



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 05/18/17**

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.

4/14-05/12/17lc

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT **PROBATE**

-----  
DATE: 05/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

**SEE ALSO 2**

HEARING:  
Probate status report filed.

COUNSEL:  
BRYAN STEWART (PET)...LEAH L DIXON  
BRYAN STEWART (PET)...PRO/PER  
DAVID STEWART (DEC)...

GENERAL INFORMATION

**Continued from 03/16/17. No appearance. Bryan Stewart ordered to appear.**

THIS CASE SET FOR HEARING ON Status Report filed **01/17/17**.

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

1. Letters of Administration issued to Bryan Stewart, son, on 4/6/11, no bond.
2. Petitioner requests additional time to close the estate in order to liquidate assets.
3. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **08/24/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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DATE: 05/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

**SEE ALSO 1**

HEARING:

Probate status report filed.

COUNSEL:

BRYAN STEWART	(PET)...LEAH L DIXON
BRYAN STEWART	(PET)...PRO/PER
DAVID STEWART	(DEC)...

See notes on other matter.

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CASE#: PRO PS1300192

CASE NAME: MATTHEW FLOREZ SPECIAL NEEDS TRUST

**SEE ALSO 4**

HEARING:

Hearing Re: REPORT RE PAIN RELIEF ASSESSMENT/RECOMMENDATIONS

COUNSEL:

MATTHEW FLOREZ	(PET)...PRO/PER
MATTHEW FLOREZ S.N. TRUST	(TRU)...
RAQUEL FLOREZ	(PET)...JOHN F WEBER
RAQUEL FLOREZ	(TEE)...JOHN F WEBER
S.N. TRUST FOR MATTHEW FLOREZ	(TRU)...

**PROPS1300192 MATTHEW FLOREZ SPECIAL NEEDS TRUST**

GENERAL INFORMATION

**Continued from 03/01/17. Counsel advised that beneficiary has not submitted to an assessment for pain relief management. However, counsel further advised the trust is no longer purchasing medical marijuana for beneficiary. Purchase of a vehicle for \$3,000 authorized.**

THIS CASE SET FOR HEARING ON Re Pain Relief Assessment/Recommendations.

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

1. Matter set on 10/27/16 when court ordered Matthew Florez to undergo an assessment for pain relief management as a center such as Kaiser, Loma Linda Etc. Trustee to pay the remainder cost.

RECOMMENDATION

Inquire status.

(lc)

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CASE#: PRO PS1300192

CASE NAME: MATTHEW FLOREZ SPECIAL NEEDS TRUST  
**SEE ALSO 3**

HEARING:  
Accounting Review

COUNSEL:  
MATTHEW FLOREZ (PET)...PRO/PER  
MATTHEW FLOREZ S.N. TRUST (TRU)...  
RAQUEL FLOREZ (PET)...JOHN F WEBER  
RAQUEL FLOREZ (TEE)...JOHN F WEBER  
S.N. TRUST FOR MATTHEW FLOREZ (TRU)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> Trust Account of Trustee Raquel Florez approved on 10/21/16.
2. Need 3<sup>rd</sup> Account beginning with 03/01/16.

#### RECOMMENDATION

Inquire status.

(lc)

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CASE#: PRO PS1400361

CASE NAME: Renee Louise Ojjeda

HEARING: PETITION FOR FINAL DISTRIBUTION ON WAIVER Account and  
Report of MARIO OJIEDA and Petition for allowance of fees filed.

COUNSEL:  
MARIO OJIEDA (PET)...PRO/PER  
RENEE LOUISE OJIEDA (DEC)...

#### GENERAL INFORMATION

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

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

1. All heirs waive accounting.
2. Petitioner waives statutory compensation.
3. Only real property remains. Need specific distribution with percentages.
4. Proposed Order: 03/10/17; however, the distribution percentages appear to be stated only as to "any other property"; need specific for current real property asset. Submit after hearing.

#### RECOMMENDATION

Need to clear note 3. If approved, set hearing on the filing of receipts and final  
discharge for **05/24/18**.

(lc)

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CASE#: PRO PS1400722

CASE NAME: Paul John Scott

HEARING:  
Probate status report filed.

COUNSEL:  
KATHERINE SCOTT (PET)... FREDDIE VVEGA  
KIMBERLY ANN CHARTIER (PET)...BROWN WHITE & NEWHOUSE LLP  
PAUL JOHN SCOTT (DEC)...

GENERAL INFORMATION:  
**Continued from 10/31/16 and 01/19/17. Court notes Inventory and Appraisal filed.**

THIS CASE IS SET FOR HEARING ON Status Report.

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 completed Inventory and Appraisal has not been received from the probate referee. However, final inventory was filed 09/09/16.
2. Petitioner requests an additional 120 days to close the estate.

RECOMMENDATION:  
Court's discretion. If approved, set next Account Review for **11/16/17**.

(/lc)

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CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

**SEE ALSO 8**

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(PET)...BORDEN LAW OFFICE
CHRISTINA ERICKSON-TAUBE	(SPA)...BORDEN LAW OFFICE
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY G PRENTICE	(OBJ)...PETER R NASMYTH JR
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR

Status – No notes – JTD



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CASE#: PRO PS1500171  
CASE NAME: ANGELA LIZETTE ALBA

**SEE ALSO 7**

HEARING: Hearing Re: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(PET)...BORDEN LAW OFFICE
CHRISTINA ERICKSON-TAUBE	(SPA)...BORDEN LAW OFFICE
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY G PRENTICE	(OBJ)...PETER R NASMYTH JR
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR

GENERAL INFORMATION

Continued from **4/9/15** and **6/26/15** Bradley Damron appointed Special Administrator.  
Continued from **7/30/15**, **9/17/15** and **10/29/15** for parties to meet and confer. Jeffrey  
Prentice appointed GAL for Katherine Prentice.

**Continued from 1/20/16 and 03/16/16.**

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by Bradley Damron (fiancé)
- Petition 2 – Petition for Letters of Administration with full authority under IAEA by Jeffery Prentice (former spouse)

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

**Petitioner 1 – Bradley Damron, fiancé.**

1. Will waives bond.
2. Decedent left 3 minors age 13 and under.
3. **Objection and will contest filed on 03/25/15 by Jeffrey Prentice, former spouse. Need summons issued and set for hearing.**
4. **Answer to will contest filed by Good Deeds Inc. on 04/13/16.**
5. ~Proposed Form Order: 02/23/15.

