



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/23/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

05/05/17lh/nb0509/0518

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400363

CASE NAME: MTR OF SANDRA ZEWE

SEE ALSO 2

HEARING:

Hearing Re: First and Final/Waiver Account and Report

COUNSEL:

JOHN FIELDS

(OBJ)...PRO/PER

PAUL KNOX

(PET)...PRO/PER

SANDRA ZEWE

(DEC)...

Request for Waiver of Court Fees and Costs filed by JOHN FIELDS is GRANTED

Fee waiver amount due \$1365.00

\$435.00 for objections on 07/02/14

\$465.00 for petition to return vehicle on 04/10/15

\$465.00 for petition to determine title etc. on 01/28/16

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account by Administrator, Paul Knox ["Petitioner"].

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

1. Need Notice of Hearing with proof of service.
2. Need final inventory and appraisal with supporting bank statements per Local Rule 20-908.
3. Beginning and ending dates for accounting periods are not identified. File verified supplement.
4. No Summary of Account or supporting schedules. Need same.
5. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c).
6. Need legal description of the real property, including common address, if any, and assessor's parcel number
7. Need vehicle license number(s) and description.
8. Need proof(s) of service to Notice of Proposed Action re: sale of any property.

9. Need findings re: sole and separate property
10. Need findings re: known creditors
11. Need findings re: all taxes have been paid, or reserve made for taxes
12. Need address(es) of beneficiary(ies) receiving real property
13. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
14. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
15. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
16. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4).
17. Please file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
18. Need proposed distribution(s).
19. 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. JTD.

RECOMMENDATION:

Need amended accounting to be placed on first check calendar no sooner than **07/11/17**. Court may wish to direct petitioner to seek legal advice. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400363

CASE NAME: MTR OF SANDRA ZEWE

SEE ALSO 1

HEARING:

Hearing Re: OSC: RE REMOVAL OF PAUL KNOX & APPT OF P.A.

COUNSEL:

JOHN FIELDS	(OBJ)...PRO/PER
PAUL KNOX	(PET)...PRO/PER
SANDRA ZEWE	(DEC)...

Request for Waiver of Court Fees and Costs filed by JOHN FIELDS is GRANTED
Request for Waiver of Court Fees and Costs filed by PAUL KNOX is GRANTED

GENERAL INFORMATION:

Matter set at **02/14/17** hearing, wherein, the court cited Paul Knox to appear in court on March 28, 2017 and court notes that it is also setting OSC re removal of Paul Knox and appointment of Public Administrator for March 28, 2017- if Paul Knox fails to appear at next hearing, court will remove him and appoint public administrator as successor administrator. Notice by Judicial Assistant.

Continued from 03/28/17. Court is continuing this order to appear for Paul Knox. If Mr. Knox fails to appear one more time Court will remove him and appoint the Public Guardian as successor administrator. List of things needed for accounting given to Mr. Fields and the Court. A verified response is to be filed by Mr. Fields by 4 pm on 4/25/17. Reply from Mr. Knox to Mr. Fields' response is to be filed by 5/9/17.

THIS CASE IS SET FOR HEARING ON **OSC re Removal of Paul Know and Appointment of Public Administrator** on Accounting Review (re Paul Knox)

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

1. Letters of Administration issued on 12/01/15, full authority, no bond.
2. Need final inventory and appraisal with supporting ban/financial statements.
3. No accounting or status report of administration filed.
4. **Proof of Service as to Citation returned served.**
5. **No response or reply filed as of the review of this matter.**

RECOMMENDATION:

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

(nb)

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500255

CASE NAME: EMIL MARTIN VAN HEULE SR

HEARING:

FIRST AND FINAL Account and Report of EMIL M VAN HEULE JR ,
JASON A VAN HEULE and Petition for allowance of fees filed.

COUNSEL:

EMIL M VAN HEULE JR (PET)...STEPHEN P JANIS
EMIL MARTIN VAN HEULE SR (DEC)...
JASON A VAN HEULE (PET)...STEPHEN P JANIS

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account Petition for Fees by Co-Administrators, Emil Van Heule, Jr. and Jason Van Heule ["Petitioners"].

