENT ON THE PLEADINGS Filed
by Petitioner FRANCES C PEREZ, LEONARD PEREZ

COUNSEL:

ARMANDO OLAZABA	(DEC)...
BARBARA LANGLOIS	(OBJ)...
BARBARA LANGLOIS	(PET)...PRO/PER
FRANCES C PEREZ	(PET)...CHANDLER LAW FIRM
LEONARD PEREZ	(PET)...CHANDLER LAW FIRM
LESLIE L GUSTAFSON	(PET)...PRO/PER
PAULA J GUSATFSON	(PET)...PRO/PER

XREF: PROPS1501026, PROPS1600677

No notes – JTD

Future Hearing:

06/01/17 Readiness calendar

06/01/17 Petition for letters of administration etc.

06/01/17 Petition to establish trust etc.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900186

CASE NAME: RYAN GEIB

HEARING:
Accounting Review

COUNSEL:

DIRK GEIB	(CE)...LENITA A SKORETZ
DIRK GEIB	(CPE)...LENITA A SKORETZ
RYAN GEIB	(CEP)...JACK B OSBORN
RYAN GEIB	(CEP)...PRO/PER

GENERAL INFORMATION

Continued from 03/23/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5th Account of Dirk Geib, father, approved on 08/11/16.
2. Need 6th Account beginning with 01/01/16.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 14A ADD ON

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300076

CASE NAME: JOSE G. ARNAL

HEARING:

Hearing re Final Discharge

COUNSEL:

SANDRA ARNAL	(CPE)...MARIVEL M ZIALCITA
JOSE ARNAL	(CEP)...MATTHEW E SHEASBY
SANDRA ARNAL	(PET)...SRG LAW GROUP
MATTHEW E SHEASBY	(PET)...MATTHEW E SHEASBY

GENERAL INFORMATION:

Continued from 07/05/16. No appearances. Counsel ordered to be present at hearing.
Continued from 11/17/16, 01/26/17, 03/16/17 an 05/08/17.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final distribution approved for Sandra Arnal approved 07/08/15. **Amended order filed on 05/04/17; however, not available in LF at time of review on 05/08/17. Clerk notified.**
2. Need receipt from Public Administrator's Office.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.
(nb/lc/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300106

CASE NAME: MTR OF MARIGOLD MOFFITT

SEE ALSO15A

HEARING:

SECOND AND FINAL Account and Report of QUANSHAY MOFFITT and
Petition for allowance of fees filed.

COUNSEL:

MARIGOLD MOFFITT (CEP)...JACK B. OSBORN
QUANSHAY MOFFITT (CPE)...LENITA A SKORETZ
QUANSHAY MOFFITT (CPE)...PRO/PER

GENERAL INFORMATION:

Conservatee passed away on 01/10/16.

Continued from 08/23/16, 11/03/16, 01/19/17 and 03/16/17. Brown, White and Osborn to file their fee petition by 03/30/17 to be calendared on 05/11/17. Fee Petition filed and 05/02/17 hearing not heard at time of review.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Quanshay Moffitt, granddaughter.

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

1. Accounting period 11/30/14 to 04/24/16. As a post-death accounting is required per Pr. C. § 2620(b), does Court wish to require a separate accounting period? JTD.
2. Assets on Hand \$166,894.63 consisting of \$11,894.63 in cash and \$155,000 in real property.
3. Current bond of \$40,000.
4. Conservator does not request fees.
5. Attorney Skoretz requests fees of \$5,100.00. Billed at \$300/hour for 17 hours attorney time. Itemized [LF, pgs. 14-16]. JTD.
6. Attorney requests reimbursement of costs advanced of \$620.50. Itemized.
7. ~Proposed Order 06/28/16.

RECOMMENDATION:

Court's discretion. If approved, set hearing for receipts and final discharge for **05/17/18**.
(nb/lc)

Superior Court of Calif, County of San Bernardino

Page: 15A ADD ON

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300106

CASE NAME: MTR OF MARIGOLD MOFFITT

SEE ALSO 15

HEARING: Petition for ATTORNEY'S FEES

COUNSEL:

MARIGOLD MOFFITT	(CEE)...BROWN WHITE & OSBORN LLP
MARIGOLD MOFFITT	(CEP)...JACK B. OSBORN
QUANSHAY MOFFITT	(CPE)...LENITA A SKORETZ
QUANSHAY MOFFITT	(CPE)...PRO/PER

GENERAL INFORMATION:

Continued from 05/02/17.

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Mark Flory.

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

- 1 Petitioner, Flory of Brown White & Osborn, LLP, was appointed counsel on 04/29/13. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 04/29/13 to 05/02/17. Period exceeds 2 years. JTD.
- 2 Attorney requests fees of \$15,270.50 for 80.7 hours at Billed at \$105/350/hour for paralegal and attorney services. Itemized [LF, pgs. 6 – 19]. JTD.
- 3 Petitioner requests an order directing Conservator of the Estate of Marigold Moffitt, or the trustee of her trust, to pay fees to Brown White & Osborn, LLP.
- 4 Proposed Order 03/22/17 does not include 3 lines of content before signature line.

RECOMMENDATION:

Court's discretion.

(nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500175
CASE NAME: Dorothy Rose Majinski
HEARING: FIRST AND FINAL Account and Report of CHICE A DAVISON and
Petition for allowance of fees filed.

COUNSEL:

CHICE A DAVISON (PET)...JOSEPHINE A. RICH
DOROTHY ROSE MAJINSKI (CEP)...

