



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/22/18

The notes on the following pages were updated approximately three court days prior to the hearing to reflect newly-filed documents. Documents filed now after that update typically will not be reviewed except on the date of hearing at the judge's discretion.

Destruction of Filed Documents:

Shredding/destruction of all court documents filed and imaged before January 2011 will begin soon. All filed/imaged documents are shredded one year after filing pursuant to court policy. Any filed original documents not retrieved timely will be permanently lost. (Wills and codicils lodged into the will vault will not be affected.)

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received, or to request the clearing of notes. No legal or procedural advice may be given by examiners in response to your email.

nb0507/0517

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500442

CASE NAME: CORRINE ELLEN HANSON

HEARING:

Accounting Review by ***

COUNSEL:

CORRINE ELLEN HANSON

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by RUTH L HENRICKS is GRANTED

GENERAL INFORMATION:

Continued from 11/28/17 at request of counsel. Court sets deadline for the filing of the accounting- if filed by 4pm November 29, 2017, the clerk's office is ordered to set the accounting for January 9, 2018. If the accounting is filed after the deadline, the accounting is to be set on the court's next available at the clerk's office.

Continued from 01/09/18, 03/06/18 and 04/17/18 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. Order on Report of Status of Administration entered 11/22/16.
2. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500591

CASE NAME: JANICE S. TOMECK

HEARING:

Accounting Review by ***

COUNSEL:

ALISSA M. GRIMES

DEPT. OF CHILD SUPPORT SVCS LO

JANICE S. TOMECK

WILLIAM D. TOMECK

(PET)...IGNAZIO FICARA

(TP)...STEVEN E. PESANTE

(DEC)...

(PET)...IGNAZIO FICARA

GENERAL INFORMATION:

Continued from 02/20/18 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 Administration issued to William D. Tomeck and Alisa M. Grimes on 10/01/15, limited authority, \$20,000 bond.
2. Status Report Order entered 02/21/17; account now due.
3. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600222

CASE NAME: MTR OF RONALD WILLIAM ZECH

HEARING:

Accounting Review by ***

COUNSEL:

BRANDON VINCENT

(PET)...JAMES B CHURCH

RONALD WILLIAM ZECH

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Administrator, Brandon Vincent.

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

1. Status Report Order entered 11/21/17; account now due.
2. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

HEARING:

Trustee's Second & Final Account & Report Account and Report of
WELLS FARGO BANK and Petition for allowance of fees filed.

COUNSEL:

RICHARD HUNTINGTON (PET)...MUSCARELLA & ASSOCIATES
THE JORDAAN CLARKE SPECIAL NEEDS TRUST (TRU)...
WELLS FARGO BANK (PET)...MUSCARELLA & ASSOCIATES

X-REF: CONPS 1600162

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by former Trustee, Wells Fargo Bank, N.A. ["Petitioner"].

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

1. Order Approving Trustee's First and Final Account entered 05/30/17 for period through 02/28/17. On 05/30/17, Court accepted Petitioners resignation [LF, pgs. 38-40] as Trustee and appointed PPF, Richard Huntington as Successor Trustee of the Trust. Richard Huntington is the current Trustee of the Trust.
2. Accounting period 03/01/17 to 02/15/18.
3. Assets on Hand \$0.00. All trust assets are in the possession, custody and/or control of Successor Trustee, PPF, Richard Huntington.
4. Petitioner requests ratification of fees paid on account during this accounting period of \$12,758.14. Billed at 1.50% of the first \$2,000,000.00 per Wells Fargo Special Needs Trust Fee Schedule [LF, pgs. 96-100]. **JTD.**
5. Petitioner seeks no additional compensation for its services during this account period.
6. Attorney requests fees of \$8,475.00. Billed at \$300/hour for 29.25 hours' attorney time. Itemized [LF, pgs. 106-108]. **JTD.**
7. Attorney requests reimbursement of costs advanced of \$701.74. Itemized [LF, p. 109]. However, costs include copy and postage charges that are normally not allowed and considered overhead. Does Court wish to reduce costs by \$311.49? **JTD.**

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8. Question whether disbursements for Living Expenses [LF, p. 74], pool maintenance [LF, p. 79] and air conditioning [LF, p. 81] are apportioned? **Need** verified supplement.
9. Question payments of \$4,900 & \$2,725x2 to Miken Construction Company, Inc. [LF, pgs. 79 & 81]. **Need** verified supplement.
10. **Court to review report by court-appointed counsel, Mitchell I. Roth, filed on 04/18/18.**
11. Beneficiary now resides at Yorba Linda in Orange County and trust is administered at Laguna Hills in Orange County. Suggest transfer to Orange County. If approved, Court to set control date. **JTD.**
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 8-9 then Court's discretion re: fees, transfer and report by court-appointed counsel. Matter already calendared for final discharge on 06/05/18.

(nb)

Future hearings:

06/05/18 Final discharge of Wells Fargo Bank.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

SEE ALSO 6

HEARING:

FIRST AND FINAL Account and Report of MICHAEL WALKER and
Petition for allowance of fees filed.

COUNSEL:

JAY JAY HENDERSON	(OBJ)...THE GROSSMANLAW FIRM,
JAY JAY HENDERSON	(PET)...THE GROSSMAN LAW FIRM
MICHAEL WALKER	(PET)...GAUDY LAW, INC
POPPY ANN WA LKER TRUST DATED	(TRU)...

GENERAL INFORMATION:

Continued from **10/24/17**. Counsel for Michael Walker to file by 4pm January 9, 2018, supplements to clear the probate notes.

Continued from **02/13/18**. Counsel represents a 473B Motion has been previously filed and is currently set on April 17, 2018. The Court continues this matter to be heard concurrently with the Motion set on April 17, 2018. Notice waived.

Continued from 04/17/18.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Successor Trustee, Michael Walker ["Petitioner"] aka Michael Ray Walker, Sr.

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

1. Accounting period 02/22/16 to 12/27/16.
2. Assets on Hand \$0.00. Prior assets on hand in the amount of \$278,498.76 distributed to petitioner per fourth amendment to the trust [LF, p. 40]
3. Petitioner requests ratification for reimbursement of costs advanced of \$22,507.20. Itemized [LF, p.62].
4. Compensation or fees are not requested.
5. No proposed order. Submit Order after Hearing.
6. **Objections filed 09/22/17 by Jay Jay Henderson.**
7. **Stipulation to Continue Trial and Related dates received 05/15/18. JTD.**

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RECOMMENDATION:
Set for contested hearing.
(nb)

Future hearings:
06/20/18 Court Trial

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

SEE ALSO 5

HEARING:

Readiness Calendar

COUNSEL:

JAY JAY HENDERSON

(OBJ)...THE GROSSMANLAW FIRM,

JAY JAY HENDERSON

(PET)...THE GROSSMAN LAW FIRM

MICHAEL WALKER

(PET)...GAUDY LAW, INC

POPPY ANN WA LKER TRUST DATED

(TRU)...

No notes – Readiness.

(nb)

Future hearings:

06/20/18 Court Trial

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 15

HEARING:

Petition for LACK OF CAPACITY UNDUE INFLUENCE ETC

COUNSEL:

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

Currently under review by Legal Research

LR

NOTICE:

Continued matter- Notice not re-reviewed.

(ww/nb)

Future hearing

01/15/19 Accounting Review

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700730

CASE NAME: MARK S OBERLY

SEE ALSO 9, 10

HEARING:

Hearing Re: PETITION FOR LETTERS OF SPECIAL ADMINISTRATION
COUNSEL:

DANIEL OBERLY SR	(OBJ)...R. STEVEN DERRYBERRY
DANIEL OBERLY SR	(PET)...R. STEVEN DERRYBERRY
MARK S OBERLY	(DEC)...
SHANNON KELLY ORTEGA	(PET)... KRING & CHUNG

GENERAL INFORMATION:

Continued from 03/06/18 at request of counsel. Notice waived.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Special Administration with general powers by purported spouse, Shannon Kelly Ortega ["Petitioner"].

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

1. Petitioner requests a bond to be determined on estate valued at \$1,015,000.00. Suggest bond of \$1,015,000.00. JTD.
2. Petitioner submits this petition for Special Appointment to "protect the Estate"; claims to be the most suited to be the administrator of the Estate; and alleges she is the sole beneficiary of the Estate.

RECOMMENDATION:

Court's discretion

(nb)

Future hearing:

11/08/18 Readiness calendar

11/08/18 Petition for letters of administration etc.