**Petitioner 2 – Jeffrey Prentice, former spouse.**

1. Petitioner is seeking bond of \$296,000.

2. Decedent left 3 minors age 13 and under.
3. ~Proposed Form Order: 05/18/15.

#### RECOMMENDATION

Matter is contested; petitioner 1 appears to have higher priority. If approved, need determination re bond and set hearing for Accounting/Status Review on **07/26/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(lc/sa/lc)

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CASE#: PRO PS1500553

***Vacated***

CASE NAME: JOSE MENDEZ

HEARING: Accounting Review

COUNSEL:  
JOSE MENDEZ (DEC)...  
MARTHA MENDEZ (PET)...RANDAL P HANNAH

Future hearing dates: 08/02/17 Final Accounting by Martha Mendez

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CASE#: PRO PS1500752

**See also 10A, 10B**

CASE NAME: AMADO ALAS

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner JOHNNY  
ALAS

COUNSEL:

AMADO ALAS (DEC)...  
JOHNNY ALAS (PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Sam  
Wasserson.

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

1. Petitioner has subsequently filed a substitution of attorney on 03/15/17.

#### RECOMMENDATION

Matter appears to be moot.

(lc)

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DATE 05/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500752

**See also 10, 10B**

CASE NAME: AMADO ALAS

HEARING: OSC re Sanctions/Surcharge

COUNSEL:  
AMADO ALAS (DEC)...  
JOHNNY ALAS (PET)...SAMUEL R WASSERSON INC

GENERAL INFORMATION

**OSC set on 04/13/17 when there was no appearance or accounting filed.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Johnny Alas, son, sole heir, on 09/24/15; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. Substitution of attorney filed on 03/15/17.

RECOMMENDATION

Court's discretion re OSC. Inquire status. No bonding company to notice.

(lc)

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CASE#: PRO PS1500752

**See also 10, 10A**

CASE NAME: AMADO ALAS

HEARING:  
Accounting Review

COUNSEL:  
AMADO ALAS (DEC)...  
JOHNNY ALAS (PET)...SAMUEL R WASSERSON INC

See notes on other matter.

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/18/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600381

CASE NAME: MTR OF WINSTON HAYES

HEARING:  
Hearing Re: ISSUE OF ESTATE POWERS

COUNSEL:  
TANISCHIKA HAYES (CPE)...PRO/PER  
TANISHA HAYES (CPE)...PRO/PER  
WINSTON HAYES (CEP)...PRO/PER

#### GENERAL INFORMATION

**Continued from 04/13/17. Court conferred with counsel and Tanischika Hayes and noted that Las Vegas hearing was continued to 05/23/17. Court also noted that upon additional filing of a declaration regarding what steps Tanischika Hayes has taken to file in Las Vegas the Court will consider granting Tanischika Hayes the conservator of the estate.**

THIS CASE SET FOR HEARING ON Issue of Estate Powers.

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

1. Tanisha Hayes and Tanischika Hayes, daughters, appointed co-conservators of the person only on 03/16/17. Court reserved issue on estate powers. Court further ordered \$2,000 to be released from the trust to Tanisha Hayes to repair the fourplex.
2. Petitioner requests no bond per Pr.C. § 2323. Petition indicates estate assets consist of annual rental income of \$40,812 directly deposited into the trust [Pet.12/28 LFpg11].

#### RECOMMENDATION

Court's discretion.

(lc)

Future Hearing: 10/19/17 Compliance review hearing

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CASE#: PRO PS1700251

CASE NAME: Donna Lee Campbell

HEARING:

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

COUNSEL:

DONNA LEE CAMPBELL (DEC)...  
HOLLY A. PARKER (PET)... DOMINIC E RAINO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Holly A. Parker (daughter)

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

1. Both heirs waive bond; however, need to use mandatory form DE-142.  
Estimated net value of estate is \$172,000. Court also has discretion to require  
bond per Pr. C. § 8481(b). JTD
2. ~Proposed form Order: 03/20/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status  
Review on **07/26/18**. Any accounting to be filed 30 days in advance. Note  
requirements of Local Rules.

(lh)



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CASE#: SPR SS06802

CASE NAME: EST OF MARY JANE WILSON

HEARING:  
Hearing Re: STATUS CONFERENCE

COUNSEL:

MARY JANE WILSON	(DEC)...
PATRICIA J O'NEIL	(PET)...HARTNELL LAW GROUP
PATRICIA J O'NEIL	(PET)...MARTIN E KELLER
PATRICIA J O'NEIL	(SA )...KELLER & KELLER
RICHARD DONELLA	(TP )...PRO/PER
WILLIAM F O'NEIL	(PET)...MARTIN E KELLER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Conference.

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

1. Matter set on 02/16/17 hearing to Determine Title and for Surcharge etc. Any objections to be filed by 03/09/17 and Martin Keller to personally appear on 05/18/17.

RECOMMENDATION

Inquire status.

(lc)

Future hearing dates: 09/28/17 Determine Title and Surcharge 09/28/17 Status Report  
– Readiness 10/23/17 Trial Day 1, 4 days total

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

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DATE: 05/18/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

HEARING:

Motion Re: RESPONDENT SUN WEST MORTGAGE CO NTC OF DEMURRER  
AND DEMURRER TO FIRST AMENDED PTN Filed by Petitioner SUN WEST  
MORTGAGE COMPANY INC

COUNSEL:

BILL GAUDREAU	(	)...
CAROL KILLEN	(	)...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	(	)...
ROBERT GAUDREAU	(	)...
STEPHANIE GAUDREAU	(	)...
STEVEN GARUDRAU	(	)...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(RES)...	

No notes – JTD

**Petitioner Heidi Hutley filed DISMISSAL as to SUN WEST on 05/01/17.**

LR/pjv

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/18/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700242

CASE NAME: THE PATSY LOU VANDENBOSCH TRUST

HEARING:  
Petition for INSTRUCTIONS

COUNSEL:  
JUDY K CHOAT (PET)...DAVID GRIGOLLA  
THE PATSY LOU VANDENBOSCH TRUS (TRU)...

Currently under review by legal research

(LR)

30 day Notice sufficient.

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DATE: 05/18/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700111

CASE NAME: JIMMY OROZCO

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
AUSTREBERTO OROZCO (PET)...PRO/PER  
JIMMY OROZCO (CEE)...  
MARIA OROZCO (PET)...PRO/PER

#### GENERAL INFORMATION

Ex parte orders entered 04/05/17. Court accepts petitioner's oral request to modify their petition to remove authorization for estate powers. Maria Orozco and Austreberto Orozco appointed temporary guardians.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Maria Orozco/Austreberto (parents)

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

1. No bond requested as proposed conservatee's only assets are SSI benefits. Petitioners are the representative payees; question need for estate powers.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
4. Petitioners do not seek medical powers; however, indicate medical treatment in Petition, item 9. Need verified supplement if seeking medical powers.
5. Capacity Declaration filed 04/17/17 is incomplete at item #4 as to name of proposed conservatee and whether a patient under continuing treatment. Need verified supplement.
6. List of Required Contacts (Local form SB-12224) is missing Antonio Meza Gonzalez (grandfather). Need same.
7. Need Court Investigator report.
8. Need Certificate of Completion of the Conservatorship Training Class.