XREF: PROPS1700068 (decedent Dororthy Majinski's estate)06/06/17

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st and Final Account and Petition for Allowance of Fees by Chice Davison, daughter.

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

1. Conservatee died on 11/11/16.
2. Accounting period 08/12/15 – 11/11/16.
3. Assets on hand \$376,401.84 of which \$9,618.33 is cash; remainder in investments and real property.
4. Attorney requests fees of \$7,260 for 26.24 hours at \$275 per hour. Itemized [Acct. 03/28 LFpg 27-28].
5. Petitioner proposes to distribution to personal representative. It appears that petitioner filed a petition for probate in case PROPS1700068; however, has not yet been appointed.
6. Proposed Order submitted 03/28/17; however, need accounting period and specific asset description. Submit order after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **05/17/18**.

(lc)

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

SEE ALSO 18

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ARTHUR CHARLES EWING

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE
LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Arthur Ewing, son, appointed conservator of the person and estate on 10/06/16, \$20,000 bond.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 2-7.

(lc)

Future Hearing:

12/14/17 *Accounting Review – conservatorship*

12/14/17 *Accounting Review – trust.*

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

SEE ALSO 17

HEARING:

Hearing Re: Proof of Bond for C'ship/Bond Review of Trust

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE
LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION:

Continued from 11/29/16. Court orders Attorney Christina Ferrante and her client to be present.

Continued from 02/21/17.

THIS CASE IS SET FOR HEARING ON Proof of Bond for C'ship/Bond Review of Trust

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

1. Bond filed 11/04/16 as to Conservatorship in the amount of \$20,000.
2. Court took jurisdiction of Trust on 10/28/16.
3. Proof of blocked account filed on 03/01/17 indicating an opening balance of \$200 and titled CRT RST ACCT for Letha Philips. Court to clarify if this is trust account.

RECOMMENDATION:

Court's discretion.

(nb/lc)

Future Hearing:

12/14/17 Accounting Review.

12/14/17 Accounting Review.

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS01214

CASE NAME: IN THE MATTER OF JULIE FORRESTER

HEARING:
Accounting Review

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(CPE)...	SHERRI L KASTILAHN
JAMES B CHURCH	(PET)...	E JOAN NELMS
JAMES B CHURCH	(PET)...	JAMES B CHURCH
MELODIE Z SCOTT	(CPE)...	BRYAN C. HARTNELL
MELODIE Z SCOTT	(PRO/PER	
MICHAEL J GILL	(TP)...	MICHAEL J. G ILL

GENERAL INFORMATION

Continued from 03/09/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 7th Account of Christina Erickson Taube approved on 04/21/16.
2. Need 8th Account beginning with 12/01/15.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS01236

CASE NAME: IN THE MATTER OF JEREMY KEN PUGEL
HEARING: Hearing Re: Status of Jeremy Ken Pugel/Co-conservator

COUNSEL:

ANDREA WILLIS	(PET)...PRO/PER
JEREMY KEN PUGEL	(CEP)...MITCHELL I ROTH
JOSEPH EARLS	(PET)...PRO/PER
VIRGIE LEE EARLS S	(CPE)...PRO/PER

XREFPROPS1700222 (Joseph Richard Earls)5/15/17 hearing

GENERAL INFORMATION

Continued from 02/09/17. Court noted that the order/letters from 2008 are not correct. Amended order/letters to be submitted. Counsel also to address the conservatee's eligibility to vote.

Continued from 04/06/17. PROPS1700222 (Joseph Richard Earls) matter is related to Andrea.

THIS CASE SET FOR HEARING ON Status of conservatee/Co-Conservator.

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

1. Co-Conservator Joseph Earls, grandfather, passed away leaving mother Andrea Willis as sole Conservator of person only. **Need amended order/letters to reflect Andrea only.**
2. Matter set on 01/20/17 after review of Court Investigator memo. Mitchell Roth appointed counsel. IRC directed to provide a report. Court Investigator also notified.
3. **Court Investigator report filed 01/30/17 and 04/18/17.**
4. IRC report filed 02/07/17.
5. Need report of Counsel.

RECOMMENDATION

Need report and amended order/letters.
(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **Readiness Calendar**

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1600458

CASE NAME: KEILEY NICOLE TAPIE

HEARING:
Readiness Calendar

COUNSEL:

JARRETT S TAPIE	(OBJ)...
KATHERINE SUE THOMAS	(PET)...LUELLA G HAIRSTON
KEILEY NICOLE TAPIE	(MIN)...
MICHAEL DEAN THOMAS	(PET)...LUELLA G HAIRSTON

Readiness – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA

SEE ALSO 3, 4, 5, 6, 7

HEARING: Hearing Re: PETITION FOR GUARDIANSHIP OF M BAYER &
VAUGHAN

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

X-REF CK57562

GENERAL INFORMATION:

Minute Order of 10/05/16 (second day of trial):

Discussion regarding pleadings resumes. Mr. Moore makes an objection to proceeding on the pleadings as currently filed, and objects to the Court's deeming the Petition to be a petition to remove guardian and for successor guardianship. Mr. Moore requests current proceedings be terminated until petitioners file corrected pleadings. Request granted.

Michael Bayer and Patricia Vaughan are ordered to file a "Petition to Remove Guardian and to become Successor Guardians" in this matter. Petition for Guardianship of M. Bayer and P. Vaughn set for 01/31/17.

Current petition is not dismissed at this time. Temporary guardianship of the minors remains with Michael Bayer and Patricia Vaughan.

Matter re-referred to court investigator for supplemental report. Referred to court investigator for investigation and report. Court investigator notified.