12/10/18 Court Trial

12/11/18 Court Trial

12/12/18 Court Trial

12/13/18 Court Trial

12/14/18 Court Trial

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700730

CASE NAME: MARK S OBERLY

SEE ALSO 8, 10

HEARING:

Hearing Re: PETITION FOR LETTERS OF SPECIAL ADMIN W/GEN PWRS

COUNSEL:

DANIEL OBERLY SR	(OBJ)...R. STEVEN DERRYBERRY
DANIEL OBERLY SR	(PET)...R. STEVEN DERRYBERRY
MARK S OBERLY	(DEC)...
SHANNON KELLY ORTEGA	(PET)... KRING & CHUNG

GENERAL INFORMATION:

Continued from 03/06/18 at request of counsel. Notice waived.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Special Administration with general powers by brother, Daniel Oberly, Sr. ["Petitioner"].

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

1. Petitioner requests a \$200,000 bond to be fixed on this estate valued at \$700,000. Suggest bond of \$700,000. **JTD.**
2. Petitioner is seeking appointment as Special Administrator to conduct an investigation to determine what assets the decedent owned; to contact and deal with third parties that might have assets belonging to the decedent and to collect and take possession of assets that remain in the decedent's name. Petitioner further seeks appointment to preserve the assets of the decedent that are now known and to prevent waste of the assets. Again, petitioner seeks appointment to protect the Estate from Mrs. Ortega's misconduct and to stop all use of decedent's assets for her own personal enjoyment.
3. Petitioner specifically requests the powers to collect and preserve all the goods, chattels and receivables of the decedent, and all incomes, rents, issues, profits, claims and demands of the estate; take charge, insure and manage the real property and enter upon it to preserve it from damage, waste and injury, including the power to commence and maintain legal proceedings to remove unauthorized occupants from the real property, i.e. occupants without legal right

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to maintain possession of said property; and the power to close accounts and pay debts of the decedent.

4. **Objections and supporting declaration filed 01/17/18 by Shannon Kelly Ortega.**

RECOMMENDATION: Matter is contested.

Court's discretion

(nb)

Future hearing:

11/08/18 Readiness calendar

11/08/18 Petition for letters of administration etc.

12/10/18 Court Trial

12/11/18 Court Trial

12/12/18 Court Trial

12/13/18 Court Trial

12/14/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700730

CASE NAME: MARK S OBERLY

SEE ALSO 8, 9

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

DANIEL OBERLY SR	(OBJ)...R. STEVEN DERRYBERRY
DANIEL OBERLY SR	(PET)...R. STEVEN DERRYBERRY
MARK S OBERLY	(DEC)...
SHANNON KELLY ORTEGA	(PET)... KRING & CHUNG

GENERAL INFORMATION:

Continued from 12/05/17 and 03/06/18 at request of counsel. Notice waived.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Shannon Kelly Ortega ["Petitioner"].

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

1. Petitioner requests bond to be determined. Suggest bond of \$1,015,000.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
2. Section 3g(2), 3h(3) or (4) to petition [LF, p.3] are incomplete. **Supp. (03/01/18) alleges petitioner has priority as she was decedent's domestic partner for 20 years, similar to husband and wife per Marvin v. Marvin (1976) 18 Cal. 3d 660.**
3. **Objections filed 12/01/17 by Daniel Oberly, Sr.**
4. ~Proposed Form Order 08/22/17

RECOMMENDATION: Matter is contested.

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

(nb)

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Future hearing:

11/08/18 Readiness calendar

11/08/18 Petition for letters of administration etc.

12/10/18 Court Trial

12/11/18 Court Trial

12/12/18 Court Trial

12/13/18 Court Trial

12/14/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800162

CASE NAME: MTR OF ERLINDA M MEZA

HEARING:

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

COUNSEL:

ERLINDA M MEZA (DEC)...
STEVEN A MEZA (PET)...MAUREEN MURATORE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executor, Steven A. Meza ["Petitioner"-son].

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

1. Will waives bond. Estimated estate valued at \$400,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. Will is not self-proving [not signed under penalty of perjury]. **Need** Proof of Subscribing Witness.
3. **Need** proof of publication.
4. ~Proposed Form Order 04/03/18.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800341

CASE NAME: VIOLET LOUISE SKEETE-MAUPIN

HEARING:

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

COUNSEL:

DEBBIE R. HUDSON (PET)...MICHAEL C MADDUX
VIOLET LOUISE SKEETE-MAUPIN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Ancillary** Petition for Letters Testamentary with full authority under IAEA by named executrix, Debbie R. Hudson ["Petitioner"-daughter].

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

1. **Need** certified copy of Will per Pr. C. 8202.
2. Section 3d(7) to petition [LF, p. 3] is incomplete. **Need** verified supplement.
3. Section 8 to petition [LF, p. 5] does not include surviving spouse, Wilmitch Caryle Maupin. **Need** verified supplement.
4. Will waives bond. Estimated estate valued at \$372,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
5. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C. §18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
6. ~Proposed Form Order/Letters 04/12/18.

RECOMMENDATION:

Need to clear notes. If approved, set future hearing for Accounting/Status Review on **07/30/119**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800342

CASE NAME: ALFONSO JESUS PICENO

HEARING:

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

COUNSEL:

ALFONSO JESUS PICENO

(DEC)...

YVETTE PICENO

(PET)...MICHAEL BROAD

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$323,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
2. **Need** proof of publication.
3. ~Proposed Form Order/Letters 04/12/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion. If approved, set future hearing for Accounting/Status Review on **07/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS0800273

CASE NAME: ANA ISABEL COLINDRES SPECIAL NEEDS TRUST

HEARING:

PETITION FOR APPROVAL OF EIGHTH Account and Report of CITIZENS
BUSINESS BANK and Petition for allowance of fees filed.

COUNSEL:

ANA ISABEL COLINDRES SPECIAL N	(TRU)...
CITIZENS BUSINESS BANK	(PET)...ELIZABETH MCDONOUGH
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
PFF BANK & TRUST	(PET)...ALTHOUSE & MCDONOUGH

XREF: CONPS1300281 (Ana Isabel Colindres)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Eighth Account Current and Petition for Fees by Successor Trustee, Citizens Business Bank ["Petitioner"].

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

1. Accounting period 11/01/16 to 09/30/17.
2. Assets on hand \$1,040,806.50 consisting or \$24,762.02 in cash; remainder in carry value of real property, mutual funds and the balance in securities.
3. Petitioner requests ratification of \$18,522.83 in fees paid through 09/25/17 per established fee schedule at a rate of 1.5% on an annual fee base, on market value [Acct. 11/15, pgs. 73-74]. **JTD**
4. Attorney Barry requests fees of \$5,810.00. Billed at \$350/hour for 16.6 hours' attorney time. Itemized [Acct. 11/15, LF, p. 78]. **JTD**.
5. Layne Bartholomew is counsel for the parents, Victor and Athalia Colindres, who are conservators of the person. Attorney Bartholomew requests fees of \$4,080.00. Billed at \$300/hour for 13.36 hours' attorney time and \$120/hour for paralegal time. Itemized [Acct. 11/15, LF pgs. 84-86]. **JTD**.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **11/29/18**.

Accounting to be filed 30 days' in advance of hearing.

(nb)

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

HEARING:

Petition for beneficiaries 1.to remove trustee; 2.to appoint successor trustee

COUNSEL:

BEN C LUNA REVOCABLE TRUST	(TRU)...
CAROLINE LUNA KRIEGER	(PET)...PRO/PER
REGINA MARIE LUNA	(MICHAEL C MADDUX
ROBERT LUNA	(PET)...ROSA MARQUEZ
STELLA JAURIGUE	(OBJ)...ROSA MARQUEZ
STELLA JAURIGUE	(PET)...ROSA MARQUEZ
THERESA BELTRAN	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by STELLA JAURIGUE is GRANTED

Request for Waiver of Court Fees and Costs filed by REGINA MARIE LUNA is GRANTED

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 7

HEARING:

Hearing Re: VERIFIED FIRST AMENDED PETITION

COUNSEL:

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

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.
(nb)

Future hearing
01/15/19 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800053

CASE NAME: THE TRUST OF JOHN W HARTMAN

HEARING:

Petition for Successor Trustee for Order Determining Title To
Property Within Trust etc

COUNSEL:

DIRK W HARTMAN

(PET)...GUAY P WILSON

THE TRUST OF JOHN W HARTMAN

(TRU)...PRO/PER

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800073

CASE NAME: BARBARA ANN CAMPBELL LIVING TRUST

HEARING:

Petition for To Confirm Transfer of Assets to Revocable Trust

COUNSEL:

BARBARA ANN CAMPBELL LIVING TR (DEC)...

