



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/16/17

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 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.

05011h/0503nb0511nb

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: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000533

CASE NAME: JOHN C. SIEBERT

HEARING:
Accounting Review

COUNSEL:

ARTHUR R. BOLTON (PET)...PAUL S. MARCHAND
JOHN C. SIEBERT (DEC)...

GENERAL INFORMATION:

Matter set at **08/25/15** hearing due to non-appearance and failure to prepare report as previously ordered, by Attorney Paul Marchand. Notice given by Judicial Assistant.

Continued from **10/13/15**. Court orders clerks' office to send counsel notice at the Cathedral City address. Court orders counsel to be present.

Continued from **12/15/15**. Attorney Paul Marchand has failed to appear and failed to file accounting as ordered. Citation issued as to: Paul Marchand.

Continued from **03/15/16 and 06/07/16**. Citation issued to: Paul Marchand who is cited and required to appear on 09/13/16.

Continued from 09/13/16. Court orders that the powers of Arthur Bolton are suspended until further order of the court. Court appoints the public administrator as special administrator. Public Administrator to prepare order/letters of special administrator. Citation issued to: Arthur Bolton.

Continued from 11/22/16. Court takes OSC re Sanctions/Contempt off calendar and reinstates powers of administration of Arthur R. Bolton and discharges the Public Administrator as Special Administrator. Court relieves Public Administrator. Counsel to prepare status/accounting by 02/21/17. If no report is filed, appearance is required.

Continued from 03/21/17 at request of Counsel.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions for FTA/Failure to File Report on Accounting/Status Review

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

1. Letters issued 6/6/11, full IAEA, no bond.
2. Need inventory & appraisal with supporting financial statements per Local Rule 20-908.
3. Accounting or status report now due. Need same.

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

RECOMMENDATION:

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

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

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

DATE: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400033

CASE NAME: Danny s. Scopen

HEARING:

Hearing re Final Discharge

COUNSEL:

DANNY S. SCOPEN (DEC)...
NANCY SCOPEN (PET)...GLENN M NAKATANI

GENERAL INFORMATION:

Continued from 02/28/17. No appearances. Court orders Nancy Scopen and/or counsel to appear at the next hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Waiver of Account entered 04/12/16.
2. Final accounting approved 05-20-08.
3. Ex-Parte Petition/Order for Final Discharge returned for corrections. Need same.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500593

CASE NAME: JOSEPH ANDREW KROPFF

HEARING:

FIRST AND FINAL Account and Report of BERNADETTE MAE
SALLAS-KROPFF and Petition for allowance of fees filed.

COUNSEL:

BERNADETTE MAE SALLAS-KROPFF (PET)...SIEVERS LAW FIRM
JOSEPH ANDREW KROPFF (DEC)...

GENERAL INFORMATION:

Continued from 03/28/17. No appearances.

THIS CASE IS SET FOR HEARING ON **Amended** (05/01/17) First and Final Account and
Petition for Fees.

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

1. Accounting period 04/28/14 to **04/17/17**.
2. Assets on Hand **\$278,758.88** consisting of cash.
3. Statutory compensation of **\$8,863.51** requested. Calculated.
4. Attorney requests extraordinary fees of \$4,900 for services rendered. Billed at the reduced rate of \$350/hour for a total of 14 hours' time. **Itemized [See decl. filed 05/01/17]**.
5. Petitioner requests authorization to withhold \$1,500 as a reserve.
6. Notice given.
7. ~Proposed Order 05/01/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **04/03/18**.

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600722

CASE NAME: MTR OF JESSIE VELASQUEZ

HEARING:

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

COUNSEL:

BRYAN C HARNELL (TP)...BRYAN C HARTNELL
JESSIE VELASQUEZ (DEC)...
MARY ANN VELASQUEZ (PET)...CRAIG M PARKER

Address: 16111 Hunter Street, Fontana, CA 92335

Appraised Value: \$235,000

Sale price: \$201,000. **However, sale must be 90% (\$211,500) of appraised value per Pr. C. § 10309(3).**

First overbid: \$211,550

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

Commission: 6% = \$12,060.00

Additional bond: Current bond of \$200,000. Appears sufficient.

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

Exposure to Market: Listed with broker; on MLS; signage and shown.

Notice: Given and published. **Need proof of clerks' posting.**

Future Hearing Dates: 11/21/17 Accounting Review.

~Proposed Form Order 03/07/17

(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.

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

DATE: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

SEE ALSO 6

HEARING:

Hearing Re: STATUS/POSSIBLE SETTING OF MEDIATION

COUNSEL:

BRENDA SIERDSMA

PAUL VANDEN PIERCE

THERESA AILE EN CORTEZ LI VING

(PET)...WEINSTOCK MANION

(OBJ)... LAYNE A BARTHOLOMEW

(TRU)...

No notes – Status/Mediation.

(nb)

Future Hearing:

12/19/17 Readiness calendar

01/08/18 Court Trial

01/09/18 Court Trial

01/10/18 Court Trial

01/11/18 Court Trial

01/12/18 Court Trial

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

DATE: 05/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

SEE ALSO 5

HEARING:

Petition for TO INVALIDATE TRUST FOR RELIEF FROM ELDER ABUSE
FROM RELIEF FROM CONVERSION

COUNSEL:

BRENDA SIERDSMA	(PET)...WEINSTOCK MANION
PAUL VANDEN PIERCE	(OBJ)... LAYNE A BARTHOLOMEW
THERESA AILE EN CORTEZ LI VING	(TRU)...

Currently under review by Legal Research.
(LR)

Previously continued – notice not re-reviewed.

Future Hearing:

12/19/17 Readiness calendar

01/08/18 Court Trial

01/09/18 Court Trial

01/10/18 Court Trial

01/11/18 Court Trial

01/12/18 Court Trial

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: BC BS83

CASE NAME: IN THE MATTER OF JAMES E JONES

HEARING:

TWELFTH REPORT AND Account and Report of JANET E JONES and
Petition for allowance of fees filed.

COUNSEL:

JAMES E JONES

(CEP)...PRO/PER

JANET E JONES

(CPE)...DEBRA S POPINEAU

JANET E JONES

(CPE)...DEBRA S POPINEAU

See **CONFIDENTIAL** notes in "J" Drive.

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

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000022

CASE NAME: ANA MARIA LINEROS

HEARING:

Hearing re Final Discharge

COUNSEL:

ALVARO LINEROS (CE)...DENNIS M ASSURAS
ALVARO LINEROS (CP)...PRO/PER
ALVARO LINEROS (PET)...GARY H BLAYLOCK
ANA MARIA LINEROS (CTE)...BROWN, WHITE & NEWHOUSE LLP
ANA MARIA LINEROS (CTP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by ALVARO LINEROS is GRANTED

GENERAL INFORMATION

Continued from 6/22/16, 08/31/16, 11/08/16 and 02/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON final discharge

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

1. Final distribution approved 6/17/15. **Order filed 8/19/16.**
2. Receipts filed.
3. Need Ex-parte petition for final discharge order submitted with document recording information per Pr.C.§11753. Returned for corrections.

RECOMMENDATION:

Inquire status.

(sa/lc/nb)

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

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0900143

VACATED

CASE NAME: CHERIE KENEALY

HEARING:
Accounting Review

COUNSEL:

CHERIE KENEALY (CEP)...PRO/PER
RAFAEL N KENEALY (CPE)...JAMES B CHURCH

XREF: GARRS900101, RFLRS21568

Ex Parte Petition to Dispense with Accounting and Order entered 03/28/17.

FUTURE HEARING DATES:
10/17/17 Accounting Review

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

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600252

CASE NAME: MTR OF ANAMARIA AVITIA MEDINA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIANA AVITIA

COUNSEL:

ANAMARIA AVITIA MEDINA (CTP)...JENNIFER M DANIEL
MARIANA AVITIA (CP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by ANAMARIA AVITIA MEDINA is GRANTED

GENERAL INFORMATION

Order appointing Mariana Avitia, Limited Conservator of the person, entered 11/29/16.

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; Care Plan; including a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

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

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700011

CASE NAME: JOHN MORALES

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JOHN MORALES (CPE)...
SILVIA GUEVARA SALAZAR (PET)...PRO/PER

GENERAL INFORMATION

Continued from 02/21/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Silvia Guevara Salazar (step-mother).

