



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/24/17

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.

04/27/17lc; 05/18/17lh

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: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1100152

CASE NAME: DENEEN WARREN LYNCH

HEARING:

FIRST AND FINAL Account and Report of DONNA B LYNCH and Petition
for allowance of fees filed.

COUNSEL:

| | |
|----------------------|-----------------------|
| DONNA B LYNCH | (PET)...GUAY P WILSON |
| DENEEN WARREN LYNCH | (DEC)... |
| PUBLIC ADMINISTRATOR | (TP)... |

GENERAL INFORMATION

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

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

1. Petitioner and attorney request statutory fees of \$5,740 each. Ok. Court to inquire how petitioner and attorney will be paid as it appears only real property remains.
2. Attorney and counsel waive additional statutory fees computed on rent due to delayed administration.
3. Attorney requests reimbursement of costs totaling \$465 for filing fee.
4. **Notice of hearing and proof of service filed 05/03/17. However, need amended Proof of Service to include server's address in item #2.**
5. ~Proposed Order: 03/17/17.

RECOMMENDATION

RFA subject to notice. If approved, set hearing on the filing of receipts and final discharge for **05/30/18**.

(lc/lh)

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

HEARING: OSC re: SANCTIONS FOR FTA/FAILURE TO FILE A TIMELY
ACCOUNT filed by CARLA JACKSON

COUNSEL:

BILLY DON JACKSON (PET)...
DELLA MARIE LEWIS (DEC)...
CARLA L JACKSON (PET)...PRO/PER
CARLA JACKSON (OBJ)...PRO/PER
LARRY WAYNE JACKSON (PRO/PER)

GENERAL INFORMATION

Continued from **07/23/15**. Carla Jackson ordered to appear at next hearing.

Continued from **09/03/15** and **12/3/15** for amended final I&A to be filed by 1/29/16.

On **3/2/16** Court set OSC for no appearance/filing. Attorney Inez Tinoco-Vaca checked in but was not present for the hearing. Citation issued for Carla Jackson.

Continued from **5/4/16** Billy Don Jackson present. Carla Jackson was not served with a citation. Carla Jackson has not filed an accounting as required. Attorney Inez Tinoco-Vaca is not present as ordered. Billy Jackson states that he has not heard from his attorney. Court orders Attorney Inez Tinoco-Vaca to be present at the next hearing. If non-appearance by counsel, court will report to the California PState Bar.

Continued from 6/22/16 Ms. Tinoco-Vaca informs the court that her client is planning on filing a petition to become successor administrator and is going to be filing a substitution of attorney to represent himself for further matters.

Continued from 11/16/16. Billy Jackson, son/special co-administrator, to file account. If Billy Jackson intends to file a petition to Remove Carla Jackson as administrator is to file petition prior to next hearing; 03/08/17. Citation issue to Carla Jackson.

Continued from 03/08/17. Billy Jackson informed the court that half-sister of Carla Jackson, Carmita Robinson, is deceased. Carla's supervisor at Fontana Kaiser is Ella Mae Harris. Citation issued to Carla Jackson. Carla reportedly is a home care nurse.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions for failure to appear or file an accounting

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

1. Letters of Administration issued to granddaughter Carla Jackson on 07/21/14; full authority no bond.
2. Final Inventory and Appraisal filed. However, section 5 re property tax certificate is not complete. Need property tax certification.
3. Need accounting or status report.
4. Miscellaneous documents filed 3/29/16 by Billy Jackson special co-administrator.
5. **Court to review declarations filed 6/16/16 and 6/29/16 by Billy Don Jackson, one of three heirs.**
6. **Citation returned unserved for Carla Jackson on 12/28/16. Need return of second issued citation.**

RECOMMENDATION

Court's discretion re OSC. Inquire status re accounting and citation.

(lc/sa/lc)

Superior Court of Calif, County of San Bernardino
Page: 2A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

SEE ALSO 2 2B 2C

HEARING: Hearing Re: OSC RE REMOVAL OF CARLA JACKSON AS
ADMINISTRATOR

COUNSEL:

BILLY DON JACKSON (PET)...
DELLA MARIE LEWIS (DEC)...
CARLA L JACKSON (PET)...PRO/PER
CARLA JACKSON (OBJ)...PRO/PER
LARRY WAYNE JACKSON (PRO/PER)

GENERAL INFORMATION

Continued from 05/10/17. Court sets OSC re removal of Carla Jackson as administrator for 05/24/17. Court notes that if Carla Jackson fails to appear at next hearing, Court may remove Carla Jackson as administrator. Notice given by Judicial Assistant.

THIS CASE SET FOR HEARING ON Petition to Remove Administrator by Billy Jackson, son.

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

1. Letters of Administration issued to Carla Jackson, granddaughter, on 07/21/14; full authority no bond. On 03/08/17, Billy was ordered to file petition for removal and administrator by 03/08/17.
2. Petition seeks an order for removal as petitioner alleges that Carla has not appeared for hearings and has failed to act as administrator.
3. Caption does not provide code section/authority per local rule 20-601.
4. Need notice of hearing and proof of service.
5. Incorrect proposed form order attached.

RECOMMENDATION

Court's discretion re OSC.