MEGAN L CAMPBELL (PET)...CHRISTOPHER A SHUMATE

Currently under review by Legal Research.

(LR)

Notice is not proper.

Probate Code Section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:
(1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
(2) a description of relief sought pursuant to Section 859 if applicable; and
(3) a statement advising any interested person that he or she may file a response.

The Notice of Hearing filed does not comply with one or more of these mandatory requirements.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800081

CASE NAME: FAMILY TRUST OF JOHN HELT DATED 11/1/2015

HEARING:

Petition for Order confirming trust, trustee and trust assets

COUNSEL:

FAMILY TRUST OF JOHN HELT: DAT (TRU)...

STEVE HELT

(PET)...RYAN MICHAEL DARLING

Currently under review by Legal Research.

(LR)

Need Notice of Hearing with proof of service as follows:

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859 if applicable; and
- (3) a statement advising any interested person that he or she may file a response.

(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700203

CASE NAME: MTR OF EDITHA M CLARKE

HEARING:

first and final Account and Report of DORA D CLARKE-PINE, DARCY D CLARKE and Petition for allowance of fees filed.

COUNSEL:

DARCY D CLARKE	(CE)...DENNIS M SANDOVAL
DARCY D CLARKE	(CPE)...JENNIFER M DANIEL
DORA D CLARKE-PINE	(CE)...DENNIS M SANDOVAL
DORA D CLARKE-PINE	(CPE)...JENNIFER M DANIEL
EDITHA M CLARKE	(CEP)...

Request for Waiver of Court Fees and Costs filed by EDITHA M CLARKE is GRANTED
Fee waiver amount due \$551.00
\$465.00 for petition and request to sell real property on 01/25/17
\$60.00 for ex parte petition for final discharge on 03/23/17
\$26.00 for certified copy on 03/23/17

*Cl fees waived in the amount of \$900.00
\$450.00 on 11/01/13
\$450.00 on 10/12/15*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account and Petition for Fees by Co-Conservators of the Person and Estate, Dora D. Clarke-Pine and Darcy D. Clarke ["Petitioners"].

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

1. Accounting period 01/01/17 to 02/28/18.
2. Assets on Hand \$23,656.06 in cash.
3. **Need** supplemental inventory and appraisal with supporting bank statement.
4. Co-Conservators do not request fees.
5. Co-Conservators request a partial reimbursement for costs advanced of \$16,252.81. Itemized [LF, pgs. 18-25].

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

6. Attorney requests fees of \$9,775.00 less cost retainer remaining on hand of \$2,371.75 for a balance owing of \$7,403.25. Billed at \$300/hour for 32.8 hours attorney time and \$475 for the preparation of a power of attorney. Itemized [LF, pgs. 27-35]. **JTD.**
7. Question whether rental income was received prior to the sale of real property? **Need** verified supplement.
8. Question whether closing costs re: sale of real property were apportioned? **Need** verified supplement.
9. **Need** Notice of Hearing with proof of service.
10. Suggest transfer to Riverside County as Conservatee resides in Beaumont, CA. If so, Court to set control date. **JTD.**
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 3, 7-9 then Court's discretion. If approved, set next hearing for Accounting Review for **04/30/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300202

CASE NAME: Juanita Lopez Guzman

HEARING:

Third Account Current Account and Report of MARIE E VENEGAS and
Petition for allowance of fees filed.

COUNSEL:

JUANITA LOPEZ GUZMAN

(CEP)...JENNIFER M DANIEL

MARIE E VENEGAS

(PCR)...DONNOE LAW

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees
by Conservator of the Person and Estate, Marie Venegas ["Petitioner"].

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

1. Account period 12/31/15 to 12/31/17.
2. Assets on hand \$154,655.49 consisting of \$149,430.49 in cash and the balance
in personal property.
3. Current bond of \$283,400. Appears sufficient.
4. Petitioner does not request compensation.
5. Attorney requests fees of \$4,515.00. Billed at \$210/hour for 21.50 hours
attorney time. Itemized [LF, pgs. 32-36]. **JTD.**
6. Current bond of \$301,600. Petitioner requests bond be reduced by \$131,600
for a bond of \$170,000. Appears sufficient. **JTD.**
7. Petitioner requests the Court allow her to file two year accountings. **JTD.**
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **02/26/19** (if
one year) or **02/25/20** (if two years). Accounting to be filed 30 days in advance of
hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500362

CASE NAME: BARBARA JEAN HIRSCHMANN

HEARING:

Accounting Review by ***

COUNSEL:

BARBARA JEAN HIRSCHMANN	(CEP)...WALTER T. MOORE
CHRISTIE M. DAVIDSON	(CPE)...HORSPOOL & HORSPOOL
CHRISTIE M. DAVIDSON	(CPE)...TREVOR D. MARTIN
MICHELE GIBBONS	(PET)...CRAIG M PARKER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Continued from 07/11/17 attorney Craig Parker indicates to the court that Barbara Jean Hirschmann passed away on 06/08/17. Continuance requested to file accounting.

Continued from 10/03/17 at request of counsel. Account to be filed by 01/16/18.

Continued from 02/13/18 at request of counsel to submit corrections to accounting. Notice to be given by Attorney Parker.

Continued from 04/03/18 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. Court appointed Barbara Jean Hirschmann conservator of the person and estate on 07/12/16, \$70,000 bond.
2. Final Inventory and Appraisal filed 02/21/17. Estate valued at \$4,651.84. However, **need** amended inventory that includes real property appraised by Probate Referee.
3. **Need** 1st and final account to include pre and post-death accounting periods along with copy of Trustee's Deed upon Sale.
4. Per minute order dated 03/21/17, counsel informed the court that the real property was foreclosed and the conservatee was still in possession subject to lawsuit. This is an estate with a loss.

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

RECOMMENDATION

Need to clear notes 2-3. When an accounting is not filed as required, the court shall take action as specified in Pr.C. §2655. Clerk to notice bond company, Liberty Mutual Insurance Company.

(lh/nb/cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700201

CASE NAME: JANETTE ILIANA GONZALEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CLAUDIA MARTINEZ

COUNSEL:

CLAUDIA MARTINEZ (PET)...PRO/PER
JANETTE ILIANA GONZALEZ (CEE)...MELVIN L FRIEDLAND

GENERAL INFORMATION

Claudia Martinez appointed Limited Conservator of the person on 10/17/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights filed.
- 2 **Need** Statement of Care Plan in accord with Pr.C.§2352.5.
- 3 **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700443

CASE NAME: CONCEPCION R RODARTE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CANDELARIA MCFARLAND	(PET)...LAMB MORRIS & LOBELLO
CONCEPCION MCFARLAND	(CEE)...CRAIG M PARKER
MIGUEL RODARTE	(PRO/PER
SERAFIN RODARTE	()...
VICTOR J RODARTE	(CAL-LAWYER PLC

X-REF: UDFS 1801234

GENERAL INFORMATION

Ex parte orders granted on 10/12/17, no bond. Candelaria McFarland appointed temporary conservator of the person and estate.

Continued from **01/10/18**. Court notes that citation is not required as Concepcion R Rodarte is present today in court. Court notes that notice of hearing and proof of service is not required as there are no relatives to notice and proposed conservatee is present. Attorney Craig M Parker is appointed. Notice by Judicial Assistant.

Continued from 03/13/18. Written report received from Craig Parker. Court orders that until further order of the Court, Victor Rodarte is not permitted to take the conservatee out of the country. Court sets deadline for filing of written objections.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Candelaria McFarland, daughter

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

1. Suggested bond \$22,894.30, based on personal property. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed.
3. Petitioner seeks dementia powers. Report by court appointed counsel, Craig M. Parker, filed.
4. Certificate of Completion of the Conservatorship Training Class filed
5. CI Report filed 01/03/18.