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr. C. §2351.5. JTD
2. Petitioner requests that proposed conservatee's civil and legal rights are not to be limited without a court order.
3. Petitioner seeks medical powers. **Capacity Declaration filed 03/15/17.**
4. Proposed conservatee is developmentally disabled. **Report of court-appointed counsel, Jeanne Kennedy filed 04/12/17.**
5. **Court Investigator report filed 02/06/17.**
6. Proposed conservatee is purportedly developmentally disabled. **Letter from IRC filed 04/04/17.**
7. **Need return of Citation.**
8. **Need Notice of Hearing and Proof of Service by mail or Due Diligence Declaration(s) as to unknown maternal grandparents and Dolores Martine (paternal grandmother).**
9. Certificate of Completion of the Conservatorship Training Class filed 03/09/17.
10. ~Proposed Form Order: 01/13/17

RECOMMENDATION

Need to clear notes 7-8. If approved, set hearing for Compliance Review for **12/19/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700123
CASE NAME: MTR OF CRISTIAN ROJAS

HEARING:
Petition for Appointment of Conservator

COUNSEL:
CRISTIAN ROJAS (CTP)...
FILIBERTA ROJAS (CP)...PRO/PER

GENERAL INFORMATION

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

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

1. Petitioner seeks powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make medical decisions.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 04/12/17 is incomplete at item 4(a) as to date proposed conservatee was last seen by physician. Need verified supplement.
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
- 7. Court Investigator report filed.**
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need return of Citation.
10. Need Notice of Hearing and proof of service, or file Due Diligence Declarations.
11. ~Proposed Form Order: 04/06/17

RECOMMENDATION

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

(lh/nb)

CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: MPR MS01383

CASE NAME: ESTATE OF GEROD HUGHES

HEARING:

Probate status report filed.

COUNSEL:

GEROD HUGHES	(DEC)...
JOSEPH J HUGHES	(PET)...JOHN M RAGER
LLOYD M HUGHES	(SA)...
SB PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Successor Administrator, Public Administrator.

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

1. Petitioner alleges the estate is not in a condition to be closed as the real properties have yet to be sold. Petitioner indicates the real properties have been listed for sale since 2006; have not sold; will go to tax sale in May of 2018; wherein, petitioner is waiting on the tax sale to take place to collect the excess sale proceeds, if any.
2. Petitioner requests an additional 12 months.
3. Notice given.
4. ~Proposed order 03/06/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/01/18**.

(nb)

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS0700834

CASE NAME: PATRICIA ANN LEWIS

HEARING:
Accounting Review

COUNSEL:
DON THOMAS (PET)...PRO/PER
PATRICIA ANN LEWIS (DEC)...

GENERAL INFORMATION:

Continued from **2/25/15 and 03/18/15**. Court notes administrator, Don Thomas, has failed to file an accounting. Court refers case to Public Administrator. Notice by Judicial Assistant.

Continued from 05/05/15, 08/04/15, 10/06/15.

Continued from 01/19/16. Oral report by administrator.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Prior Status Report granted 2/26/14.
2. Need final accounting or further status report.
3. Returned mail on 04/01/15.

RECOMMENDATION

Inquire status.
(gls//nb/lh)

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1400384

CASE NAME: MTR OF RONALD B GOOD

HEARING: STATUS REPORT

COUNSEL:

ALICE P CARTER	(SCOTT A HANCOCK
ANNETTE PORTER	(SCOTT A HANCOCK
DOROTHY S FISHER	(SCOTT A HANCOCK
JANE FRICK	(SCOTT A HANCOCK
LAURA SKEENS	(SCOTT A HANCOCK
MARILYN J WATT	(SCOTT A HANCOCK
PERRY W. AYERS	(TP)...SCOTT A HANCOCK
RICHARD AYERS	(SCOTT A HANCOCK
RONALD B GOOD	(DEC)...
SAMUEL J GOOD JR	(SCOTT A HANCOCK
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER
VANESSA DOWELL	(SCOTT A HANCOCK

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Public Administrator
[“Petitioner”].

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED: 1.

1. Petitioner alleges the estate is not in a condition to be closed as petitioner is still in the process of collecting an account from Bank of America, who has not turned over the funds, in 3 accounts belonging to the decedent.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/06/17.

RECOMMENDATION:

Court’s discretion. If approved, set next hearing for Accounting Review for **05/01/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1501008

CASE NAME: MARILYN RICHMOND

HEARING:

Probate status report filed.

COUNSEL:

MARILYN KAY RICHMOND (DEC)...
S.B. COUNTY PUBLIC ADMINISTRAT (PET)...CRAIG M PARKER
STATE OF CALIFORNIA FRANCHISE (TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Public Administrator
["Petitioner"]

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner is working on marshaling the AT&T stock and has filed an 850 Petition to clear title on the Inyo County lots.
2. Petitioner requests an additional 12 months.
3. Notice given.
4. ~Proposed order 03/06/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/01/18**.

(nb)

FUTURE HEARING DATES:

06/06/17 Petition for Amended Petition to Determine Title and to Require Transfer of Real Property

06/06/17 Petition for Order to Confirm Transfer of Real Property to Trust

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600825
CASE NAME: MTR OF RAYMOND JERRY MICHAEL
HEARING:
Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

RAYMOND JERRY MICHAEL (DEC)...
RONALD D ALLEN (PET)...PRO/PER

GENERAL INFORMATION

Continued from **10/05/16**. Non-appearance by petitioner. Court refers the matter to the Public Administrator for possible appointment.

Continued from 10/11/16 at request of counsel.

Continued from 01/10/17. Hearing continued at request of counsel for further investigation by public administrator (PA).

Continued from 03/21/17. The Public Administrator to file a petition for administration.

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

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

1. Petitioner alleges he is the sole heir/beneficiary and waives bond. However, it appears petitioner is not an heir and as there is no will, is not a beneficiary. Court may wish to require full bond of \$204,000.
2. Petitioner alleges that he was decedent's caregiver and they had a "verbal contract" of caregiving services in exchange for an inheritance in decedent's real property. Petitioner alleges that decedent is survived by a nephew, Robert Lawrence Char, who is currently in Patton. Court may wish to require PA noticed.
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate and proof of service.
5. ~Proposed form order: 8/18/16

RECOMMENDATION:

Need to clear notes and Court's determination re bond. If approved, set hearing for Accounting/Status Review on **05/29/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(sa/nb/lh)

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: SPR SS06771

CASE NAME: VERNICE OWENS INDIVIDUAL TRUST

SEE ALSO 19

HEARING:

Accounting Review

COUNSEL:

LAWRENCE R OWENS	(TEE)...PRO/PER
ZOANNE MARTZ	(PET)...HARTNELL LAW GROUP
ZOANNE MARTZ	(PET)...JACK B OSBORN

GENERAL INFORMATION:

Continued from **05/24/16**. Court orders Attorney Hartnell to prepare an accounting on behalf of his client.

Continued from **08/09/16**. Attorney Hartnell to file an accounting.

Continued from 10/18/16, 01/10/17, 02/28/17 and 03/27/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review (by former Trustee, Zoanne Martz)

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

1. Matter set at 03/29/16 hearing, wherein, the Court removed Zoanne Martz as the trustee and appointed the Public Administrator as Successor Trustee.
2. Court ordered Attorney Bryan Hartnell to submit an accounting on behalf of his client. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

DATE: 05/16/17 TIME: 10:00 DEPT: S35P

CASE#: SPR SS06771

CASE NAME: VERNICE OWENS INDIVIDUAL TRUST

SEE ALSO 18

HEARING:

Accounting Review

COUNSEL:

LAWRENCE R OWENS	(TEE)...PRO/PER
ZOANNE MARTZ	(PET)...HARTNELL LAW GROUP
ZOANNE MARTZ	(PET)...JACK B OSBORN

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. Order Removing Trustee and Appointing Public Administrator as Successor Trustee entered 04/22/16; first account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate
PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/16/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400251

CASE NAME: Rodney Rogers & Lacey Rogers Family Trust

HEARING:
Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

GARY ROGERS	(PET)...BRIAN W. SMETHURST
LYNN GAETA	(PET)...CUMMINS & WHITE
LYNN GAETA	(PET)...JAMES R WAKEFIELD
RODNEY ROGERS & LACEY ROGERS F (TRU)...	

No notes – Court Trial.
(nb)

Future Hearing:
05/17/17 Court Trial
05/18/17 Court Trial
05/19/17 Court Trial

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

HEARING:

FINAL Account and Report of DOROTHY R HARMON and Petition for allowance of fees filed.

COUNSEL:

ABRAHAM C. RAMIREZ (DEC)...
DOROTHY R HARMON (PET)...PRO/PER

GENERAL INFORMATION

Continued from 02/02/17 and 03/23/17. Court orders the administrator, Dorothy Harmon to pay back the administrator fees that she paid herself without prior court order. Court notifies the Public Administrator of possible appointment. If a proper accounting is not filed prior to the next hearing the court shall appoint the Public Administrator as the successor administrator.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees.

