



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 05/22/17**

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.

05/03/17lh/nb0505/05/17

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500933

CASE NAME: CELIA LYDIA LARKIN

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY ANN WALLNER

(PET)...THE TERESA RHYNE LAW GROUP, A

CELIA LYDIA LARKIN

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final entered 05/23/16.
2. Need receipt by Steven Boucha or copy of front and back of negotiated check.
3. Ex-parte Petition/Order for Final Discharge returned for corrections.

RECOMMENDATION:

Need to clear note 2.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500993

CASE NAME: ETHELMARY VAN DYK

HEARING:

FIRST AND FINAL Account and Report of JON KRIS VAN DYK and  
Petition for allowance of fees filed.

COUNSEL:

JON KRIS VAN DYK (PET)...CHRISTOPHER L CARPENTER  
ETHELMARY VAN DYK (DEC)...

GENERAL INFORMATION:

**Continued from 03/27/17 and 04/17/17. Notice to be given by Jacqueline Yaeger.**

THIS CASE IS SET FOR HEARING ON **Amended** (04/14/17) First and Final Account and Petition for Fees by Executor, Jon K. Van Dyk.

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

- 1. Beneficiaries waive accounting.**
2. Assets on Hand \$320,000 consisting of real property.
3. Petitioner waives compensation.
4. Attorney requests statutory fees of \$9,400.00. Calculated.
5. The will conditionally incorporates decedent's Trust. **Certification of trust filed 04/14/17.** Copy of decedent's Trust affixed at LF, pgs. 8-24.
6. Notice given.
7. ~Proposed Order 01/27/17 names petitioner as sole Successor Trustee and does not include address of person(s) receiving real property.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **06/04/18.**

(nb)

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

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600820

CASE NAME: MTR OF IVA LEE CONRAD

HEARING:

Petition to determine succession to Real Property

COUNSEL:

WALTER DEPAUW (PET)...WILLIAM M NASSAR & ASSOCIATES  
IVA LEE CONRAD (DEC)...

#### GENERAL INFORMATION

**Continued from 10/03/16, 11/07/16 and 02/27/17 at request of counsel.**

THIS CASE SET FOR HEARING ON **AMENDED** (10/20/16) Petition to Determine Succession.

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

1. Petitioner is seeking 100% interest in decedent's 100% interest in property per terms of the will to be divided equally amongst 3 heirs.
2. Inventory & Appraisal attached to petition does not include signatures of verification by Andria Felix and David DePauw. Need corrected inventory.
3. Inventory does not indicate whether Decedent owns the real property where mobile home is located. Need further clarification via verified supplement.
  - a. If real property is not owned by Decedent, a petition concerning personal property only is not permitted under Pr. C. §13151. Where only personal property is involved, the affidavit procedure under Pr. C. § 13100 is the appropriate summary procedure to use.
4. ~Proposed Form Order: 08/17/16.

#### RECOMMENDATION

Need to clear notes then Court's discretion.

(lc/nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600963

CASE NAME: MTR OF CYRIL SR BOZONIER

**SEE ALSO 5**

HEARING:

Hearing Re: OSC RE TERMINATION OF ESTATE

COUNSEL:

CYRIL JR BOZONIER (PET)...PRO/PER

CYRIL SR BOZONIER (DEC)...

GENERAL INFORMATION:

**Continued from 04/17/17 due to non-appearance. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re** on Petition for Termination of Further Proceeding and for Discharge of Personal Representative of a No Asset Estates [Pr. C. 12251].

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

1. Letters of Administration 11/09/16, full authority, no bond.
2. Final inventory and appraisal filed 02/17/17 incorrectly lists real property at Section 1; at Attachment 1; and is not appraised by probate referee at Section 10. However, appraisal by Financial Freedom is affixed [LF, pgs. 8-37]. Does Court wish to have corrected inventory signed by probate referee; require a petition to waive probate referee; or accept provided appraisal? JTD.
3. Petitioner seeks to terminate this administration per Pr. C. § 12251 on the basis that the sole asset of the Estate, consisting of over-encumbered real property located in Rialto, CA, was sold via short sale and the estate received no funds from said sale (copy of closing statement affixed to inventory filed 02/17/17, LF, p. 5).
4. Petitioner waives compensation.
5. Petitioner requests an order terminating the administration of the estate and discharging the personal representative from further duties and responsibilities of the estate.
6. ~Proposed Order 02/17/17.

RECOMMENDATION:  
Court's discretion.  
(nb)

FUTURE HEARING:  
01/11/18: Accounting Review

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600963

CASE NAME: MTR OF CYRIL SR BOZONIER

**SEE ALSO 4**

HEARING:

Petition for Termination of Proceedings etc

COUNSEL:

CYRIL JR BOZONIER (PET)...PRO/PER  
CYRIL SR BOZONIER (DEC)...