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

6. **Need** Notice of Hearing with proof of service.
7. **Objections filed by grandson, Miguel Rodarte. Need proof of service.**
8. **Objections filed by grandson, Serafin Rodarte.**
9. **Objections filed by son, Victor J. Rodarte.**
10. ~Proposed Form Order: 12/05/17

RECOMMENDATION

Require notice then set for contested hearing. If approved, set hearing for Compliance Review for **01/04/19** for the filing of the required documents and hearing re Accounting Review for **07/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800042

CASE NAME: XAVIER BONILLA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ESPERANZA BONILLA (PET)...PRO/PER

XAVIER BONILLA (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Ex Parte Orders granted on 02/26/18, person only, no bond. By agreement of petitioner, Court amends both petitions for temporary and general conservatorship to be for the person only and removing request for estate powers as petitioner indicates that the proposed conservatee does not have assets or real property.

Continued from 03/27/18. Attorney Jeanne E. Kennedy appointed. Case referred to Legal Aid for assistance. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by mother Esperanza Bonilla ["Petitioner"].

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

1. No bond - PG.
2. Section f & g to petition re 2351 powers and medical powers are not marked. **Need** verified supplement.
3. Section 5f to petition does not indicates whether proposed conservatee is or is not developmentally disabled. **Need** verified supplement.
4. Section 9d does not indicate whether proposed conservatee is an adherent of a religion that relies on prayer alone for hearing. **Need** verified supplement.
5. Proposed conservatee appears to be developmentally disabled. Report by court-appointed counsel, Jeanne E. Kennedy filed.
6. This petition is for a general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? JTD.
7. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed conservatee; authority to access all confidential records, paper, documents,

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

reports and other information regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed conservatee to contract, authority to make and consent to all medical decisions for the proposed conservatee.

8. Petitioner seeks medical powers. **Need** Medical Capacity Declaration.
9. Court Investigator's Report filed.
10. **Need** return of Citation.
11. Certificate of Completion re Conservatorship Class filed.
12. **Need** Notice of Hearing and proof of service.
13. ~Proposed Form Order/Letters 02/09/18.

RECOMMENDATION:

Need to clear notes 2-4, 8 & 10 & 12 then Court's discretion re: 6. If approved, set hearing for Compliance Review for **01/04/19** or the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 05/22/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800100

CASE NAME: Mtr of Julie T Evergreen

HEARING:
Case Management Conference

COUNSEL:

JANA SNOOK	(CP)...DANIEL G. MCMEEKIN
JULIE T EVERGREEN	(CEP)...
LIBERTY MUTUAL INSURANCE COMPA	(TP)...
TIM TODD	(CP)...DANIEL G. MCMEEKIN

GENERAL INFORMATION:

Tim Todd (son) and Jana Snook (daughter) appointed Temporary Co-Conservators of the Person and Estate on 07/24/14, \$553,000 bond. General appointment on 09/04/14, \$553,000 bond.

THIS CASE IS SET FOR HEARING ON CMC re Transfer from Los Angeles.

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

1. **Need** amended Letters.
2. **Need** CI Report.
3. Conservatee has dementia. **Need** appointment of counsel and report by same.
4. Second Account Current filed 11/30/17.

RECOMMENDATION:

Need to clear notes 1-3 then **set** hearing for Second and Current Account on first check calendar no sooner than **07/10/18**.
(nb)

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT **PA**

DATE: 05/22/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100392

CASE NAME: patricia ann howerton

HEARING:
Probate status report filed.

COUNSEL:
BRASWELL'S MEDICAL CONSULTANTS (TP)...SANDERS, COLLINS &
PATRICIA ANN HOWERTON (DEC)...
RAUL GARCIA (PET)...BETTY AUTON-BECK
S.B. COUNTY PUBLIC ADMINISTRAT (PET)...CRAIG M PARKER
STEVEN EUGENE HOWERTON (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by STEVEN EUGENE HOWERTON is GRANTED

GENERAL INFORMATION:

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

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner is attempting to marshal AT & T and Comcast Stock and has discovered that there are several new items on the State of California Unclaimed Property Site.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/27/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/28/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

HEARING:

1st and Final Account and Report of LON M ANDERSON and Petition
for allowance of fees filed.

COUNSEL:

CHERRAKEE LEE GROETZINGER	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
LON M ANDERSON	(PET)...PRO/PER
SUSAN C BUCKELEW	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by LON M ANDERSON is GRANTED
Fee waiver amount due \$955.50
\$465.00 probate petition on 07/15/15
\$25.50 for cert copy of the letters on 08/24/15
\$465.00 for accounting on 03/27/18

Request for Waiver of Court Fees and Costs filed by SUSAN C BUCKELEW is GRANTED
Fee waiver amount due \$51.00
\$25.50 for certified copy of the letters on 06/14/17
\$25.50 for certified copy of the letters on 07/03/17

GENERAL INFORMATION:

Susan C. Buckelew appointed Successor Administrator on 05/19/17.

THIS CASE IS SET FOR HEARING ON First and Final Account by Prior Administrator,
Lon M. Anderson ["Petitioner"].

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

1. Accounting period 08/24/15 to 05/19/17.
2. Assets on Hand \$0.00.
3. Petitioner waives compensation.
4. Petitioner requests reimbursement of costs advanced of \$2,079.90. Itemized.
 - a. Costs include \$200 to Team Legal Document Service. Does Court wish to reduce reimbursement by this amount? **JTD.**

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

5. Summary of Account [LF, p. 17] does not balance by \$148.44. Does Court wish to deem this amount de minimus? **JTD.**
6. **Need** applicable schedules per Pr. C. §1060 et seq.
7. **Need** legal description as to real property that was foreclosed upon via verified supplement.
8. **Need** license, VIN and decal number for 2003 Winnebago Motor Home via verified supplement.
9. **Need** bank account number for Pacific Marine Credit Union Account.
10. **Need** bank statement to support date of death balance for Upside Acct. No. XXXX0661.
11. Petition does not include creditors' claims by Ascension Point Recovery or Phillips Cohen filed on 10/22/15 and 11/16/15, respectively. **Need** verified supplement.
12. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. §9202(b).
13. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. §9202(c)(1).
14. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
15. **Need** Notice of Hearing with proof of service.
16. Proposed Form Order 03/27/18 is not complete in and of itself per Local Rule 20-614.

RECOMMENDATION:

Need amended accounting to be placed on first check calendar no sooner than **07/24/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/22/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600642

CASE NAME: MTR OF ERVHINS HURTADO

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

ERVHINS HURTADO (DEC)...

LISSET A CORDOVI (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by LISSET A CORDOVI is GRANTED

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 05/22/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1601024

CASE NAME: WENDELL LEYERLY

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

RUBY MEININGER (PET)...LAW OFFICES OF RICHARD SAMUEL

RUBY MEININGER (PET)...PRICE LAW FIRM APC

STATE OF CALIFORNIA FRANCHISE (TP)...

TOMMY LEYERLY (PET)...JAMES B CHURCH & ASSOCIATES

WENDELL LEYERLY (DEC)...

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

No notes – Court Trial.

(nb)

Future hearings:

05/23/18 Court Trial

05/24/18 Court Trial

05/25/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501186

CASE NAME: MTR OF ROSE CORRA

HEARING:

OSC re: SANCTIONS FOR FTA/FAILURE TO FILE AN ACCOUNTING filed by
JOHN PAUL CORRA

COUNSEL:

JOHN PAUL CORRA (PET)...PRO/PER
ROSE CORRA (DEC)...

GENERAL INFORMATION

Continued from 08/16/17. No appearance and no accounting filed. John Corra ordered to appear.

Continued from 10/11/17. Citation to be issued for John Paul Corra for failure to appear and failure to file an accounting; John Paul Corra to be present at next hearing. Should he fail to appear, a bench warrant will be issued.

Continued from 12/06/17. No appearance; no return of citation has been filed with the Court. Court will send another Citation out for John Corra for failure to appear and/or file an accounting as ordered.

Continued from 01/31/18. No appearance. Citation reissued at to John Paul Corra.

Continued from 03/27/18. Non-appearance nor has the accounting been filed by John P. Corra. Matter referred to Public Administrator.

THIS CASE SET FOR HEARING ON **OSC re Sanctions for FTA/Failure to File Acct/Accounting review/Status.**

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

1. Letters of Testamentary issued to John Corra, son, on 04/20/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.
4. **Need** return of citation re John Paul Corra with proof of service. **Proof of unsuccessful service filed 01/24/18, 03/02/18 & 04/24/18. Change of Address received by Post Office on 01/31/18.**

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

RECOMMENDATION

Court's discretion re OSC

Inquire status of accounting and I&A.