Need to clear notes and Petition for Successor on mandatory judicial council forms.
(lc/lh)

Superior Court of Calif, County of San Bernardino
Page: 2B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS
SEE ALSO 2 2A 2C
HEARING: Petition for TO REMOVE ADMINISTRATOR

COUNSEL:
BILLY DON JACKSON (PET)...
DELLA MARIE LEWIS (DEC)...
CARLA L JACKSON (PET)...PRO/PER
CARLA JACKSON (OBJ)...PRO/PER
LARRY WAYNE JACKSON (PRO/PER)

See notes on page 2A.

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Page: 2C add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

SEE ALSO 2 2A 2B

HEARING: FIRST REPORT AND Account and Report of BILLY DON J ACKSON and
Petition for allowance of fees filed.

COUNSEL:

BILLY DON JACKSON (PET)...
DELLA MARIE LEWIS (DEC)...
CARLA L JACKSON (PET)...PRO/PER
CARLA JACKSON (OBJ)...PRO/PER
LARRY WAYNE JACKSON (PRO/PER)

GENERAL INFORMATION

Continued from 05/10/17.

THIS CASE SET FOR HEARING ON 1st Report and Account by Billy Jackson, son.

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

1. Report is not verified per Pr.C. § 1021.
2. There is merely a short report without a summary of account or schedules.
3. Need notice of hearing and proof of service.
4. No proposed order.

RECOMMENDATION

Petitioner does not have any current standing to bring an accounting as Billy Jackson is not the appointed administrator.

(lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400121

CASE NAME: MTR OF INGER STEWART SOTO

HEARING:

Petition for APPROVAL OF COMPROMISE AGREEMENT AND MUTUAL
RELEASE IN PENDING CIVIL ACTION

COUNSEL:

STEPHANIE ANN SOTO (PET)...KEVIN STAPLETON

INGER STEWART SOTO (DEC)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearing: 02/05/18: Accounting Review

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500001
CASE NAME: The Charles Phillip Meisner Trust
HEARING: Hearing Re: PETITION FOR REMOVAL OF TRUSTEE & SUCCESSOR
TRUSTE

COUNSEL:

BRYAN MEINSER (PET)...MATTHEW SHEASBY
CHARLES PHILLIP MEISNER (DEC)...
CHARLES DAVID MEISNER (PET)...RICHARD G ANDERSON
CHARLES DAVID MEISNER (OBJ)...RICHARD G ANDERSON

CCP170.6 filed as to Judge TARA REILLY

GENERAL INFORMATION:

Continued from **2/11/15, 04/20/15, 06/02/15, 7/9/15, 08/24/15, 10/22/15 and 11/09/15.**

Written objections to be filed by end of December.

Continued from **01/07/16, 02/25/16, 4/11/16, 7/6/16, 08/03/16 trial dates were set.**

Continued from trial 03/08/17. Agreement has been reached and read into the record.

THIS CASE IS SET FOR HEARING ON Petition for Removal of Trustee, Appointment of Successor Trustee, to Compel Trustee to Account, and for surcharge by Bryan Meinser.

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

1. Petitioner, Bryan Meisner, is a beneficiary of the Charles Phillip Meisner Trust executed on 10/22/08. The original settlor is now deceased and settlor's father, Charles David Meisner has been serving as successor trustee since his death on 1/10/10.
2. Petitioner alleges an informal accounting was prepared by the successor trustee at the request of the petitioner which petitioner believes has a number of deficiencies (noted at LF pgs3-4).
3. Petitioner believes the successor trustee has breached his fiduciary duty to the trust by failing to accurately account for trust assets and for his failure to repay the loan owed by the successor trustee to the trust in the amount of \$50,000. In addition, petitioner believes the successor trustee paid himself an additional \$58,310.37 without support or justification for the same.
4. Petitioner requests that the court remove the respondent as successor trustee and appoint petitioner, that Charles Meisner be ordered to account for all acts as

successor trustee and that he be ordered to repay the \$58,310.37 to the trust as well as repay his outstanding loan of \$50,000. Petitioner requests the successor trustee be surcharged in the amount of at least \$750/month since the death of the settlor.

5. **Objection filed 2/6/15, as Supplemented on 3/25/15, by Charles David Meisner, successor trustee.**

RECOMMENDATION

Inquire status of written agreement.

(gls/vet/lc/gls/lc/dl/sa/lc)

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501041

CASE NAME: MTR OF BETTY GENE SLATER

SEE ALSO 5A

HEARING: Petition for DETERMINATION OF HEIRSHIP AND ENTITLEMENT

COUNSEL:

| | | |
|-------------------|----------|--------------------|
| GREGORY BACHMAN | (PET)... | CRAIG E WILSON |
| BETTY GENE SLATER | (DEC)... | |
| DAVID L WALLER | (PET)... | HARTNELL LAW GROUP |
| BRYAN C HARTNELL | (TP)... | |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Heirship and Entitlement to Estate Pr.C. § 11700 by David Waller.