Continued from 02/14/17. Court determined Estate powers are NOT requested.

Continued from 03/23/17. Court determines UCCJEA Declaration has been filed.

Court approves minor to go out of state for vacation provided father is given notice; missed visits to be made up before or after vacation.

THIS CASE SET FOR HEARING ON

Petition 1: **Petition** for Successor Guardianship, of **only**, by Patricia Vaughan (maternal aunt) and Michael Bayer (cousin), of minors: **Jesse**, 13 and **George**, 12

Petition 2: **Amended Petition** for Guardianship, of **person only**, by Patricia Vaughan (maternal aunt) and Michael Bayer (cousin), of minor: **Gloria Amador only**, age 9.

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

Successor Petition for Guardianship of minors George and Jesse by Patricia Vaughan and Michael Bayer, maternal aunt and cousin

1. Miguel Amador, step-father, was appointed Guardian in Los Angeles of the Person only, of minors George and Jesse Acuna on 10/18/10. Letters and Los Angeles minute order filed 07/28/15 indicate Miguel was appointed Guardian and that jurisdiction was previously terminated on 02/14/12. Court found guardianship from Los Angeles DCFS was not overturned and ordered co-guardians, Patricia Vaughan and Michael Bayer, to file a Petition to remove guardian and to become successor guardians.
2. Court deemed estate powers not requested.
3. Mother and maternal grandparents are deceased.
4. **Need Notice of Hearing and Proof of Personal Service on minors Jesse and George, George Acuna (father of Jesse and George).**
5. **Need notice of hearing and proof of mailed service or due diligence declaration on Victor Acuna, paternal grandfather.**
6. Family Court Services Reports filed 07/29/09 and 12/29/15.
7. CI Special Reports filed 08/18/09, 06/14/16 and 01/24/17.
8. DCFS Emergency Report filed 09/14/15. DCFS Emergency Disposition Report filed 09/17/15, 10/13/15.
9. No objections filed to current petitions.

Amended Petition for Guardianship of minor Gloria by Patricia Vaughan and Michael Bayer, maternal aunt and cousin:

10. Proof of mailed service filed on 12/07/16 as to Miguel Amador Sr. and Maria Amador; however, unknown relationship to minor. Court to inquire if parties are paternal grandparents. See next note.
11. Need Notice of Hearing and Proof of mailed service on paternal grandparents of minor Gloria (listed as unknown).
12. ~Proposed form Order: 03/24/17

RECOMMENDATION:

Need to clear notes 4-5 & 10-11, then Court's discretion.

(/lc/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: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA

SEE ALSO 2, 4, 5, 6, 7

HEARING:

Petition for (AMENDED) PETITION FOR APPOINTMENT OF GUARDIAN OF
MINOR

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

See notes on matter 2.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA
SEE ALSO 2, 3, 5, 6, 7

HEARING:

Petition for SUCCESSOR GUARDIANSHIP OF PERSON AND ESTATE

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

See matter number 2.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA

SEE ALSO 2, 3, 4, 6, 7

HEARING: Petition for REMOVAL OF GUARDIAN OF PERSON

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 01/31/17 at request of counsel to consolidate with other hearings set and for Judge Reilly to be present

Continued from 03/23/17.

THIS CASE SET FOR HEARING ON Petition for **Removal of Guardian of the person, Miguel Amador**, by Patricia Vaughan (maternal aunt) and Michael Bayer (cousin), of minors: Jesse 13 and George 12.

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

1. Petitioners' allege that it is in the best interest of both minors (George and Jesse) and require that Miguel Amador, step-father, be removed as the guardian of the person and to appoint successor guardians.
2. Petitioners, Patricia Vaughan and Michael Bayer, have brought a petition to remove the current guardian, Miguel Amador.
3. ~Proposed form Order: 03/24/17

RECOMMENDATION:

Court's discretion.

(/lc/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: 05/11/17 TIME: 11:04 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA

SEE ALSO 2, 3, 4, 5, 7

HEARING:

Petition for SUCCESSOR GUARDIANSHIP OF PERSON AND ESTATE

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

See notes on matter 2.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: GAR VS900115

CASE NAME: MTR OF GEORGE A ACUNA & JESSE V ACUNA

SEE ALSO 2, 3, 4, 5, 6

HEARING:

Readiness Calendar

COUNSEL:

ARGELIA AMADOR	(PRO/PER
GEORGE ALEX ACUNA	(MIN)...
GLORIA AMADOR	(MIN)...
JESSE VALENTINO ACUNA	(MIN)...
MICHAEL A BAYER	(PET)...DENNIS M SCHUSTER
MIGUEL AMADOR	(PET)...PRO/PER
PATRICIA VAUGHAN	(PET)...DENNIS M SCHUSTER
PATRICIA VAUGHN	(OBJ)...DENNIS M SCHUSTER
RENE DURAN	(PET)...PRO/PER
SANDRA DURAN	(PET)...PRO/PER

Readiness – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 7A ADD ON

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA

SEE ALSO 7B, 7C

HEARING: Hearing Re: Petition for First and Final Accounting

COUNSEL:

ANTONIO C CADENA	(DEC)...
AUCTION-CA FINANCIAL SERVICES	(TP)...
GREGORY L ZUMBRUNN	(PET)...ZUMBRUNN LAW
JESUS JESSE CADENA	(PRO/PER
RAMON CADENA	(PET)...GREGORY L ZUMBRUNN

Request for Waiver of Court Fees and Costs filed by JESUS JESSE CADENA is GRANTED

GENERAL INFORMATION

Continued from 08/10/16. Closed hearing with only Jesus Cadena. Jesus to pay \$50 monthly payments commencing 9/6/16. Re-appraisal needs to be filed on real property and vehicles.