(ww/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501186

CASE NAME: MTR OF ROSE CORRA

HEARING:

Accounting Review by ***

COUNSEL:

JOHN PAUL CORRA

(PET)...PRO/PER

ROSE CORRA

(DEC)...

See prior matter #1.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601276

CASE NAME: MTR OF SATUR P ULAT

HEARING:

Accounting Review by ***

COUNSEL:

GERALDINE V ULAT MONDRAGON

(PET)...MATHEW ALDEN

SATUR P ULAT

(DEC)...

VACATE – Status Report filed and set for 06/20/18.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700676

CASE NAME: MTR OF PAUL JAMES LENHART

HEARING:

Waiver of Account and Report of JODIENNA ANN LUKACS and Petition for allowance of fees filed.

COUNSEL:

CA FRANCHISE TAX BOARD (TP)...
JODIENEE ANN LUKACS (PET)...MICHAEL C MADDUX
PAUL JAMES LENHART (DEC)...

Request for Waiver of Court Fees and Costs filed by JODIENNA ANN LUKACS is GRANTED

Fee waiver amount due \$1276.00
\$695.00 for probate petition/special admin on 07/10/17
\$90.00 for ex parte app on 08/17/17
\$26.00 for certified copy on 08/28/17
\$465.00 waiver of account on 03/07/18

GENERAL INFORMATION:

Continued from 04/17/18 to clear notes.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Jodienee A. Lukacs ["Petitioner"].

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

1. Heirs waive accounting.
2. Assets on Hand \$149,366.10 consisting of \$4,366.10 in cash and remaining in real property.
3. Statutory fees of \$5,350.00 requested. Calculated.
4. Attorney requests extraordinary fees of \$4,950.00 for services rendered in connection with the stay of foreclosure. Billed at \$325/hour for a total of 14 hours' attorney time. Itemized [LF, p. 6]. **JTD.**
5. Petitioner requests that Court that a judgment in the total amount of \$10,300 be entered against the Estate and against each heir for \$3,417.60 each; Beth Atmold, Leta Lenhart and Codi Lenhart, jointly and severally, to secure attorney's fees, since the heirs intend to retain the estate property. **JTD.**

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

6. Petitioner requests the title to the real property located at 12262 Beaver Avenue, Victorville, CA 92392, be vested in above-named heirs as Tenants in Common at 33.33%, each. **JTD.**
7. Petitioner request remaining cash assets at Citibank Acct. No. XXX6134 be paid to her as partial statutory fees. **JTD.**
8. Petition indicates there are only 2 creditors' claims. However, there are at least 5 creditor's claims. **Need** verified supplement.
9. Petitioner requests authorization and direction to pay the claim of FTB in the amount of \$2,289.67. **JTD.**
10. Notice does not include all outstanding creditors. **Need** proper service.
11. Proposed Order 03/07/18 includes deficiencies as noted above.

RECOMMENDATION

Need to clear note 8 & 10 then Court's discretion. If approved, set next hearing for receipts and final discharge for **05/28/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700726

CASE NAME: THE PASILLAS REVOCABLE TRUST

HEARING:

Petition for compel trustee to acct; 2) for removal of trustee
etc

COUNSEL:

EMILIANO PASILLAS

(PET)...HORSPPOOL & HORSPPOOL

EMILIANO SANCHEZ PASILLAS JR.

(PET)...HORSPPOOL & HORSPPOOL

THE PASILLAS REVOCABLE LIVING

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800184

CASE NAME: JOHN CRAIG FEDAK

HEARING:

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

COUNSEL:

JOHN CRAIG FEDAK (DEC)...
MARY WETTISH (PET)...JASON L GAUDY

GENERAL INFORMATION:

Continued from 04/17/18 at request of counsel.

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

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

1. Heirs waive bond. Estimated estate valued at \$389,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. ~Proposed Form Order/Letters 02/26/18.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800325

CASE NAME: MTR OF CAROL LOUISE PAIR

HEARING:

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

COUNSEL:

BEVERLY M VASSOR (PET)...ALBREKTSON & SHUMATE, LLP
CAROL LOUISE PAIR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named Executrix, Beverly M. Vassor ["Petitioner"-friend-successor trustee].

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

1. Non-resident Petitioner requests bond be set at \$589,215.00. Appears sufficient. **JTD.**
2. Proof of publication filed.

RECOMMENDATION:

Court's discretion re: \$589,215.00 bond. If approved, set future hearing for Accounting/Status Review on **07/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800326

CASE NAME: MTR OF CONNIE RAE THOMPSON

HEARING:

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

COUNSEL:

CATHERINE BARKER (PET)...ALBREKTSON & SHUMATE, LLP

CONNIE RAE THOMPSON (DEC)...

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$310,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. Proof of publication filed.
3. Proposed Form Order/Letters 04/10/18.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800346

CASE NAME: MTR OF ALLAN ARMIJO

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ALLAN ARMIJO

(DEC)...

CARMEN ARMIJO

(PET)...DIANE E ROBBINS

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800354

CASE NAME: DOREEN A BOTELHO

HEARING:

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

COUNSEL:

ANTHONY BOTELHO (PET)...CRAIG M PARKER
DOREEN A BOTELHO (DEC)...

X-REF: CONPS 1600149

GENERAL INFORMATION:

Ex Parte orders granted 04/24/18, \$440,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother-in-law, Anthony Botelho ["Petitioner"].

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

1. Petitioner requests bond of \$440,000 be fixed. Appears sufficient. **JTD.**
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 04/17/18.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 12

HEARING:

Hearing re Final Discharge

COUNSEL:

CALIFORNIA VICTIM COMPENSATION	(PRO/PER
CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
PHILIP FELIX GARCIA	(DEC)...

XREF: PROPS1100842 (Miquela Macias Garcia)

VACATED – final discharge order entered 05/01/18.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 11

HEARING:

Accounting Review by ***

COUNSEL:

CALIFORNIA VICTIM COMPENSATION	(PRO/PER
CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
PHILIP FELIX GARCIA	(DEC)...

Request for Waiver of Court Fees and Costs filed by CHRISTINE GARCIA IRISH is GRANTED

XREF: PROPS1100842 (Miquela Macias Garcia)

VACATED

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/22/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700614

CASE NAME: The Juan and Aurora Acosta 2001 Living Trust

HEARING:

Hearing Re: PTN TO CONFIRM TRANSFER OF ASSETS

COUNSEL:

EVELIA SANCHEZ

OLGA ACOSTA

THE JUAN AND AURORA ACOSTA 200

(OBJ)...KENNETH U REYES

(PET)...ALBREKTSON & SHUMATE,

(TRU)...

Currently under review by Legal Research.

(LR)

NOTICE:

Notice filed; however, does not indicate a copy of petition was served per Pr.C. § 17203(b).

(ww/nb)

Notice is not proper.

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859 if applicable; and
- (3) a statement advising any interested person that he or she may file a response.

The Notice of Hearing filed does not comply with one of more of these mandatory requirements.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700146

CASE NAME: ANDREA ALVAREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARTIN ALVAREZ

COUNSEL:

ANDREA ALVAREZ	(CTP)...JENNIFER M DANIEL
MARTIN ALVAREZ	(PET)...LAYNE A BARTHOLOMEW
MIREYA ALVAREZ	(PET)...LAYNE A BARTHOLOMEW

X-REF: SCVSS 73491

GENERAL INFORMATION

Parents, Martin & Mireya Alvarez appointed conservator of the person and estate on 10/17/17, no bond.

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

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

1. Notification of Conservatee's Rights filed.
2. Care Plan filed.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Final Inventory & Appraisal filed 12/18/17 reflects \$0.00 and indicates bond is waived.
5. Inventory & Appraisal including Instructions for Objection filed.

RECOMMENDATION:

None.

(nb)

Future hearings:

12/31/18 Accounting Review (re SNT)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700325

CASE NAME: MUHAMMAD ALLAH

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MADINAH AARON

COUNSEL:

MADINAH AARON (CP)...PRO/PER
MUHAMMAD ALLAH (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Madinah Aaron (daughter) appointed conservator of the person on 10/17/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights filed.
2. **Need** Statement of Care Plan in accord with Pr.C. §2352.5
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).