9. Need return of Citation
10. ~Proposed Form Order: 03/29/17

#### RECOMMENDATION

Need to clear notes 4-9. If approved, set hearing for Compliance Review for **12/21/17** for the filing of the required documents and hearing re Accounting Review for **07/26/18**. Any accounting to be filed 30 days in advance.  
(lh)

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HONORABLE: STANFORD E. REICHERT **PG**

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DATE: 05/18/17 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS00376

CASE NAME: IN THE MATTER OF ANGELA PADILLA

HEARING:  
Accounting Review

COUNSEL:  
ANGELA PADILLA (CEP)...HARTNELL LAW GROUP  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION  
Letters expire 11/11/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 11<sup>th</sup> Waiver of Account for Public Guardian approved on 07/15/16.
2. Need 12<sup>th</sup> Account beginning with 03/01/16.

RECOMMENDATION  
Inquire status. Continue to **Monday hearing as this is a Public Guardian** case.

(lc)

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

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DATE: 05/18/17 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1400251

CASE NAME: Rodney Rogers & Lacey Rogers Family Trust

HEARING:

Hearing Re: COURT TRIAL (FOURTH 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)...	

Trial – No notes – JTD

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

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DATE: 05/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIV RS1400249

CASE NAME: MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON

HEARING:

Hearing Re: OSC re Settlement

COUNSEL:

ARROWHEAD CREDIT UNION	(CC )...KNAPP, PETERSEN &
ARROWHEAD CREDIT UNION	(KNAPP, PETERSEN & CLARKE
DAVINA MICHELLE PATTERSON	(DEF)...PRO/PER
DAVINA MICHELLE PATTERSON	(PRO/PER
MERCEDES MURRAY AND MONICA MUR (PLA)...OSBORN	LAW

**XREF: PROPS1300718**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Settlement

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

1. Matter set on 03/30/17 when parties stated they are in negotiations in the civil matter.

RECOMMENDATION

Inquire status.

(lc)



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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 05/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400336

CASE NAME: William John Wallace Chadwell

HEARING:  
Accounting Review

COUNSEL:  
ANGELINA IBBOTSON (OBJ)...RICHARD A HIGBIE  
STEELE ROCKWELL CHADWELL (PET)...ENTERPRISE COUNSEL  
WILLIAM JOHN WALLACE CHADWELL (DEC)...

GENERAL INFORMATION  
**Continued from 10/20/16 and 02/16/17.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Steele R Chadwell, son, on 11/10/15; full authority, \$20,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION  
Inquire status.

(lc)

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CASE#: PRO PS1400404  
CASE NAME: MTR OF RONALD HARVEY GREEN  
HEARING: REPORT OF ADMINISTRATOR ON WAIVER Account and Report  
of EMILY S GREEN and Petition for allowance of fees filed.

COUNSEL:

BARBARA EISENBEISZ	(PET)...JAMES B CHURCH
EMILY S GREEN	(PET)...GUY A BOVEE
EMILY S GREEN	(PET)... RIPLEY & ASSOCI
MELVIN FRIEDLAND	(PET)...MELVIN L FRIEDLAND
RONALD HARVEY GREEN	(DEC)...

Request for Waiver of Court Fees and Costs filed by EMILY S GREEN is GRANTED  
Fee waiver amount due \$930.00 \$465.00 for petition on 05/19/14 \$465.00 for report of sale on  
10/08/15 Request for Waiver of Court Fees and Costs filed by MELVIN FRIEDLAND is  
GRANTED Fee waiver amount due \$465.00 for petition for atty fees on 07/20/16

***XREF: CONPS1500259 (heir Brook Green; matter 10).***

GENERAL INFORMATION

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

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

1. Petitioner will receive \$92,428.81 in cash. Does court wish to revisit filing fees waived? JTD
2. Petitioner and attorney requests statutory fees of \$14,754.64 each. Ok.
3. Petitioner seeks a reserve of \$5,000.
4. Petitioner to direct personal representative to distribute Brook Green's share of estate to SNT granted on 08/30/16. Order sent to dept for signature on 04/27/17.
5. Petitioner seeks attorney fees of \$6,615 for Sandy Turner re Brook Green's conservatorship case be taken off her distributive share. JTD
6. All heirs waive accounting; however, need waiver for Brook Green (through her Conservator Barbara Eisenbeisz).
7. Need bank statement to support attachment 1 of the Inventory and Appraisal per local rule 20-908. Alternatively, need attachment 1 appraised by referee as the description is not clear as to cash.
8. Need notice of hearing and proof of service.

---

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

9. Proposed order submitted 05/10/17; however, need allegations re taxes, Creditor's Claims, separate property, specific distribution, property on hand, specific heirs..all orders must be complete in themselves. Local rule 20-614.

#### RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing on the filing of receipts and final discharge for **05/24/18**.

(lc)

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CASE#: PRO PS1400815  
CASE NAME: MARIA C ACEVEDO  
HEARING: (AMENDED) FINAL Account and Report of MIGUEL BARRIOS  
ACEVEDO and Petition for allowance of fees filed.

COUNSEL:  
MARIA C ACEVEDO (DEC)...R  
MIGUEL BARRIOS ACEVEDO (PET)...PRO/PER

Waiver of Court Fees and Costs filed by MIGUEL BARRIOS ACEVEDO is GRANTED **FILING FEES  
2014-2016 TOTAL \$930.00**

#### GENERAL INFORMATION

**Previous accountings continued from 05/09/16, 07/18/16, 10/17/16 and 03/15/17.  
Parties are urged to consult with counsel.**

THIS CASE IS SET FOR HEARING ON **Amended (03/13/17)** Final Account and  
Report by Miguel Acevedo, spouse.