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

1. Letters issued to Gregory Bachman, nephew, on 01/12/16; full authority \$1,285,000.00 bond.
2. Petitioner, David Waller, is son of Mary Waller, predeceased sister of decedent.
3. Decedent died 09/12/15. Decedent allegedly inherited 5 parcels of real property from her mother as separate property. Petitioner alleges that per Pr.C. § 6401(c)(2)(B) the surviving spouse is entitled to ½ of the separate property and the issue the other ½. The alleged heirs entitled are as follows.
 - a. Gerald Slater, spouse, 50%
 - b. Petitioner, David Waller, nephew, 12.5% - issue of Mary Waller, sister.
 - c. Joseph Strong & Heather Lambert, nephew/niece, 6.25% each – Issue of Edward Strong, brother.
 - d. Louana Smith and Arletta Robinson, sisters, 12.5% each.
4. The surviving spouse receives one-half of the decedent's separate property if (Prob C § 6401 (c)(2))
 - a. The decedent leaves only one child or the issue of a deceased child; or
 - b. The decedent leaves no issue but leaves a parent or parents or the issue of either or both parents.
5. Genealogy chart provided attached [Pet. 3/17 LFpg7 et seq].
6. ~Proposed Order: 03/17/17.

RECOMMENDATION
Court's discretion.
(lc)

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501041

CASE NAME: MTR OF BETTY GENE SLATER

SEE ALSO 5

HEARING: FIRST Account and Report of GREGORY BACHMAN and Petition for allowance of fees filed.

COUNSEL:

| | |
|-------------------|----------------------------|
| GREGORY BACHMAN | (PET)...CRAIG E WILSON |
| BETTY GENE SLATER | (DEC)... |
| DAVID L WALLER | (PET)...HARTNELL LAW GROUP |
| BRYAN C HARTNELL | (TP)... |

GENERAL INFORMATION

Continued from 05/11/17. Court clears on the record probate note #5b as to need for amended accounting due to filing of corrected partial Inventory and Appraisal.

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees and Costs by Gregory Bachman, nephew

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

1. Accounting period 09/03/15 – 09/19/16.
2. Assets on hand \$2,198,365.80.
3. Petitioner and attorney reserve the right to statutory fees when estate is ready to close.
4. Attorney requests reimbursement of costs totaling \$3,601.15. Itemized [Acct.03/08 LFpg7].
5. Inventory and Appraisal filed 04/26/16.
 - a. Vehicles to be appraised by probate referee.
 - b. Corrected partial Inventory and Appraisal filed 05/02/17; need amended accounting. **Court cleared note per minute order on 05/11/17.**
6. Current Bond is \$1,285,000. Does court wish to require an increase of bond as assets are \$2,198,365.80. JTD
7. Proposed order submitted 03/08/17; however, 3 lines of content must appear above judge's signature local rule 20-614(d).

RECOMMENDATION

Need to clear note 5a. If approved, set Accounting/Status Review for **05/17/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/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: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600351

CASE NAME: ELEANOR VILLANUEVA MANIGBAS TRUST

SEE ALSO 7 8

HEARING: Hearing Re: RECEIPT OF SETTLEMENT/DISMISSAL

COUNSEL:

PACIFICO A. DIGMAN JR (PET)...NEIL J DE LEON
THE ELEANOR VILLANUEVA MANIGBAS TRUST (TRU)...
CZAR IVAN MANIGBAS (OBJ)...CANDICE A GARCIA-RODRIGO

See notes on matter 8.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600351

CASE NAME: ELEANOR VILLANUEVA MANIGBAS TRUST

SEE ALSO 6 8

HEARING:

Hearing Re: PETITION FOR INSTRUCTIONS TO COMPEL TRUSTEE ETC

COUNSEL:

PACIFICO A. DIGMAN JR

(PET)...NEIL J DE LEON

THE ELEANOR VILLANUEVA MANIGBAS TRUST (TRU)...

CZAR IVAN MANIGBAS

(OBJ)...CANDICE A GARCIA-RODRIGO

Currently under review by legal research

(LR)

NOTICE:

1. Notice appears sufficient, including personal service.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600351

CASE NAME: ELEANOR VILLANUEVA MANIGBAS TRUST

SEE ALSO 6 7

HEARING: Petition for INSTRUCTIONS TO COMPEL TRUSTEE TO RENDER AN ACCOUNTING AND REMOVE TRUSTEE

COUNSEL:

PACIFICO A. DIGMAN JR

(PET)...NEIL J DE LEON

THE ELEANOR VILLANUEVA MANIGBAS TRUST (TRU)...

CZAR IVAN MANIGBAS

(OBJ)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION:

Continued from 06/07/16 at request of counsel. Currently in settlement discussions.
Notice waived.

Continued from 09/13/16, 11/23/16 and 03/15/17. Stip and order filed 12/08/16.

Counsel for petitioner stated there has been a breach in the settlement terms as the trustee has allegedly been collecting rents not accounted for and property taxes are delinquent for 2016. Petition for accounting/compel sale etc not yet in system as of 03/15/17.