RECOMMENDATION:

Matter appears moot as it appears Conservatee has passed away. Court to confirm.
(nb)

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

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800050

CASE NAME: MTR OF FELIZ ARGRIPIA CONTRERAS GOMEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARLA GUADALUPE GOMEZ	(CP)...PRO/PER
FELIZ ARGRIPIA CONTRERAS GOME	(CTP)...MITCHELL I ROTH
MARY M GOMEZ	(CP)...PRO/PER

GENERAL INFORMATION

Continued from 04/03/18 for notes to be cleared. Attorney Mitchell I. Roth appointed.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of the person, by mother, Mary M. Gomez and sister, Carla G. Gomez ["Petitioners"].

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

- 1 No bond – person only.
- 2 Petitioner seeks medical powers. Section 7 to Medical Capacity Declaration is not initialed and Section 8 is blank. Capacity declaration filed on 05/15/18, Sections 4a & 4b are incomplete; and signature lines are not dated. **Need** complete capacity declaration.
- 3 Proposed Conservatee is developmentally disabled. **Need** report by court-appointed counsel, Mitchell I Roth.
- 4 Court Investigator's Report filed.
- 5 Citation returned served.
- 6 **Need** Proof of Completion re Conservatorship Class by Mary M. Gomez.
- 7 Notice of Hearing with proof of service filed on 05/11/18 does not give 15 days' notice. **Need** proper service.
 - a. Petitioner requests an Order Dispensing with notice as to father (unnamed); alleges he abandoned proposed conservatee at birth; and has never had any involvement in her life. **JTD.**
- 8 This petition is for general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). Does court wish to require? **JTD.**
- 9 **Response to CI's Recommendation** by Carla G. Baca filed.

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

RECOMMENDATION:

Need to clear notes 2-3 & 6-7 then Court's discretion. If approved, set hearing for Compliance Review for **01/04/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800084

CASE NAME: KARIN FRIDLUND

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GAIL BASHAW (PET)...PRO/PER
KARIN E FRIDLUND (CEE)...JENNIFER M DANIEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Limited Conservatorship of person only, by sister, Gail Bashaw ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Jennifer Daniel.
3. Petitioner requests medical powers. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.
9. **Need** Certificate of Completion re Conservatorship Class.

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

10. ~Proposed Form Order/Letters 03/16/18.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **01/04/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800095

CASE NAME: Mtr of Jade El Gaouny

HEARING:
Petition for Appointment of Conservator

COUNSEL:
JADE EL GAOUNY (CTP)...
MUNTASER H EL GAOUNY (CP)...PATRICIA A LOBELLO
NAM S LEE (CP)...PATRICIA A LOBELLO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents Nam S. Lee and Muntaser H El Gaouny ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Petitioners request medical powers. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.

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

9. **Need** Certificate of Completion re Conservatorship Class by Muntaser.
10. ~Proposed Form Order/Letters 03/28/18.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **01/04/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/22/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS424

CASE NAME: KENNETH ANDERSON AKA KENNETH DALE ANDERSON

HEARING:

Petition for (SIXTH) Attorney's fees and for order directing
payment to court appointed counsel

COUNSEL:

BARBARA ANDERSON	(PET)...PRO/PER
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
KENNETH ANDERSON	(CEP)...DONNASUE ORTIZ
KENNETH DALE ANDERSON	(CEP)...DONNASUE ORTIZ
KENNETH DALE ANDERSON AND BARB (TRU)...	
KENNETH DEE ANDERSON	(PET)...PRO/PER
LINDA MAXWELL	(CPE)...ELISABETH KEMPE-OLINGER
LINDA MAXWELL	(TEE)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Donnasue Smith Ortiz ["Petitioner"].

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

- 1 Petitioner was appointed on 09/07/04. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 01/04/16 to 12/20/17.
- 2 Attorney requests fees of \$2,835.00. Billed at \$375 - \$395/hour for 6.85 hours' attorney time and \$125/hour for 1.65 hours' paralegal time. Itemized [LF, P. 7]. **JTD.**
- 3 Petitioner requests an order directing and ordering Conservator, Linda Maxwell, to pay requested fees.
- 4 ~Proposed Order 04/12/18

RECOMMENDATION:

Court's discretion.

(nb)

Future hearing

01/29/19 Accounting Review

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

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300188

CASE NAME: EUGENE F. SACHARA

HEARING:
Hearing Re: FINAL DISCHARGE OF LYNETTE HILL

COUNSEL:
EUGENE F SACHARA (DEC)...
LYNETTE HILL (PET)...J. DAVID HORSPOOL
MARK T SACHARA (TP)...THOMAS W DOMINICK

XREF PROPS1200758 (Eugene F Sachara Trust of 2005)

GENERAL INFORMATION:

Continued from 10/22/15, 5/4/16, 07/20/16, 01/09/17 and 04/03/17 at request of counsel. Attempting to deliver property.

Continued from 06/26/17, 08/22/17 and 12/12/17. Oral report given by Attorney David Horspool.

Continued from 03/06/18. Counsel to file a declaration that petitioner will hold property for Lance Sachara. Due diligence declaration will be filed as to Lance Sachara.

THIS CASE SET FOR HEARING ON Final Discharge

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

1. Final Distribution approved on 01/21/15.
2. Receipts filed.
3. ~Ex Parte Petition for Final Discharge and Order 03/19/18.
4. Declaration by Petitioner filed as directed by Court.
5. Due Diligence filed as to Lance Sachara. **JTD.**
6. Assignment of Interest in Personal Effects signed by Mark T. Sachara in consideration for \$20,000.

RECOMMENDATION

Court's discretion.
(lc/sa/nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600069

CASE NAME: ESTATE OF MANJIBHAI R VAGHASHIA

HEARING:

Accounting Review by ***

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 to Monika D Vaghashia, full authority, no bond.
2. Status Report Order entered 08/29/17; accounting now due.
3. **Need** final inventory and appraisal.
4. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

FUTURE HEARING DATES:

07/17/18 Petition for termination of probate proceedings & discharge of administrator

07/17/18 Spousal Property Petition hearing

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600670

CASE NAME: MTR OF DOROTHY THOMAS

HEARING:

Hearing re Final Discharge

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving First and Final Account entered 07/27/17.
2. **Need** informal account for reserves per Local Rule 20-911.
3. Ex-Parte Petition/Order for Final Discharge retuned for corrections. **Need** same.

RECOMMENDATION:

Need to clear notes.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600767

CASE NAME: LENA L MOSSUTO

HEARING:

First and Final Account and Report of CAROL A HOWARD and
Petition for allowance of fees filed.

COUNSEL:

CAROL A HOWARD	(PET)...TAYLOR, SIMONSON & WINTER
LENA L MOSSUTO	(DEC)...
SURETEC INSURANCE CO	(TP)...

X-REF: PROPS 0900586

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Executrix, Carol A. Howard ["Petitioner"-Trustee-sole beneficiary].

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

1. Accounting period 01/27/16 to 03/26/18.
2. Assets on Hand \$206,959 in cash.
3. Petitioner waives compensation.
4. Attorney requests statutory fees of \$7,379.18. Calculated.
5. Proposed Order 03/28/18 describes petitioner as "the Administrator with will annexed" at page 3.

RECOMMENDATION:

Court's discretion, If approved, set next hearing for final discharge on **05/28/19**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700488

CASE NAME: DONALD WALLACE THOMAS

HEARING:

First and Final Account and Report of LARRY R THOMAS and
Petition for allowance of fees filed.

COUNSEL:

DONALD W THOMAS (DEC)...
LARRY R THOMAS (PET)...JOSEPHINE A. RICH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Executor, Larry R. Thomas ["Petitioner"-nephew-beneficiary].

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

1. Accounting period 12/10/16 to 02/28/18.
2. Assets on Hand \$1,425,188.39 in cash.
3. Statutory fees of \$27,454.86 requested. Calculated.
4. **Need** bank/financial statements to support date of death and closing balances
per Local Rule 20-908.
5. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. JTD.
6. Proposed Order 03/28/18 does not include findings re: sole and separate
property or creditors.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set next hearing for receipts
and final discharge for **05/28/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700759

CASE NAME: LILY MAE ROBINSON

SEE ALSO 7

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

GERALDINE SIMMONS (PET)...JONATHAN BRADLEY SMITH
LILY MAE ROBINSON (DEC)...

XREF: PROPS1700079 (James Odell Robinson)

VACATE – bond of \$352,000 filed.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700759

CASE NAME: LILY MAE ROBINSON

SEE ALSO 6

HEARING:

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

COUNSEL:

GERALDINE SIMMONS (PET)...JONATHAN BRADLEY SMITH
LILY MAE ROBINSON (DEC)...

