



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/15/18

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.

nb0430/0509

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: 05/15/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500853

CASE NAME: Raymond S.G. Pryke

HEARING:

Hearing re Final Discharge

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Amended Order Settling First and Final Account entered 05/09/17.
2. Need receipt by Linda L. Garber and Charles S. Garber as Trustees of the Pryke Family Living Trust.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/15/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

SEE ALSO 3

HEARING:

Hearing Re: FIRST & FINAL REPORT, PETITION, ETC

COUNSEL:

JAMES STEVEN JONES

(PET)... SHERYL S HAYASHI

JASON JONES

(OBJ)...BORDEN LAW OFFICE

JUSTIN JONES

(BORDEN LAW OFFICE

REVOCABLE LIVING TRUST OF JAME

(TRU)...

GENERAL INFORMATION:

Continued from **10/24/17**. Court indicates that any future filings of counsel for Jason & Justin Jones are to be filed at least 5 court days prior to the hearing date- If not timely filed, court will not consider that filing; counsel for Jason & Justin Jones states that she understands this court order. Court orders that Stephanie Chao will not be permitted to make any future court call on this case.

Continued from 12/12/17. Court trial requested. Pre-trial orders made.

THIS CASE IS SET FOR HEARING ON **AMENDED** (09/14/17) First and Final Account and Petition for Fees by Trustee, James S. Jones ["Petitioner"].

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

1. This trust does not appear to have been court-supervised; a formal probate has not commenced; and trust indicates that upon the death of both trustors, the trustee shall distribute the entire trust estate, equally to the grandchildren [LF, p34]. **Supp. (09/14/17) indicates that an accounting was submitted as not all the beneficiaries of the Trust agree to the amounts to be disbursed.**
2. Accounting period 09/30/14 to 03/09/17.
3. Assets on Hand \$178,628.18 consisting of cash.
4. Petitioner requests ratification of fees paid in the sum of \$2,500.00.
5. Petitioner requests reimbursement of costs advanced of \$250.00. Itemized.
6. Attorney requests fees and costs of \$8,631.98. Billed at \$300/hour for 26.6 hours' attorney time and \$100/hour for 4.5 hours' paralegal time. Itemized [LF, pgs. 56-61]. 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.

7. Distributions [LF, p11] reflect preliminary distributions totaling \$68,503.37.
8. Petitioner requests authority to withhold \$10,000 as a reserve. JTD.
9. Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.
10. Need Notice of Hearing with proof of service as to amended account.
11. **Objections filed by Jason Jones and Justin Jones.**
12. **Reply to Objections filed 12/01/17.**
13. Proposed Order 12/01/17 does not include case number and discharges Trustee upon filing of receipts instead of entry of final discharge order.

RECOMMENDATION:

Require notice then set for contested hearing. If approved, set next hearing for receipts and final discharge for **12/18/18**.

(nb)

Future Hearing:

06/12/18 Court Trial

06/13/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/15/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

SEE ALSO 2

HEARING:

Readiness Calendar

COUNSEL:

JAMES STEVEN JONES

(PET)... SHERYL S HAYASHI

JASON JONES

(OBJ)...BORDEN LAW OFFICE

JUSTIN JONES

(BORDEN LAW OFFICE

REVOCABLE LIVING TRUST OF JAME

(TRU)...

No notes – Readiness.

(nb)

Future Hearing:

06/12/18 Court Trial

06/13/18 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

CONSRVATORSHIP

DATE: 05/15/18 TIME: 9:30 DEPT: S35P

CASE#: RC RS00582

CASE NAME: MARY ELIZABETH HOLLOWAY

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY ELIZABETH HOLLOWAY (CEP)...

MARY ELIZABETH HOLLOWAY (PCE)...MAUREEN MURATORE

PAULA D HOLLOWAY (CPE)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Fifth and Final Accounting entered 05/09/17.
2. Receipt filed.
3. Ex-Parte Petition/Order for Final Discharge returned for corrections. **Need same.**

RECOMMENDATION:

Inquire status.

(nb)

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: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600436

CASE NAME: DELORES TANNER

HEARING:

Accounting Review by ***

COUNSEL:

DELORES TANNER

(DEC)...

KURT ANDRA BENION

(PET)...PRO/PER

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Public Administrator.