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

1. Accounting period 05/05/15 to 02/28/17.
2. Assets on Hand \$139,016.75 consisting of \$118,016.75 in cash and remaining in personal property.
3. Statutory compensation requested of \$12,142.01. Calculated.
4. Attorney requests extraordinary fees of \$6,495.00 for 21.39 hours' time for services rendered in connection with the sale of real property and request for preliminary distribution. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
5. Attorney requests reimbursement of costs advanced of \$1,138.50. Itemized [LF, p. 7 to acct filed s03/16/17].
6. Co-Petitioners requests reimbursement of costs advanced of \$19,265.77. Itemized [LF, p.15 to acct filed s03/16/17].
7. Need bank/financial statement to support date of death and closing balances per Local Rule 20-908 via verified supplement.
8. Petitioner requests authority to withhold a reserve of \$1,000 for closing costs.

9. Petitioner request discharge and bond exoneration upon filing of receipts. However, discharge and exoneration are not allowed upon entry of final discharge order.
- 10.No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4 & 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for 05/29/18.

(nb)

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600391

CASE NAME: MTR OF XIAN LIU

SEE ALSO 5

HEARING:
Hearing Re: SPOUSAL PROPERTY PETITION

COUNSEL:

SHI ZHENG	(PET)...MAY LIOU
THOMAS E WHITEAKER	(PET)...RICHARD
XIAN LIU	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Spousal Property Petition.

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

1. Petitioner, Thomas Whiteaker, is requesting to confirm his half of the community property and acquire decedent's half. The community assets consist of real property and 12 bank accounts.
2. Petitioner and decedent were married in 2002. The real property and bank accounts were allegedly acquired during the marriage with community funds.
3. **Order entered 06/16/16 VACATED per minute order dated 12/27/16. Need Order on Motion to Set Aside by Murray Robertson as directed by Court.**

RECOMMENDATION

Need to clear note 3 then Court's discretion.
(lc/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: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600391

CASE NAME: MTR OF XIAN LIU

SEE ALSO 4

HEARING:

Hearing Re: STATUS CONFERENCE/TRIAL SETTING CONFERENCE

COUNSEL:

SHI ZHENG

(PET)...MAY LIOU

THOMAS E WHITEAKER

(PET)...RICHARD

XIAN LIU

(DEC)...

No notes – Status/TSC.

(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: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600613

CASE NAME: MTR OF JEFFREY WARREN ASHTON SR

SEE ALSO 7

HEARING:

Hearing Re: OSC RE DISMISSAL

COUNSEL:

JEFFREY WARREN ASHTON SR (DEC)...

THRIVENT TRUST COMPANY (PET)...KEVIN

GENERAL INFORMATION:

Letters of Special Administration issued 06/27/16. Court directs that any monies received by civil litigation are to be placed into a blocked account.

Continued from 08/30/16 and 11/08/16.

Continued from 03/07/17. Matter is continued for receipt of certification of trust.

Continued from 04/18/17. No appearance. Court set for OSC re dismissal. Petition will be dismissed at next hearing if there is no appearance, or if probate notes are not cleared.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA, by named executor, Thrivent Trust Company.

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

1. The will conditionally incorporates Decedent's Trust. Need Certification of Trust that meets the requirements in Pr. C. § 18100.5, to include a list of Trust beneficiaries for notice purposes. Copy of Trust affixed to petition [LF, pgs. 18-87].
2. No bond – corporate fiduciary.
3. Proof of Publication filed 07/12/16.
4. Notice given.
5. No proposed Order submitted.

RECOMMENDATION:

Need to clear note 1, no bond. If approved, set future hearing for Accounting/Status Review on **05/15/18**. Any account to be filed 30 days' in advance. Note requirements of Local Rules. (nb/lc/nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600613

CASE NAME: MTR OF JEFFREY WARREN ASHTON SR

SEE ALSO 6

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/
FULL AUTHORIZATION UNDER IAEA

COUNSEL:

JEFFREY WARREN ASHTON SR (DEC)...
THRIVENT TRUST COMPANY (PET)...KEVIN

See notes on previous page

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600753

CASE NAME: THE DAVID SERVANTES FAMILY TRUST

SEE ALSO 9

VACATED

HEARING:
Hearing Re: OSC RE DISMISSAL

COUNSEL:

DANIEL D O'BRIEN	(PET)...BUXBAUM & CHAKMAK
JENNIFER R MACDONALD	(PET)...BUXBAUM & CHAKMAK
THE DAVID SERVANTES FAMILY TRU	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Dismissal on Petition for Order Nunc Pro Tunc Correcting Trust Name Appointing Trustee

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

1. Matter set at 04/18/17 hearing, wherein, there was no check in by Court Call or in person.
2. Notice by Judicial Assistant.
3. Order Nunc Pro Tunc Correcting Name of Trust, Appointing Co-Trustees, and Transferring Property to Co-Trustees of the Trust entered 04/13/14.