See prior matter.  
(nb)

FUTURE HEARING:

01/11/18: Accounting Review

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601282

CASE NAME: ESTATE OF GARY ROSS MONTGOMERY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ANDREW MONTGOMERY (PET)...LAW OFFICES OF ANNETTE L ISAAC  
JAYLYNN MONTGOMERY (PET)...LAW OFFICES OF ANNETTE L ISAAC  
CHASE MONTGOMERY (PET)...LAW OFFICES OF ANNETTE L ISAAC  
GARY ROSS MONTGOMERY (DEC)...  
DEPT OF HEALTHCARE SERVICES (TP )...PRO/PER

GENERAL INFORMATION:

Continued from **03/06/17**. Court appoints Jack Osborn as guardian ad litem for the minor children.

**Continued from 04/17/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON **AMENDED** (02/03/17) Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by son and grandchildren.

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

1. Renunciation and Disclaimer of Property filed 02/07/17 by daughter, Holly Montgomery, in favor of her minor children, Jaylynn Capwell and Chase Montgomery. Disclaimer is timely.
2. Petitioners request a determination that decedent's real and personal property located at Morongo Valley in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's son and grandchildren and heirs per intestate succession.
3. Attachment 15 to initial petition filed on 12/29/16 [LF, p. 11] indicates minors' inheritance is to be held in a blocked account until minors' turn 18 years old. However, the estate includes real and personal property. JTD.
4. Creditor's Claim by decedent's mother, Joanne Schryver, filed 02/22/17 in the amount of \$1,979.50 for cremation services.
5. Creditor's Claim by DHS filed 03/13/17 in the amount of \$7,186.52.
6. ~Proposed Form Order 01/17/17.

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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:  
Court's discretion.  
(nb)

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700152

CASE NAME: GILBERT AND ROSA LINDA GONZALES TRUST

HEARING:

Petition for AN ORDER TO CONFIRM THE VALIDITY OF THE TRUST ASSETS

COUNSEL:

ROSA LINDA GONZALES (PET)...MCGARRIGLE, KENNEY & ZAMPIELLO  
THE GILBERT M AND ROSA LINDA GONZALES TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Matter continued – notice not re-reviewed.

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700233

CASE NAME: MTR OF JERRY ROBERT VASILIS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:

KATHERINE PINKOCZI (PET)...TREVOR D. MARTIN  
JERRY ROBERT VASILIS (DEC)...PRO/PER

GENERAL INFORMATION:

Ex parte orders granted on 03/20/17. Court appointed Katherine Pinkoczi Special Administrator with special powers, only, no bond.

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

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

1. All heirs appear to waive bond - see note 2. Estimated net value of estate is \$180,500. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Need verified supplement clarifying identity of "Laurie" Barron in Petition, item #8. Attached bond waiver is signed by Laura Barron, and notice was served on Laura Barron.
3. Conformed copy of Duties and Liabilities affixed to supplement filed 05/15/17, LF, p5. Clerk's office notified.
4. ~Proposed Order affixed to supplement filed on 05/15/17, LF, p. 7. Clerk's office notified.

RECOMMENDATION:

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

(lh/nb)

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700243

CASE NAME: MARY T MARSHALL

**SEE ALSO 10**

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JAMES L MARSHALL (PET)...JOHN G WURM  
MARY T MARSHALL (DEC)...

**\*\*\*COUR TO REVIEW NEXT MATTER PRIOR TO ADDRESSING THIS HEARING\*\*\***  
GENERAL INFORMATION:

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

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

1. Petition, section one [petition filed 03/16/17, LF, p2] does not include James L. Marshall (surviving spouse) who has also signed petition and Attorney Wurm's name is not typed or printed at signature line. Need corrected petition.
2. Inventory & Appraisal attached to petition [filed 3/16/17, LF, p. 15] has the following issues:
  - a. No signatures on the I&A by surviving spouse James L. Marshall. Need signature of verification.
  - b. Need full legal address and descriptions of real properties listed on Attachment 2 for vacant land, parcels 15 and 15 in LA county and 4 parcels listed by APN #'s..
  - c. Real property is an item that must be appraised by the probate referee Pr.C. §8902. Need corrected inventory
3. Petitioner requests determination that decedent's real property located in San Bernardino County pass to petitioners without administration. Petitioners are decedent's son and surviving spouse. Petitioner attaches a copy of decedent's will [LF, p. 4], however, will indicates decedent's surviving spouse, James L. Marshal is the primary beneficiary.
4. Need Notice of Hearing with proof of service to include all those named in will.
5. ~Proposed Form Order 03/16/17.