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

1. Letter of Special Administration issued on 11/22/16. Letters of Administration issued to PA on 03/17/17, full authority, no bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600656

CASE NAME: MTR OF CYNTHIA MARIE THOMAS-WILLIAMSON

HEARING:

Accounting Review by ***

COUNSEL:

CYNTHIA MARIE THOMAS-WILLIAMSON (DEC)...

DELMAR THOMAS

(PET)...HOLSTROM BLOCK & PARKE

VACATE – status report filed and set for 06/14/18.
(nb/lh/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700845

CASE NAME: THE JOHN P MCGLONE REVOCABLE TRUST

HEARING:

Petition for (VERIFIED) FOR DETERMINATION OF VALIDITY OF
PURPORTED TRUST DOCUMENTS ETC

COUNSEL:

DANNY NICHOLS

(OBJ)...C. TRACY KAYSER

MARGARET CLUKEY

(PET)...PRICE LAW FIRM APC

NANCY NICHOLS

(C. TRACY KAYSER

ROSEMARY HALEY

(PET)...PRICE LAW FIRM APC

THE JOHN P MGLONE REVOCABLE TR (TRU)...

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800146

CASE NAME: MTR OF DAISY CRUZ

HEARING:

Spousal Property Petition hearing.

COUNSEL:

DAISY CRUZ (DEC)...
LUIS GODINA (PET)...PRO/PER

GENERAL INFORMATION:

Continued from 03/26/18 to allow Mrs. Vargas to probate the Will. Mrs. Vargas represents she is the Executor of Decedent's Will.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition, by spouse, Luis Godina, Petitioner

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

1. Petitioner, Luis Godina, requests a determination of personal property passing to the surviving spouse as community property. Specifically, a 2013 Toyota Venza, Samsung note cell phone, purse and wallet, and all personal property of decedent. However, petitioner does not set forth facts sufficient to establish a community property interest in said property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? **Need** verified supplement.
2. Section 1(a) to petition re determination of property passing to surviving spouse is not checked.
3. Section 1(b) to petition re confirmation of property belonging to surviving spouse checked, however, section 7(b) is not checked. **Need** verified supplement clarifying.
4. Section 5(b) to petition is incomplete as to whether decedent is survived by step or foster child. **Need** verified supplement.
5. Section 8 to petition is incomplete re whether a written agreement exists. **Need** same via verified supplement.
6. Section 9 to petition does not include relationship of person listed. **Need** same via verified supplement.
7. **Need** Notice of Hearing with proof of service to decedent's issue(s).

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: 02/15/18

RECOMMENDATION:

Need to clear notes 1, 3-7, then Court's discretion.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800304

CASE NAME: GILBERT LOYA

HEARING:

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

COUNSEL:

GILBERT LOYA (DEC)...
JASON LOYA (PET)...PECCORINI & PECCORINI

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by son, Jason Loya ["Petitioner"].

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

1. Heirs waive bond. Estimated estate valued at \$360,000. The Court may for
good cause require that a bond be given, either before or after issuance of
letters. Pr. C. § 8481(b). **JTD.**
2. ~Proposed Form Order/Letters 04/03/18.

RECOMMENDATION:

RFA. If approved, set future hearing for Accounting Review on **07/23/19**. Any account
to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

DATE: 05/15/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800324

CASE NAME: Mtr of Kenneth O Williams

HEARING:

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

COUNSEL:

HANK D WILLIAMS (PET)...IGNAZIO FICARA
KENNETH O WILLIAMS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by son, Hank D. Williams ["Petitioner"-successor trustee/executor].

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

1. First named executrix, Peggy W. Edwards, declines to act [LF, p. 12].
2. Will waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. Estimated estate valued at \$174,900. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
3. Will is not self-proving [not signed under penalty of perjury under the laws of the State of California]. **Need** Proof of Subscribing Witness.
4. **Need** proof of publication.

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **07/23/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

DATE: 05/15/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1601258

CASE NAME: JAKE VELASQUEZ SPECIAL NEEDS TRUST

HEARING:

First Account and Report of ROBERT SCHNIEDERS and Petition for allowance of fees filed.