RECOMMENDATION:

Matter appears moot.
(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: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600753

CASE NAME: THE DAVID SERVANTES FAMILY TRUST

SEE ALSO 8

VACATED

HEARING:

Petition for ORDER NUNC PRO TUNC CORRECTING TRUST NAME
APPOINTING TRUSTEE

COUNSEL:

DANIEL D O'BRIEN	(PET)...BUXBAUM & CHAKMAK
JENNIFER R MACDONALD	(PET)...BUXBAUM & CHAKMAK
THE DAVID SERVANTES FAMILY TRU	(TRU)...

See prior matter.

Currently under review by Legal Research.
(LR)

Notice:

Notice filed 02/22/17 does not include beneficiaries David R. Servantes and Leticia S. O'Brien; or Trustees (unnamed) of the Survivor's Trust and Residual Trust. Need proper service.

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700011

CASE NAME: MTR OF LEWIS J BARTHA

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LEWIS J BARTHA

(DEC)...

WILLIAM G BARTHA

(PET)...KATHLEEN CRIST

GENERAL INFORMATION:

Continued from **03/07/17** at request of counsel.

Continued from 04/18/17. Counsel reports to the court that the petitioner has passed away; counsel requests continuance to determine if she intends to dismiss this petition.

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by brother, William G. Bartha.

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

1. Petition's caption includes property, however, inventory and appraisal [LF, p. 6] does not include personal property. Need verified supplement.
2. Attachment 11 [LF, p. 4] does not indicate decedent's interest in the real property. Need verified supplement.
3. Petition does not include Attachment 14 listing names of heirs or devisees. Need verified supplement.
4. Inventory & Appraisal [LF, p. 6], section 5 is incomplete as to property tax certificate. Need same per Revenue and Taxation Code § 480.
5. Inventory & Appraisal [LF, p. 8] does not include full legal description. Need full legal description of real property listed on Attachment 2. Need corrected inventory
6. Petitioner requests a determination that decedent's real property located at Hesperia, CA, in San Bernardino County, pass to petitioner without administration. Petitioner is decedent's brother and purported sole heir.

RECOMMENDATION:

Need to clear notes then Court's discretion.

(nb)

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700162

CASE NAME: MTR OF SHIRLEY JOANNA HEIL

HEARING:

Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/FULL IAEA

COUNSEL:

MARY E HEIL

(PET)...LAW OFFICE OF MARY M. BADER

SHIRLEY JOANNA HEIL

(DEC)...

GENERAL INFORMATION:

Continued from 04/18/17.

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Mary Heil (executor)

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

1. Will waives bond. Estimated net value of estate is \$209,250. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. ~Proposed form Order: 02/21/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **06/26/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700253

CASE NAME: EVELYN DORIS EKLAND

HEARING:

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

COUNSEL:

DEBRA WENDY EKLAND (PET)...LAW OFFICES OF EMMA D ENRIQUEZ
EVELYN DORIS EKLAND (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Debra Ekland (daughter/alt executor)

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

1. Will waives bond. Estimated net value of estate is \$230,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. ~Proposed form Order: 03/21/17

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **07/31/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700302

CASE NAME: JOHN L. MILLER

SEE ALSO 13A, 13B

HEARING:

Fifth and Final Account and Report of JOHN D MICKUS and Petition for allowance of fees filed.

COUNSEL:

ANNE L. CHAVIS	(PCR)...PRO/PER
CONNIE K. EPPS	(SC)...
JOHN D MICKUS	(CPE)...PRO/PER
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
JOHN L MILLER	(CEP)...PRO/PER
JOHN L. MILLER	(PCE)...JACK B. OSBORN
LAWRENCE A DEAN II	(CPE)...SHERRI L KASTILAHN
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

Order Appointing, Lawrence A. Dean, II, Successor Conservator of the person and estate entered 11/15/16.

Continued from 02/14/17 at request of counsel. Notice given by Mark Flory to John Mickus

THIS CASE IS SET FOR HEARING ON **Amended (04/28/17) Sixth and Final Account** and Petition for Fees by prior Conservator of the Person and Estate, John D. Mickus [PPF].