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

1. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. Need a proper summary of account, report and accounting schedules.
2. There is no verification per Pr.C. § 1021.
3. Proposed order is not proper.
4. **Request for continuance filed 05/09/17. Proposed Order 05/09/17 does not have 3 lines of content before signature line.**

RECOMMENDATION

Need to file a proper accounting and report to be set on first check calendar no sooner than **07/06/17**. Suggest Administrator seek legal advice. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(lc/nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400910

CASE NAME: MIEKO LIVINGSTON

SEE ALSO 3

HEARING:

FIRST AND FINAL Account and Report of PAULINE SANCHEZ, PATRICIA LIVINGSTON and Petition for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV ()...
DIXIE MUNEKIYO	(PET)...DINA I FARHAT
MIEKO LIVINGSTON	(DEC)...
PATRICIA LIVINGSTON	(EXE)...HORSPOOL & HORSPOOL
PATRICIA LIVINGSTON	(PET)...HORSPOOL & HORSPOOL
PAULINE SANCHEZ	(PET)...J. DAVID HORSPOOL
SEAN MUNEKIYO	(PET)...DINA I FARHAT
SEAN MUNEKIYO	(TP)...DINA I FARHAT

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Co-Administrators w/Will Annexed, Pauline Sanchez and Patricia Livingston (daughters) ["Co-Petitioners"].

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

1. Accounting period 09/14/13 to 03/20/17.
2. Assets on Hand \$130,785.56 in cash.
3. Co-Petitioners request statutory compensation of \$9,005.45 minus \$225 paid to Lisa Contreras for the preparation of the final accounting leaving a balance of \$8,780.45. Calculated.
4. Attorney requests statutory compensation of \$9,005.45. Calculated.
5. Attorney requests extraordinary fees of \$5,000 for services rendered in connection with the sale of real property, per the terms of the Settlement Agreement. Billed at \$295-\$395/hour for 19.90 hours' attorney time. Itemized [LF, p. 23-25]. JTD.
6. Petitioners request authority to pay the sum of \$7,500 to Attorney Dina Farhat from Sean Munekiyo share of the estate, for legal services requested by him.

7. Petition alleges there are no creditor's claims or request for special notice. However, a creditor's claim and request for special notice was filed by DHS on 06/30/15 in the amount of \$25,033.34 in the name of Dixie Munekiyo, now deceased. Need further clarification via verified supplement.
8. Need proof of service to Notice of Proposed Action re sale of real property.
9. Need escrow closing statement as is required by Local Rule 20-910.
10. Petitioners' request Pacific Premier Bank Account # XXX4042 be unblocked and disbursed to counsel's IOLTA account for disbursements to be made pursuant to the Order of the Court.
11. Petitioners request authority to reserve the sum of \$2,000 as a reserve.
12. Notice given.
13. ~Proposed Order 03/29/17

RECOMMENDATION:

Need to clear notes 7-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **05/22/18**.

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400910

CASE NAME: MIEKO LIVINGSTON

SEE ALSO 2

HEARING:

FIRST AND FINAL Account and Report of PAULINE SANCHEZ, PATRICIA LIVINGSTON and Petition for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV ()...	
DIXIE MUNEKIYO	(PET)...DINA I FARHAT
MIEKO LIVINGSTON	(DEC)...
PATRICIA LIVINGSTON	(EXE)...HORSPOOL & HORSPOOL
PATRICIA LIVINGSTON	(PET)...HORSPOOL & HORSPOOL
PAULINE SANCHEZ	(PET)...J. DAVID HORSPOOL
SEAN MUNEKIYO	(PET)...DINA I FARHAT
SEAN MUNEKIYO	(TP)...DINA I FARHAT

VACATE – see prior matter.

(nb)

CASE TO REMAIN IN S36

GENERAL INFORMATION

Continued from 11/10/16, 11/17/16 and 03/27/17. This is the first and final account of the special administration. Attorney Horspool will be filing a first and final account for the co-administrators which will include the time period of the special administration. The clerks' office to set the date of 05/16/17. Once this is filed this petition and this account will become moot.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees.

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

1. Co-Special Administrators, Pauline Sanchez & Patricia Livingston, daughters, request statutory compensation of \$9,003.41 to be divided equally. Calculated.
2. Attorney requests statutory fees of \$9,003.41. Calculated.

3. Attorney requests extraordinary fees of \$5,000, reduced from \$7,570.50 for 19.9 hours at \$295/395 per hour. Itemized [LFpgs25-27]. JTD
4. Despite the settlement, general powers were not granted to special administrators. Question the authority to distribute? Need points and authorities.
5. Parties reached a global settlement agreement. Settlement filed 11/3/16.
6. ~Proposed Order: 09/27/16.

RECOMMENDATION

Need to clear note 4. If approved, set hearing on the filing of receipts and final discharge for **04/05/18**.

(/lc/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500250

CASE NAME: Steven Charles Vaughan

HEARING:

Probate status report filed.

COUNSEL:

RANDY VAUGHAN (PET)...PRO/PER
STEVEN C VAUGHAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Personal Representative, Randy Vaughn (brother) ["Petitioner"]

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

1. Petitioner alleges the estate is not in a condition to be closed as the real property has been sold and escrow remains to be closed.
2. Petitioner requests an additional 10 weeks to close probate. Suggest 3 months.
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **08/15/17**.
(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500266

CASE NAME: BARBARA LEE BRINEGAR

HEARING:
Accounting Review

COUNSEL:
BARBARA LEE BRINEGAR (DEC)...
RONALD LEE DAILEY (PET)...PRO/PER

GENERAL INFORMATION

Continued from **10/13/16**. No appearance. Matter referred to Public Administrator for an inventory accounting and status report filing.

Continued from **12/20/16** at request of PA. Citation issued as to Ronald Lee Dailey who is cited and required to appear.

Continued from 03/07/17. Court has not been able to serve Ronald Dailey, nor has the Public Administrator been able to locate him. Public Administrator to do further investigation.

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 Ronald Lee Dailey, son, on 08/06/15; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. Affidavits of Unsuccessful Service with Declarations of Due Diligence filed 01/17/17 & 01/18/17.
5. **Declaration Lack of Assets filed 04/27/17 by PA indicates prior Administrator, Ronald Lee Daily, sold the real property located in Fontana, CA and location of personal property is unknown. Does Court wish to surcharge Ronald Lee Dailey? JTD.**

RECOMMENDATION

Court's discretion
(lc/nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500456

CASE NAME: BRUCE DARRELL BORTNEM

HEARING:

FIRST AND FINAL Account and Report of LISA ANNE REYNOLDS and
Petition for allowance of fees filed.

COUNSEL:

BRUCE DARRELL BORTNEM	(DEC)...
LISA ANNE REYNOLDS	(PET)...EDWARD S KENT
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER

GENERAL INFORMATION:

Continued from 01/10/17 and 03/14/17 (no appearance). Court orders Attorney Edward Kent to personally be present at the next hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees.

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

1. Petition is not verified. Need verification signed by personal representative. Pr.C. § 1021.
2. Petition is not signed by attorney requesting attorney fees. Local Rule 20-903. Need same.
3. Accounting period 09/09/015 to 10/31/16. However, account should begin as of date of death, or 03/19/15.
4. Assets on Hand \$377,500.00 consisting of real and personal property.
5. Petitioner waives compensation.
6. Attorneys request statutory compensation of \$10,550.00. Calculated.
7. Attorneys request reimbursement of costs advanced of \$1,649.50. Not itemized. Need same via verified supplement.
8. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
9. Petition does not describe in detail all real and personal property to be distributed. Local Rule 20-906. Need street address, legal description, APN #, vehicle ID and license numbers.
10. Need address of the distributee receiving real property. Local Rule 20-907(c)(2).

11. Petitioner requests authorization to pay the FTB, as creditor of the Estate, the sum of \$1,557.38.
12. **Notice filed 04/20/17 does not include son, Mark D. Bortnem; siblings, Lyn Rosemary and David Bortnem; or creditors American Express; Bank of America; Capital One; and FTB. Need proper service.**
13. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes. If approved, set next hearing for final discharge on **05/22/18**.

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

HEARING:

Hearing Re: Status of Will Contest

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
CATHERINE ROUNTREE	(PET)...BERT Y KAWAHARA
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP)...PRO/PER
REGINA NITASHA HOWARD	(PET)...PRO/PER

No notes – Status.
(nb)

Future Hearing:

05/31/17 Mediation settlement conference

06/22/17 Accounting Review.

06/22/17 Readiness calendar

06/22/17 Petition for letters testamentary etc.

07/05/17 Court Trial

07/05/17 Petition for letters testamentary etc.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

SEE ALSO 9

HEARING:

Order to Show Cause RE: REMOVAL

COUNSEL:

CHERRAKEE LEE GROETZINGER (DEC)...
LON M ANDERSON (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by LON M ANDERSON is GRANTED

GENERAL INFORMATION:

Set on **10/31/16** due to non-appearance. Notice by Judicial Assistant.

Continued from **01/09/17**. No appearance. Court notifies the Public Administrator of possible appointment.

Continued from 01/10/17 at request of counsel. Public administrator to conduct investigation.

Continued from 03/07/17. Citation issued to Lon Anderson, who is cited to appear on 05/16/17 and show cause why FTA/failure to file required documents.