COUNSEL:

| | |
|--------------------------------|--------------------------------|
| MALIA VELASQUEZ | (MIN)...BRYAN C. HARTNELL |
| RACHEL VELASQUEZ | (PET)...BALABAN & SPIELBERGER, |
| ROBERT SCHNIEDERS | (PET)...RODNUSKY & ASSOCIATES |
| THE JAKE VELASQUEZ SPECIAL NEE | (TRU)...RODNUSKY & ASSOCIATES |

XREF: CIVDS1500163 (Gregoire vs. Chaffey Joint Union)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Trustee of SNT, Robert Schnieders ["Petitioner"-PPF].

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

1. Accounting period 02/21/17 to 02/28/18.
2. Assets on hand \$2,306,594.52 consisting of \$63,943.37 in cash and remaining in real and personal property.
3. Current bond of \$2,510,000.00. Petitioner requests a bond increase by \$225,000 for a new bond of \$2,735,000.00 [includes recovery]. Appears sufficient. **JTD.**
4. Petitioner requests compensation of \$10,328.50. Billed at \$30-\$125/hour for 124.95 hours. Itemized [LF, pgs. 61-73]. **JTD.**
 - a. Question whether case assistant services [LF, pgs. 66-70] were provided by petitioner or another individual? **Need** verified supplement.
5. Attorney requests fees of \$13,600.00. Billed at \$375/hour for 25.60 hours' attorney time. Itemized [LF, p. 78]. **JTD.**
 - a. Attorney will reduce his fee request by 3 hours or \$1,125.00, for a reduced balance requested of \$12,475.00 if matter is RFA'd and no appearance is required.

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. Attorney requests reimbursement of costs advanced of \$1,723.69. Itemized [LF, p. 79].
7. **Need** Notice of Hearing with proof of service.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4a & 7 then Court's discretion re: bond and fees. If approved, set next Accounting Review for **04/30/19**.

(nb)

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

DATE: 05/15/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1701234

CASE NAME: The Miller Trust dated 05/27/1987, as amended, and

HEARING:

Petition for 1)REMOVE TRUSTEE 2)APPOINTMENT OF SUCCESSOR

COUNSEL:

ARIANNA A WAILANI (PET)...BEZAIRE LEDWITZ &
THE MILLER TRUST DATED 05/27/1(TRU)...
TRUDY LYNN (PET)...BEZAIRE LEDWITZ &

Currently under review by legal research.

(LR)

NOTICE:

Need notice of hearing and proof of service as to Chere A. Miller (surviving settlor);
Germaine C. Miller, successor trustee; Mark T. Mauerman per Pr. C. §17203.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900114

CASE NAME: ALEXANDER T. SEGAL

HEARING:

Hearing Re: proof of transfer

COUNSEL:

ALEXANDER T. SEGAL

(PCE)...NOREEN FONTAINE

CINDY FABRICIUS-SEGAL

(PCR)...CHRISTOPHER A POULOS

MARK SEGAL

(PCR)...CHRISTOPHER A POULOS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Proof of Transfer to Orange County.

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

1. **Need** post-move notice of change of address and directed by court on 02/13/18.
2. Certified Mail Receipt of Transfer received.

RECOMMENDATION:

Need to clear note 1.

(nb)

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

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200246

CASE NAME: MILO VERNON ELLINGER

HEARING:

FIRST Account and Report of LISA ZIEMER and Petition for allowance of fees filed.

COUNSEL:

| | |
|----------------------|---------------------------|
| JACK B. OSBORN | (PET)...JACK B OSBORN |
| LISA ZIEMER | (CPE)...JENNIFER M DANIEL |
| MILO VERNON ELLINGER | (CEP)...WALTER T. MOORE |
| PUBLIC GUARDIAN | (CPE)...COUNTY COUNSEL |

GENERAL INFORMATION

Continued from 11/13/17, 01/08/18 and 03/06/18. Court has read the supplement filed 01/11/18. The court questions the conservator's expenses. The Court will not approve the Accounting, and appoints attorney Craig Parker as guardian ad litem for Milo Vernon Ellinger.