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

1. Accounting period **09/01/15 to 03/31/17**.
2. **Assets on Hand \$19,050.56 consisting of \$12,657.81 in cash and \$6,392.75 in non-cash assets.**
3. Attorney requests fees of **\$2,310.00**. Billed at **\$130-\$250/hour** for 8.40 hours' conservator/attorney time and **\$105/hour** for 2.80 hours' paralegal time. Itemized [LF, pgs. 29-30 to amended acct filed 04/28/17]. JTD.

4. **Petitioner requests that he be ordered to distribute the balance of the conservatorship estate, after payment of costs and fees, to Lawrence Dean II, Successor Conservator.**
5. Notice given.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **05/29/18.**

(nb)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700302

CASE NAME: JOHN L. MILLER

SEE ALSO 13, 13B

HEARING:

Conservatorship Compliance Review Hearing on Accounting Review
of JOHN D MICKUS

COUNSEL:

ANNE L. CHAVIS	(PCR)...PRO/PER
CONNIE K. EPPS	(SC)...
JOHN D MICKUS	(CPE)...PRO/PER
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
JOHN L MILLER	(CEP)...PRO/PER
JOHN L. MILLER	(PCE)...JACK B. OSBORN
LAWRENCE A DEAN II	(CPE)...SHERRI L KASTILAHN
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Order Appointing Successor Conservator of the person and estate, Lawrence A. Dean II,
entered 11/15/16, \$300,000 bond.

Continued from 04/25/17 at request of counsel.

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 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).
- 4 Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 5 If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.
- 6 Need Court Investigator 6 month report per Pr.C.§1850(a)(1).

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700302

CASE NAME: JOHN L. MILLER

SEE ALSO 13, 13A

HEARING:

AMENDMENT TO FIFTH & FINAL ACCT TO RENAME AS SIXTH Account and
Report of *** and Petition for allowance of fees filed.

COUNSEL:

ANNE L. CHAVIS	(PCR)...PRO/PER
CONNIE K. EPPS	(SC)...
JOHN D MICKUS	(CPE)...PRO/PER
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
JOHN L MILLER	(CEP)...PRO/PER
JOHN L. MILLER	(PCE)...JACK B. OSBORN
LAWRENCE A DEAN II	(CPE)...SHERRI L KASTILAHN
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

See matter #13.

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

SEE ALSO 15

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JAMES KUNST

COUNSEL:

JAMES KUNST (PET)...VALERIE ROSS
SARA M KUNST (CEE)...ROBERTA L TAYLOR

GENERAL INFORMATION

Continued from 11/08/16 at request of counsel.

Continued from 02/28/17. Counsel represents the conservatee has recently passed away in December. Matter is continued by the Court. Accounting Review is ordered vacated and reset to 05/23/17.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. James Kunst, son, appointed conservator of the person and estate on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued. 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. JTD.
2. Conservatee passed away on 12/05/16.
3. Final Inventory and Appraisal was filed 12/13/16.

RECOMMENDATION

Court's discretion

(lc/nb/lh/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: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

SEE ALSO 14

HEARING:

Accounting Review

COUNSEL:

JAMES KUNST

(PET)...VALERIE ROSS

SARA M KUNST

(CEE)...ROBERTA L TAYLOR

Request for Waiver of Court Fees and Costs filed by SARA M KUNST is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. James Kunst, son, appointed conservator of the person and estate on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. Conservatee died on 12/05/16.
3. Need pre-death and post-death accountings per Pr. C. §2620(b).

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500341

CASE NAME: MTR OF SARA ANDRADE

SEE ALSO 17, 18

HEARING:

Petition for TERMINATION OF CONSERVTRSHIP OF THE ESTATE FOR SARA ANDRADE

COUNSEL:

HILDA ANDRADE (CPE)...LAW OFFICES OF RYAN S CARRIGAN
SARA ANDRADE (CEP)...

GENERAL INFORMATION:

Continued from **01/10/17 and 03/23/17**. Counsel indicates he has item to file re accounting. Counsel to file and return to the department with information for next hearing. **Continued from 04/13/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Petition for Termination of Conservatorship of the Estate, by Conservator, Hilda Andrade (daughter-"Petitioner").