THIS CASE IS SET FOR HEARING ON **OSC re Removal** on Accounting Review

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

1. Letters of Administration issued 08/24/15, full authority, no bond.
2. Need final inventory and appraisal.
3. No accounting or status report of administration. Need same.
4. **Need return of Citation.**

RECOMMENDATION:

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

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

SEE ALSO 8

HEARING:
Accounting Review

COUNSEL:
CHERRAKEE LEE GROETZINGER (DEC)...
LON M ANDERSON (PET)...PRO/PER

See notes on prior matter.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600055

VACATE

CASE NAME: MTR OF OLIVIA YVONNE ROBERTS

HEARING:

Accounting Review

COUNSEL:

JILLIAN HACKETT

OLIVIA YVONNE HACKETT

(PET)...RICHARD

(DEC)...

Order on DECREE OF FINAL DISTRIBUTION ON WAIVER OF ACCOUNT AND
APPROVAL OF STAT ATTORNEY'S FEES entered 03/30/17.

Future Hearing:

03/26/18 Final Discharge

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600214

CASE NAME: BETTY H HANSEN

HEARING:

WAIVER OF FINAL Account and Report of DANA J HENRY and Petition
for allowance of fees filed.

COUNSEL:

BETTY H HANSEN (DEC)...
DANA J HENRY (PET)...ROBIN S BENTLER

GENERAL INFORMATION

Continued from **02/08/17**. No appearance. Court needs Texas probate order and notice
to Verrel Henry heirs.

Continued from 04/12/17 at request of counsel. Notice by Judicial Assistant.

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

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

1. Petitioner Dana Henry, nephew, is sole remainder beneficiary, waives accounting
and statutory fees.
2. Attorney requests statutory fees of \$8,500. Ok.
3. As this is an ancillary probate, specific bequest of \$200,000 to Verrel Henry was
reportedly satisfied in the Texas Probate. **Copy of Texas Probate Order;
cancelled check by Verrel Henry and Waivers of Notice by heirs filed.**
4. Proposed Order: 02/10/17; however, need statement re taxes are paid, property is
sole and separate, that Creditors are satisfied if any.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for
04/18/18.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600735

CASE NAME: MTR OF NUNCIO JOSEPH BONELLI

HEARING:

Hearing Re: Status

COUNSEL:

JOSEPH BONELLI	(PET)...MICHAEL C MADDUX
LIVE WELL FINANCIAL, INC	(TP)...MCCARTHY & HOLTHUS LLP
NUNCIO JOSEPH BONELLI	(DEC)...
PUBLIC ADMINISTRATOR	(CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by JOSEPH BONELLI is GRANTED

Status – no notes.

(nb)

Future Hearing:

03/01/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 11A ADD ON

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601236

CASE NAME: THE FRANCISCO DE LA ROSA FAMILY IRREVOCABLE TRUST
SEE ALSO 16A

HEARING:

Petition for TO DETERMINE VALIDITY OF PURPORTED TRUST; FOR ORDER
SUSPENDING AND REMOVING TRUSTEE

COUNSEL:

HERMAN A DE LA ROSA	(PET)...THE LEGACY LAWYERS,
RENATO A DE LA ROSA	(PET)...THE LEGACY LAWYERS,
THE FRANCISCO DE LA ROSA FAMIL	(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: CYNTHIA LUDVIGSEN

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601240

CASE NAME: MTR OF JOSE RAMON SALAS CHAVEZ

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JOSE RAMON SALAS CHAVEZ (DEC)...
MICAELA ADAME SOTO (PET)...MICHAEL C MADDUX

Request for Waiver of Court Fees and Costs filed by MICAELA ADAME SOTO is GRANTED

GENERAL INFORMATION:

Decedent died intestate on 10/30/15.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Micaela Adame Soto.

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

1. Petitioner, Micaela Adame Soto, requests a determination that Decedent interest in real property, located at San Bernardino, passes to the surviving spouse as community property. Petitioner indicates parties were married in November 2001 in Baja, California, Mexico and lived together since 1996. There are 3 biological children of this marriage, 2 of which are minors.
2. On 07/24/94, Decedent and his sister, Theresa M. Garcia, purchased subject real property in Joint Tenancy. Grant Deed [LF, p. 9], which also, includes a Guadalupe Alvarez, a single man, *all as joint tenants*.
3. On 07/17/98, Decedent added his maternal name on the title by executing a Grant Deed [LF, p.11]. However, the type of tenancy was not specified, which *resulted in a tenancy in common in equal shares*. Question if Guadalupe Alvarez lives, and if not, date of death and whether an Affidavit Death of a Joint Tenant was filed in order to determine whether the joint tenancy was extinguished as to Guadalupe Alvarez?. **Supp. (03/01/17) affixes a quitclaim deed recorded on 08/08/95, wherein, Guadalupe Alvarez, quitclaimed property to Decedent and his sister, Theresa M. Garcia..**
4. On 10/12/16, Decedent's sister, Theresa M. Garcia, the purported holder of the remaining 50% interest in the real property, executed a Grant Deed [LF, p.15] to transfer Decedent's interest to the Petitioner, as Joint Tenants, with her. However,

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.

she alleges since the title company has deemed title to be held in “Tenancy in Common,” the title company would not insure title without a formal court order determining the property interest passing to the surviving spouse. Appears Theresa M. Garcia could only transfer her interest, not the Decedent’s.

5. **Renunciation and Disclaimer of Property filed 05/02/17 by Petitioner’s adult child, Victor Ramon Salas Adame, in favor of petitioner. However, disclaimer is untimely per Pr. C. § 279. Suggest court require an assignment. JTD.**
6. **Chronology of Transfer of Title filed 05/02/17 indicates that per Intestate Succession, the petitioner is entitled to her share of 33.33% by operation of law; states the court should confirm decedent’s 50% interest in the subject property to petitioner; appoint the petitioner Guardian ad Litem for the two minor children; and confirm the remaining 50% interest to Theresa M. Garcia.**
7. **Ex Parte Petitions for Appointment of Guardian Ad Litem filed 05/03/17, wherein, minors, Alfonso Salas Adame (17) and Daniela Salas Adame (13) have consented.**
8. ~Proposed Form Orders 12/15/16 & 05/03/17.

RECOMMENDATION:

Court’s discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700016

CASE NAME: MTR OF FLORENCE MARIE SUMMERS

HEARING:

Petition for AMENDED PROBATE OF LOST WILL & FOR LTRS OF ADMIN
W/WILL ANNEXED

COUNSEL:

PAULA MARIE WHITESIDE (PET)...CARPENTER, ZUCKERMAN &
FLORENCE MARIE SUMMERS (DEC)...

GENERAL INFORMATION:

Continued from 03/20/17. Court notes an Amended Petition was filed and set for 05/16/17. Counsel represents the amended petition should have been filed as a supplement.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration w/WA of a **LOST WILL** and LIMITED authority under IAEA by Paula Marie Whiteside (daughter).

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

1. Will waives bond. Petitioner requests bond of \$6,000 on an estate estimated at \$0.00. Petition indicates there are no assets at this time and this petition is being filed to pursue litigation which may, or may not have a favorable result. JTD
2. Petition alleges the whereabouts of the original, recorded Affidavit (with the original will attached) is unknown [LF, p. 11]. A copy of the decedent's will dated 08/10/19 is attached [LF, p. 6]. Petitioner alleges the will was attached to an Affidavit for Transfer of Title to Real Property in Arizona, although the original recorded Affidavit is also believed to be lost. Petitioner alleges the will was never revoked and that it was the intention of decedent that her estate be distributed according to that will.
3. Supp. filed 04/28/17 alleges a certified copy of Affidavit recorded in Arizona was filed with petition on 01/09/17; **copy of certified Affidavit for Transfer of Title to Real Property in Arizona with copy of will, filed 05/09/17.**
4. Will names Kathleen R. Summers Adams and Thomas Trefry as Co-Personal Representatives then Linda C. Parker Trefry as Personal Representative, whom petitioner alleges have failed to act. Parties have been served notice.
5. Proof of publication filed 01/25/17.

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. Amended Petition filed 03/08/17. **Supp. filed 04/28/17 alleges filing was meant to be treated as a supplement, not an amended petition. JTD**
7. ~Proposed Form Order/Letters 01/09/17.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **07/24/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700215

CASE NAME: TIMOTHY ALLEN LAWRENCE

HEARING:
Petition for LETTERS OF ADMINISTRATION

COUNSEL:

KATHLEEN ELLEN LAWRENCE (PET)...LAW OFFICES OF PAUL S RABER
TIMOTHY ALLEN LAWRENCE (DEC)...