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees for Successor Conservator Lisa Artinger

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

1. Accounting period 04/09/14 – 01/13/17.
2. Assets on hand \$4,473.70 cash.
3. Current bond \$24,000. Appears adequate.
4. **Conservator requests compensation of \$45,625.00. Billed at \$25/day for period 01/14/13 to 01/13/18, for an annual total of \$9,125.00. Conservator requests that all personal expenses be credited towards this total and waive any and all fees over the amount for this accounting period. Thus, Conservator waives fees over \$17,077.13; acknowledges that she has received the benefit of \$17,077.13; and therefore. The total amount waived is \$28,547.87.**
5. Attorney requests total fees of **\$20,868.50** for attorney's time billed at \$325/hour for **55.2** hours of which \$491 is for costs and for paralegal time billed at \$125/hour for 19.5 hours. Itemized [LF pgs. 29-35 & supp. filed 01/11/18, LF, p.

- 5]. **Question how counsel proposed to be paid as assets on hand are insufficient? JTD**
6. Schedule C includes various expenditures to Home Depot, Sandborn's Air Conditioning, Solar Mosaic, Inc., Mountain West, Edison, the Gas Company, Time Warner Cable, auto repairs to Palms Springs Infinity, Window tinting to Edana Window tint and Octavio Martinez, Auto Zone, O'Reillys, and AAA membership. Final Inventory and Appraisal filed 06/04/15 does not indicate Conservatee has a residential home or vehicle. **Supp. (01/11/18) indicates conservatee resided with petitioner for 16 months during this accounting period and should be in lieu of rent which averages to \$605/month which petitioner alleges is a reasonable fee for living expenses. JTD.**
 7. Additional expenditures to Toys R Us, Attorney Heath Baker and payments to credit cards not belonging to Conservatee. **Supp. (01/11/18) alleges Conservatee offered to pay these expenses as an offset for Conservator fees. JTD.**
 8. Petitioner indicates Conservatee can maintain and does not require a Conservatorship, however, the conservator has filed a newly updated Capacity Declaration [filed 08/21/17] which indicates continued moderate cognitive impairment despite the conservatee's right to consent to make medical decisions. It is anticipated that the conservatee through his attorney may file a petition to terminate the conservatorship.
 9. Proposed order. 10/03/17 Need statement of bond amount.

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **01/14/19** (if one year) or **01/13/20** (if two years). Accounting to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(cs/ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400236

CASE NAME: Robert R Lara

HEARING:

Hearing Re: CONFIRMATION OF TRANSFER

COUNSEL:

JEANNE E KENNEDY

(PET)...JEANNE E KENNEDY

ROBERT R LARA

(CEP)...

VICTORIA A CARR

(CPE)...PRO/PER

XREF: FAMVS1003497 (Robert Lara –n-Darlean Lara)

VACATE – signed, certified mailed receipt returned.
(nb)

Future Hearing:

08/08/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

HEARING:

FIRST Account and Report of SHANNON M DEBENEDICTIS and Petition
for allowance of fees filed.

COUNSEL:

SEAN E SITTLER (CEP)...PRO/PER
SHANNON M DEBENEDICTIS (CPE)...HARTNELL LAW GROUP
SHANNON M DEBENEDICTIS (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SEAN E SITTLER is GRANTED
Fee waiver amount due \$633.00
\$555.00 for temp and general petitions on 04/21/16
\$78.00 for 3 certified copies of the letters on 05/12/16

Request for Waiver of Court Fees and Costs filed by SHANNON M DEBENEDICTIS is
GRANTED
Fee waiver amount due 538.00
\$73.00 for 3 certified copies of the letters on 07/14/16
\$465.00 for first account current on 09/19/17

GENERAL INFORMATION:

Continued from **10/24/17** at request of counsel. Mr. Hartnell's Office has been sub'd
back in.

Continued from **12/05/17** to amend and file a final account. Conservatee passed
away.

Continued from 036/20/18 to file amended account.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by
Conservator of the Person and Estate by Shannon DeBenedictis ["Petitioner"-sister].

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

1. Conservatee died on 11/13/17. **Need** separate pre and post-death accountings.
2. Accounting period 07/27/16 to 08/15/17. However, accounting should begin as
of day of appointment on 07/12/16.

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.**

3. Assets on Hand \$66,384.13 consisting of \$17,884.13 in cash and \$48,500 in personal property.
4. Current bond of \$18,000.
5. Supplemental Inventory and Appraisal filed 04/04/18, Attachment 1 does not include amount and does not include bank statement. **Need** corrected inventory with bank statement.
6. Petition indicates Conservator is receiving \$2,200 per month for conservatee's care and services. It does not appear this has been authorized by Court. Does court wish to ratify monthly payments and make a formal order authorizing same? **JTD.**
7. Question whether any receipts were received during the period 07/12/16 to 03/01/17? **Need** verified supplement.
8. **Need** Schedule E, Non-Cash Assets on Hand at End of Account period via verified supplement.
9. **Need** Notice of Hearing with proof of service.
10. Proposed Order 09/19/17 reflects wrong judge and does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c).