RECOMMENDATION:  
Need corrected I&A then Court's Discretion.  
(nb)

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San Bernardino District - Probate

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700243

CASE NAME: MARY T MARSHALL

**SEE ALSO 9**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JAMES L MARSHALL (PET)...JOHN G WURM

MARY T MARSHALL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by surviving spouse, James T. Marshall ["Petitioner"].

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

1. Petition [filed 3/16/17, LF, pgs. 13-14, indicates decedent's primary residence was in Agua Fria, California, in Mariposa County. Venue is improper.
2. Will also referenced all corporate and/or partnership interests [petition filed 3/16/17, LF, p6] in the business known as Advanced Vertical Systems, Inc., Tommy Glascock Heating and Air Conditioning, or any other business decedent had interest in. Question the status of subject assets? Need verified supplement.
3. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically real property in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? Need verified supplement.
4. Notice filed 03/29/17 does not include all persons named in will. Need proper service.
5. ~Proposed Form Order 03/16/17.

RECOMMENDATION:

Need to clear notes.

(nb)

RECOMMENDATION:  
Need verified supplement.  
(nb)

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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: SC SS02388

CASE NAME: MTRR OF DAVID RYAN CAMAIONI

**SEE ALSO 12**

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

FOREST FOX	(CE )...MAUREEN MURATORE
DAVID RYAN CAMAIONI	(CTE)...DONNASUE ORTIZ
RON B OLUND	(SC )...J. DAVID HORSPOOL

**XREF: SPR01021**

GENERAL INFORMATION

Continued from **09/29/16** to trail related matter.

**Continued from 04/20/17. Court confirms order of estate powers; court notes it will be setting accounting review hearing date at the next hearing date. Register of actions reflects that the reason this matter is set at 8:30am is that there is a related trust case SPRSS01021.**

THIS CASE SET FOR HEARING ON re Need for Estate Powers/Status of Trust.

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

1. Ron Olund is Successor Conservator of person and estate. **Estate** powers on 09/10/04 & **person** on 07/30/07. **Court to inquire as the letters for each power is separate and there does not appear to have been any accounting in conservatorship.**
2. Court set matter on 07/27/16 after review of Court Investigator report.
3. On 07/30/09, court took conservatorship accounting review matter off calendar, as all assets were held in trust. Final Inventory and Appraisal filed 12/31/04 indicated \$0 conservatorship assets. The trust had over \$2M. It appears that the trust now has \$1,518,992.65 per the 7<sup>th</sup> accounting that was approved on 06/09/16. Next trust accounting filed; see future dates.
4. Pr.C. § 2828 waiver submitted and sent to dept for signature on 05/09/17.

RECOMMENDATION

Court's discretion. If approved, Court may wish to discharge Conservator of **estate only** on the record.

(lc/nb)

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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.



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DATE: 05/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: SPR SS01021

CASE NAME: IN THE MATTER OF DAVID RYAN CAMAIONI

**SEE ALSO 11**

HEARING:

EIGHTH Account and Report of RON OLUND and Petition for allowance of fees filed.

COUNSEL:

DAVID RYAN CAMAIONI	(DEC)...DONNASUE ORTIZ
DAVID RYAN CAMAIONI REVOCABLE (TRU)...	
RON OLUND	(PET)...E. JOAN NELMS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
RON OLUND	(PET)...HORSPOOL & HORSPOOL
CARLYN ANNE CAMAIONI	(STE)...PRO/PER
WESTERN SURETY COMPANY	(LEWIS D'AMATO BRISBOIS & BISGA)
JERE L. FOX	(JERE L FOX)

**XREF: SCSS02388**

See **Confidential** Notes in J Drive.

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San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

-----  
DATE: 05/22/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1200063

CASE NAME: IN MATTER RE JUAN JOSE CUEVAS

HEARING:

Hearing Re: ACCOUNTING FOR TRUST

COUNSEL:

NORINE BOEHMER	(CPE)...TAMILA C JENSEN
DAWN MILLS	(CPE)...TAMILA C JENSEN
JUAN JOSE CUEVAS	(CEP)...JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER, A.
KATHRYN J BLACK	(TP )...KATHYRN J BLACK

GENERAL INFORMATION

**Continued from 04/10/17 at request of counsel. Notice given by Jeanne Kennedy.**

THIS CASE IS SET FOR HEARING ON Accounting Review (re Trust)

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

- 1 Order Approving Petition for Substituted Judgment entered 04/25/16 ordered the first account of trustees set for this date.
- 2 Trustee's bond set at \$3,006,819.00. Need same.
- 3 No accounting filed.

RECOMMENDATION:

When a Trustee does not file an accounting as required, the court may take action as specified in Pr.C. § 800 and CCP § 128.