GENERAL INFORMATION:

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

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

1. Bond waived by both heirs. Estimated net value of estate is \$257,000, cash. Court also has discretion to require bond per Pr. C. § 8481(b).
2. ~Proposed form Order: 03/07/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/24/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: VPR VS01544

CASE NAME: ESTATE OF ISABEL ALEXANDER NIELSEN

SEE ALSO 16

HEARING:

Hearing Re: STATUS OF PROBATE IN UTAH

COUNSEL:

BRENT K NIELSEN	(PET)...PRO/PER
DOROTHY I NIELSEN	(PET)... LAYNE A BARTHOLOMEW
DOROTHY I NIELSEN	(PET)...PRO/PER
GARY NIELSEN	(PET)...PRO/PER
ISABEL ALEXANDER NIELSEN	(DEC)...

GENERAL INFORMATION:

Continued from 2/2/16, 02/22/16, 07/12/16, 09/20/16, 12/20/16 and 03/07/17. Oral report given by counsel. The accounting is completed, to be filed today.

THIS CASE IS SET FOR HEARING ON Status of Probate in Utah

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

1. Matter set at 12/01/15 hearing, wherein, Court ordered Dorothy Nielsen to file status of probate in Utah before next hearing date of 2/2/16.
2. Seventh Report/Status of Administration and Fifth Accounting filed 12/28/15 per register of actions. **Seventh Report/Status and Fifth Accounting filed 12/28/15 indicates the property in Utah is under ancillary probate administration and has not yet been sold and requests an additional 6 months to close administration. JTD.**
3. Notice filed 01/08/16 reflects hearing has been re-scheduled to 02/22/16.
4. **Notice of hearing and proof of service filed 06/27/16 is not 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.

RECOMMENDATION:

Need proper notice then Court's discretion. If approved, set next hearing for **03/13/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 05/16/17 TIME: 8:30 DEPT: S36P

CASE#: VPR VS01544

CASE NAME: ESTATE OF ISABEL ALEXANDER NIELSEN

SEE ALSO 15

HEARING:

SECOND AMENDED SEVENTH REPORT & FIFTH & FINAL Account and Report of DOROTHY I NIELSEN and Petition for allowance of fees filed.

COUNSEL:

BRENT K NIELSEN	(PET)...PRO/PER
DOROTHY I NIELSEN	(PET)... LAYNE A BARTHOLOMEW
DOROTHY I NIELSEN	(PET)...PRO/PER
GARY NIELSEN	(PET)...PRO/PER
ISABEL ALEXANDER NIELSEN	(DEC)...

GENERAL INFORMATION:

Continued from 02/22/16, 07/12/16, 09/20/16 and 12/20/16.

THIS CASE IS SET FOR HEARING ON **Second Amended [03/07/17]** Fifth and Final Account and Petition for Fees by former Administrator, Dorothy I. Nielsen.

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

1. Need Order after Hearing for Fourth Account covering period 06/15/05 to 11/01/05. **Supp. (04/19/16)** affixes proposed order. Require proposed order to be submitted separately and properly received by clerk's office.
2. Accounting period 11/01/05 to **08/31/16** [9.9 years].
3. Assets on Hand \$62,694.93 consisting of cash.
4. Total Charges and Total Credits to Summary of Account [LF, p. 14 to amended account filed 06/13/16] do not balance by a difference of \$16,523.30. Need amended Summary of Account and affected schedules to begin with balance on hand at end of prior accounting period reflected as \$179,805.01 [see LF, p. 224 to amended acct. filed 06/13/16].
5. Petitioner requests statutory fees of \$11,976.00. Calculated [LF, p.5 to amended acct. filed 03/07/17].
6. Petitioner does not requesting attorney statutory fees Counsel, by signing this petition is also not requesting statutory attorney fees from this estate.

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. Disbursements – Schedule C! [LF, p. 22] reflects preliminary distributions totaling \$240,000. Need further clarification via verified supplement.
8. Petitioner requests ratification and approval for reimbursement of expenses in the sum of \$5,519.61. Itemized [LF, pgs. 42-47]. However, costs include items considered overhead per Local Rule 20-909 totaling \$4,631.44. Does Court wish to reduce outstanding costs (note 10) by this amount? JTD.
9. Petitioner requests reimbursement of outstanding costs advanced of \$4,955.39. Itemized [LF, pgs. 48-55]. However, costs include items considered overhead per Local Rule 20-909 totaling \$984.61. Does Court wish to reduce outstanding cost request by this amount? JTD.
10. Need proposed distribution(s).
11. Need proof of service to Notice of Proposed Action re Sale of Real Property.
12. Notice given.
13. Proposed Order 03/07/17 does not include proposed distribution.

RECOMMENDATION:

Need to clear notes 7-11. If approved, set next hearing for receipts and final discharge for **05/22/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 16A ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **TRUSTS AND MOTIONS**

DATE: 05/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1601236

CASE NAME: THE FRANCISCO DE LA ROSA FAMILY IRREVOCABLE TRUST

SEE ALSO 11A

HEARING:

Motion Re: MOTION FOR AN ORDER TO TRANSFER PROCEEDING BASED ON
IMPROPER VENUE Filed by Petitioner RENATO A DE LA ROSA

COUNSEL:

HERMAN A DE LA ROSA

(PET)...THE LEGACY LAWYERS,

RENATO A DE LA ROSA

(PET)...THE LEGACY LAWYERS,

THE FRANCISCO DE LA ROSA FAMIL

(TRU)...

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIP

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500044

CASE NAME: ELLEN H. MANULLANG

HEARING:

FIRST Account and Report of SANDRA TOBING and Petition for allowance of fees filed.

COUNSEL:

SANDRA TOBING

(CPE)...JAMES B CHURCH & ASSOCIATES

ELLEN H MANULLANG

(CEP)...

GENERAL INFORMATION:

Continued from **01/31/17 and 04/18/17**. Counsel is to submit additional Information regarding conservatee's ability to return to her residence, status of conservatee's vehicle, and any renovations made.

Continued from 05/01/17.

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

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

1. Accounting period 05/14/15 to 05/13/16.
2. Assets on Hand \$255,227.50 consisting of \$3,727.50 in cash and \$251,500 in real and personal property.
3. Petitioner indicates that the current bond of \$20,000 is insufficient and requests bond be increased by \$13,000 for a new bond of \$33,000. Appears sufficient.
4. Petitioner requests compensation of \$5,243.58. Billed at \$25/hour for 301.55 hours. Itemized [LF, pgs. 33-37]. JTD.
 - a. Fee request include mileage totaling \$608.58 which is not allowed per Local Rule 20-1406. Does Court wish to disallow mileage fee? JTD.
 - b. **Petitioner requests that said fees in the amount of \$5,243.58 payable to Petitioner, Sandra Tobing, shall be a lien, with interest at the legal rate of 10%, against the residential real property of the conservatee located at 10655 Mountain View Avenue, Redlands, CA. JTD.**
5. **Petitioner requests reimbursement of costs advanced of \$768.59.**
6. Attorney requests fees of \$10,917.00. Billed at \$375/hour for 18.95 hours' attorney time and \$115-\$150/hour for 28.55 hours' paralegal time. Itemized [LF, pgs. 28-32]. **Attorney requests that said fees in the amount of \$10,917.00 payable to James**

B. Church of James B. Church & Associates, shall be a lien, with interest at the legal rate of \$10%, against the residential real property of the conservatee located at 10655 Mountain View Avenue, Redlands, CA

7. Attorney requests reimbursement of costs advanced of \$965.00. Itemized.
8. It is requested that the Court authorize payment for services provided to the Conservatee to become a lien against the real property of the Conservatee. It is understood that payment for services will not be received until sometime after the death of the Conservatee.
- 9. Supplement filed 04/13/17 with requested information filed 04/13/17.**
- 10. Need proof of service to supplement filed 04/13/17.**
11. ~Proposed Order 12/23/16.

RECOMMENDATION:

Need to clear note 10 then Court's discretion re: fees and bond. If approved, set hearing on the next accounting review for **08/01/17** (if one year) or **07/31/18**(if two years). Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

HEARING:

PROPOSED CONSERVATOR, KENIA ORENDAYN'S Account and Report of
KENIA ORENDAYN ISALDO and Petition for allowance of fees filed.

COUNSEL:

ASCENCION ISALDO DIAZ	(TP)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CARLOS ORENDAIN	(PCE)...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER

Request for Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED
Fee waiver amount due \$465.00 for first apt and ct rept on 04/15/15

Request for Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED
Fee waiver amount due \$930.00
\$465.00 for petition on 06/1/16
\$465.00 for accounting report on 03/21/17

VACATED per register of actions.