RECOMMENDATION:

Need to clear notes then Court's discretion re bond and fees. If approved, set hearing for receipts and final discharge on **05/21/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600244

CASE NAME: BARBARA PRAMSCHUFER

HEARING:

First Account and Report of ANDREW PRAMSCHUFER, SUSAN PRAMSCHUFER and Petition for allowance of fees filed.

COUNSEL:

| | |
|--------------------------------|-----------------------------|
| ANDREW PRAMSCHUFER | (CE)...ROSA M MARQUEZ, ESQ |
| ANDREW PRAMSHUFER | (CPE)...ROSA MARQUEZ |
| BARBARA A. PRAMSHUFER | (CEP)...MITCHELL I ROTH |
| BARBARA PRAMSCHUFER | (CE)...MITCHELL I ROTH |
| BARBARA PRAMSCHUFER | (PP)...JOHN D LUECK |
| JANICE PRAMSCHUFER | (TP)...DONNASUE ORTIZ |
| NATIONAL HEALTH MARKETING SERV | (PRO/PER |
| SHAHANDANA ULLAH | (PRO/PER |
| SUSAN PRAMSCHUFER | (CE)...ROSA M MARQUEZ, ESQ |
| SUSAN PRAMSCHUFER | (CPE)...ROSA MARQUEZ |
| TONY ULLAH | (GARY BARSEGIAN)... |

Request for Waiver of Court Fees and Costs filed by TONY ULLAH is GRANTED

Request for Waiver of Court Fees and Costs filed by SHAHANDANA ULLAH is GRANTED

Request for Waiver of Court Fees and Costs filed by NATIONAL HEALTH MARKETING SERVICES INC is GRANTED

XREF: FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)
CIFDS1700057 (Pramschufer-n- Ullah)
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Co-Conservator of the Estate, Andrew Pramschufer ["Petitioner"].

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

1. Accounting period 08/26/16 to 01/31/18.
2. Assets on Hand \$253,937.54 consisting of \$146,615.24 in cash and remaining in personal property.
3. Current bond of \$450,000. Appears sufficient.

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.**

4. Petitioner waives compensation.
5. Attorney requests fees of \$6,713.68 for the period 03/01/17 to 06/30/17. **Need** itemization via verified supplement.
6. At 11/02/17 hearing, the Court approved reimbursement of \$37,919.60 to petitioner for out of pocket Attorney fees and costs and \$1,454.02 reimbursement for miscellaneous expenditures made for the benefit of the Conservatee, once accounting was approved. As permitted by prior order of this Court, Petitioner requests the Court ratify and allow such fees to be reimbursed. **JTD.**
 - a. Disbursements – Schedule C reflects a reimbursement to Petitioner in the amount of \$28,033.79. Question whether this amount is in addition to above fees and costs? **Need** verified supplement.
7. Total Charges and Total Credits to Summary of Account do not match. **Need** corrected Summary and affected schedule(s) via verified supplement.
8. Cash Assets on Hand at beginning of Account does not include Charles Schwab Investment Acct. #4830 in the amount of \$56,701.55, included on inventory filed 04/21/17. **Need** amended schedule.
9. Non-Cash Assets on Hand at beginning of Account does not include all equities. **Need** amended schedule.
10. Receipts include rental income from various properties. However, no real property is included in inventory and appraisal. **Need** further clarification via verified supplement.
11. Disbursements **need** further clarification as to the following:
 - a. Silverado payments;
 - b. Transfers to Conservatorship Accounts;
 - c. Legal Order(s);
 - d. Withdrawals to Close Accounts;
 - e. IRA Distribution;
 - f. Benjamin Smith and Assoc.;
 - g. Julia G. Allen;
 - h. Indian Hills;
 - i. Town of Great Barrington.
12. Report by court-appointed counsel, Mitchell I. Roth filed 04/24/18.
13. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c)(4).
14. As this is the first accounting we must **also have** account statements showing account balance immediately preceding the date Conservator was appointed. per Pr.C. § 2620(c)(2).
15. During the accounting period, petitioner paid Angel Care for caregiver expenses. **Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
16. Declaration filed by Andrew Pramschufer requests the Court to maintain the status quo and allow him and Susan to continue managing the estate.
17. Evaluation filed 04/26/18.
18. No proposed order. Submit Order after Hearing.