(nb)

FUTURE HEARING:

12/12/17: FINAL DISCHARGE

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HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500240

CASE NAME: PAUL N JONES

HEARING:

Accounting Review

COUNSEL:

ERIC H JONES	(PET)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PAUL JONES	(CEP)...SHERRI L KASTILAHN
PAUL N JONES	(CEE)...SHERRI L KASTILAHN
CHARLENE FLETCHER	(PRO/PER)

Waiver of Court Fees and Costs filed by PAUL N JONES is GRANTED

Waiver of Court Fees and Costs filed by CHARLENE FLETCHER is GRANTED

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order appointing Public Guardian Conservator of the person and estate on 02/22/16, Order signed 11/18/16. No bond.
2. Need Notice of Filing of Inventory and Appraisal as to Charlene Fletcher (sister) per Pr. C. §2610(a).
3. Need First Account Current and Report.

#### RECOMMENDATION

Inquire status.

(lh)

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DATE: 05/22/17 TIME: 9:30 DEPT: S35P  
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CASE#: VC VS00451

CASE NAME: MATTER OF JOLEE BONILLA

HEARING:  
Hearing re Final Discharge

COUNSEL:  
ARNOLD FROST (CPE)...VALERIE ROSS  
SANDRA FROST (CPE)...VALERIE ROSS  
HENRIETTA PURTLE (CPE)...VALERIE ROSS  
JOLEE BONILLA (CEP)...SHERRI L KASTILAHN  
CYNTHIA REUTER (CPE)...PRO/PER  
ARNOLD FROST (CPE)...VALERIE ROSS  
BERNARD M BIDART (TP )...PRO/PER

GENERAL INFORMATION

Continued from 04/21/16.

OSC set on **06/09/16** when there was no appearance of notes cleared. Valerie Ross to personally appear.

Continued from **08/25/16**. Counsel states that she has not been able to locate her client. Citation issued to: Arnold Frost who is cited and required to appear.

Court vacates OSC.

**Continued from 10/31/16 and 03/06/17. Court clears note 2, receipt not needed.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Account of Conservator approved on 04/16/15. Need order for final account to comply with Local Rule 20-614.
2. Ex Parte Petition for Final Discharge and Order submitted 10/31/16. However, No matter (e.g.: attachments) may appear after the signature of the Judge (Local Rule 20-614).
3. Proof of served Citation filed 09/23/16

RECOMMENDATION

Need to clear notes.

(lc/nb)

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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.

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/22/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500320

CASE NAME: MARIEL BUSTAMANTE HERRERA

HEARING:

Hearing Re: WHY SERVICES ARE NOT BEING PROVIDED BY IRC

COUNSEL:

ALVARO BUSTAMANTE (PET)...PRO/PER  
LUZ MARIA HERRERA (PET)...PRO/PER  
MARIEL BUSTAMANTE HERRERA (CEE)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Service from IRC

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

1. Matter set at 05/01/17 hearing, wherein, the court ordered that either Robert Britton or another IRC designee to explain to the court why IRC is not providing services to the conservatee and provide a report to the court.
2. Notice given by Candice Garcia-Rodrigo

RECOMMENDATION:

Court's discretion

(nb)

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HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

-----  
DATE: 05/22/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON DS1000018

**VACATED**

CASE NAME: BETTY DUGAN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

BETTY DUGAN

(CEP)...HARTNELL LAW GROUP

Order That Conservator Need not Present Third Account entered 04/19/17 for period through 01/31/16.

Future hearing date:

07/17/17 Accounting Review

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON DS1000156

CASE NAME: ORBAN WIMER

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN  
ORVAN WIMER

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Fourth and Final Account entered 05/23/16.
2. ~Ex-Parte Petition/Order for Final Discharge 05/04/17.

RECOMMENDATION:

RFA.

(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: 05/22/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS0700119

CASE NAME: MTR OF ALEXANDER SCHERT

HEARING:

Hearing re: Petition for authority to establish an Irrevocable  
Burial Trust.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
ALEXANDER W SCHERT (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters terminate on 07/10/17.

THIS CASE IS SET FOR HEARING ON Petition to Establish Irrevocable Burial Trust

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

- 1 Petitioner alleges the current assets on hand are \$2,682.62, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
- 2 Petitioner requests authority to deposit up to \$5,000 in an Irrevocable Burial Trust.
- 3 ~Proposed Order 03/21/17.

RECOMMENDATION:

Court's discretion

(nb)

FUTURE HEARINGS:

06/12/17: Petition for Authority to Establish Irrevocable Burial Trust (duplicate petition?)

08/28/17: Accounting Review



Superior Court of Calif, County of San Bernardino

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS0700208

CASE NAME: SALVADOR HERNANDEZ

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
SALVADOR HERNANDEZ (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 08/05/17.

**Continued from 04/03/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Third Account entered 01/19/17; account or waiver of account now due beginning period 02/01/16.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS0800269

CASE NAME: SHERIE WITTER

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
SHERIE WITTER (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 10/07/17.