THIS CASE IS SET FOR HEARING ON Petition for Instructions

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

1. Petitioner alleges that on 5/5/14, Eleanor Villanueva Mangbas executed the Eleanor Villanueva Mangbas Revocable Trust (the Trust). The beneficiaries of the trust are the settlor's child, Czar Ivan Mangbas and Petitioner who is a friend of the settlor.
2. Czar is the first successor trustee, Petitioner and Emelita Exconde is the second successor co-trustees.
3. The Settlor has died; the date of death is not stated. Czar has assumed the duties as successor trustee. On 11/9/15, petitioner requested that the trustee provide an accounting and an inventory of the trust assets.
4. The Trust provides that petitioner is to receive 30% of the settlor's interest in her personal residence located at 1793 Ambrosia Ave., Upland CA. and a 30% of Calix Drugs, a company in which the Settlor and petitioner were partners. Czar is to receive the remainder of the trust assets.
5. Petitioner further alleges that he has personal property in a safe deposit box owned by the settlor.

6. Petitioner alleges that Czar has not provided an accounting, has not distributed the trust assets and has failed to return petitioner's personal property. In addition, Czar has allegedly changed Calix Drugs from a sole proprietorship to a corporation in order to allow Czar to gain additional equity and to disenfranchise the petitioner.
7. Petitioner seeks to remove Czar as trustee. Petitioner further requests redress for Czar's breach of his fiduciary duty, damages for converting petitioner's personal property and the imposition of a constructive trust over the trust assets.
8. **Objection filed on 5/25/16. Objection by Czar Ivan Manigbas filed 05/10/17.**
9. **Stip and order re settlement filed 12/08/16.**

RECOMMENDATION:

Court's discretion.

(oc/lc/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: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600853

CASE NAME: DANIEL TRUTANICH

HEARING:
Petition for LETTERS OF ADMINISTRATION

COUNSEL:

KATHY TRUTANICH-ROGERS (PET)...PRO/PER
DANIEL TRUTANICH (DEC)...
NANCY TOUCHARD (PET)...PRO/PER

GENERAL INFORMATION:

Continued from 09/27/16, 11/23/16 and 03/15/17. Counsel to file substitution of attorney by 4:00 pm on 03/22/17. Trial set. Vintage record collection to remain in tact.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Kathy Rogers, sister.

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

1. Petitioner now seeks bond of \$50,000. Ok.
2. Need substitution of attorney
3. **Objections filed 09/01/16 by sibling, Nancy Touchard. No competing petitions filed.**
4. ~Proposed Form Order/Letters 03/06/17

RECOMMENDATION:

Matter is contested. If approved, set future hearing for Accounting/Status Review on **08/01/18**. Any accounting to be filed 30 days' in advance of hearing. Note requirements of Local Rules.
(nb/lc/lh/lc)

Future Hearing: 11/09/17: Court Trial Set For Petition For Probate

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601200

CASE NAME: MTR BURNS ELMER LANGDON

HEARING: Petition for (AMENDED)PROBATE OF WILL AND FOR LETTERS OF
ADMINISTRATION WITH WILL ANNEXED

COUNSEL:

SHELANDA LANGDON (PET)...NEIL J DE LEON
BURNS ELMER LANGDON (DEC)...

GENERAL INFORMATION

Reset from 02/08/17.

Continued from 03/29/17.

THIS CASE SET FOR HEARING ON **Amended** Petition for Probate of Will, Letters of
Administration With Will Annexed full authority under IAEA by Shelanda Langdon,
daughter-in-law.

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

1. Petitioner seeks bond of \$160,000. Ok.
2. Remaining named executor nominates petitioner.
3. ~Proposed Form Order:01/30/17.

RECOMMENDATION

RFA, \$160,000 bond. If approved, set Accounting/Status Review for **08/01/18**. Any
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule
20-908.

(lc/lh)

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700033

CASE NAME: MTR OF THERESA V FLORES

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY WITH
FULL AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

SLYVIA T SMITH (PET)...PRO/PER
THERESA V FLORES (DEC)...

GENERAL INFORMATION

Continued from 03/15/17.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Sylvia Smith, daughter.

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

1. Will waives bond. Inventory and Appraisal filed indicating \$230,000 in real property.
2. The will conditionally incorporates decedent's Trust. Copy of Trust attached.
3. Need Notice to Petition to Administer Estate and proof of service for remainderman beneficiary Charles Smith.
4. Need receipt of **original** lodged will. Alternatively, need amended petition with declaration to support lost will per Pr.C. § 6124.
5. Section 8 of petition does not list Trustee. Need verified supplement.
6. Proof of publication filed 03/15/17; however, does not indicate IAEA powers requested. Need corrected publication.
7. ~Proposed Form Order: 01/18/17.

RECOMMENDATION

Need to clear notes 3-6 If approved, set Accounting/Status Review for **08/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700241

CASE NAME: MTR OF RICHARD MARTINEZ

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PHYLLIS MARTINEZ (PET)...ROSE C ROSADO
RICHARD MARTINEZ (DEC)...

X-Ref: PROPS1700161

GENERAL INFORMATION

Letters of Special Administration issued to petitioner on 03/21/17.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Phyllis Martinez, spouse.