RECOMMENDATION:
Need to clear notes.
(nb)

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: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700144

CASE NAME: MTR OF CHARLIE BRANDON PARDO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JUAN CARLOS PARDO

COUNSEL:

| | |
|-----------------------|--------------------------|
| AURORA TEMPLETON | (CP)...PRO/PER |
| CHARLIE BRANDON PARDO | (CTP)...LENITA A SKORETZ |
| JUAN CARLOS PARDO | (CP)...PRO/PER |
| KIMBERLY PARDO | (CP)...PRO/PER |

GENERAL INFORMATION

Juan C. Pardo (father), Aurora Templeton (mother) and Kimberly Pardo (sister)
appointed Limited Co-Conservators of the person on 08/22/17.

Continued from 03/27/18 at request of counsel. Counsel to give notice.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 **Need** proof of service of a copy of the Order for Conservatorship with
Notification of Conservatee's Rights per Pr.C. §1830(c).
- 2 **Need** Statement of Care Plan in accord with Pr.C. §2352.5.
- 3 **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.
§2352.5 (form GC-355).

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/15/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS4456

CASE NAME: IN THE MATTER OF ROBERT ACEVES

HEARING:

Accounting Review by ***

COUNSEL:

EVA ACEVES

(CPE)...PRO/PER

ROBERT ACEVES

(CEP)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review of Conservator of the Estate, Eva Aceves.

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

1. Ex Parte Petition to Dispense with Account and Order entered 07/22/16; account now due beginning 03/02/16..
2. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0701087

CASE NAME: CHARLES WAYNE MAGBY

HEARING:

Accounting Review by ***

COUNSEL:

CHARLES WAYNE MAGBY

(DEC)...

DEPT. OF HEALTH CARE SERVICES

(TP)...PRO/PER

MICHAEL E MAGBY

(PET)...JAMIE P GELBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review of Administrator, Michael E. Magby.

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

1. Status Report Order entered 06/15/17; account now due.
2. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500900

CASE NAME: ALFREDO ESPINOZA ROMERO

HEARING:

Hearing re Final Discharge

COUNSEL:

ALFREDO ESPINOZA ROMERO (DEC)...

MANUEL ESPINOZA (PET)...FULLERTON LEMANN SCHAEFER

SOLEDAD ZUNIGA LOPEZ (OBJ)...

SOLEDAD ZUNIGA LOPEZ (PET)...PRO/PERH

VACATE – final discharge entered 04/02/18.

(nb)

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

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600748

CASE NAME: MTR OF BRADLEY H HANSSON

HEARING:

Probate status report filed.

COUNSEL:

| | |
|-------------------|-----------------------|
| ASHLEY MEYERS | (PET)...ASHLEY MEYERS |
| BRADLEY H HANSSON | (DEC)... |
| CHERISE HANSSON | (PET)...ASHLEY MEYERS |

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Personal Representatives, Ashley Meyers and Cherise Hansson ["Petitioners"].

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

1. Petitioner alleges the estate is in a condition to be closed as the real property has been sold and prays for an order closing the estate. **Require** final accounting per Pr. C. §1060 et seq.
2. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700380

CASE NAME: MTR OF LAURENCE CARL MALCHOW JR

HEARING:

petition for final distribution on waiver of Account and Report
of MELISSA VALDES-POPE and Petition for allowance of fees filed.

COUNSEL:

LAURENCE CARL MALCHOW JR (DEC)...
MELISSA VALDES-POPE (PET)...HILMOE LAW GROUP PC

GENERAL INFORMATION:

Continued from 04/10/18 at request of counsel via telecom.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Executrix, Melissa Valdes-Pope ["Petitioner"].