Continued from 11/02/16, 03/02/17 and 04/20/17.

THIS CASE IS SET FOR HEARING ON 1st & final account and petition for fees and final distribution by **Ramon Adena**.

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

1. Petitioner alleges accounting period begins 12/17/14; however, the accounting should begin as of date of death. Need an amended accounting.
2. Date of death listed in the Petition for Appointment is 10/15/14 and in this accounting petitioner state decedent died 10/7/14; yet a partial I&A lists date of death as 10/15/14 and the Final I&A states the date of death is 10/7/14. **Need verified supplement as to when decedent died** and corrected I&As reflecting date of death values. **Date of death is confirmed as 10/07/14. Values do not appear to have a change in the 8 days.**
3. Corrected Inventory and Appraisal filed; however, it appears to be a supplemental as the Hickory Ave real property is not listed in prior Inventory and Appraisal.
4. Petitioner and attorney request statutory fees of \$13,960.75. ok
5. Petitioner requests to Partition or Allot Undivided Interests in Property due to one heir's redutants to keep the residence and objection to sale of vehicles. (Pr.C.§11950 et. seq.) [LF p.7-8].
6. Petitioner requests to withhold \$2,000 for closing expenses.

7. Proposed order submitted 5/11/16 needs correction as to the accounting period and date of death.
8. **Objection filed by Jesus Cadena on 08/09/16.**
9. ~Proposed Order: 09/26/16.

RECOMMENDATION:

Matter is contested. If approved, court to set hearing re filing receipts and final discharge for **05/1718.**

(sa/lc)

Superior Court of Calif, County of San Bernardino

Page: 7B ADD ON

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA
SEE ALSO 7A, 7C

HEARING:

Hearing Re: Petition for Attorney's Fees

COUNSEL:

ANTONIO C CADENA	(DEC)...
AUCTION-CA FINANCIAL SERVICES	(TP)...
GREGORY L ZUMBRUNN	(PET)...ZUMBRUNN LAW
JESUS JESSE CADENA	(PRO/PER
RAMON CADENA	(PET)...GREGORY L ZUMBRUNN

GENERAL INFORMATION

Continued from 03/02/17 and 04/20/17.

THIS CASE SET FOR HEARING ON Petition for Extraordinary Fees.

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

1. Petitioner, Gregory Zumbrunn, is counsel for administrator Ramon Cadena.
2. Petitioner seeks extraordinary fees in relation to real and personal property to be determined by the court. The currently statutory fees would be approximately \$13,960.75.
3. Need notice of hearing and proof of service for the **03/02/17** hearing date.
4. ~Proposed Order: 12/13/16.

RECOMMENDATION

Need to clear note 3.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 7C ADD ON

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

DATE: 05/11/17 TIME: 8:29 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA
SEE ALSO 7A, 7B

HEARING:
Readiness Calendar

COUNSEL:

ANTONIO C CADENA	(DEC)...
AUCTION-CA FINANCIAL SERVICES	(TP)...
GREGORY L ZUMBRUNN	(PET)...ZUMBRUNN LAW
JESUS JESSE CADENA	(PRO/PER
RAMON CADENA	(PET)...GREGORY L ZUMBRUNN

Readiness – No notes – JTD

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: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0700887

CASE NAME: LUIS ALBERTO SANCHEZ JR.

HEARING:

Hearing re Final Discharge

COUNSEL:

LUIS ALBERTO SANCHEZ JR (DEC)...
MARIA L DOERZAPF (PET)...SARAH E BREWSAUGH
MARIA L. DOERZAPF (PET)...CHARLIE D BARB

GENERAL INFORMATION

Continued from 12/22/16 and 03/02/17. No appearance. Maria Doerzaph to appear at next hearing.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution approved for Maria Doerzaph on 12/17/15. **Order rejected by examiner for corrections on 03/08/17. Need corrected order.**
2. No receipt required, petitioner is sole heir.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b). **Rejected for corrections on 03/03/17.**
4. Need substitution of attorney for Charles Barb.

RECOMMENDATION

Need to clear notes.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0800067

CASE NAME: MTR OF JACK RICHARD EDWARDS

HEARING:

Probate status report filed.

COUNSEL:

BRETT EDWARDS (PET)...JACK B OSBORN
JACK RICHARD EDWARDS (DEC)...

XREF: RPRRS03035

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report by Brett Edwards.

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

1. Letters of Administration issued to Brett Edwards, son, on 03/03/08, full authority no bond.
2. Petitioner seeks an additional year to close the estate in order to settle ongoing litigation.
3. ~Proposed Order: 03/08/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **04/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300069

CASE NAME: THE STEVEN VEGO JR SETTLEMENT TRUST

HEARING:

Petition for Attorney's fees for Guardian Ad Litem

COUNSEL:

MELVIN L. FRIEDLAND	(PET)...MELVIN L FRIEDLAND
MIDLAND STATES BANK, TRUSTEE	(PET)...MELINDA S. BELL
MIDLAND STATES BANK, TRUSTEE	(TEE)...MELINDA S. BELL
THE STEVEN VEGO JR SETTLEMENT	(TRU)...

XREF: PRODS1100084, PRODS1100102, GARSS1100113, CIVDS1104100

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees for GAL Melvin L Friedland.