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

1. Petitioner requests all liquid assets be placed in attorney/client trust account until further order. Liquid assets are undetermined. Real property is valued at \$300,000. JTD
2. **Notice of Related Case PROPS1700161 filed 05/10/17 for mother's trust: Sally Martinez Family Trust.**
3. ~Proposed Form Order: 03/15/17.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **08/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

DATE: 05/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700252

CASE NAME: CARMELITA HELM

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

TRICIA C DEBAUN
CARMELITA HELM

(PET)...CALDWELL, KENNEDY & PORTER, A.
(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Tricia DeBaun, daughter.

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

1. Will waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr.C. §8571. Estimated value of estate is personal property of \$10,000 and real property of \$160,000. Petitioner requests that proceeds from sale of residence be placed into attorney/client trust account until further order of court.
JTD
2. Will is not self-proving as it is not signed under penalty and perjury under laws of California. Need proof of subscribing witness.
3. ~Proposed Form Order: 03/21/17.

RECOMMENDATION

RFA subject to note 2, Court's discretion re bond. If approved, set Accounting/Status Review for **08/01/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300213

CASE NAME: Bertha Mae Chatman

SEE ALSO 15

HEARING:

Hearing Re: OSC RE SANCTIONS FOR \$500.00 ON MS. BANKS

COUNSEL:

BERTHA MAE CHATMAN (PET)...JAMES B CHURCH

JACQUELINE MARIE BANKS (PCR)...

BERTHA MAE CHATMAN (CEP)...

JACQUELINE MARIE BANKS (CPE)...PRO/PER

Waiver of Court Fees and Costs filed by JACQUELINE MARIE BANKS is GRANTED

XREF: CONDS1000221(Dwight Banks) 07/24/17 Accounting review

GENERAL INFORMATION

Continued from 02/15/17. Additional time needed to file accounting.

OSC set on 04/19/17 for failure to file as ordered. Jacqueline Banks to appear.

THIS CASE SET FOR HEARING ON **OSC re Sanctions for \$500/Accounting review.**

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

1. 1st Account of Jacqueline Banks, daughter, approved on 02/18/15.
2. Need 2nd Account beginning with **11/10/14**.

RECOMMENDATION

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

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300213

CASE NAME: Bertha Mae Chatman

SEE ALSO 14

HEARING:

Accounting Review

COUNSEL:

BERTHA MAE CHATMAN (PET)...JAMES B CHURCH

JACQUELINE MARIE BANKS (PCR)...

BERTHA MAE CHATMAN (CEP)...

JACQUELINE MARIE BANKS (CPE)...PRO/PER

Waiver of Court Fees and Costs filed by JACQUELINE MARIE BANKS is GRANTED

XREF: CONDS1000221

See notes on previous matter.

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500066

CASE NAME: MTR OF DAVID C JOHNSON
HEARING: Petition for ATTORNEYS FEES BY CO-TRUSTEE SUSI PAYNE

COUNSEL:

| | |
|--------------------------|--------------------------------|
| DAVID C JOHNSON | (CEP)... |
| CHRISTINA ERICKSON-TAUBE | (TC)...SHERRI L KASTILAHN |
| SUSI PAYNE | (PET)...MCINTIRE & MCINTIRE |
| CHRISTINA ERICKSON-TAUBE | (PET)...SHERRI L KASTILAHN |
| MITCHELL I ROTH | (PET)...MITCHELL I ROTH |
| SUSI PAYNE | (OBJ)...CHRISTOPHER D MCINTIRE |

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Christopher McIntire, attorney for prior Co-Trustee Susi Payne, daughter.

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

1. Petitioner, Christopher McIntire attorney for daughter and was Co-Trustee, along with siblings David Jr, Joni Haatvedt and Phyllis Lew, of the David Johnson Trust. Christina Erickson Taube is current Successor Trustee.
2. Petitioner seeks fees of \$25,950 for 99.8 hours at \$250 per hour. Itemized [Pet. 04/11LFpg12-27].
3. Petitioner request reimbursement of costs totaling \$2,204. [Pet. 04/11LFpg4].
4. Petitioner requests fees and costs for Susi Payne for court appearances totaling \$610.
5. Caption does not include authority per local rule 20-610. Need same.
6. **Notice of Hearing and Proof of Service filed 05/04/17. Need notice to David Horspool, attorney for Joni Haatvedt.**
7. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 5-6.

(lc/lh)

Future Hearing: 11/28/17: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500130

CASE NAME: HAIDY RUIZ

SEE ALSO 18

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSALINA RUIZ

COUNSEL:

| | |
|------------------|-----------------------|
| ROSALINA RUIZ | (PCR)...PRO/PER |
| JUAN CARLOS RUIZ | (PCR)...PRO/PER |
| HAIDY RUIZ | (PCE)...MARK J. FLORY |

See notes on next matter.

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500130

CASE NAME: HAIDY RUIZ

SEE ALSO 17

HEARING:

Hearing Re: OSC RE SURCHARGE/SANCTIONS OF \$500.00

COUNSEL:

| | |
|------------------|-----------------------|
| ROSALINA RUIZ | (PCR)...PRO/PER |
| JUAN CARLOS RUIZ | (PCR)...PRO/PER |
| HAIDY RUIZ | (PCE)...MARK J. FLORY |

GENERAL INFORMATION

Continued from 08/22/16, 11/02/16 and 02/08/17. Conservators to be personally present on 04/19/17.