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

1. Petitioner waives statutory compensation.
2. Amended accounting is not verified per Pr.C. § 1021. Need same.
3. Petitioner requests accountings be waived. Petitioner provides bond waivers; however, need waivers of account by all heirs: Cesar, Miguel, Yvette and Elizabeth Acevedo.
4. Petitioner appears to have distributed the real property to Cesar Acevedo, son. However, petitioner had no authority to distribute the real property to anyone without a court order. [Sup. 04/19 LFpg 4]. There also appears to be 3 other children and no assignments of interest. Court to may wish to direct petitioner to transfer the real property back to the estate.
5. Proposed distribution excludes petitioner and the other 3 children. See note 4.
6. Need residual distribution clause.
7. No statement regarding Creditor's Claims. Seven (7) Creditor's Claims filed.
8. Need statement regarding debts being paid.
9. Need statement regarding character of estate property, sole and separate etc.
10. Need notice to Franchise Tax Board. Notice not attached to supplement.
11. Need Notice of Hearing as to amended accounting.
12. Proposed Order 10/14/16 and 1/04/17 are incomplete and do not comply with Local Rule 20-614.

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

RECOMMENDATION:

Need amended account with proper full report. If approved, set Accounting/Status Review for **05/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(/lc)

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CASE#: PRO PS1500525

CASE NAME: PHYLLIS CAROL BECKLUND

HEARING:

Motion Re: FOR RESTRAINING ORDER Filed by Petitioner ANGELA  
MCVEIGH

COUNSEL:

ANGELA MCVEIGH	(PET)...PRO/PER
KIM COOPER	(PET)...MATTHEW E. SHEASBY
PHYLLIS CAROL BECKLUND	(DEC)...

No notes – JTD

Future Hearing:

05/30/17 Hearing re: Restraining order

07/18/17 Final Discharge

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CASE#: PRO PS1600744

CASE NAME: MTR OF ALICE L WALL

HEARING:

FIRST AND FINAL Account and Report of JENNIFER JUNE WALL WALSTEN  
and Petition for allowance of fees filed.

COUNSEL:

ALICE L WALL (DEC)...  
JENNIFER JUNE WALL WALSTEN (PET)...LUELLA G HAIRSTON

#### GENERAL INFORMATION

**Continued from 03/30/17.**

THIS CASE SET FOR HEARING ON Final Account of **Special Administrator** by  
Jennifer June Wall Walsten, daughter.

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

1. Letters of special Administration issued to June Wall Walsten on 10/28/16;  
**general letters** Testamentary issued 01/10/17; \$638,000 bond.
2. Assets on hand \$500,857.42
3. Partial and reappraisal for sale filed 03/23/17.
4. Accounting period not stated. Need same to begin with date of death.
5. Summary of account does not comply with Pr.C. § 1061. Need proper summary  
of account and schedules.

#### RECOMMENDATION

Need to clear notes 4&5. If approved, set Accounting/Status Review for **04/05/18**.  
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of  
local rule 20-908.

(lc)

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CASE#: PRO PS1600784  
CASE NAME: RUTH ESTER JAMES  
HEARING: Petition for AMENDED PROBATE OF WILL AND FOR LETTERS  
TESTAMENTARY

COUNSEL:  
JANET M PENNMORRIS (PET)...QUINTON  
RUTH ESTER JAMES (DEC)...

#### GENERAL INFORMATION

Letters of special Administration issued to petitioner on 12/28/16. **Petitioner authorized to list real property for sale.**

THIS CASE SET FOR HEARING ON **Amended** Petition for Probate, Letters Testamentary with Full Authority under IAEA Janet Penn-Morris, daughter.

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

1. Will waives bond. Net value of estate is \$215,735.44 of which \$2,735.44 is cash. JTD
2. Notice to Petition to Administer Estate and proof of service filed 04/27/17; however, section 4 is incomplete as to probate of a will. Need corrected notice.
3. Will is not self-proving and not signed "under penalty of perjury under the laws of the State of California." Need Proof of Subscribing Witness either on mandatory judicial council form DE-131. Proof filed 11/21/16 is not sufficient.
4. Will is witnessed by petitioner and a notary. In order to take under the will, petitioner must rebut presumption that the devise to her fails Pr.C. § 6112(c). Need verified supplement with points and authorities.
5. ~Proposed Form Order: 08/09/16.

#### RECOMMENDATION

Need to clear notes 2-4. If approved, set Accounting/Status Review for **07/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)



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CASE#: PRO PS1601096

CASE NAME: MTR OF KENNETH GENE CROSSWHITE JR

HEARING:

Petition for (AMENDED) PETITION TO DETERMINE SUCCESSION TO REAL  
PROPERTY

COUNSEL:

KENNETH GENE CROSSWHITE III (PET)...PRO/PER  
KENNETH GENE CROSSWHITE JR (DEC)...

#### GENERAL INFORMATION

**Continued from 10/05/17, 02/23/17 and 03/30/17 to file supplement.**

THIS CASE SET FOR HEARING ON **Amended** Petition to Determine Succession to Real and Personal Property by children Kenneth, Ashia and Candice Crosswhite.

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

1. Petitioners seek 100% interest, 1/3<sup>rd</sup> each, in the decedent's 100% interest in real property.
2. Petition indicates personal property in the caption; however, original Inventory and Appraisal does not state personal property and is not dated. Need amended Inventory and Appraisal filed with petition that is signed and dated by all petitioners.
3. Petitioner used 1998 form. Need updated form.
4. Need attachment with legal description of property.
5. Need amended order.

#### RECOMMENDATION

Need to clear notes 3-5.

(lc)

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CASE#: PRO PS1700045

CASE NAME: MTR OF EFREN MICHAEL SALAZAR

HEARING:

Petition to determine succession to Real Property

COUNSEL:

EFREN MICHAEL SALAZAR (DEC)...  
MELANIE VANESSA SALAZAR (PET)...KELLIE

GENERAL INFORMATION

**Continued from 03/23/17.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal property per Pr.C. §13151 by Melanie Salazar, daughter.

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

1. Petitioner seeks 100% interest in the decedent's 100% interest in real property per intestate succession and assignments of interest.
2. No proposed order.

RECOMMENDATION

RFA.

(lc)

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CASE#: PRO PS1700060

CASE NAME: MTR OF PATRICK M SEYMOUR

HEARING:  
Hearing Re: Posting of Bond

COUNSEL:  
JAMES L LEESTMA (TP )...JAMES L LEESTMA  
MELISSA R POLSON (PET)...MARK MOKTARIAN  
PATRICK M SEYMOUR (DEC)...

GENERAL INFORMATION:  
**Continued from 05/02/17.**

THIS CASE IS SET FOR HEARING ON Posting of Bond

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

1. Melissa R. Polson step-daughter appointed executor on 04/04/17, full authority, \$100,000 bond.
2. Need proof of bond.