(nb)

FUTURE HEARING DATES:

06/19/17 Petition for APPOINTMENT OF CONSERVATOR PERSON/ESTATE

06/19/17 Kenia Orendayn's Account and Report/Petition

06/19/17 Petition for Appointment of Conservator

06/19/17 Petition for Appointment of Conservator 022717

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

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500116

CASE NAME: Robert Sanchez

SEE ALSO 19

HEARING:

Hearing Re: Termination of Conservatorship of the Estate

COUNSEL:

ROBERT SANCHEZ (CEP)...J BENJAMIN SELTERS III
SANDRA WILLIAMS (OBJ)...PRO/PER
SYLVIA VALENZUELA (PET)...AVILES & ASSOCIATES

Request for Waiver of Court Fees and Costs filed by SYLVIA VALENZUELA is GRANTED

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

GENERAL INFORMATION:

Continued from 03/14/17. Attorney Parker to submit a written report.

THIS CASE IS SET FOR HEARING ON OSC re Termination of Conservatorship of the Estate.

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

1. Matter set at hearing held on 01/03/17, as the only assets in the conservatorship of the estate are SSI funds.
2. All other monies and property are held in the SNT in LA County.
3. Court ordered Attorney Moses Aviles and his client Sylvia Valenzuela to be present at the 3/14/17 hearing.
4. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500116

CASE NAME: Robert Sanchez

SEE ALSO 18

HEARING:

Hearing Re: PETITION FOR AUTHORITY TO ALLOW TRUST ACTION

COUNSEL:

ROBERT SANCHEZ (CEP)...J BENJAMIN SELTERS III

SANDRA WILLIAMS (OBJ)...PRO/PER

SYLVIA VALENZUELA (PET)...AVILES & ASSOCIATES

Request for Waiver of Court Fees and Costs filed by SYLVIA VALENZUELA is GRANTED

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

Currently under review by Legal Research.

(LR)

Continued matter – notice not re-reviewed.

(nb)

Future Hearing:

10/17/17 Court Trial

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

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600040

CASE NAME: LUGENE ROBINSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROXANNE ROBINSON

COUNSEL:

LUGENE ROBINSON SR (CTP)...JAMES B CHURCH
ROXANNE ROBINSON (CP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by LUGENE ROBINSON SR is GRANTED

GENERAL INFORMATION

Roxanne Robinson appointed conservator of the person on 06/30/16.

Continued from **02/06/17**. The conservator and counsel state that Lugene Robinson went to Las Vegas for a visit with some of her children and they now will not return her to the custody of the Roxanne Robinson. Court orders that Lugene Robinson to be returned to Roxanne Robinson immediately.

Continued from **02/21/17**. Conservator presents to court the Conservatorship Documents filed in Las Vegas by conservator. Counsel offers to assist conservator in her attempts to have conservatee returned to her.

Continued from **04/18/17**. Counsel represents there is a guardianship matter filed in Las Vegas, Clark County which has been granted. Referred to Court Investigator for investigation and report. The Court investigator is to make effort to contact Las Vegas (Clark County) as it appears the family members who took Lugene Robinson Sr. without the consent of the caregiver have filed for guardianship and guardianship has been granted.

Continued from 05/01/17. Matter is continued. Attorney Church is going to try to contact the District Attorney Elder Abuse unit regarding the conservatee.

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 02/03/17, section 5 to proof of mailing is blank. Question if the Order Appointing Probate Conservator was also provided? JTD.
- 2 Need Statement of Care Plan in accord with Pr.C.§2352.5.
- 3 Determination of Conservatee's Appropriate Level of Care filed.

4 **CI report filed 04/19/17.**

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 05/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700115

CASE NAME: JORJINA ELIZABETH LOPEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JORJINA ELIZABETH LOPEZ (CEP)...PRO/PER

MARYHELEN LOPEZ (CP)...PRO/PER

GENERAL INFORMATION

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

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

1. Petitioner seeks civil rights not be limited without court order. JTD
2. Petitioner seeks powers under Pr. C. §2351.5 to access confidential records, to give or withhold medical consent, to make decisions re-education, the power to contract. Need verified supplement as to whether petitioner also seeks power to fix residence as indicated in Notice of Hearing Attachment 3(LF, pg4) filed 04/04/17.
3. Petitioner seeks medical powers. Capacity Declaration filed 04/03/17 is incomplete at items #1-2 re physician's name, address and telephone number. Need verified supplement.
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
- 6. Court Investigator report filed.**
- 7. Certificate of Completion of the Conservatorship Training Class filed.**
8. Return of Citation and Proof of Personal Service filed 04/04/17.
9. ~Proposed Form Order: 04/03/17

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **12/19/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: CIV DS1600795

CASE NAME: TAPIA VS RAMIREZ

f/s

HEARING:
Trial Setting Conference

COUNSEL:
ELAINE TAPIA (PLA)...SALLY ANNE COX
RICHARD RAMIREZ (DEF)...PRO/PER

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

XREF: PROPS1400857

No notes - TSC

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: CIV DS1610559

CASE NAME: RICHARD RAMIREZ -V- ELAINE TAPIA, ET AL

SEE ALSO 3

HEARING:

Motion Re: SUMMARY JUDGMENT AS TO HIS COMPLAINT Filed by
Plaintiff RICHARD RAMIREZ

COUNSEL:

ALEX RAMIREZ	()...
ELAINE TAPIA	(DEF)	...
ESTHER ARCHULETA	()...
JESSE RAMIREZ	()...
PATRICIA RAMIREZ	()...
RICHARD RAMIREZ	(PLA)	...PRO/PER
RUBY MACIAS	()...
RUDY RAMIREZ	()...
VALERIE RAMIREZ	()...

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

XREF: PROPS1400857

Currently under review by Legal Research.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: CIV DS1610559

CASE NAME: RICHARD RAMIREZ -V- ELAINE TAPIA, ET AL

SEE ALSO 2

HEARING:
Trial Setting Conference

COUNSEL:

ALEX RAMIREZ	()...
ELAINE TAPIA	(DEF)...	
ESTHER ARCHULETA	()...
JESSE RAMIREZ	()...
PATRICIA RAMIREZ	()...
RICHARD RAMIREZ	(PLA)...PRO/PER	
RUBY MACIAS	()...
RUDY RAMIREZ	()...
VALERIE RAMIREZ	()...

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

XREF: PROPS1400857

No notes - TSC

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: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000839

CASE NAME: JOSE M MARTIN

HEARING:
Accounting Review

COUNSEL:

JESUS J MARTIN	(PET)...MARIA G NICIFOROS
JESUS J MARTIN	(PET)...PRO/PER
JOSE M MARTIN	(DEC)...
M ELICENA BLANCO	(PET)...MARIA G NICIFOROS
M ELICENA BLANCO	(PET)...PRO/PER

GENERAL INFORMATION:
Continued from 02/28/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Status Report entered 02/23/16; account now due.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200258

CASE NAME: ESTATE OF GUADALUPE LOPEZ OJEDA

HEARING:

Hearing re Final Discharge

COUNSEL:

CARLOS R OJEDA	(PRO/PER
CRAIG PARKER	(PET)...CRAIG M PARKER
GUADALUPE LOPEZ OJEDA	(DEC)...
LINA MONTES	(PET)...CHO, SHEASBY, CHUNG &
MARIA E DOMINGUEZ	(TP)...PRO/PER

GENERAL INFORMATION:

Continued from 09/20/16, 11/29/16, 01/31/17 and 03/14/17.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on Second and Final Account entered 10/23/15.
2. Receipt filed.
3. **Ex-Parte Petition/Order for Final Discharge received on 05/09/17 affixes various attachments. Local Rule 20-614(d)**

RECOMMENDATION:

Need to clear note 3

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

HEARING:

SECOND Account and Report of ALEX HUANG and Petition for allowance of fees filed.

COUNSEL:

ALEX HUANG	(PET)...LAW OFFICES OF YVONNE HS U
CHIA HSIN HUANG	(DEC)...
J DAVID HORSPOOL	(PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

Continued from **01/10/17** at request of counsel. Notice to be given by Ms. Park.
Continued from 03/14/17 at request of Court for recently filed supplement to be reviewed. Notice waived.

THIS CASE IS SET FOR HEARING ON **Amended** (03/03/17) Second Account and Petition for Fees.

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

- 1. First accounting approved on 10/15/15. Proposed Order after Hearing received 03/3/17 is not complete in and of itself and does not include 3 lines of content. Local Rule 20-614. Need correction of same.**
- 2. Accounting period 05/06/15 to 05/31/16.**
- 3. Assets on Hand \$985,387.67 (carry value) consisting of real property and interests in several partnerships that own real property. However, beginning assets on hand do not match ending assets on hand of prior accounting of \$1,522,462.36. Need amended schedule(s).**
- 4. Amended Final Inventory and Appraisal affixed to amended accounting filed 03/03/17 [LF, p. 12].**
- 5. Statutory compensation will be requested at close of probate.**
- 6. Amended Summary of Account [LF, p. 6] charges and credits do not match. Need corrected summary.**
- 7. Petitioner requests costs advanced of \$31,197.99 for first accounting period and \$30,840.75 for the current period [LF, p. 10] when funds become available. However, Liabilities, Schedule B [LF, p. 10] reflects expenses carried over**

from last account period as \$19,697.99 which are not itemized. Need itemization of costs advanced for first account period via verified supplement..