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

1. Petitioner, Melvin L Friedland, was appointed GAL on 02/09/11.
2. Petitioner seeks fees of \$4,470 for 14.9 hours at \$300 per hour. Itemized [Pet. 03/03 LFpg 7].
3. Need notice of hearing and proof of service.
4. ~Proposed Order: 03/22/17.

RECOMMENDATION

Need notice
(lc)

Future Hearing: 06/07/17 Petition for Attorney's Fees by Tom Dominick 06/21/17 5th
Account of Midland States Bank

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 12, 13, 14

HEARING:

Petition for /TO COMPEL REMOVAL OF TRUSTEE;FOR APPOINTMENT OF
SUCCESSOR TRUSTEE ETC

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

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: TARA REILLY

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 11, 13, 14

HEARING:

Petition for to Recover Trust Assets, to Impose Constructive Trust, to Impress
Equitable Lien etc

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

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: TARA REILLY

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 11, 12, 14

HEARING: FIRST Account and Report of KEITH MITCHELL and Petition for allowance of fees filed.

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

GENERAL INFORMATION

Continued from 09/29/16. Written objections to be filed to accounting. Court recommends PPF be considered while the parties are disputing issues. Parties report there is a probate filed in Riverside.

Continued from 12/08/16 and 02/23/17 for Riverside probate to proceed.

THIS CASE SET FOR HEARING ON 1st Account Current and Report of Trustee, Keith Mitchell by Keith Mitchell.

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

1. Accounting period 11/01/14 – 12/31/15.
2. Assets on hand \$729,945.58: cash of \$26,944.58 and remainder in real property.
3. Accounting does not balance by \$1.30. Court may wish to deem as de minimis.
4. Partial distributions of \$595,000 each made to Keith Mitchell and Cherie Keith and \$25,000 to Carol Storrs.
5. **Objections filed by beneficiary Cherie Keith on 12/07/16.**
6. **Response to Objection by Keith Mitchell filed 02/15/17.**
7. Proposed Order: 07/08/16; however, need assets on hand and accounting period stated.

RECOMMENDATION

Court's discretion; matter is contested. If approved, set Accounting/Status Review for **06/29/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/oc/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 11, 12, 13

HEARING:

Trial Setting Conference

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

TSC – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600047

CASE NAME: MTR OF LELA I REYNOLDS

HEARING:
Accounting Review

COUNSEL:
CHERIE Y LUNGREN (PET)...DIANA J CARLONI
LELA I REYNOLDS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Cherie Lungren, daughter, on 03/14/16; limited authority, no bond.
2. Order Confirming Sale of Real property dated 11/16/16 that sale proceeds to be placed into a **blocked account**. Need Receipt for Deposit of Monies into Blocked Account [Judicial Council Form MC-356].
3. Need accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600443
CASE NAME: DONALD E ADAM
HEARING: REPORT ON WAIVER OF Account and Report of JAMES DOUGLAS
ADAM and Petition for allowance of fees filed.

COUNSEL:

DONALD E ADAM (DEC)...
JAMES DOUGLAS ADAM (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JAMES DOUGLAS ADAM is GRANTED
Fee waiver amount due \$955.00 \$465.00 for petition for probate on 05/06/16 \$25.50 for certified copy of the
letters on 07/22/16 \$465.00 for accounting on 03/02/17

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by James Adam, son.

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

1. **Amended Report on Waiver of Account filed 04/20/17; however, report not filed 30 days prior to review date per Local Rule 20-901. Court to set matter for first check calendar no sooner than 06/22/17. Petitioner also filed supporting declaration to continue hearing on 05/03/17.**
2. Both heirs waive accounting.
3. It appears the real property was sold and there is no proceeds. Court to inquire.
4. Petitioner must file a final report of administration per CRC 7.550, Pr. C. § 1064 and Pr. C. §10954(c)(1).
5. Need statement of compliance with Pr.C.§9202 re notice to Director of Health Services per local rule 20-907(e).
6. Need statement of compliance with Pr.C.§9202(b) re notice to the California Victim Compensation Board.
7. Petitioner does not note whether all taxes have been paid nor requests a reserve made for taxes.
8. Need statement regarding notice to Franchise Tax Board or proof of service of the same Pr. C. § 9202(c)(1).
9. Nature of the property not stated (sole and separate, community, etc.). Need verified supplement.
10. Need proposed distribution/residual distribution. Need verified supplement.
11. No proposed order. Submit after hearing.

RECOMMENDATION

Continue matter for review of amended accounting.

Need to clear notes. If approved, set hearing on the filing of receipts and final discharge for **05/17/18**.

(lc/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: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

HEARING: Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner
KIMBERLY P TREBING

COUNSEL:

DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP
KIMBERLY P TREBING	(PET)...FERRUZZO & FERRUZZO,
MICHAEL C MADDUX	(MICHAEL C MADDUX
RANDALL PETERSON	(PET)...VOORHEES LAW GROUP
SURETEC INSURNACE COMPANY	()...
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP
VERNON JEROME PETERSON	(DEC)...

Notice of Taking Motion to Be Relieved Off Calendar filed 04/20/17.

Substitution of Attorney naming John Stysal as attorney of record filed 04/17/17.

Future Hearing:

05/31/17 Petition for removal of administrator etc. by Randall Peterson, son

06/26/17 Report of Account by Kimberly Trebing

02/21/18 *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: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601227

CASE NAME: RICHARD MORRIS MURDOCK

VACATED

HEARING:

Spousal Property Petition hearing.