RECOMMENDATION:  
Need bond,  
(/lc)

Future Hearing: 06/05/18 *Accounting Review.*

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CASE#: PRO PS1700076

CASE NAME: ALBERT JEAN GOOVAERTS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ALBERT JEAN GOOVAERTS (DEC)...  
THEA BIRRER (PET)...ROBERT R BOWNE II

GENERAL INFORMATION

**Continued from 03/30/17.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal property Pr.C. § 13151 by Thea Birrer as Trustee.

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

1. Petitioner, Trustee, is seeking 100% interest in decedent's 100% interest in real and personal property per terms of the will.
2. ~Proposed Form Order: 01/24/17.

RECOMMENDATION

RFA.

(lc)

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CASE#: PRO PS1700146

***Vacated***

CASE NAME: BARBARA J CRAVEN

HEARING:  
Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:  
BARBARA J CRAVEN      (DEC)...  
GUAY P WILSON      (PET)...GUAY P WILSON

Bond filed 04/28/17.

Future Hearing: 06/28/17 *Accounting Review.*

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DATE: 05/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0800115

CASE NAME: ROBERTA EILEEN GOSNEY

HEARING:

Hearing Re: Bond Review

COUNSEL:

DONALD NICKEL	(OBJ)...BUXBAUM & CHAKMAK
EILEEN B. GOSNEY	(PCR)...DOUGLAS M. GEE
ROBERT TEMPLE	(CPE)...LENITA A SKORETZ
ROBERTA EILEEN NICKEL	(CEP)...WILLIAM P LEAMY
ROLLIN R. GOSNEY	(PCR)...DOUGLAS M. GEE

GENERAL INFORMATION

**Continued from 05/04/17. No appearance. Counsel to be present if bond not filed.**

THIS CASE SET FOR HEARING ON Bond Review.

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

1. On 04/03/17 22<sup>nd</sup> account, Court ordered an increase of bond of \$220,000 for a total bond of \$2,972,000. Need amended proposed order.
2. Need bond.

RECOMMENDATION

Inquire status of order and bond.

(lc)

Future Hearing: 01/28/18 *Accounting Review.*

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CASE#: CON PS1500259

CASE NAME: BROOK GREEN

HEARING:  
Hearing Re: Status of Funding of SNT

COUNSEL:  
BARBARA EISENBEISZ (PET)...JAMES B CHURCH  
BROOK GREEN (CEE)...  
BROOK GREEN (PCE)...  
SANDY TURNER (PET)..

***XREF PROPS1400404 (Estate of Harvey Green; matter 3)***

Status – No notes – JTD

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CASE#: CON PS1600074

CASE NAME: MTR OF FANNIE ESTELLA BAILEY  
**SEE ALSO 12**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of VIVIAN E JEMISON

COUNSEL:

FANNIE ESTELLA BAILEY	(CEE)...J. DAVID HORSPOOL
FANNIE ESTELLA BAILEY	(CTP)...J. DAVID HORSPOOL
JAMES BOLDEN	(CPE)...PRO/PER
VIVIAN E JEMISON	(CP )...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Vivian Jemison, daughter, appointed Conservator on 10/03/16; person only.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/06/16..
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 12/06/16.

RECOMMENDATION

None.

(lc)



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CASE#: CON PS1600074

CASE NAME: MTR OF FANNIE ESTELLA BAILEY  
**SEE ALSO 11**

HEARING:  
Hearing Re: RECEIPT OF GAL REPORT/STATUS

COUNSEL:  
FANNIE ESTELLA BAILEY (CEE)...J. DAVID HORSPOOL  
FANNIE ESTELLA BAILEY (CTP)...J. DAVID HORSPOOL  
JAMES BOLDEN (CPE)...PRO/PER  
VIVIAN E JEMISON (CP )...PRO/PER

GENERAL INFORMATION

**Continued from 01/05/17 and 03/02/17. No appearance.**

THIS CASE SET FOR HEARING ON Receipt of GAL report/Status.

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

1. Vivian Jemison, daughter, appointed Conservator on 10/03/16; person only.
2. Jack Osborn appointed GAL for conservatee. Report filed 01/05/17.

RECOMMENDATION

Court's discretion.

(lc)

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CASE#: CON PS1600225  
CASE NAME: MTR OF AYHAM KAREEM JLELATI

**SEE ALSO 12B**

HEARING: Petition for APPOINTMENT OF PROBATE CONSERVATOR OF  
THE PERSON

COUNSEL:

ABDUL JLELATI (CP )...PRO/PER  
AYHAM KAREEM JLELATI (CTP)...JENNIFER M DANIEL  
BASSIMAH A AYOUBI (CP )...PRO/PER

GENERAL INFORMATION

**Continued from 10/20/16.** Jennifer Daniel appointed counsel.

**Continued from 01/05/17.** Oral report given by Jennifer Daniel. Matter continued for proposed conservatee to be served.

**Ex parte hearing held 01/05/17.** Matter will be continued to be hearing along with the petition for appointment of conservator on 01/10/17.

**Continued from 01/10/17.** Oral report given by Jennifer McDaniel. Matter continued to serve proposed conservatee.

**Ex parte hearing held 01/10/17.** Oral report given by Jennifer McDaniel.

**Ex parte hearing held 03/23/17.** Court appoints Attorney Mitchell Roth as the Guardian Ad Litem for Ayham Kareem Jlelati. Court orders Ayham Jlelati not to be removed from his current placement in Kansas without prior court approval.

Continued from 03/28/17. Matter continued to be heard with competing petition [by Abdul Jlelati, father].

**Continued from 04/24/17. Pending meeting with IRC.**

THIS CASE SET FOR HEARING ON

- **Petition - 1** by Bassimah Ayoubi (mother) for Appointment of *Limited* Conservator, person only
- **Petition -2** by Abdul Jlelati (father) for Appointment of Conservator, person only

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

**Petitioner-1 by Bassimah Ayoubi (mother)**

1. Petitioner seeks medical powers. Need Capacity Declaration.
2. Proposed conservatee is developmentally disabled. Report of Counsel Daniel filed 12/23/16.

3. Proposed conservatee is developmentally disabled. IRC report filed 10/19/16.
4. List of required contacts (Local form SB-12224) does not appear to list all relatives in second degree: **Court to inquire.**
5. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
6. Petitioner seeks civil rights not be limited without court order. However, attachment 1j is not filed. Need same.
7. Declaration filed by petitioner on 12/23/16 with attached IPP program. [Dec.12/23 LFpg6-22].
8. Need return of Citation.
9. Need notice of hearing and proof of service for general hearing.
10. Certificate of Completion of the Conservatorship Training Class filed 11/03/16.
11. Court Investigator report filed 03/21/17.
12. ~Proposed Form Order: 08/01/16.