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

1. Hilda Andrade, daughter, appointed Conservator of estate on 01/15/16' \$539,000 bond.
2. Petitioner, Hilda Andrade, requests termination of the estate of Sara Andrade.
3. Petitioner states the conservatorship was necessary for the settlement of a personal injury case of the Conservatee, which, has settled, and for which, a lump sum was received.
4. Petition alleges the Conservatee wishes to have Petitioner act with a Power of Attorney to serve her needs; wishes to live outside the country, in Mexico; where doing so would be a significant savings in cost of living and 24 hour care-giving services, which would help maintain Conservatee's quality of life and the needed caregiving service for several more years than in the current situation.
5. The termination of the relationship of the conservator and conservatee by the death of either, by the determination of the court that the conservatorship is no longer necessary, by the removal or resignation of the conservator, or for any other reason, does not cause the court to lose jurisdiction of the proceeding for the purpose of settling the accounts of the conservator or for any other purpose incident

to the enforcement of the judgments and orders of the court upon such accounts or upon the termination of the relationship. Pr. C. § 2630.

6. Proposed Order 11/30/16.

RECOMMENDATION:

Court's discretion. If approved need final accounting.

(nb/lc/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: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500341

CASE NAME: MTR OF SARA ANDRADE

SEE ALSO 16, 18

HEARING:

Accounting Review

COUNSEL:

HILDA ANDRADE

(CPE)...LAW OFFICES OF RYAN S CARRIGAN

SARA ANDRADE

(CEP)...

GENERAL INFORMATION

Continued from **03/23/17**. Counsel indicated he has item to file re accounting. Counsel to file and return to the department with information for next hearing.

Continued from 04/13/17 at request of counsel.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Hilda Andrade, daughter, appointed conservator of the estate only on 01/15/16, \$539,000.00 bond.
2. Need accounting.

RECOMMENDATION

Inquire status.

(lc/nb)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500341

CASE NAME: MTR OF SARA ANDRADE

SEE ALSO 16, 17

HEARING:

BALANCE SHEET Account and Report of HILDA ANDRADE and Petition
for allowance of fees filed.

COUNSEL:

HILDA ANDRADE (CPE)...LAW OFFICES OF RYAN S CARRIGAN
SARA ANDRADE (CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Balance Sheet Accounting, Income and Expenses
by Conservator of the Estate, Hilda Andrade ["Petitioner"].

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

1. Purported accounting filed 04/06/17 does not include Summary of Account or
comply with Pr. C. 1060 et. seq. Further, verification by petitioner and requests for
attorney's fees and costs are filed separately.
2. Beginning and ending dates for accounting periods are not identified. Need verified
supplement.
3. No Summary of Account or supporting schedules. Need same.
4. Need balance and description of the assets on hand, specifically noting the amount
of cash included in said balance (Local Rule 20-614c).
5. Need Notice of Hearing with proof of service.
6. 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. JTD.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need one, complete accounting in compliance with Pr. C. § 1060 et seq. to be set on first
check calendar no sooner than **07/11/17**. Any account to be filed 30 days before hearing.
Note requirements of Local Rules.

(nb)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600143

CASE NAME: REGINA TOFFI

HEARING:

Conservatorship Compliance Review Hearing on PETIITON FOR
CONSERVATORSHIP of EBTISAM HELO TOFFI

COUNSEL:

EBTISAM HELO TOFFI	(CP)...PRO/PER
DIMITRI JEAN TOFFI	(CP)...PRO/PER
REGINA DIMITRI TOFFI	(CTP)...DUANE P BOOTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Audelia Munoz appointed Conservatee of the person on 10/18/16.
2. Need Notification of Conservatee's rights per Pr. C. §1830(c).
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Need to clear notes.

(lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700012

CASE NAME: LYDA M SHILLINGBURG

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DONNA WASHBURN (PET)...FERNANDO J BERNHEIM
LYDA M SHILLINGBURG (CPE)...JENNIFER M DANIEL

GENERAL INFORMATION

Ex parte orders entered 01/23/17. Court appointed Donna Washburn temporary conservator of the person and estate, no bond.