**Continued from 12/19/16.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Sixth Account entered 12/23/15; account or waiver of account now due.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/lh)

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1100127

CASE NAME: JOHN A ACOSTA

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JOHN A ACOSTA (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters Expire 08/19/17.

**Continued from 04/04/16, 11/07/16 and 02/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 11/24/14, Court approved the Second Account ending 04/28/14.
2. Need accounting.

RECOMMENDATION:  
Inquire status.

(lc/dl/lc/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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300222

CASE NAME: MTR OF PATRICIA BATTLE

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
PATRICIA BATTLE (CEP)...  
LUTHER A WAGONER JR (CPE)...PRO/PER  
PATRICIA BATTLE (CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/07/17.

**Continued from 12/19/16.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Second Account entered 02/18/16; account or waiver of account now due.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/lh)

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1400188

CASE NAME: Liliana Hicks

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (PCR)...COUNTY COUNSEL  
LILIANA HICKS (PCE)...JEANNE E KENNEDY  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

#### GENERAL INFORMATION

**Continued from 03/14/16, 10/31/16, and 04/17/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Conservatorship, person and estate, issued 06/21/14.
2. A Final Inventory and Appraisal was filed 10/20/14; Supplemental I&A's filed 03/19/15, 06/03/15, and 04/24/17.
3. No accounting or status of administration filed. Need accounting or status report.

#### RECOMMENDATION

Inquire status.

(dl/nb/lh)

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600254

CASE NAME: MICHAEL PARKER BRADFORD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MICHAEL PARKER BRADFORD (CEP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Public Guardian appointed Conservatee of the person and estate on 10/17/16, no bond.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care, and Care Plan filed 10/25/16.

RECOMMENDATION

Inquire status.

(lh)

FUTURE HEARING: 12/18/17: Accounting Review

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600290

CASE NAME: OGIS DEAN

HEARING:

Petition for REQUEST FOR COURT ORDER AUTHORIZING SALE OF  
CONSERVATEE'S PERSONAL PROPERTY

COUNSEL:

OGIS DEAN (CEP)...CANDICE A GARCIA-RODRIGO  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Request for Court Order Authorizing Sale of Conservatee's Personal Property [Pr.C. § 2540(b)] by Conservator of the person and estate, Public Guardian ["Petitioner"].

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

1. Petitioner proposes to sell the conservatee's miscellaneous household items and a 2009 silver Chevrolet Malibu, located at the PG's warehouse located in San Bernardino, CA.
2. Petitioner alleges the sale is necessary in order to provide funds to pay ongoing expenses related to the care of the conservatee and the Petitioner believes it is in the best interest of the conservatorship estate to sell the property.
3. Petitioner prays of an Order authorizing Petitioner to sell the property aforementioned.
4. **Proof of Service to Notice filed 05/16/17 is dated 05/22/17 (the same date as hearing). Need proper service.**
5. ~Proposed Form Order 03/28/17.

RECOMMENDATION:

Need proper notice then Court's discretion  
(nb)

Future Hearings:

6/19/17: Conservatorship Compliance Review Hearing

1/22/17: Accounting Review

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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.

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

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DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS03192

CASE NAME: MTR RE DORIS JENE SALWAY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
DORIS J SALWAY	(CEP)...DONNASUE ORTIZ
DORIS J SALWAY	(CEP)...HARTNELL LAW GROUP
JAMES B GILES	(OBJ)...PRO/PER

GENERAL INFORMATION:

**Continued from 3/23/15, 03/23/16 and 12/05/16.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 3/24/14 Court approved the 3<sup>rd</sup> account current.
2. No accounting or waiver of account filed.

RECOMMENDATION:

Inquire status. **If continued set for Monday, Public Guardian calendar.**

(sa/lh)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS3485

CASE NAME: IN THE MATTER OF KIMBERLY ANN POOL

HEARING:  
Accounting Review

COUNSEL:  
KIMBERLY ANN POOL (CTP)...  
PUBLIC GUARDIAN (CP )...COUNTY COUNSEL  
KIMBERLY ANN POOL (CEP)...HARTNELL LISTER & MOORE  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION  
**Continued from 11/21/16.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order settling thirteenth accounting entered 11/17/14; fourteenth account now due.
2. No accounting filed.

RECOMMENDATION:  
Inquire status.

(nb/lh)

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

-----  
DATE: 05/22/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: SC SS5965

CASE NAME: IN THE MTTR OF MICHELLE LARIVIERE

HEARING:

TWENTY-EIGHTH Account and Report of PUBLIC GUARDIAN and Petition  
for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MICHELLE LARIVIERE	(CEP)...EDWARD B FISCHER
MICHELLE LARIVIERE	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 28<sup>th</sup> Account Current and Petition for Fees by  
Conservator of the Person and Estate, Public Guardian.