**Petitioner -2 by Abdul Jlelati (father) filed 03/17/17**

1. Proposed conservatee is developmentally disabled. Does court wish to deem this petition as a petition for limited conservatorship? JTD
2. Proposed conservatee resides at a special needs facility in Wichita, Kansas.
3. Petition does not request medical powers, yet indicates proposed conservatee lacks capacity for medical treatment in section 9 [LF, pg7]. Need verified supplement clarifying whether medical powers are sought. If so, need Capacity Declaration.
4. Need report of Attorney Mitchell Roth (GAL).
5. Need Certificate of Completion of the Conservatorship Training Class.
6. Need return of Citation.
7. Notice of Hearing and proof of service filed 03/27/17 & 05/08/17. However, did not serve copy of petition with notice; proof of service is incomplete at section 2 as to server's address; need to include 30 days' notice to Inland Regional Center.
8. Court Investigator report filed 03/21/17.
9. ~Proposed Form Order: 03/17/17

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **12/21/17** 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  
(lc/lh/nb/lh/)

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CASE#: CON PS1600225

CASE NAME: MTR OF AYHAM KAREEM JLELATI  
**SEE ALSO 12A**

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
ABDUL JLELATI (CP )...PRO/PER  
AYHAM KAREEM JLELATI (CTP)...JENNIFER M DANIEL  
BASSIMAH A AYOUBI (CP )...PRO/PER

See notes on previous matter.

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CASE#: CON PS1700106

CASE NAME: JUAN MERCADO GONZALEZ

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
MA VIRGINIA MERCADO (PET)...PRO/PER  
JUAN MERCADO GONZALEZ (CEE)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Ma Virginia Mercado (daughter)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/28/17 is incomplete at items #1-2 as to physician's general information, items 9 (a) and 9(b) are not checked; no date at signature on page two of form. Need completed form.
2. Petitioner seeks dementia powers. Need appointment of counsel for report.
3. Need Court Investigator report.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need return of Citation.
6. Need Notice of Hearing and Proof of Service.
7. ~Proposed Form Order: 03/28/17

#### RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **12/21/17** 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)

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DATE: 05/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700124  
CASE NAME: MTR OF CHARLES RAYMOND SMITH  
HEARING: Petition for Appointment of Conservator

COUNSEL:  
CHARLES RAYMOND SMITH (CEP)...  
TIFFANY ANN SMITH (CPE)...PRO/PER

#### GENERAL INFORMATION

Ex parte orders entered 04/13/17. Tiffany Smith appointed temporary conservator of person. Walter Moore appointed as GAL.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Tiffany Smith (granddaughter-in-law)

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

1. Need notice of hearing and proof of service.
2. Petitioner requests no bond but did not include Attachment 1c stating reasons. Suggested bond \$69,300.
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Petitioner does not seek dementia powers. However, alleges proposed conservatee has dementia and requires medication. Need verified supplement clarifying whether dementia powers are requested. If so, so need appointment of counsel for report.
5. Petition is incomplete at item #5e as to confidential Supplement Information; 5(f) as to whether proposed conservatee is developmentally disabled, and item 9 as to medical treatment of conservatee. Need verified supplement.
6. Need report of Walter T. Moore, GAL.
7. Need Court Investigator report.
8. Need List of Required Contact Information (Local form SB-12224).
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need return of Citation.
11. ~Proposed Form Order: 04/07/17

#### RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **12/21/17** for the filing of the required documents and hearing re Accounting Review for **07/26/18**  
Any accounting to be filed 30 days in advance.

(lh)

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CASE#: PRO PS1400012

CASE NAME: Joe Edward Bush

HEARING: Accounting Review

COUNSEL:  
APPROVED INHERITANCE CASH, INC (PRO/PER  
JOE EDWARD BUSH (DEC)...  
REGINA D HOLT (PET)...  
STANLEY FOREMAN (APP)...HORSPOOL & HORSPOOL  
STANLEY FOREMAN (JOHN W SHORT

***XREF: PROPS1100186, CONPS0800284***

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of ***Special*** Administration issued to Regina Holt, niece on 08/07/15 and ***general letters Testamentary*** issued 03/17/17; full authority, no bond. Remainder of funds are to remain in blocked account until it can be determined whether or not there are any outstanding creditors.
2. Need accounting or status report.

#### RECOMMENDATION

Inquire status.

(lc)

Future hearing dates: 08/03/17 Motion to be relieved as counsel Carmen Qualls re Regina Holt.

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CASE#: RC RS00386

CASE NAME: ELIZABETH ANDERSON

HEARING:

Accounting Review

COUNSEL:

ELIZABETH ANDERSON (PCE)...MARK J. ANDREW FLORY  
KENT ANDERSON (PCR)...CHRISTOPHER A POULOS  
LINDA ANDERSON (PCR)...CHRISTOPHER A POULOS

#### GENERAL INFORMATION

Continued from 12/01/16 and 02/02/17. Conservators nor Counsel appeared. Court suspended powers of Conservators and ordered Christopher Poulos and his clients to appear. Linda and Kent Anderson to personal appear.

**Continued from 03/23/17. Attorney Flory indicated he cannot locate his client.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Previous account for Linda and Kent Anderson dispensed Account approved on 05/29/15.
2. Need next Account/waiver beginning with 10/02/14.

#### RECOMMENDATION

Inquire status.

(lc)



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CASE#: SC SS01254

CASE NAME: IN THE MATTER OF ALLEN RHAJIVE CARABALLO

**SEE ALSO 18, 19**

HEARING: Hearing Re: FIRST CURRENT Account and Report OF EDUARDO Y GONZ

COUNSEL:

ALLEN RAHJIVE CARABALLO	(CEP)...MITCHELL I ROTH
ALLEN RAJHIVE CARABALLO	(CEP)...HORSPOOL & H ORSPOOL
AMERICAN CONTRACTORS INDEMNITY (TP )	...LANAK & HANNA
ARDIS ENRIGHT	(CPE)...PRO/PER
EDUARDO Y GONZALEZ LOPEZ	(CPE)...PRO/PER
VERLENE CAMERON	(CPE)...JOHN D MICKUS

See notes on matter 19.