Continued from 02/28/17 to clear probate notes. Attorney Jennifer M Daniel is appointed for Lyda M Shillingburg.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Donna Washburn (daughter)

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

1. **Court to review CI Special Report filed 04/20/17.**
2. **Question whether assets have been marshalled. If so, Court to set accounting review for 07/25/17.**
3. Petitioner seeks bond of \$400,000. Suggested bond \$440,000 per CRC 7.207 bond calculation.
4. Petitioner seeks orders granting conservator right to avoid transactions. JTD
5. Petitioner seeks powers to establish residence, medical decisions, sexual contacts under Pr. C. §2351-2358. JTD
6. Petitioner seeks powers to administer all aspects of person and estate under Pr. C. §2590. Need verified supplement specifying requested powers.
7. Petitioner seeks medical powers. Need Capacity Declaration.
8. Petitioner seeks dementia powers. Need report of Counsel Jennifer M Daniel.
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Court Investigator Report filed 02/15/17.
11. Return of Citation filed 02/28/17
12. Due Diligence Declarations filed 02/28/17 as to David Watley and John MacFarland (grandsons). JTD

13. Need Notice of Hearing and proof of service.
14. ~Proposed Form Order: 01/13/17

RECOMMENDATION

Petition appears to be moot per CI Special Report filed 04/20/17. Court to set Accounting Review for **07/25/17**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules 20-901 and 20-908.

(lh/nb/lh)

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

DATE: 05/23/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100556

CASE NAME: ***MF*** RICHARD C MCPHERSON

HEARING:

Probate status report filed.

COUNSEL:

CHRISTY WOLFF	(PET)...DENNIS M SANDOVAL
CHRISTY WOLFF	(PET)...PRO/PER
DANIEL J. MCPHERSON	(PET)...PRO/PER
DANIEL MCPHERSON	(APP)...PRO/PER
DANIEL MCPHERSON	(OBJ)...PRO/PER
ESTATE OF RICHARD C MCPHERSON	(PRO/PER
MARY BOETTCHER	(PET)...PRO/PER
MARY BOETTCHER	(PRO/PER
MICHELLE MCPHERSON	(APP)...PRO/PER
PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER
RICHARD C MCPHERSON	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(PRO/PER
WELLS FARGO CARD SERVICES	(PRO/PER

Request for Waiver of Court Fees and Costs filed by DANIEL J. MCPHERSON is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Successor Administrator of the Estate, Public Guardian ["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 waiting on Stanford Financial Group, Inc., to turn over about \$30,000 in funds belonging to the decedent.
2. Petitioner requests an additional 12 months to close the estate.
3. Notice filed 03/21/17 does not include FTB or Wells Fargo who have requested special notice. Need proper service.
4. ~Proposed Order 03/14/17.

RECOMMENDATION:

Need proper service then Court's discretion. If approved, set next hearing for Accounting Review on **05/29/18**.

(nb)

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

DATE: 05/23/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300077

CASE NAME: BRUCE E. COCKRELL

HEARING:
Accounting Review

COUNSEL:

BRUCE ELLIOT COCKRELL	(DEC)...
DENNIS JAMES BALSAMO	(PRO/PER
DORI LEE COCKRELL	(PET)...
ELIZABETH MARIAN COCKRELL	(PET)...
KRISTINA ANN LEON	(PET)...PRO/PER
MICHAEL WILLIAMSON	(ADM)...
PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER
STATE OF CALIFORNIA FRANCHISE	(PRO/PER

VACATE – first and final account filed and set for 08/01/17.

(nb/lh/nb)

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

DATE: 05/23/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1501031

CASE NAME: MTR OF STANLEY GLICK

HEARING:

Probate status report filed.

COUNSEL:

S. B. COUNTY PUBLIC ADMINISTRA (PET)...CRAIG M PARKER
STANLEY GLICK (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator of the Estate,
Public Guardian ["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 needs to liquidate the 2008 Geo Metro, collect bond that belonged to the decedent and is still waiting on the State of California to turn over the unclaimed property that the State is holding.
2. Petitioner requests an additional 12 months to close the estate.
3. Notice given.
4. ~Proposed Order 03/07/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **05/29/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 05/23/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

VACATED

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

KEVIN STUOT

(PET)...GUAY P WILSON

KEVIN STUOT

(TEE)...GUAY P WILSON

KRAIG STOUT

(PET)...FULLERTON LEMANN SCHAEFER & DO

STOUT TRUST

(TRU)...