XREF: PROPS1700079 (James Odell Robinson)

GENERAL INFORMATION:

Continued from **10/24/17**. Bond required of \$352,000.

Continued from 12/12/17 and 03/06/18 at request of court.

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

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

1. All heirs waive bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. § 8571. **Estimated estate valued at \$106,666.67. Petitioner requests bond be fixed. Suggest bond of \$107,000. JTD.**
2. Proof of publication filed.
3. **Notices filed on 08/18/17 and 11/01/17 are the wrong type of notice. Need Notice of Petition to Administer Estate with proof of service.**
4. ~Proposed Form Order/Letters 07/28/17

RECOMMENDATION:

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

(nb)

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

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

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701078

CASE NAME: STANLEY JOSEPH DYDO

SEE ALSO 7B

HEARING:

Petition to determine succession to Real Property

COUNSEL:

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

XREF: PROPS1800270 (Petrita Dydo)

GENERAL INFORMATION:

Continued from 02/20/17 on Court's motion to open an estate for post-deceased spouse and to notify leinholders, if any.

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

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

1. Decedent passed away on 02/03/00.
2. Petitioner requests a determination that decedent's separate 1/3rd interest in real property located in Colton, CA in San Bernardino County pass to petitioner without administration. Petitioner is decedent's issue and only heir.
3. Declaration by petitioner indicates the real property is held as tenants-in-common by decedent, the Dydo House Trust, and petitioner. Upon decedent's passing on 02/03/00, no action was taken by surviving spouse to probate decedent's 1/3rd interest in the real property. Surviving spouse passed away on 01/27/17. Petitioner states he is the sole heir of his parents.
4. Court to review sticky note [see I & A affixed to petition, LF, p. 10]. Suggest Court require copy of vesting documents. **JTD.**
5. ~Proposed Form Order 10/30/17.

RECOMMENDATION:

Deny.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800270

CASE NAME: Mtr of Petrita Dydo

SEE ALSO 7A

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

KENNETH W DYDO

(PET)...THE ELDER & DISABILITY LAW FIR

PETRITA DYDO

(DEC)...

XREF: PROPS1701078 (Stanley Joseph Dydo)

GENERAL INFORMATION

Continued from 05/07/18 at request of counsel.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Kenneth Dydo, son/ sole heir

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

1. Decedent passed away on 01/27/17.
2. Petitioner seeks 100% interest, in decedent's 1/3 interest in an undivided 1/70th interest; in real property located in Colton, per intestate succession.
3. ~Proposed Form Order: 03/21/18

RECOMMENDATION

Court's discretion.

(ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800239

CASE NAME: Mtr of Kathleen Ann Gwartney.

HEARING:

Hearing re: Petition for Probate of Will and Letters with limited authority IAEA.

COUNSEL:

KATHLEEN ANN GWARTNEY (DEC)...
SARINA N LOWERY (PET)...BYRON R LANE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with Limited authority under IAEA by named executrix, Sarina N. Lowery ["Petitioner"-Successor Trustee].

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

1. Will waives bond. Estimated estate valued at \$505,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. **Need** proof of publication.
3. The will conditionally incorporates decedent's Trust. Copy of decedent's Trust affixed to supp. filed 05/15/18.
4. ~Proposed Form Order/Letters 04/10 04/18/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion. If approved, set future hearing for Accounting/Status Review on **07/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800347

CASE NAME: Mtr of Khosrow Yousefi

HEARING:

Spousal Property Petition hearing.

COUNSEL:

KHOSROW KLINKERT (DEC)...

ZAHRA BOOESHAGHI (PET)...JAMES E KLINKERT

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to Jabiz Santoriello Yousefi and Aidin Yousefi.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

DATE: 05/22/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700280

CASE NAME: FAMILY TRUST OF JOSEPHINE ROBINSON

SEE ALSO 11

HEARING:

Petition for REMOVAL OF TRUSTEE, ACCOUNT, AND APPOINTMENT
OF SUCCESSOR

COUNSEL:

DALE ROBINSON

(OBJ)...OSTERGAR LAW GROUP

DALE ROBINSON

(PET)...OSTERGAR LAW GROUP

FAMILY TRUST OF JOSEPHINE ROBI

(TRU)...

MARTIN ROBINSON-TOBEY

(PET)...GRIDER LAW OFFICE

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700280

CASE NAME: FAMILY TRUST OF JOSEPHINE ROBINSON

SEE ALSO 10

HEARING:

FORMAL Account and Report of DALE ROBINSON and Petition for allowance of fees filed.

COUNSEL:

DALE ROBINSON

(OBJ)...OSTERGAR LAW GROUP

DALE ROBINSON

(PET)...OSTERGAR LAW GROUP

FAMILY TRUST OF JOSEPHINE ROBI

(TRU)...

MARTIN ROBINSON-TOBEY

(PET)...GRIDER LAW OFFICE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account and Petition for Fees by Trustee, Dale Robinson ["Petitioner"].

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

1. Accounting period 02/01/10 to 12/31/13 (3.10 years) per supp. filed 01/30/18.
2. Accounting period 01/01/14 to 12/30/16 (3 years).
3. Accounting period 01/01/17 to 12/31/17 per supp. filed 01/30/18
4. Assets on Hand \$49,297.89 consisting of cash and rental home in Norco, CA as of 12/30/16.
5. Total Debits and Total Credits to Summary of Account [LF, p. 4] do not match. Need corrected summary and affected schedule(s).
6. Schedule No. 2 [LF, p.5] has the following deficiencies:
 - a. Need rental address, legal description and APN #.
 - b. Need all Bank Account information for Accts. #1 & #2.
 - c. Total Inventory does not include value of house. Need amended schedule.
7. Disbursements – Schedule 5 [LF, pgs. 11-12] requires further clarification via verified supplement as to the following:
 - a. Online transfer of \$3,000 to D. Robinson;
 - b. Legal Representation fees totaling \$17,000.

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

8. Schedule No. 9 [LF, p. 17] includes fees requested by Petitioner. Generally described [LF, p. 18]. Need itemization of services rendered to support fee requests via verified supplement.
9. Schedule No. 9 [LF, p. 17] does not include creditors' claims or totals. Need same.
10. Account does not include sale of real property. Need proof of service to Notice of Proposed Action re: sale and copy of closing statement.
11. Need Notice of Hearing with proof of service.
12. This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.
13. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need one, complete, amended accounting per Pr. C. §1060 et seq. to be set on first check calendar no sooner than **07/17/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: BC BS00014

CASE NAME: STEPHEN MACUTE

HEARING:

TENTH Account and Report of CHRISTINA ERICKSON-TAUBE and
Petition for allowance of fees filed.

COUNSEL:

AMERICAN CONTRACTORS INDEMNITY (PRO/PER	
CHRISTINA ERICKSON-TAUBE	(CEP)...ALEX R BORDEN
MELODIE Z SCOTT	(PRO/PER
MELVIN L. FRIEDLAND	(PET)...MELVIN L FRIEDLAND
SANTOS MACUTE	(PET)...PRO/PER
STEPHEN T MACUTE	(CEP)... MELVIN L FRIEDLAND
WESTERN SURETY COMPANY	(TP)...ANDERSON, MCPHARLIN &

CCP170.6 filed as to CYNTHIA LUDVIGSEN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Tenth Account Current and Report of
Conservator of the Person and Estate and Petition for Allowance of Fees filed by
Christina Erickson-Taube/PPF.

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

1. Accounting covers 01/01/17 to 12/31/17.
2. Assets on hand: \$396,605.31 (of which \$394,605.31 is in cash and the balance in carry value of preneed burial plan).
3. Petitioner requests compensation of \$6,214.95 for services rendered during this accounting period. Billed at various rates for various services not exceeding \$115/hour. Itemized [LF, pgs. 25-31]. **JTD.**
4. Attorney requests fees of \$3,306.00. Billed at \$390/hour for 20.7 hours attorney time and \$135/hour for paralegal time and costs of \$86 for a total of \$3,392.00. Itemized [LF, pgs. 33-34]. **JTD.**
5. Current bond of \$488,000. Petitioner requests bond increase by \$5,000 for a total bond of \$493,000. Appears sufficient. **JTD.**
6. Report by court-appointed counsel, Melvin L. Friedland, filed.

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

7. ~Proposed Order 03/28/18

RECOMMENDATION

Court's discretion re: fees and bond. If approved, set next hearing for Accounting Review for **02/26/19** (if one year) or **02/25/20** (if two years). Accounting to be filed 30 days in advance before hearing. Note requirements of Local Rules.