8. Petitioner alleges the expenses incurred by the Petitioner in administering the Estate total \$30,840.75, as of 10/01/16, and have been advanced by Petitioner as there are currently no liquid assets. Need itemization on proper Schedule.
9. Petitioner states there are talks with a solar farm developer to sell the property at 48050 North 110th Street West, Lancaster, CA, 93536 in order to satisfy the liabilities of the estate.
10. Notice given.

RECOMMENDATION:

Need to clear notes. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review for **01/16/18**. 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
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400279

CASE NAME: Kikuyo Richardson

HEARING:

PETITION FOR FINAL DISTRIBUTION UPON WAIVER OF Account and
Report of KIM DAVIS and Petition for allowance of fees filed.

COUNSEL:

KIKUYO RICHARDSON (DEC)...
KIM DAVIS (PET)...DAVID D WADE

GENERAL INFORMATION

Continued from 03/16/17 at request of counsel. Notice to be given by Mr. Wade.

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Kim Davis, daughter.

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

1. Both heirs waive accounting.
2. Petitioner and attorney request statutory fees of \$9,830.98 each. Ok.
3. Attorney requests reimbursement of costs totaling \$2,222.68. Itemized [Acct.01/06 LFpg8].
4. ~Proposed order 01/06/17.
5. **Need notice as directed by court on 03/06/17.**

RECOMMENDATION

RFA subject to note 5. If approved, set hearing on the filing of receipts and final discharge for **03/22/18**.

(lc/nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

HEARING:

Probate status report filed.

COUNSEL:

ELAINE TAPIA	(PET)...	SALLY ANNE COX
PETRA AMADOR RAMIREZ	(DEC)...	
RICHARD RAMIREZ	(OBJ)...	PRO/PER

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

XREF: CIVDS1610559, CIVDS1600795

GENERAL INFORMATION:

Continued from **11/21/16**. Matter set to trail CIVDS1610559 and CIVDS1600795.

Continued from 02/27/17. Richard Ramirez advises court a motion for summary judgment was filed on related case CIVDS1610559 and is set for 05/16/17. This matter will be continued to be heard on that date. Notice waived.

THIS CASE IS SET FOR HEARING ON Status Report (filed 09/07/16).

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

1. Petitioner alleges the estate is not in a condition to be closed as there are numerous civil complaints being litigated that are preventing this administration from closing.
2. Petitioner does not specify the additional time in which to close the estate. Suggest 12 months.
3. 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.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require notice. If approved, set next Accounting Review for **11/27/17**.

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500578

CASE NAME: RONALD LLOYD CARROLL

HEARING:
Accounting Review

COUNSEL:
RONALD LLOYD CARROLL (DEC)...
WILLIAM M CARROLL JR. (PET)...MARIA G NICIFOROS

GENERAL INFORMATION:
Continued from 03/14/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Report of Status of Administration entered 11/15/16.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500698

CASE NAME: MARICELA CUEVAS

HEARING:

FIRST & FINAL Account and Report of MONICA FLORES and Petition
for allowance of fees filed.

COUNSEL:

MARICELA CUEVAS (DEC)...
MONICA FLORES (PET)...JASON L GAUDY

GENERAL INFORMATION:

Continued from 03/14/17 for recently filed supplement to be reviewed. The Court approves attorney fees and costs as requested.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Administrator, Monica Flores.

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

1. Accounting period 04/12/15 to 12/21/16.
2. Assets on Hand \$129,636.37 consisting of \$125,136.37 in cash and a 2003 GMC Sierra Truck.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$9,557.00. Calculated.
5. Attorney requests reimbursement of costs of \$1,403.00. Itemized [LF, p. 13].
6. Notice given.
7. Proposed order filed 01/05/17 reflects different amounts for cash on hand.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final distribution on **05/08/18**.

(nb)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501037

CASE NAME: CLARE IRENE BLOXHAM

HEARING:

Hearing Re: OSC RE: WHY ADMINISTRATOR SHOULD NOT BE SUSPENDED

COUNSEL:

CLARE IRENE BLOXHAM	(DEC)...
LIBERTY MUTUAL INSURANCE	(TP)...
MALCOLM VICTOR SMITH	(PET)...CRAIG E WILSON
SANDRA SPACHTHOLZ	(PET)...CRAIG E WILSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Suspension of Administrator, Sandra Spachtholz.

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

1. Matter set on 05/17/17, wherein, the Court set an OSC as to why administrator should not be suspended as a general petition of administration has not been filed.
2. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600670

CASE NAME: MTR OF DOROTHY THOMAS

HEARING:

FIRST & FINAL Account and Report of TONDRA HILL and Petition for allowance of fees filed.

COUNSEL:

DOROTHY THOMAS (DEC)...
TONDRA HILL (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Distribution by Administrator, Tondra Hill (daughter).

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

1. Accounting period 04/18/16 to 12/31/16.
2. Assets on hand \$312,717.77 consisting of \$12,717.77 in cash and remaining in carry value of \$300,00 in real property.
3. Petitioner requests statutory fees of \$9,289.87, Calculated.
4. Petitioner requests reimbursement of costs advanced of \$10,473.39. Itemized [LF, p. 14]. However, costs include payments for paralegal services totaling \$2,450.00 that are normally not allowed. JTD.
5. Petitioner requests authority to withhold a reserve in the amount of \$450.00.
6. Notice given.
7. ~Proposed Order 03/06/17 does not include assets on hand or statutory fees.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **05/22/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601289
CASE NAME: BENJAMIN O. CONTRERAS

HEARING:
Petition for LETTERS OF ADMINISTRATION W/ FULL IAEAA

COUNSEL:
BENJAMIN O CONTRERAS (DEC)...
DEPARTMENT OF CHILD SUPPORT SV ()...
ELIZABETH (TP)...DEPT OF CHILD SUPPORT
SALUD S MOTA (PET)...ZACHARY R. HAGENBUCH

X-Ref: CIVDS1615911

GENERAL INFORMATION:

Continued from 03/14/17/ Court clarifies for objector that this petition is solely to enable petitioner to handle pending litigation in a quiet title action. Matter continued for notice or waiver to be filed as to DCSS and for objector to consider whether she wants to withdraw her objection and file a competing petition.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Salud S. Mota

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

1. No bond requested as there are no known estate assets. JTD.
2. Petition filed to continue litigation against decedent prior to death. See x-ref matter.
3. Request for Special Notice by Dept of Child Support Service (DCSS) filed 01/24/17.
4. **Objections by Leticia Garcia (daughter) in the form of a declaration filed 03/10/17.**
5. **Declaration by Michael R. Schaefer in the form of a response filed 04/24/17 indicates no formal objection has been filed, nor have filing fees been paid. Declaration by Leticia Garcia does not identify assets belonging to the estate, and no competing petition has been filed.**
6. ~Proposed form Order: 12/30/16

RECOMMENDATION:

Matter is contested. If approved, set future hearing for Accounting/Status Review on **07/24/18**. Accounting to be filed 30 days in advance of hearing date. Note requirements of Local Rules 20-901 and 20-908 concerning account statements or verification letters.
(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700007

CASE NAME: MTR OF JOSEPH WILLIAM SCHLAGER

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JOSEPH WILLIAM SCHLAGER (DEC)...
KATHY VALERIE ACOSTA (PET)...T W RONALD DANIERI

VACATE – Bond filed on 04/28/17.

(nb)

Future Hearing:

05/22/18 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: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700227

CASE NAME: MTR OF NICHOLAS F KFOURY

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

NICHOLAS F KFOURY (DEC)...
STEPHEN KFOURY (PET)...DARLYNN MORGAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with LIMITED authority under IAEA by Stephen Kfoury (son)

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

1. Bond \$20,000, appears sufficient.
2. Supp. filed 04/25/17 requesting Limited authority under IAEA and \$20,000 bond; however, no Proof of Service filed. Does court wish to require an Amended Petition?
3. ~Proposed form Order: 03/06/17

RECOMMENDATION:

Need to clear note 2, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/24/17**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 05/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700228

CASE NAME: SAMUEL WILSON

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

MARGARET WILSON (PET)...PRO/PER
SAMUEL WILSON (DEC)...

Request for Waiver of Court Fees and Costs filed by MARGARET WILSON is GRANTED

GENERAL INFORMATION:

Ex Parte orders granted on 03/30/17, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA wife, Margaret Wilson

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

1. Petition indicates all beneficiaries waive bond instead of all heirs at section 2 [LF, p. 3]. Need waivers of bond by all 5 issue. Alternatively, suggest bond of \$130,000. JTD.
2. Need proof of publication.
3. Need Notice of Petition to Administer Estate with proof of service.
4. ~Proposed Form Orders/Letters 03/10/17.