COUNSEL:

RICHARD MORRIS MURDOCK (DEC)...
RUTHANN MURDOCK (PET)...NANCY NOEL

Future hearing dates: 06/27/17 **Amended** Spousal Property petition.

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

DATE: 05/11/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601249
CASE NAME: MTR OF DEE SHCNEPF-EWING
HEARING:
Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

ANGELA LANDIN (PET)...DIANA J CARLONI
DEE SHCNEPF-EWING (DEC)...

GENERAL INFORMATION:

Continued from 03/02/17. Court orders subscribing witnesses to appear in court at next hearing. Testimony of subscribing witnesses will be taken at next hearing unless declaration is signed before hearing.

THIS CASE IS SET FOR HEARING ON Petition for Probate of Will and Letters Testamentary w/ Full IAEA, by Angela Landin (daughter)

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

1. Will waives bond. Estimated net value of estate is \$174,000. JTD
2. Estate appears to have a minor beneficiary. Does court wish to appoint GAL or guardian of the estate for minor Bo Ramos? JTD.
3. Notice of Petition to Administer Estate and proof of service filed 03/07/17, included service to John Ramos on behalf of minor, Bo Ramos. Need direct notice to minor, Bo Ramos per CRC 7.51(d). **Supp. filed 04/27/17 with attached Waiver of Notice by John Ramos on behalf of minor Bo Ramos; Waiver is not dated at signature.**
4. Will is not self-proving as the witnesses do not state the Will was not signed under duress, menace, fraud etc. Need Proof of Subscribing Witness (DE-131). **Supp. filed 04/27/17. Witnesses refuse to sign Proof of Subscribing Witness and have been subpoenaed.**
5. ~Proposed form Order/Letters: 12/20/16

RECOMMENDATION:

Need to clear notes 3-4. Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **07/19/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.
(lh/lc/lh/)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000149

CASE NAME: MARIA CONSUELO SOLTERO DIAZ

HEARING: FINAL Account and Report of JUAN SOLTERO DIAZ and Petition for allowance of fees filed.

COUNSEL:

JUAN SOLTERO DIAZ (CPE)...PRO/PER

MARIA CONSUELO SOLTERO DIAZ (CEE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JUAN SOLTERO DIAZ is GRANTED
Fee waiver amount due: \$3700.00 \$355.00 for initial filing on 06/11/10
\$450.00 CI fees on 06/11/10, \$450.00 CI fees on 09/29/11 waived on 01/03/12
\$450.00 CI fees on 03/14/12, \$450.00 CI fees on 11/14/12, \$60.00 for ex-parte ptn to dispense on
05/22/13, \$450.00 CI fees on 12/11/13, \$450.00 CI fees on 10/28/15
\$465.00 for accounting on 11/12/15 \$60.00 for ex-parte ptn to dispense on 02/11/16
\$60.00 for ex-parte ptn to dispense on 08/03/16. Request for Waiver of Court Fees and Costs
filed by MARIA CONSUELO SOLTERO DIAZ is GRANTED Fee waiver amount due \$465.00 .

GENERAL INFORMATION

Continued from 03/02/17. Asset clause waived.

THIS CASE SET FOR HEARING ON Final Waiver of Account per Pr.C. § 2628 by Juan Diaz.

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

1. Conservatee died on 07/20/16. Petitioner alleges that the estate qualifies for a waiver per Pr.C. § 2628.
2. Accounting period 09/2015 – 07/21/16. Accounting period should be begin 01/01/16. Need amended accounting.
3. Assets on hand appear to be \$255.34.
4. There does not appear to be a distribution clause; although the assets appear to be de minimis. Ok.
5. Proposed order submitted 04/04/17; however, assets on hand and accounting period is not stated.

RECOMMENDATION

Need to clear note 2. If approved, set hearing on the filing of receipts and final discharge for **05/17/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900098

CASE NAME: OSCAR HUANTES

HEARING: Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

ANITA HUANTES	(CP)...JAMES B CHURCH
ANITA HUANTES	(CPE)...JAMES B CHURCH
BOND SERVICES OF CALIFORNIA LL(TP)...	
CITIZENS BUSINESS BANK	(PET)...ELIZABETH MCDONOUGH BARRY
JUAN HUANTES	(CPE)...MICHAEL ROOFIAN AND
MITCHELL I. ROTH	(PET)...PRO/PER
OSCAR HUANTES	(CEP)...LENITA A SKORETZ

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION

Continued from 02/23/17. Counsel Roth and Skoretz to meet with conservatee and prepare a report. \$10,000 to be released for purchase of furniture. Counsel Church to prepare order and circulate order to for approval to all counsel.

THIS CASE SET FOR HEARING ON Court Investigator Report.

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

1. Matter set after review of Court Investigator report filed 11/17/16.
2. Need report of counsel.

RECOMMENDATION

Need report.

(lc)

Future Hearing: 06/12/17

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900101

CASE NAME: JOSE EMMANUEL MACIAS

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

ARTURO ROMERO	(CP)...PRO/PER
JOSE EMMANUEL MACIAS	(CTP)...BRYAN C. HARTNELL
MARIA E ROMERO	(CP)...PRO/PER

GENERAL INFORMATION:

Continued from **10/1/14 and 12/10/14** for Nevada conservatorship to be filed.

Continued from 01/28/15, 03/05/15, 04/30/15, 06/25/15, 08/06/15 and 09/17/15. Counsel has been unable to contract their client. Counsel given copy of Court Investigator report from 08/20/14 and advised that no further Court Investigator report is being prepared.

Citations issued for Maria and Arturo Romero.