(nb)

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

HEARING:

Petition for Attorney's fees and for order directing payment to court appointed counsel

COUNSEL:

CHRISTIE DAVIDSON	(CPE)...KARIN E HORSPPOOL
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JAMES B CHURCH	(PET)...JAMES B CHURCH
TODD KOERBER	(CEP)...JAMES B CHURCH & ASSOCIATES
TODD KOERBER	(TP)...VANCE & BLAIR LLP
TODD L. KOERBER	(CEP)...DONNASUE ORTIZ
TODD L. KOERBER SPECIAL NEEDS	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Guardian ad Litem, Donnasue Smith Ortiz ["Petitioner"].

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

1. Petitioner was appointed GAL on 07/14/11. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 03/07/15 to 01/31/18.
 - a. Exceeds 2 years. JTD.
2. Attorney requests fees of \$25,983.25. Billed at \$350-\$395/hour for 65.60 hours' attorney time and \$125/hour for 4.50 hours' paralegal time. Itemized [LF, pgs. 7-12]. JTD.
3. Petitioner requests Conservator, Christie Davidson, be directed and ordered to pay requested attorney fees.
4. ~Proposed Form Order 04/12/18.

RECOMMENDATION:

Court's discretion.

(nb)

Future hearing:
05/30/18 Accounting review
05/30/18 Hearing re: Review

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100089

CASE NAME: JOSE PEREZ JR

SEE ALSO 15

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of KATIE HERNANDEZ

COUNSEL:

JEANNE E KENNEDY	(PET)...
JOSE PEREZ jr	(CEP)...PRO/PER
JOSE PEREZ JR	(DEC)...MITCHELL I ROTH
KATIE C HERNANDEZ	(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from **10/24/17** on court's motion for Mr. Roth to file his report. Notice waived.

Continued from 12/12/18 and 03/06/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Matter set at 09/18/17 hearing, wherein, the Court appointed counsel, Attorney Mitchell I Roth, to represent Conservatee based on CI report dated 09/13/17.
2. Need report of court appointed counsel, Attorney Mitchell I Roth.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need to clear note 2.

(nb)

Future hearing

10/24/18 Accounting Review

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

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100089

CASE NAME: JOSE PEREZ JR

SEE ALSO 14

HEARING:

Hearing Re: RECONSIDERATION OF PETITIONER'S FEE REQUEST

COUNSEL:

JEANNE E KENNEDY	(PET)...
JOSE PEREZ jr	(CEP)...PRO/PER
JOSE PEREZ JR	(DEC)...MITCHELL I ROTH
KATIE C HERNANDEZ	(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from **10/24/17**. Court notes this is a motion for reconsideration of the fee request of the conservator in this matter. Court orders Mr. Hartnell to file a declaration with the court prior to the next hearing.

Continued from 12/12/17 and 03/06/18 at request of counsel for supplement to be filed. All temporary orders to remain in full force and effect. Should supplement not be filed by next hearing, request for reconsideration will be taken off calendar.

THIS CASE IS SET FOR HEARING ON Reconsideration of Petitioner's Fee Request by Katie Hernandez ["Petitioner"].

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

- 1. Supp. (02/28/18):** At the hearing on the fourth account current, held on 04/19/17, the Court denied a portion of the fees of the Trustee and stated it would reconsider the reduction based on further information as provided. The Court denied petitioner's request for periodic monthly payments of \$250/month and reduced petitioner's fees to \$4,503.00 (in lieu of \$7,844.00).
- 2.** Petitioner requests the court consider the length of time that the conservator has served, the skills required, her involvement in the divorce proceedings and the management required for the conservatee; and asks the court award the amount prayed for (not provided).
- 3. Need** Notice of Hearing with 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 for clarification of the notes only - no legal or procedural advice will be given.

RECOMMENDATION:
Require notice then Court's discretion.
(nb)

Future hearing
10/24/18 Accounting Review

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

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500115

CASE NAME: MARIA TOMASA TRUJILLO

HEARING:

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

COUNSEL:

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

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

Fee waiver amount due \$1485.00

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

\$465.00 for accounting on 03/30/17

\$465.00 for termination on 03/30/17

GENERAL INFORMATION:

Continued from **05/16/17** on Court's motion. Notice

waived. Continued from **08/15/17** at request of counsel.

Continued from 10/10/17, 12/11/17 and 03/06/18 at request of counsel. An unreported asset has been found. Supplemental I & A to be filed.

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

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

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

RECOMMENDATION:

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

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

seq. to be placed on first check calendar no sooner
07/17/18. Any account to be filed 30 days before hearing
date. Note requirements of Local Rules.
(nb/cs/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600149

CASE NAME: MTR OF DOREEN BOTELHO

HEARING:

Accounting Review by ***

COUNSEL:

ANTHONY BOTELHO	(CPE)...PETER LAW GROUP
CRAIG M PARKER	(PET)...CRAIG M PARKER
DOREEN BOTELHO	(CEP)...CRAIG M PARKER
DOREEN BOTELHO	(CPE)...PRO/PER

XREF: CONPS1300121 (Doreen A Botelho)

GENERAL INFORMATION

Continued from **11/14/17** at request of court to clear notes. Notice to be given by Mr. Parker.

Continued from 03/06/18 at request of counsel. Notice to be given by Mr. Parker.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order Appointing, Anthony Botelho, Temporary Conservator entered 07/12/16, \$245,000 bond; general order entered 01/23/17; first and final account now due.
- 2 No accounting or waiver of account. **Need** same.
- 3 Conservatee passed away on 10/15/17. Question whether any assets were marshaled as to require an accounting? If no assets were marshaled, suggest Court require a verified statement that no assets were marshaled, in which case an accounting will not be necessary. Alternatively, **need** first and final account that includes pre and post-death periods. JTD.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700339

CASE NAME: MTR OF MARGARITA DEL PILAR FLORES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARISOL C FLORES

COUNSEL:

MARGARITA DEL PILAR FLORES (CTP)...JANET LATOURETTE
MARISOL C FLORES (CP)...PRO/PER

GENERAL INFORMATION

Margarita Del Pilar Flores (mother) appointed limited conservator of the person on 10/17/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights filed.
2. Care Plan filed.
3. Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS717

CASE NAME: IN THE MTTR OF SHAREEN A BRITTAIN

HEARING:

Fourth Account and Report of DAVID L BATES and Petition for allowance of fees filed.

COUNSEL:

CHARLES GRAY	(CP)...PRO/PER
CONNIE GRAY	(CP)...PRO/PER
DAVID L BATES	(PET)...PATTERSON HANNA &
DAVID L. BATES	(TEE)...PATTERSON HANNA &
JENNIFER M. DANIEL	(PET)...JENNIFER DANIEL
SHAREEN ANN BRITTAIN	(CEP).. JENNIFER M DANIEL.
SHAREEN ANN BRITTAIN TRUST CRE	(TRU)...

GENERAL INFORMATION:

Continued from 03/06/18 at request of Court. Budget proposal clarifying art expenses are actually therapeutical, to be filed.

THIS CASE IS SET FOR HEARING ON Fourth Account Current filed by Petitioner, David L. Bates, CPA/Trustee of the Shareen Ann Brittain Trust.

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

1. Accounting covers 01/01/17 to 12/31/17.
2. Assets on hand: \$1,104,544.00 (consisting of securities, annuity and life insurance policy)
3. Petitioner requests the Court ratify, confirm and approve trustee and accounting fees totaling \$11,007.00. Billed at \$225-\$250/hour. [Itemized pgs. 34-37].
JTD.
4. Petitioner requests the Court ratify, confirm and approve payment of attorneys' fees in the amount of \$5,249.75 for the accounting period. Billed at \$350/hour for attorney time. Itemized [LF, pgs. 258-272]. JTD.
5. **Need** budget proposal re art expenses.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 5 then Court's discretion. If approved, set next accounting period for the SNT for **02/26/19** Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/22/18 TIME: 9:30 DEPT: S37P

CASE#: VC VS248

CASE NAME: IN THE MATTER OF JAMES W GENTRY JR

HEARING:

Accounting Review by ***

COUNSEL:

CHARLES L HUNT JR	(PET)...HAYTON & HUNT
JAMES W GENTRY JR	(CEP)...PRO/PER
LINDA ATKINSON	(CPE)...STEVEN G GROSSMANN

VACATE – Eighth Account filed and set for 06/21/18.

(nb)