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

1. All beneficiaries waive accounting.
2. Assets on Hand \$225,030.99 consisting of cash.
3. Accounting period 03/21/17 to
4. Assets on Hand \$225,030.99 consisting of cash.
5. Petitioner waives statutory compensation.
6. Attorney requests statutory fees of \$8,114.22. Calculated.
7. The named beneficiaries of the decedents Will, propose an alternate distribution, which includes a 50% interest to decedent's sole issue, Charlene Gosney. **JTD**.
8. Proposed Orders 02/13/18 does not include findings re sole and separate property; known creditors; or that petitioner waives compensation.

RECOMMENDATION

Court's discretion re alternate distribution. If approved, set next hearing for receipts and final discharge for **05/21/19**.

(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701078

CASE NAME: STANLEY JOSEPH DYDO

HEARING:

Petition to determine succession to Real Property

COUNSEL:

KENNETH W. DYDO (PET)...THE ELDER & DISABILITY LAW FIR
STANLEY JOSEPH DYDO (DEC)...

X-REF: PROPS 1800270

GENERAL INFORMATION:

Continued from 02/20/18 at request of court to open an estate for post-deceased spouse and to notify lienholders, if any.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by son, Kenneth W. Dydo ["Petitioner"].

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

1. Petitioner requests a determination that decedent's separate 1/3rd interest in real property located in Colton, CA in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and only heir.
2. Declaration by petitioner indicates the real property is held as tenants-in-common by decedent, the Dydo House Trust, and petitioner. Upon decedent's passing on 02/03/00, no action was taken by surviving spouse to probate decedent's 1/3rd interest in the real property. Surviving spouse passed away on 01/27/17. Petitioner states he is the sole heir of his parents.
3. ~Proposed Form Order 03/21/18

RECOMMENDATION:

Require probate for post-deceased spouse.

(nb)

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: TARA REILLY

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800317

CASE NAME: CHRISTOPHER DAVID BISHOP

HEARING:

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

COUNSEL:

CHRISTOPHER DAVID BISHOP (DEC)...
GAYNOR E DEWEESE (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by sister, Gaynor E. DeWeese ["Petitioner"].

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

1. All heirs waive bond. Estimated estate valued at \$141,250. The Court may for
good cause require that a bond be given, either before or after issuance of
letters. Pr. C. § 8481(b). **JTD.**
2. **Need** proof of publication.
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. ~Proposed Form Order/Letters 04/06/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing
for Accounting/Status Review on **07/23/19**. Any account to be filed 30 days' in
advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/15/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800318

CASE NAME: Sharlene Ann Pusch

HEARING:

Petition for probate of will and for letters of administration
with will annexed w/full IAEA

COUNSEL:

MICHELE HAMILTON (PET)...FULLERTON LEMANN SCHAEFER & DO
SHARLENE ANN PUSCH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration w/WA
and full authority under IAEA by niece, Michele Hamilton ["Petitioner"-beneficiary].

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

1. Declinations [LF, pgs. 16-17 to petition] by named executors affixed to petition.
2. Non-resident Petitioner requests bond of \$150,000 be fixed. Appears sufficient.
3. Section 7b to petition re: predeceased spouse is incomplete. **Need** verified supplement.
4. **Need** proof of publication.
5. ~Proposed Form Order/Letters 04/06/18.

RECOMMENDATION:

Need to clear notes, \$150,000 bond. If approved, set future hearing for Accounting
Review on **07/23/19**. Any account to be filed 30 days' in advance of hearing. Note
requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 05/15/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500219

CASE NAME: Tonya Smith

HEARING:

Hearing re Final Discharge

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (PET)...LAYNE A BARTHOLOMEW
TONYA SMITH (CEE)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 03/07/17.
2. **Need** Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/15/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700269

CASE NAME: MTR OF TERESA ANN GOLLEDGE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PENNY GADUT

COUNSEL:

| | |
|---------------------|----------------------------|
| JASON GOLLEDGE | (CPE)...JEFFREY A GOTTLIEB |
| PENNY GADUT | (CPE)...JEFFREY A GOTTLIEB |
| TERESA ANN GOLLEDGE | (CEP)...SANDY L. TURNER |

GENERAL INFORMATION

Jason Golledge (son) and Penny Gadut (sister) appointed Conservators of the person on 10/10/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights filed. However, section 5 to proof of mailing is incomplete. Question whether a conformed copy of the Order Appointing Probate Conservator was also mailed? **JTD.**
2. Care Plan and a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

12/18/18 Accounting Review.