Continued from 12/10/15. Parties confirmed that they moved to Las Vegas. Parties to establish conservatorship in Nevada in order that this California action be dismissed. If Nevada conservatorship is in place prior to next hearing, an ExParte terminating conservatorship will be filed and hearing taken off calendar.

Continued from 12/08/16 and 02/23/17. Citation issued for Arturo and Maria Romero to be present or bench warrants will be issued.

THIS CASE IS SET FOR HEARING ON re Court Investigator's report

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

1. The Court set this matter on its own motion after receipt/review of the Notice of No Court Investigator's report filed 8/20/14.
2. Need proof of Nevada conservatorship.
3. **Need return of citations sent on 02/23/17 for Arturo and Maria Romero.**
4. Post move notice filed; Conservators moved to Las Vegas.

RECOMMENDATION

Need return of citations.

(gls/vet/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400317
CASE NAME: MTR OF KNUD ANDERSEN
HEARING: FIRST Account and Report of JENS ANDERSEN and Petition for allowance of fees filed.

COUNSEL:

JENS ANDERSEN (CPE)...MATTHEW E. SHEASBY
KNUD ANDERSEN (CEP)...E JOAN NELMS/J. CHURCH

GENERAL INFORMATION

Continued from 02/23/17.

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees by Jens Andersen, son.

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

1. Accounting period 11/20/14 – 05/31/16.
2. Assets on hand \$753,882.74 of which \$150,228.65 is cash.
3. Attorney requests fees of \$16,101.85 at \$300 an hour. Itemized [Sup.12/12 LFpg4-31]. Need hours totaled.
4. Beginning balance does not match Inventory and Appraisal values. Need corrected accounting or Inventory and Appraisals.
5. Inventory and Appraisals filed do not have full legal descriptions. Need same.
6. Need bank statement that covers 05/31/16. Last statement appears to be 05/23/16 [Con.12/12 LFpg215].
7. Disbursements indicate \$315 in overdraft charges [Acct.12/12 LFpg16-17]. Question why the overdraft fees and why petitioner should not be liable? Need verified supplement.
8. Disbursements indicate several credit card payments, one of which is \$8,715.81 to Bank of America [Acct.12/12 LFpg16-17]. Question if these credit cards were paid and closed or are they a continuing liability? Need verified supplement.
9. Question the reimbursement of \$945 to Anelise Andersen? Need verified supplement.
10. Petitioner paid Arnie Muderspach, Teresa McKinney, Elsie Muderspach, Anelise Andersen, Jorgen Anderson and American Companion Care for caregiver services. Need verified declaration that payment was received for the dates services were provided per local rule 20-1406(c).

11. Conservator completed the Saticoy Property transaction whereby a 1st Deed of Trust was secured for \$450,000, which conservatee received monthly interest. Conservatee was also paid a lump sum of \$208,794.88.
12. Current bond is \$507,000.
13. ~Proposed Order: 12/12/16.

RECOMMENDATION

Need to clear notes 3-10. If approved, set hearing on the next accounting review for **8/31/17** (if one year) or **8/30/18** (if two years). Accounting to be filed 30 days in advance.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500187

Vacated

CASE NAME: Helen Louise Lewis

HEARING:
Accounting Review

COUNSEL:
HELEN LOUISE LEWIS (PCE)...MITCHELL I ROTH
RENEE ARROYO (PET)...CRAIG E WILSON

Future hearing dates: 06/01/17 1st Account of Renee Arroyo

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500339

CASE NAME: REUBEN HARRINGTON III

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of REUBEN HERMAN HARRINGTON

COUNSEL:

REUBEN HERMAN HARRINGTON
REUBEN HARRINGTON III

(PET)...MICHAEL C. MADDUX
(CEE)...

GENERAL INFORMATION

Continued from 03/02/17. No appearance. Reuben Harrington to be present at next hearing.

THIS CASE SET FOR HEARING ON Compliance Review

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

1. Reuben Harrington, father, appointed conservator of the person and estate on 07/28/16, \$0 bond.
2. Conservatee passed away on 02/12/17; therefore care plans are moot.
3. Final Inventory and Appraisal filed 02/27/17.

RECOMMENDATION

None.

(lc/lh/lc)

Future Hearing: 06/26/17 First and current account etc.

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

DATE: 05/11/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600380
CASE NAME: MTR OF MARK ANDREW LIZARRAGA
HEARING: Petition for Appointment of Conservator

COUNSEL:

MARCO A LIZARRAGA (CP)...PRO/PER
MARIA G LIZARRAGA (CP)...PRO/PER
MARK ANDREW LIZARRAGA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 03/02/17. Court refers matter to IRC for report. Clerk's office to give notice. Attorney Sandy L. Turner appointed for Mark Andrew Lizarraga.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Marco and Maria Lizarraga (parents)

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

1. Petitioners seek medical powers. Capacity Declaration filed 12/29/16.
2. Petitioners seek powers re habilitation, treatment, training, medical etc
3. Petitioners seek limited powers under Pr. C. §2351.5 to access confidential records, control right to contract, make and consent to all medical decisions. JTD
4. Petitioner seek civil rights not be limited without court order. JTD
5. CI report filed 02/23/17.
6. Proposed conservatee is developmentally disabled. Report of Counsel Sandy Turner filed 03/16/17.
7. Proposed conservatee is developmentally disabled. **IRC requested a 30 day continuance on 02/23/17. Need IRC report.**
8. List of Required Contacts filed 12/29/16 is incomplete as to maternal grandparents, paternal grandparents, and brothers. **Need completed form.**
9. Need Certificates of Completion of the Conservatorship Training Class.
10. Proof of Service of citation filed 03/21/17; however, Mark Andrew Lizarraga was served post-hearing on 03/14/17. **Need re-issued Citation and Proof of Personal Service with 15 days' notice per Pr. C. §1824.**
11. Notice of Hearing filed 12/30/16 and 03/21/17; however, copy of petition was not served with notice. Need same.
12. Due Diligence Declaration filed 03/28/17 as to Mark Anthony Lizarraga (brother). JTD
13. ~Proposed Form Order: 12/26/16

RECOMMENDATION

Need to clear notes 7-11. If approved, set hearing for Compliance Review **12/14/17** 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/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC.