OSC set on 04/19/17 for failure to file as ordered. Conservators to appear.

THIS CASE IS SET FOR HEARING ON **OSC re Surcharge/Sanctions of \$500/Compliance Review.**

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

1. Rosalina Ruiz and Juan Ruiz, parents, appointed limited Co-Conservators of the person only on 11/10/15.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.
4. Need Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Court's discretion re OSC. Need to clear notes 2-4.

(/lc)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500202
CASE NAME: RUBY B. HAALAND
HEARING: FIRST Account and Report of ALICE EVANS and Petition for allowance of fees filed.

COUNSEL:

ALICE EVANS (PET)...PATRICIA A LOBELLO
RUBY B HAALAND (CEE)...DONNASUE ORTIZ

XREF: CONPS1500203 (Oscar Haaland Jr; Ruby's spouse)5/25/17 hearing

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Account Current, Request to Terminate Estate and Petition for Allowance of Fees by Alice Evans, daughter.

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

1. Accounting period 08/06/15 – 12/31/16.
2. Assets on hand \$156,145.32; cash.
3. Petitioner waives fees.
4. Attorney requests fees of \$8,756.25 for 33.15 hours at \$125/375 per hour for paralegal and attorney services. Itemized. [Acct. 04/05 LFpg 23-26].
5. Petitioner requests to terminate conservatorship of estate. Petitioner requests that the assets, which are community property, be transferred into the 2014 Haaland Family Trust. Trust page 28. However, request within accounting is not proper. Court to require a separate petition such as a substituted judgment.
6. Current bond is \$304,000. Petitioner requests bond be reduced to \$183,000.
7. Summary of account and schedules are not on mandatory Judicial Council forms GC-400/SUM/GC-400/405. Need to file amended accounting.
8. Need residential facility statements per Pr.C. §2620(c)(5).
9. Proposed Order: However, includes request to terminate, transfer and exonerate bond.

RECOMMENDATION

Need to clear notes 7-8 and require a separate petition for trust issue. If approved set next Accounting review for **03/28/18**.. Accounting to be filed 30 days in advance.

(lc)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700072

CASE NAME: MTR OF RUBEN HURTADO

SEE ALSO 21

HEARING: Hearing Re: OSC RE DISMISSAL

COUNSEL:

ROSA MARIA ZAMORA (CP)...PRO/PER
RUBEN HURTADO (CTP)...

GENERAL INFORMATION

OSC set on 04/19/17. No appearance.

THIS CASE SET FOR HEARING ON **OSC re Dismissal on** Petition for Appointment of Limited Conservator person only by Rosa Zamora, mother.

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

1. Proposed conservatee will not be 18 until the 27th of April.
2. Petitioner seeks medical powers. Capacity Declaration filed 03/03/17.
3. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
4. Petitioner seeks civil rights not be limited without court order. JTD
5. Citation returned served.
6. Proposed conservatee is developmentally disabled. **Letter from IRC filed 03/23/17.**
7. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need notice of hearing and proof of service to siblings Luis and David.
10. CI Report filed 04/06/17.
11. ~Proposed Form Order: 03/03/17.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 7-9. If approved, set hearing for Compliance Review for **12/27/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700072

CASE NAME: MTR OF RUBEN HURTADO

SEE ALSO 20

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ROSA MARIA ZAMORA (CP)...PRO/PER

RUBEN HURTADO (CTP)...

See notes on previous matter.

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700129
CASE NAME: MTR OF LYNN KIELE ANDERSON
HEARING: Petition for Appointment of Conservator

COUNSEL:

LORRAINE DOTSON (CP)...JENNIFER M DANIEL
LYNN KIELE ANDERSON (CTP)...

GENERAL INFORMATION

Petitioner appointed temporary Conservator of person only on 05/01/17. To be heard with related matter PRODS1000147.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Lorraine Dotson, aunt.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 04/27/17.
2. Petitioner seeks bond of \$20,000; however, petition is for person only. Court to inquire.
3. Petitioner is seeking appointment as successor trustee of Lynn Anderson SNT. Although, petitioner is nominated by current Trustee, Phyllis Anderson, petitioner to file separate petition for appointment re successor Trustee. Appears to be case PRODS1000147.
4. Need list of required contacts (Local form SB-12224).
5. Need return of citation.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. **CI report filed 05/16/17.**
8. ~Proposed Form Order: 04/11/17.

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **12/27/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700141

CASE NAME: APRIL EDWARDS

HEARING: Petition for Appointment of Conservator

COUNSEL:

DEBBIE EDWARDS (PET)...M DANIEL SAYLOR
JON RICHARDS (CE)...
APRIL EDWARDS (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate Debbie Edwards, mother for Jon Richards, family friend.

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

1. Petitioner seeks bond of \$15,000. Court may wish to require bond of \$20,000. Alternatively, court to inquire need for conservatorship as there appears to be only public benefits.
2. Proposed Conservator is nominated by proposed conservatee and her father.
3. Jon Richards consents to act.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need Court Investigator report.
6. **Return of Citation with proof of personal service filed 04/05/17.**
7. ~Proposed Form Order: 04/05/17.

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **12/27/17** for the filing of the required documents including a care plan.