FUTURE HEARING DATES:

05/25/17 ACCOUNTING/PETITION FOR FEES

05/25/17 TRIAL SETTING CONFERENCE

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 05/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400376

CASE NAME: THE LUCILLE SABBATH GRIFFIN REVOCABLE TRUST

HEARING:

Accounting Review

COUNSEL:

THE LUCILLE SABBATH GRIFFIN RE

YOLANDA QUAM

YOLANDA QUAM

YOLANDA QUAM

YOLANDA QUAM

(TRU)...

(PET)...CHO, SHEASBY, CHUNG &

(PET)...CKB VIENNA, LLP

(PET)...ERIC N CHUNG

(TEE)...ERIC N CHUNG

XREF: CONPS1500124

GENERAL INFORMATION:

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

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

1. Second Account approved/granted on 10/12/16. Need Order after Hearing.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIP**

DATE: 05/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000118

CASE NAME: MTR OF EDWARD LEE ROSENBERRY

HEARING:

Accounting Review

COUNSEL:

2008 EDWARD LEE ROSENBERRY REV (TRU)...	
CHOC CHILDRENS FOUNDATION	(PAUL HASTINGS LLP
DIANE D HARKISON	(CP)...M DANIEL SAYLOR
DIANE D HARKISON	(PET)...M DANIEL SAYLOR
EDWARD LEE ROSENBERRY REVOCABL(TRU)...	
JEAN ANN EMMONS	(OBJ)...SHIRLEY L KOVAR
KATIE CURE HERNANDEZ	(PET)...E. JOAN NELMS
LOMA LINDA UNIVERSITY CHILDREN	(CLAYSON, MANN, YAEGER & ,
NANCY SUE CARMAN	(BEN)...PRO/PER
STACY CARMEN	(PRO/PER
W. A, HLAVATY	(CP)...PRO/PER
W. A. HLAVATY	(PET)...THOMPSON & COLEGATE
WILLIAM LEE ROSENBERRY	(BEN)...BRYAN C. HARTNELL
WILLIAM LEE ROSENBERRY	(CPE)...HARTNELL LAW GROUP
WILLIAM LEE ROSENBERRY	(SHIRLEY L KOVAR

XREF: PROPS1601174, CIVDS1008424

GENERAL INFORMATION

Continued from 04/04/17 for accounting to be submitted.

THIS CASE IS SET FOR HEARING ON accounting review

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

- 1 Order Settling First and Current Account entered 11/08/16; Second Account now due.
- 2 No accounting or waiver of account. Need same.

RECOMMENDATION:

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

(nb/lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000166

CASE NAME: CAROL ANN BROWN

HEARING:
Accounting Review

COUNSEL:

CAROL ANN BROWN (CEP)..CAROL ANN BROWN
SHIRLEY M. MORGAN (CPE)...J. TERRENCE MOYNIHAN
VIRGINIA C. PEARSON (CPE)...RYSKAMP & ROBINSON

Request for Waiver of Court Fees and Costs filed by CAROL ANN BROWN is GRANTED

GENERAL INFORMATION

Continued from 03/21/17. No appearance. Court orders Shirley M. Morgan and/or Counsel to appear at next hearing on 05/23/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved a Waiver account for the period ending 12/31/14 on 03/23/15.
2. Ex Parte Petition to Dispense with Accounting and Order returned by court on 05/02/17.
3. Need waiver of account, or accounting.

RECOMMENDATION:

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500124

CASE NAME: LUCILLE SABBATH GRIFFIN

HEARING:
Accounting Review

COUNSEL:

DEMETRIUS WILLIAMS	(RES)...GEORGE M HALIMI
LUCILLE SABBATH GRIFFIN	(CEP)...PRO/PER
YOLANDA QUAM	(CPE)...CHO, SHEASBY, CHUNG &
YOLANDA QUAM	(CPE)...MATTHEW SHEASBY
YOLANDA QUAM	(PET)...CKB VIENNA, LLP

Request for Waiver of Court Fees and Costs filed by DEMETRIUS WILLIAMS is GRANTED

XREF: PROPS1400376

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved Third Accounting on 10/12/16. No Order submitted.
2. Fourth Account Current now due.

RECOMMENDATION

Inquire status.
(lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600266

CASE NAME: BETTY JANE WOODSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALICE L WINCHESTER (PET)...HARTNELL LAW GROUP
BETTY JANE WOODSON (DEC)...MARK J. FLORY

GENERAL INFORMATION

Ex Parte orders granted on 09/08/16. Alice Winchester appointed temporary conservator as to estate only. Bond required of \$33,000.00. Proceeds from sale to be placed into a blocked account.