DATE: 05/11/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1300488

CASE NAME: MARY LOU LIRA

SEE ALSO 28, 29, 30

HEARING:

Hearing Re: EVIDENTIARY HEARING

COUNSEL:

MARY LOU LIRA	(DEC)...
MICHAEL C MADDUX	(MICHAEL C MADDUX
PATRICIA A LAROH	(PET)...GATEWAY LEGAL GROUP, P.C
PATRICIA A LAROH	(PET)...J BENJAMIN SELTERS III
PRIMO S LIRA	(OBJ)...OLYMPIA LAW, P.C.
PRIMO S LIRA	(STEVEN S GOHARI
TOYOTA MOTOR CREDIT CORP	(SCOTT WELTMAN

XREF: CIVDS1611047

Evidentiary hearing – No notes – JTD

Future Hearing:

06/08/17 Motion to consolidate

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1300488

CASE NAME: MARY LOU LIRA

SEE ALSO 27, 29, 30

HEARING:

Hearing Re: PTN TO DETERMINE TITLE AND REQ FOR TRANSFER

COUNSEL:

MARY LOU LIRA	(DEC)...
MICHAEL C MADDUX	(MICHAEL C MADDUX
PATRICIA A LAROH	(PET)...GATEWAY LEGAL GROUP, P.C
PATRICIA A LAROH	(PET)...J BENJAMIN SELTERS III
PRIMO S LIRA	(OBJ)...OLYMPIA LAW, P.C.
PRIMO S LIRA	(STEVEN S GOHARI
TOYOTA MOTOR CREDIT CORP	(SCOTT WELTMAN

XREF: CIVDS1611047

Currently under review by legal research

(LR)

Future Hearing: 06/08/17 Motion to consolidate

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1300488

CASE NAME: MARY LOU LIRA

SEE ALSO 27, 28, 30

HEARING: Hearing Re: PETITION FOR PROBATE

COUNSEL:

MARY LOU LIRA	(DEC)...
MICHAEL C MADDUX	(MICHAEL C MADDUX
PATRICIA A LAROH	(PET)...GATEWAY LEGAL GROUP, P.C
PATRICIA A LAROH	(PET)...J BENJAMIN SELTERS III
PRIMO S LIRA	(OBJ)...OLYMPIA LAW, P.C.
PRIMO S LIRA	(STEVEN S GOHARI
TOYOTA MOTOR CREDIT CORP	(SCOTT WELTMAN

XREF: CIVDS1611047

GENERAL INFORMATION:

Continued from **7/22/13** and **8/26/13** for Primo Lira to file competing petition.

Continued from **9/3/13**, **2/18/14** and **2/24/14**.

Ruling on submitted matter filed 3/17/14, Court denies without prejudice the Petition to Determine Succession; Court has not yet admitted the Will to probate as the issue re authenticity was not presented at trial; petitioners are urged to seek counsel.

Continued from **05/05/14** and **05/06/14**. **Any objections or will contest to be filed no later than 05/30/14.**

Continued from **06/26/14** and **03/08/17** to trail future hearing set. Notice waived.

Continued from 04/03/17. Evidentiary hearing set.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA, by Patricia Laroh

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

1. Will waives bond.
2. Note: ROA indicates mailings to Primo Lira were returned undelivered.
3. Amended Ruling on Submitted Matter entered 3/20/14.
4. **Objections by Primo Lira filed 05/29/14.**
5. **Response by Patricia A. Laroh filed 06/19/14.**
6. **Request for Admissions and Production of Documents filed 06/19/14.**
7. **Request for Judicial Notice filed 06/20/14.**

RECOMMENDATION:

Matter is contested for contested hearing then Court's discretion, no bond. If approved, set hearing for Accounting/Status Review on **07/19/18**. Any accounting to be filed 30 days in advance. Note Local Rule requirements.

(kra/cbr/kra//vet/lc/lh/nb/lh)

Future Hearing: 06/08/17 Motion to consolidate

Superior Court of Calif, County of San Bernardino

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

DATE: 05/11/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1300488

CASE NAME: MARY LOU LIRA

SEE ALSO 27, 28, 29

HEARING:

Petition for TO ENFORCE SETTLEMENT AGREEMENT

COUNSEL:

MARY LOU LIRA	(DEC)...
MICHAEL C MADDUX	(MICHAEL C MADDUX
PATRICIA A LAROH	(PET)...GATEWAY LEGAL GROUP, P.C
PATRICIA A LAROH	(PET)...J BENJAMIN SELTERS III
PRIMO S LIRA	(OBJ)...OLYMPIA LAW, P.C.
PRIMO S LIRA	(STEVEN S GOHARI
TOYOTA MOTOR CREDIT CORP	(SCOTT WELTMAN

XREF: CIVDS1611047

Currently under review by legal research

(LR)

Future Hearing: 06/08/17 Motion to consolidate