RECOMMENDATION:

Need to clear notes then Court's discretion. If approved, set future hearing for Accounting/Status Review on **08/07/18**. 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

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200138

CASE NAME: MTR OF ASHLEY KERNS

HEARING:

Hearing Re: REQUEST TO TERMINATE CONSERVATORSHP

COUNSEL:

ASHLEY KERNS

(CEP)...MARK J. FLORY

BOBBIE KERNS

(CPE)...PRO/PER

JOHN KERNS

(CPE)...PRO/PER

GENERAL INFORMATION:

Continued from **10/21/16**. No appearances. Notice by Judicial Assistant.

Continued from 01/10/17 and 03/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Request to Terminate Conservatorship.

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

1. Matter set for hearing upon receipt and review of CI report filed 08/22/16 on the issues of conservatee's request to terminate conservatorship.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500115

CASE NAME: MARIA TOMASA TRUJILLO

SEE ALSO 17

HEARING:

Petition for Termination of Conservatorship and discharge of conservator

COUNSEL:

MARIA GRINDE (CPE)...R.M. SCHLOSSER
MARIA TOMASA TRUJILLO (CEP)...MATTHEW E. SHEASBY

Request for Waiver of Court Fees and Costs filed by MARIA GRINDE is GRANTED

***** COURT TO RULE ON FOLLOWING MATTER PRIOR TO ADDRESSING THIS HEARING*****

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Termination of Conservatorship and Discharge of Conservator Maria Grinde ["Petitioner"].

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

1. Petitioner indicates the conservatorship was sought to allow her to settle issues of Conservatee's burial plot in Mexico and requests termination of the conservatorship and discharge as conservator, alleging the conservatorship is no longer needed as all issues have concluded.
2. Initial petition filed on 05/01/15 requested medical and dementia powers due to conservatee's inability to care for herself. Question if a new proceeding for appointment of successor conservatorship will be filed? Need verified supplement.
3. Need Notice of Hearing with proof of service to include court-appointed counsel.
4. ~Proposed Order 03/30/17 does not comply with Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 2-3 then Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500115

CASE NAME: MARIA TOMASA TRUJILLO

SEE ALSO 16

HEARING:

Final Account and Report of MARIA GRINDE and Petition for allowance of fees filed.

COUNSEL:

MARIA GRINDE (CPE)...R.M. SCHLOSSER
MARIA TOMASA TRUJILLO (CEP)...MATTHEW E. SHEASBY

Request for Waiver of Court Fees and Costs filed by MARIA GRINDE is GRANTED

Fee waiver amount due \$1020.00

\$555.00 for Petition and temp on 05/01/15

\$465.00 for pet for termination on 03/30/17

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account by Conservator, Maria Grinde ["Petitioner"].

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

1. This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.
2. Need Notice of Hearing with proof of service to include court-appointed counsel.
3. ~Proposed Order 03/30/17 does not comply with Local Rule 20-614.

RECOMMENDATION:

Need proper, complete accounting per Pr. C. § 1060 et seq.

(nb)

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700047

CASE NAME: MTR OF GLADYS LAMRIA DIASMARA HUTAGAOL

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DIAN HUTAGAOL	(CP)...PRO/PER
GLADYS LAMRIA DIASM HUTAGAOL	(CTP)...JAMES B CHURCH
GRACE HUTAGAOL	(CP)...PRO/PER
HENDRICK HUTAGAOL	(CP)...PRO/PER

GENERAL INFORMATION

**Continued from 03/14/17 at request of IRC for 30 day extension to file report.
Attorney James Church appointed Counsel for Gladys Hutagaol.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Hendrik Hutagaol (father)

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

1. Petitioner seeks powers to fix residence, access confidential records, consent to marriage, enter contracts, select social/sexual contacts, make educational decisions under PR. C. §2351.5. JTD.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Proposed conservatee is developmentally disabled. **Need report of Counsel James Church.**
5. Proposed conservatee is developmentally disabled. **Need IRC report.**
6. List of Required Contacts filed 02/08/17 is missing relatives: Grant Hutagaol (brother) and Sri Subekti (grandmother). Need completed form.
7. **Return of Citation with Proof of Personal Service filed 03/02/17; however, need at least 15 days' notice.**
8. Need Notice of Hearing and proof of service.
9. Certificates of Completion of the Conservatorship Training Class from Hendrik and Dian Hutagaol filed.
10. **CI Report filed 03/06/17.**

11. Proposed form Order: 03/01/17

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review **12/19/17** 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)

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700118

CASE NAME: OMAR GAITAN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
OLGA PLASCENCIA (CP)...
OMAR GAITAN (CTP)...

GENERAL INFORMATION

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks order related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, to make and consent to medical decisions. JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed.**
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **IRC requests a 30-day continuance.**
7. List of required contact Information is missing Alfredo Gaitan (father) and Fatima (sister). Need completed form.
8. **Certificate of Completion of the Conservatorship Training Class filed.**
9. Need return of citation.
10. Need notice of hearing and proof of service.
11. CI Report filed 04/25/17.
12. ~Proposed Form Order: 04/04/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **12/19/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS00412

CASE NAME: MATTHEW RICHARD BENAVIDEZ

HEARING:

SIXTH REPORT OF CO-CONS. W/ WAIVER OF Account and Report of
FREDERICK MEIER, ANGEL BENAVIDEZ and Petition for allowance of
fees filed.

COUNSEL:

ANGEL BENAVIDEZ	(CPE)...MAUREEN MURATORE
ANGELICA MEIER	(PET)...MAUREEN MURATORE
COURT INVESTIGATOR, BARRY ESKI	(AGN)...PRO/PER
FREDERICK MEIER	(CPE)...MAUREEN MURATORE
MATTHEW RICHARD BENAVIDEZ	(CEP)...ALTHOUSE & MCDONOUGH
MATTHEW RICHARD BENAVIDEZ	(CEP)...PRO/PER
MATTHEW RICHARD BENAVIDEZ	(PCE)...SISSIE BARKER
RICHARD BENAVIDEZ	(OBJ)...CHRISTOPHER A POULOS

Request for Waiver of Court Fees and Costs filed by FREDERICK MEIER is GRANTED

Fee waiver amount due \$ 860.00

\$395.00 for petition on 12/30/11

\$465.00 for accounting fees on 02/11/13

Request for Waiver of Court Fees and Costs filed by FREDERICK MEIER, ANGEL
BENAVIDEZ is GRANTED

Fee waiver amount due \$465.00 for accounting on 03/23/15

CI waived fees \$1700.00

\$350.00 on 06/21/05

\$450.00 on 07/25/11

\$450.00 on 06/12/14

\$450.00 on 02/17/17

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Sixth Waiver of Account (Pr.C.§2628) by Co-
Conservators of the person and estate, Frederick Meier (step-father) and Angel Schaffer
(sister) (formerly Benavidez).

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

1. Accounting period 03/01/15 to 02/28/17.
2. Assets on hand \$368.27 in cash.
3. Petitioners waive compensation.
4. Petitioners have retained Maureen Muratore as their attorney of record and have agreed to compensate counsel from their private funds.
5. Petitioner requests a waiver of accounting as assets are less than \$15,000 and income was less than \$2,000 exclusive of public benefits.
6. CI report filed 01/31/17.
7. Petitioners request the Court enter an order waiving CI fees.
8. Petitioners request and order acknowledging Angel Benevidez has changed her name to Angel Shaffer; confirming the appointment of Angel Schaffer as Co-Conservator of the person and estate; and directing the issuance of revised Letters of Conservatorship in the name of Angel Shaffer. JTD.
9. Notice given.
10. ~Proposed Order 04/06/17.

RECOMMENDATION:

RFA. If approved, set hearing re next Accounting Review for **04/24/18** (if one year) or **04/23/19** (if two years). Accounting to be filed 30 days in advance.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS01379

CASE NAME: IN THE MATTER OF ALEX NOE LLAMAS

HEARING:
Accounting Review

COUNSEL:

ALEX NOE LLAMAS (CEP)...
MARIA LLAMAS (CP)...HARTNELL LAW GROUP
MARIA LLAMAS (CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON ACCOUNTING REVIEW

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

1. Order settling Eighth Account and Report entered 05/19/15
2. Ninth Account and Report now due

RECOMMENDATION

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

Page: 22 ADD ON

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700039

CASE NAME: GUZMAN VS JOHN

f/s

HEARING:
Hearing Re: Elder Abuse Restraining Order

	COUNSEL:
ELSA GUZMAN	(PP)...PRO/PER
JEAN JOHN	(RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Judge to decide.

Superior Court of Calif, County of San Bernardino

Page: 23 ADD ON

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

DATE: 05/16/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700040

CASE NAME: GUZMAN VS JOHN

f/s

HEARING:
Hearing Re: Elder Abuse Restraining Order

COUNSEL:
ELSA GUZMAN (PP)...PRO/PER
MARCK A JOHN (RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Judge to decide.