Continued from 10/25/16. Court orders petitioner to re-cite conservatee at least 15 days prior to hearing. Court orders Alice Winchester to appear at 04/04/17 hearing. If petitioner does not appear, court will appoint public guardian. Attorney Mark J. Flory appointed for Betty Jane Woodson.

Continued from 04/04/17 at request of counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, estate only, by sister.

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

1. Petitioner seeks bond of \$33,000. Ok.
2. Return of citation filed 10/19/16, but did not provide least 15 days' notice. **Need to re-cite conservatee.**
3. **Capacity Declaration filed 01/19/17.**
4. Need report from court-appointed counsel.
5. Certificate of Completion of the Conservatorship Training Class.
6. CI Report filed on 09/28/16.
7. ~Proposed Form Order: 09/02/16

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **12/26/17** for the filing of the required documents and hearing re Accounting Review for **07/31/18**. Any accounting to be filed 30 days in advance. (lh/lc/lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700055

CASE NAME: MTR OF MICHAEL ESPINOZA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IRENE S MORA ESPINOZA (CP)...PRO/PER
MICHAEL ESPINOZA (CTP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 03/22/17 to clear notes. Attorney Craig M. Parker appointed. Petitioner states she has not been able to get medical records for proposed conservatee. Court sets an ex-parte hearing for temporary conservatorship.

Ex parte order granted on 04/04/17. Court appoints Irene S Mora temporary conservator with medical powers. Craig Parker to prepare order/temporary letters.

Continued from 04/04/17. Certificate of Completion of Conservatorship Court provided in open court. Court clears probate note #13 as to CI report.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Irene Espinoza, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical, sexual contacts etc per Pr.C. §§ 2351, 2351.5. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 02/08/17.
4. Proposed conservatee is developmentally disabled. **Report by court-appointed counsel, Craig Parker filed 04/04/17.**
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Need ***dated*** Confidential Screening Form.
7. Need ***dated*** Confidential Supplemental Information.
8. **Return of Citation and proof of service filed 04/24/17; however, item #1b does not reflect petitioner/proposed conservator, Irene Mora Espinoza. Need return of amended Citation and proof of service.**
9. **Due Diligence Declaration filed as to Ramiro Espinoza Cerda (father). JTD**
10. List of required contacts does not include maternal or paternal grandparents. Need updated list or verified supplement.

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.

11. Court Investigator report filed 03/16/17.
12. ~Proposed Form Order: 02/08/17.

RECOMMENDATION

Need to clear notes 5-10. If approved, set hearing for Compliance Review for **12/26/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 05/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600077

CASE NAME: ESTATE OF ARDITH A EUDEY

HEARING:

Accounting Review

COUNSEL:

ARDITH A EUDEY

(DEC)...

DU'VENE GAMMA EAVES

(PET)...CHARLES S ALTHOUSE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Du'Vene Gamma Eaves as executor with full authority, no bond; Letters issued 03/15/16.
2. Need accounting or status report. Need same.

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600078

CASE NAME: JOHN HANF

HEARING:
Accounting Review

COUNSEL:

JOHN HANF	(DEC)...
PAT PERLEY	(PET)...MITCHELL I ROTH
SCOTT A HANCOCK	(SNYDER & HANCOCK
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Pat Perley as administrator with full authority, \$220,000 bond. Letters issued 01/27/16.
2. Partial Inventory and Appraisal filed 05/31/16. Need Final Inventory and Appraisal.
3. Need accounting or status report. Need same.

RECOMMENDATION

Inquire status.
(lh)

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

DATE: 05/23/17 TIME: 9:30 DEPT: S37P

CASE#: OC RS596

CASE NAME: IN THE MTTR OF KEVIN ALBERS

HEARING:
Accounting Review

COUNSEL:

KEVIN ALBERS	(CON)...
KEVIN ALBERS	(CTE)...PRO/PER
KEVIN ALBERS	(CTP)...
LINDA ALBERS	(CE)...PRO/PER
LINDA ALBERS	(CP)...PRO/PER
LINDA ALBERS	(CPE)...PRO/PER
LINDA ALBERS	(PET)...PRO/PER

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved 14th account current and report of conservator on 12/16/15.
2. Need 15th account current.

RECOMMENDATION

Inquire status.
(lh)