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DATE: 05/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS01254

CASE NAME: IN THE MATTER OF ALLEN RHAJIVE CARABALLO  
**SEE ALSO 17, 19**  
HEARING: Petition for CONSERVATORSHIP FEES

COUNSEL:

ALLEN RAHJIVE CARABALLO	(CEP)...MITCHELL I ROTH
ALLEN RAJHIVE CARABALLO	(CEP)...HORSPPOOL & H ORSPOOL
AMERICAN CONTRACTORS INDEMNITY (TP )	...LANAK & HANNA
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G
ARDIS ENRIGHT	(CPE)...PRO/PER
EDUARDO Y GONZALEZ LOPEZ	(CPE)...PRO/PER
RON OLUND	(CE )...J. DAVID HORSPPOOL
RON OLUND	(SC )...J. DAVID HORSPPOOL

GENERAL INFORMATION

Hearing advanced from 05/01/17.

THIS CASE SET FOR HEARING ON Petition for Conservatorship Fees by Eduardo Gonzalez Lopez, cousin.

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

1. Petitioner seeks conservatorship fees of \$75,000 in payments of \$4,000 per month. Itemization appears to be \$119,313 for 954.5 hours at \$125 per hour with additional costs. Itemization is miniscule without zoom feature in LF. Question how petitioner is qualified to receive a PPF rate? Need verified supplement.
2. Petition is not verified per Pr.C. § 1021. Need same.
3. Need notice of hearing and proof of service.
4. Estate does not appear to be able to pay fees.
5. No proposed order.

RECOMMENDATION

Need to clear notes 1-3.

(lc)

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CASE#: SC SS01254

CASE NAME: IN THE MATTER OF ALLEN RHAJIVE CARABALLO

**SEE ALSO 17, 18**

HEARING: AMENDED FIRST AND CURRENT Account and Report of EDUARDO Y GONZALEZ LOPEZ and Petition for allowance of fees filed.

COUNSEL:

COUNSEL:

ALLEN RAHJIVE CARABALLO	(CEP)...MITCHELL I ROTH
ALLEN RAJHIVE CARABALLO	(CEP)...HORSPOOL & H ORSPOOL
AMERICAN CONTRACTORS INDEMNITY (TP )	...LANAK & HANNA
ARDIS ENRIGHT	(CPE)...PRO/PER
EDUARDO Y GONZALEZ LOPEZ	(CPE)...PRO/PER
VERLENE CAMERON	(CPE)...JOHN D MICKUS

GENERAL INFORMATION:

**Continued from 03/15/17 and 03/30/17.**

THIS CASE IS SET FOR HEARING ON **Amended [02/10/17]** First Account Current and Petition for Fees by Successor Conservator of the Estate, Eduardo Gonzalez Lopez.

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

1. Accounting period 08/01/15 to 09/30/16.
2. Assets on Hand \$19,938.77 consisting of \$8,938.77 in cash and remaining in 2005 Chevrolet Impala and household furnishings.
3. Beginning balance on hand does not match distributions from prior Conservator Verlene Cameron, and the ending balance/remaining assets of the 3<sup>rd</sup> and final account of prior Conservator. **Need amended accounting or reconciliation.**
4. Attorney requests fees of \$3,167.78 for 20.1 hours at \$100/200 per hour for paralegal and attorney services. Itemized [Acct. 02/10 LFpg42-27].
  - a. **Need qualifications that comply with CRC 7.703(e).**
  - b. Billing includes postage that is considered overhead totaling \$11.78. Does Court wish to reduce fee request by this amount? JTD.
5. Petitioner indicates he has not had the opportunity to complete a detailed report of all hours expended on behalf of the conservatee and will submit a detailed report with his itemization and hours for the Second Accounting.

6. Petition indicates the Conservatee has written a bad check; misuses his bank card; frequently incurs overdraft charges; has taken a title loan on his vehicle in efforts to acquire more cash; and Conservatee's incursions have been happening throughout Petitioner's tenure. Petitioner indicates he has had no effective method of eliminating this problem. Petitioner indicates a major problem for the conservatee continues to be money management.
7. Current bond at \$305,000.00. Petitioner requests a reduction of bond to \$134,000. Ok.
8. **Response filed by conservatee through Counsel Roth on 03/01/17.**
9. **Response to conservatee's response filed by Eduardo Gonzalez Lopez on 03/14/17.**
10. Proposed Order: 02/10/17; however, 3 lines of content must appear above judge's signature.

RECOMMENDATION:

Need to clear notes 3-4. If approved, set hearing on the next accounting review for **02/01/18** (if one year) or **01/31/19** (if two years). Accounting to be filed 30 days in advance.

(/lc)

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CASE#: SC SS03114

***Vacated***

CASE NAME: MTR RE CYNTHIA BAUTISTA

HEARING:  
Hearing Re: STATUS OF TRANSFER

COUNSEL:  
CYNTHIA BAUTISTA (CEP)...  
MARIA HURTADO (CP )...MOISES A AVILES  
MARIO G ROBLES (CP )...MOISES A AVILES

Proof of transfer filed 04/13/17.

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DATE: 05/18/17 TIME: 1:30 DEPT: S36P  
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CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

HEARING:

Court Trial set for PETITION FOR CONSERVATORSHIP of GEORGE DEKTEROV

COUNSEL:

DIANE D HARKISON	(CE )...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
GEORGE DEKTEROV	(CP )...ELIZABETH MCDONOUGH BARRY
GEORGE DEKTEROV	(CPE)...ROY A BARRY
LIDIA DEKTEROV	(CEP)...PRO/PER
LIDIA KEKTEROV	(PCE)...THE ALVAREZ FIRM
LIDIA KEKTEROV	(THE ALVAREZ FIRM
SURETEC INSURANCE COMPANY	(PRO/PER
VICTOR DEKTEROV	(APP)...AMY M COHEN
VICTOR DEKTEROV	(APP)...JOHN
VICTOR DEKTEROV	(OBJ)...

Trial – No notes – JTD

Future Hearing: 06/06/17 Final Discharge

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HONORABLE: TARA REILLY **Readiness Calendar**

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DATE: 05/18/17 TIME: 8:29 DEPT: S37P  
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CASE#: PRO PS1300958  
CASE NAME: MTR OF LUCY M ROMO

**SEE ALSO 2, 3**

HEARING: Hearing Re: FIRST AND FINAL ACCT'G OF IRENE HERNANDEZ

COUNSEL:

IRENE HERNANDEZ (OBJ)...GARY A FOLTZ  
LUCY M ROMO (DEC)...  
LYDIA LUCILLE ROMO (PET)...BROCK LAW OFFICE

GENERAL INFORMATION:

Continued from **04/28/15**. Objections to be filed by 05/08/15 or will be deemed waived. Matter had previously been set for trial but on **10/14/15**, court continued matter as non-trial to allow time for discovery.

**Continued from 02/29/16, 05/17/16 and 11/02/16.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Irene Hernandez, daughter.