Set hearing re Accounting Review for **08/01/18**. Any accounting to be filed 30 days in advance.

(lc/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: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: VC VS00351

CASE NAME: MTR OF TERRY LYNN MEZA

HEARING:

Hearing Re: Bond Increase

COUNSEL:

THE GOOD SHEPHERD FUND, KATHLEN WOOD (CPE)...ROBERTA L TAYLOR
TERRY LYNN MEZA (CPE)...JEANNE KENNEDY
JOSEPHINE MORREO (PET)...WALWICK & FREED
THE GOOD SHEPHERD FUND/PAMELA D BENITEZ(CPE)...ROBERTA L. TAYL
THE GOOD SHEPHERD FUND/DAN T JETT (CPE)...ROBERTA L. TAYL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Bond Increase.

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

1. 7th Account of Gary Beagle of Good Shepard Fund was approved.
2. Court ordered bond increased to \$2,425,000.
3. Need proof of bond.

RECOMMENDATION

Inquire status.

(lc)

Future Hearing: 10/24/18 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 23A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 05/24/17 TIME: 9:30 DEPT: S35P

CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

HEARING:
Hearing Re: BOND REVIEW

COUNSEL:
PHYLLIS ANDERSON (PET)...DENNIS M SANDOVAL
THE LYNN K ANDERSON SPECIAL NE (TRU)...
PHYLLIS ANDERSON (TEE)...DENNIS M. SANDOVAL

XREF: CONPS1700129 (Lynn Anderson) matter 17

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Bond Review.

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

1. Phyllis Anderson resigned as trustee and court appointed Lorraine Dotson interim Successor Trustee of the Lynn Anderson SNT \$20,000 bond. **Need order.**
2. Need bond.

RECOMMENDATION

Inquire status.

(lc)

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: 05/24/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

VACATED

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

KRAIG STOUT

(PET)...FULLERTON LEMANN SCHAEFER & DO

STOUT TRUST

(TRU)...

KEVIN STUOT

(PET)...GUAY P WILSON

KEVIN STUOT

(TEE)...GUAY P WILSON

Trial – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500460

CASE NAME: CHARLES RICHARD WERNER

SEE ALSO 2

HEARING:

Petition for ORDER SETTING APART OMITTED SPOUSE'S SHARE OF
DECEDENT'S ESTATE

COUNSEL:

| | |
|------------------------|----------------------------|
| LORRAINE WARREN | (PET)...LENITA SKORETZ |
| CHARLES RICHARD WERNER | (DEC)... |
| SHIRLEY E WERNER | (PET)...HARTNELL LAW GROUP |

GENERAL INFORMATION

Continued from 1/21/16, 3/17/16, 5/23/16, 08/03/16 and 10/19/16. Counsel stated a settlement has been reached and continued for dismissal to be filed.

THIS CASE SET FOR HEARING ON Petition Re: Omitted Spouse

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

1. Petitioner, Shirley Werner, alleges that she was married to the decedent from 08/01/06 to the date of decedent's death on 12/24/14.
2. Decedent's Will was executed by him on 10/28/2004, one month after the death of his 4th wife, Jeanette Werner, but before he was married to the petitioner.
3. Petitioner alleges that decedent did not intentionally omit her from his Will. She requests her share of the estate under the omitted spouse statute - Pr. C. §21610.
4. Notice complete.
5. **Objections filed by executor Lorraine Warren on 01/28/16.**
6. Proposed order not submitted.

RECOMMENDATION

Inquire status of dismissal.

(oc/lc/dl/sa/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500460

VACATE

CASE NAME: CHARLES RICHARD WERNER

SEE ALSO 1

HEARING: Accounting Review

COUNSEL:

| | |
|------------------------|----------------------------|
| LORRAINE WARREN | (PET)...LENITA SKORETZ |
| CHARLES RICHARD WERNER | (DEC)... |
| SHIRLEY E WERNER | (PET)...HARTNELL LAW GROUP |

First and Final Account filed 03/01/17.

Future hearing date: 07/18/17 First and Final Account by Lorraine Warren

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500845
CASE NAME: MIGUEL MARTINEZ ORTIZ
HEARING: ACCOUNTING REVIEW Account and Report of GLORIA E. MARTINEZ
and Petition for allowance of fees filed.

COUNSEL:

GLORIA E. MARTINEZ (PET)...PRO/PER
MIGUEL MARTINEZ ORTIZ (DEC)...

GENERAL INFORMATION

Continued from 03/29/17. Spanish Interpreter.

THIS CASE SET FOR HEARING ON Accounting review Gloria Martinez, daughter;

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

1. Petitioner filed an "Accounting review" with an accounting attached. **No fees appear to have been taken at filing** and the accounting appears to have conservatorship forms.
2. Petitioner appears to have distributed the assets to herself and the other 3 heirs. [Acct.01/26 LFpg6]. A personal representative ***may only preliminary distribute personal property per Pr.C. § 10520; if it is pecuniary per terms of a will under \$10,000 and/or personal property under \$50,000.*** There is no will. However, the estate does not appear to have suffered harm.
3. The report is not complete as to Creditor's Claim allegations, taxes paid, and notices to Department of Health Services etc. Need a proper report and summary of account and accounting schedules Pr.C.§10900 and Pr.C.§1060 et. seq.
4. Need final Inventory and Appraisal.
5. Proof of service filed; however, no notice filed. Need notice of hearing and proof of service.
6. No proposed order.