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

1. Accounting period 07/30/13 to 08/31/15.
2. Assets on hand \$2,081.31 consisting of \$281.31 cash and pre-need burial trust.
3. Public Guardian request fees of \$2,915.00 deferred until such time as the conservatorship estate has sufficient funds for such purpose. Generally described.
4. County Counsel request fees of \$1,515.00 deferred until such time as the conservatorship estate has sufficient funds for such purpose. Generally described.
5. Petitioner indicates the conservatee owes \$1,351.00 in Court Investigator fees and requests the fees waived until such time as there are sufficient funds to pay the fees.
6. Notice given.
7. ~Proposed Form Order 11/29/16.

RECOMMENDATION:

Court's discretion. If approved, Court may to set the next hearing re Accounting  
Review for **10/31/17** for biennial accounting.

(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: 05/22/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: SLC SS1862

CASE NAME: IN THE MATTER OF BILLY RAY

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
BILLY RAY (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Amended Ninth Account entered 05/16/16.
2. Need receipt by County Counsel.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Probate  
PROBATE/CONSERVATORSHIP CALENDAR

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

-----  
DATE: 05/22/17 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

**VACATED**

HEARING:

Hearing Re: COURT TRIAL ON PETITION FOR REMOVAL, ETC

COUNSEL:

KRAIG STOUT  
STOUT TRUST  
KEVIN STUOT

(PET)...FULLERTON LEMANN SCHAEFER & DO  
(TRU)...  
(TEE)...GUAY P WILSON

No notes – Court Trial.  
(nb)

FUTURE HEARINGS:

5/23/17-5/24/17: COURT TRIAL

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **MISC.**

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: CIP DS1700045

CASE NAME: Harley Reinhart

HEARING:  
Status Hearing on Petition

COUNSEL:

JAMIE CHRISTOPHERSEN (PET)...PRO/PER  
HARLEY PATRICIAROSE REINHART (MIN)...

Waiver of Court Fees and Costs filed by JAMIE CHRISTOPHERSEN is GRANTED

No notes – Status.  
(nb)

FUTURE HEARING:  
06/12/17 Hrg to Establish Fact, Time & Place of Birth

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400675

CASE NAME: Rose Meserole

**SEE ALSO 3**

HEARING:  
Hearing re Final Discharge

COUNSEL:

JACQUELINE WILLIAMS	(PET)...FREEMAN FREEMAN & SMILEY
ROSE MESEROLE	(DEC)...
ROBIN KEARNS	(TP )...PRO/PER

**XREF: PROPS1400676**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and final account entered 05/25/16.
2. Receipts filed.
3. Ex-parte Petition/Order for Final Discharge returned for corrections. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400676

CASE NAME: Joseph John Meserole Jr

**SEE ALSO 2**

HEARING:

Hearing re Final Discharge

COUNSEL:

JACQUELINE WILLIAMS (PET)...FREEMAN FREEMAN & SMILEY  
JOSEPH JOHN MESEROLE Jr (DEC)...

**XREF: PROPS1400675**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and final account entered 05/25/16.
2. Receipts filed.
3. Ex-parte Petition/Order for Final Discharge returned for corrections. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400904

CASE NAME: Penelope Ann Nasabal

HEARING:

Hearing re Final Discharge

COUNSEL:

DONALD ANTON NASABAL (PET)...TANYA L WILLIS

PENELOPE ANN NASABAL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on First and Final Account entered 09/15/16.
2. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500906

CASE NAME: MTR OF JACQUELINE DAVIS

HEARING:

Probate status report filed.

COUNSEL:

CHRISTOPHER DAVIS (PET)...FORESIGHT LEGAL GROUP  
JACQUELINE DAVIS (DEC)...

**XREF: PROPS1500977; CIVDS 1605914**

GENERAL INFORMATION:

**Continued from 03/20/17. Counsel represents the related civil matter is ongoing and a demurrer has been sustained with leave of court to amend complaint. Counsel is informed by the Court if a settlement is reached in the civil matter, the settlement must be approved by the probate court.**

THIS CASE IS SET FOR HEARING ON Status Report by Administrator Christopher Davis.

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 Steven Davis filed a Petition to Quiet title on 04/19/16, for the real property owned by Decedent and located at 11620 3<sup>rd</sup> Avenue, Hesperia, CA, in the related civil matter.
2. Petitioner requests an additional 12 months to close the estate.
3. **Notice of Hearing filed 03/14/17 does not give 15 days' notice. Need proper service.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need proper service then Court's discretion. If approved, set next hearing for Accounting Review on **03/26/18**.