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

13. Assets on Hand \$310,849.28 consisting of cash.
14. Statutory fees of \$10,128.97 requested. Calculated.
15. Attorney requests extraordinary fees of \$2,525.00 for services rendered in connection with filing a response; conducting discovery; and appearing at multiple hearings due to a Petition for Order Determining Title to Property filed by Lydia L. Romo. Billed at the lower hourly rate of \$250/hour for a total of 10.1 hours' attorney time. Itemized [see declaration filed 03/16/15]. JTD.
  - a. **Supp. (04/17/15) requests an additional \$425 for the 1.7 hours required to travel to and from and attend the hearing for a total of \$2,950.00 in extraordinary fees. However, this court does not normally allow "travel time" per Local Rule 20-909. JTD.**
16. Petitioner requests the Petition of Lydia L. Romo be denied if it has not already been dismissed because this report makes it clear that all assets of the Decedent and her estate have been accounted for by Petitioner. JTD.
17. Petitioner requests to withhold \$1,500 as a reserve for closing costs.
18. Notice appears complete. No objections.
19. **Supp. (04/17/15) alleges no assets have been identified that are subject of the petition set to be tried in September of this year and since no assets**

**have been identified by Lydia L. Romo, there is no need for trial in September. Petitioner states the estate should be closed and distributed to the beneficiaries of the estate without further delay. JTD.**

20. **Objection filed 5/18/15 by Lydia Romo, beneficiary.**

21. ~Proposed Order 03/16/15.

22. Notice appears complete. No objections as of the review of this matter.

**RECOMMENDATION:**

Matter is contested.

(vet/vet/abs/dl/nb/lc)



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CASE#: PRO PS1300958  
CASE NAME: MTR OF LUCY M ROMO

**SEE ALSO 1, 3**

HEARING: Hearing Re: DETERMINE TITLE ON PROPERTY

COUNSEL:

IRENE HERNANDEZ (OBJ)...GARY A FOLTZ  
LUCY M ROMO (DEC)...  
LYDIA LUCILLE ROMO (PET)...BROCK LAW OFFICE

GENERAL INFORMATION:

Continued from various dates, last being 02/29/16. Matter had previously been set for trial but on 10/14/15, court continued matter as non-trial to allow time for discovery. Notice waived.

**Continued from 05/17/16 and 11/02/16.**

THIS CASE IS SET FOR HEARING ON Petition for Order Determining Title to Property (Pr. C. § 850)

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

1. Petitioner, Lydia Lucille Romo, is the granddaughter of Lucy M. Romo (deceased). Respondent, Irene Hernandez, is the daughter of Lucy M. Romo and court-appointed executor of her estate. Petitioner alleges Lucy Romo died on 9/15/13 naming petitioner as beneficiary in her Will. The Will was lodged with the Court on 10/28/13. Petitioner states she is not aware of any other judicial proceeding to determine the ownership of the property.
2. Petitioner alleges that it is her belief that decedent died holding right, title and interest to certain personal property, and that respondent, Irene Hernandez, holds or claims title and possession to such personal property individually, specifically: (1) all bank accounts in the name of decedent including but not limited to unidentified bank accounts at US Bank; (2) proceeds from rents collected.
3. Petitioner requests the court determine that the title to the subject property is an asset of the probate estate and direct respondent, Irene Hernandez, to convey and transfer the subject property to the estate immediately, including the rents belonging to the estate. Petitioner further requests respondent inventory and account all personal property of the decedent and turn over to the estate all such personal property.

4. This case shows that respondent, Irene Hernandez, was appointed executor of the estate on 1/14/14. An Inventory and Appraisal was filed on 6/17/14 showing funds on deposit at US Bank as well as the value of the real property in Chino and household furnishing. The appraised value of the estate is \$324,295.66.

Decedent's will dated 12/18/79 admitted to probate on 1/14/14 leaves the estate ½ to be divided among decedent's grandchildren, Regina Romo, Lydia Romo, Thomas Romo and Anthony Romo. The remaining ½ is to go to respondent/daughter, Irene Hernandez.

**5. Objection filed 11/24/14 by Irene Hernandez.**

#### RECOMMENDATION

Matter is contested.

(gls/kra/cbr/dl/nb/lc)

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CASE#: PRO PS1300958

CASE NAME: MTR OF LUCY M ROMO  
**SEE ALSO 1, 2**

HEARING:  
Readiness Calendar

COUNSEL:  
IRENE HERNANDEZ (OBJ)...GARY A FOLTZ  
LUCY M ROMO (DEC)...  
LYDIA LUCILLE ROMO (PET)...BROCK LAW OFFICE

Readiness – No notes – JTD

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HONORABLE: TARA REILLY **PROBATE**

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DATE: 05/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400789

CASE NAME: Frances Sylvia Williams

HEARING:  
Hearing re Final Discharge

COUNSEL:  
ANGELIA WOODS (PET)...BRIAN C MILES  
ANGELIA WOODS (PET)...MILES & HATCHER  
FRANCES SYLVIA WILLIAMS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Angelia Woods approved on 05/25/16.
2. Need receipts for Bernard Bidart and Eli Yoder.
3. Need Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status.

(lc)

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DATE: 05/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500989

CASE NAME: MIKE FOSTER

HEARING: FIRST AND FINAL Account and Report of JUSTIN MCCOLLUM and  
Petition for allowance of fees filed.

COUNSEL:  
JUSTIN MCCOLLUM (PET)...MATTHEW L TONKOVICH  
MIKE FOSTER (DEC)...

#### GENERAL INFORMATION

**Continued from 03/02/17. No appearance.**

THIS CASE SET FOR HEARING ON Final Account, Distribution by Justin McCollum.

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

1. Initial petition indicates that Justin is grand-nephew, but final account alleges he is grandchild. Court to clarify on the record.
2. Petitioner and attorney waive statutory fees.
3. Decedent's sibling Geraldine assigns her interest to her nephews Matthew and Justin McCollum.
4. No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **05/24/18**.

(lc)

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DATE: 05/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0900053

CASE NAME: MTR OF JORGE CAMPOS PEREZ

HEARING:  
Accounting Review

COUNSEL:

JACK B. OSBORN	(PET)...JACK B OSBORN
JORGE CAMPOS PEREZ	(CEP)...WALTER T. MOORE
LETICIA PEREZ	(OBJ)...WILLIAMS BECK & FORBES
MARIA ESTELA PEDROZA	(CPE)...BRYAN C HARTNELL
WALTER T MOORE	(PET)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> Account of Maria Pedroza, sister, approved on 11/05/15.
2. Need 3<sup>rd</sup> Account beginning with 03/05/15.

RECOMMENDATION

Inquire status.

(lc)