(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: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1501105

CASE NAME: BRUCE COY CRUSAN

HEARING:

Accounting Review

COUNSEL:

DONALD MICHAEL COYLE (PET)...PRO/PER

BRUCE COY CRUSAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration w/Will Annexed issued 03/22/16, full authority, no bond.
2. No accounting or status report of administration.

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: CYNTHIA LUDVIGSEN

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DATE: 05/22/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700234

CASE NAME: THE JOANNA SABLE REVOCABLE TRUST

HEARING:

Hearing Re: Removal of Trustee/etc

COUNSEL:

THE NATIONALHUMANE EDUCATION SOCIETY (PET)...HOLSTROM BLOCK &  
THE JOANNA SABLE REVOCABLE TRUST (TRU)...  
DAVID M. WILSON (STE)...PRO/PER

Currently under review by Legal Research.  
(LR)

Notice:

Notice given.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Probate

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

-----  
DATE: 05/22/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600164

CASE NAME: RUDOLPHO GARCIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of BEATRICE ESCARCEGA

COUNSEL:

BEATRICE ESCARCEGA (CP)...PRO/PER

RUDOLPHO GARCIA (CEE)...J. DAVID HORSPOOL

Waiver of Court Fees and Costs filed by RUDOLPHO GARCIA is GRANTED

#### GENERAL INFORMATION

Order appointing Conservator of the Person and Estate, Beatrice Escarcega, entered 08/15/16, \$46,700 bond.

**Continued from 03/20/17. No appearance by conservator no have the required documents been filed. There is no real property; the letters do not need to be recorded. Court orders Beatrice Escarcega to be personally present at next hearing.**

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Beatrice Carcega appointed Conservatee of the person and estate on 08/15/16, \$46,700 bond.
2. Determination of Conservatee's Appropriate Level of Care filed 10/13/16.
- 3. Confidential Care Plan filed.**
4. Notice of Conservatee's Rights filed 04/10/17.
5. Final Inventory & Appraisal and Instructions for Objection filed.

RECOMMENDATION:

None.

(nb/lh)

FUTURE HEARING: 10/23/17 Accounting Review

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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.

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

-----  
DATE: 05/22/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600345  
CASE NAME: LEIF SANCHEZ  
HEARING:  
Petition for Appointment of Conservator

COUNSEL:

ERIC SANCHEZ (PET)...WILLIAM M NASSAR & ASSOCIATES  
LEIF SANCHEZ (CEE)...JENNIFER M DANIEL

GENERAL INFORMATION

**Continued from 01/09/17** at request of counsel. Attorney Daniel appointed.  
**Continued from 03/27/17. Matter continued for petitioner to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Eric Sanchez, father

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

1. Petitioner seeks bond of \$20,000. However, estate assets appear to consist solely of social security benefits at \$8,160 per year (see petition, LF, p.4). Does court wish to waive bond? Also, question need for estate powers.
2. Petitioner seeks medical powers. **Capacity Declaration filed 05/03/17.**
3. Proposed conservatee is developmentally disabled. **IRC report filed 01/05/17.**
4. **Report by Court-Appointed counsel, Jennifer Daniel, filed 03/06/17.**
5. See Confidential Supplemental form filed 11/22/16 (LF, p.4).
6. **Citation with proof of personal service filed 03/22/17; however, served Citation was not issued by the clerk. JTD**
7. **Certificate of Completion of the Conservatorship Training Class filed 02/02/17.**
8. CI Report filed 11/22/16.
9. ~Proposed Form Order: 11/22/16

RECOMMENDATION

Need to clear note 6. If approved, set hearing for Compliance Review for **12/18/17** for the filing of the required documents and hearing re Accounting Review for **07/30/18**. Any account to be filed 30 days in advance.

(lh/nb/lh)

FUTURE HEARING: 6/12/17: Petition for Substituted Judgment to Create Trust

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: 05/22/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500080

CASE NAME: MTR OF CLIFFORD T SCOTT

**VACATED**

HEARING:

Hearing re Final Discharge

COUNSEL:

RHONDA L FOX (PET)...ALAN D. DAVIS

GREGORY A SCOTT (PET)...ALAN D. DAVIS

CLIFFORD T SCOTT (DEC)...

Ex-Parte Petition/Order for Final Discharge entered 05/22/17.

(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: 05/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

HEARING:

Accounting Review

COUNSEL:

MARJORIE SUNDEEN HUMPSTEAD (PET)...H. BROOKS TRAVIS  
DORIS ANNE SUNDEEN (DEC)...  
DONALD HEMPSTEAD (PET)...KATHRYN A FLANIGAN

GENERAL INFORMATION:

**Continued from 11/21/16 to file accounting (Marjorie Humpstead).**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Letters of administration issued 09/14/15 to Marjorie Sundeen Hempstead as administrator, full authority, no bond. **Marjorie passed away on 06/02/16.**
2. Need final inventory and appraisal.
3. Need accounting or status report of administration by H. Brooks Travis, attorney for Marjorie Sundeen Hempstead per Pr. C. §10953. JTD

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)

FUTURE HEARING

1/16/18: Accounting Review

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HONORABLE: TARA REILLY

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DATE: 05/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500907

CASE NAME: MTR OF CHRISTINE MARY DEDIANOUS

HEARING:  
Accounting Review

COUNSEL:  
KATHLEEN ANN OWENS (PET)...DALE C HUFFAKER  
CHRISTINE MARY DEDIANOUS (DEC)...

GENERAL INFORMATION:

**Continued from 01/23/17 at request of counsel. Additional time is needed to sell real property.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 11/16/15, full authority, no bond.
2. Status report filed 01/19/17. Real property was listed for sale and no bids or offers were made as of status report filing.
3. Need accounting or status report of administration.

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)



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HONORABLE: TARA REILLY

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DATE: 05/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600028

CASE NAME: MTR OF MARTY LANE

HEARING:  
Accounting Review

	COUNSEL:
PAUL LANE	(PET)...PRO/PER
MARTY LANE	(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 03/14/16 to Paul Lane, full authority, no bond.
2. Need Inventory and Appraisal.
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status.  
(lh)

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CASE#: PRO PS1600069

CASE NAME: ESTATE OF MANJIBHAI R VAGHASHIA

HEARING:

Accounting Review

COUNSEL:

GOVIND R VAGHASHI	(PET)...	GLENN M. HORAN
MANJIBHAI R VAGHASHIA	(DEC)...	
MONIKA D VAGHASHIA	(PET)...	LAYNE A BARTHOLOMEW

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 03/14/16 to Monika Vaghashia, full authority, no bond.
2. Need Inventory and Appraisal.
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status.

(lh)

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DATE: 05/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 7 8**

HEARING:

Petition for RELIEF FOR BREACH OF TRUST BY TRUSTEE; DAMAGES FOR  
BREACH, ETC

COUNSEL:

KELLY ZUNIGA	(PET)...DAWN HALL CUNNEEN
PIUS F HORNER TRUST	(TRU)...
ROSEMARY HORNER	(PET)...ROBERT L KERN
KELLY ZUNIGA	(OBJ)...DAWN HALL CUNNEEN

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

-----  
DATE: 05/22/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 6 8**

HEARING:

SUPPLEMENTED ACCOUNT (AMENDED FIRST ACCOUNT) Account and  
Report of ROSEMARY HORNER and Petition for allowance of fees filed.

COUNSEL:

KELLY ZUNIGA	(PET)...DAWN HALL CUNNEEN
PIUS F HORNER TRUST	(TRU)...
ROSEMARY HORNER	(PET)...ROBERT L KERN
KELLY ZUNIGA	(OBJ)...DAWN HALL CUNNEEN

See next matter.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 05/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 6 7**

HEARING:

FOR APPROVAL OF FIRST Account and Report of ROSEMARY HORNER and  
Petition for allowance of fees filed.

COUNSEL:

KELLY ZUNIGA	(PET)...DAWN HALL CUNNEEN
PIUS F HORNER TRUST	(TRU)...
ROSEMARY HORNER	(PET)...ROBERT L KERN
KELLY ZUNIGA	(OBJ)...DAWN HALL CUNNEEN

GENERAL INFORMATION:

Continued from **12/05/16**. The Court orders that a proper accounting be filed. Counsel to file a supplement to clear notes and a proper accounting. Request to appoint a paid professional fiduciary as temporary trustee is reserved.

**Continued from 03/06/17 to review supplemental accounting. Court orders any objections being filed by Mr. Kern to be code compliant. Mr. Kern is to file any other objections by 4/3/17. If both parties cannot agree on accountings the court will appoint a professional fiduciary.**

THIS CASE IS SET FOR HEARING ON **Amended** (02/28/17) First Account Current and Petition for Fees by Successor Trustee, RoseMary Horner (surviving spouse) ["Petitioner"].

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

- 1. Accounting period 11/01/14 to 12/31/16.**
- 2. Assets on Hand \$516,865.64 consisting of \$104,248.64 in cash; \$390,000 in carry value of real property; and remaining in personal property.**
3. Trustee requests ratification of compensation taken in the amount of \$5,515.13.
4. Trustee requests reimbursement of costs advanced of \$1,733.98. .
5. Need bank statement for Bank of America Account XXX7066.
6. Notice given.
7. No proposed order. Submit Order after Hearing.
- 8. Objections et seq. filed 12/02/16 by trust beneficiary, Kelly Zuniga.**

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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: Matter is contested.  
Need to clear note 5 then set for contested hearing. If approved, set next Accounting Review for **02/28/18**. Any account to be filed 30 days before hearing date. Note requirements of Local Rules.

(nb)