RECOMMENDATION

Need to clear notes 3-5. If approved, set hearing on the filing of receipts and final discharge for **05/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 05/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500984

VACATED

CASE NAME: TROY MATTHEW JOHNSON

HEARING:

Accounting Review

COUNSEL:

MICHAEL B JOHNSON

(PET)...HARTNELL LAW GROUP

TROY MATTHEW JOHNSON

(DEC)...

STATE OF CALIFORNIA FRANCHISE (TP)...PRO/PER

Future Hearing: 07/13/17 Probate Status Report

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601134

CASE NAME: THE SIMPSON TRUST DATED OCTOBER 30, 2004

HEARING:

Petition for TO CONFIRM REAL PROPERTY BELONGS TO TRUST AT
SETTLOR'S DEATH ETC

COUNSEL:

MICHAEL S SIMPSON (PET)...JASON L GAUDY
THE SIMPSON TRUST (TRU)...PRO/PER

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 05/24/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600055

CASE NAME: RAY R RAMOS

HEARING: Petition for Appointment of Conservator

COUNSEL:

RETA R RIOS

(CPE)...BRYAN C HARTNELL

RAY R RAMOS

(CEP)...E JOAN NELMS

GENERAL INFORMATION:

Ex-parte hearing 3/17/16 continued. Attorney E. Joan Nelms appointed.

Continued from 07/18/16 and 09/26/16. Temporary orders denied on 10/13/16.

Continued from 12/21/16. Attorney Theios to submit order for doctor to complete Capacity Declaration.

Continued from 03/08/17. Order for physician to complete Capacity Declaration – HIPPA signed on 03/06/17.

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person and estate, by sister

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

1. Petitioner requests bond waived as petitioner has no assets in this state and receives only public benefits. Court may wish to inquire the necessity of estate powers. Alternatively, bond may be waived per Pr.C.§2628. JTD
2. Report of court appointed attorney, E. Joan Nelms, filed 05/02/16.
3. Medical powers sought. Need Capacity Declaration.
4. Declaration of Completion of Riverside County's Video Orientation filed 02/28/17.
5. Court Investigator report filed 04/15/16.
6. Citation returned served.
7. ~Proposed form order: 3/10/16.

RECOMMENDATION:

Need to clear note 3. If approved, set hearing for Compliance Review for **12/27/17** for the filing of the required documents and hearing re Accounting Review for **08/01/18**. Any account to be filed 30 days in advance of hearing.

(sa/dl/nb/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400008

CASE NAME: George Contreras, Sr.

HEARING:
Hearing re Final Discharge

COUNSEL:

JESS CONTRERAS (PET)...KELLY L PEXTON
GEORGE CONTRERAS Sr. (DEC)...

X REF: PROPS1100601 PROPS1300500

GENERAL INFORMATION

Continued from 10/19/16. No appearance. Jess Contreras ordered to be present if notes not cleared.

Continued from 12/21/16. Jess Contreras order to be present if notes are not cleared.

Continued from 03/15/17.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Jess Contreras approved on 10/27/15.
2. Need receipts for Clara, George and Georgette.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500028

CASE NAME: ANGELA GAIL MATTHEWS

HEARING:
Accounting Review

COUNSEL:
CHRISTOPHER K MATTHEWS (PET)...JOHN M WOODBURN
ANGELA GAIL MATTHEWS (DEC)...

GENERAL INFORMATION

Continued from 5/3/16 Court is informed that the Civil Case has been settled and a Minor's Compromise case filed.

**Continued from 08/15/16, 10/26/16, 01/04/17 and 03/15/17. Waiver to be filed today.
Continued for further status report.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration with Limited IAEA issued to Christopher Matthews, spouse on 3/10/15, \$20,000 bond.
2. Need an accounting or status report.

RECOMMENDATION:

Inquire status.
(sa/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500217

CASE NAME: CHARLINE MCFARLING

SEE ALSO 4

HEARING:

Accounting Review

COUNSEL:

COLLIN CHARLES MUNRO (PET)...GARY H BLAYLOCK
CHARLINE MCFARLING (DEC)...
BRANDON MUNRO (PET)...NANCY E LOFDAHL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to **Colin Munro**, son, on 09/14/15; full authority, no bond. Colin was removed as administrator on 10/19/16. **Brandon Munro**, son was appointed temporary, then later successor administrator and letters issued 03/06/17.
2. Need final Inventory and Appraisal.
3. Need accounting or status report. Court may wish to require counsel to file accounting for **Colin Munro** per Pr.C. § 10953.

RECOMMENDATION

Inquire status.

(lc)

Future Hearing: 05/14/18 Accounting Review for **Brandon Munro**

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500217

CASE NAME: CHARLINE MCFARLING

SEE ALSO 3

HEARING:

Accounting Review

COUNSEL:

COLLIN CHARLES MUNRO (PET)...GARY H BLAYLOCK

CHARLINE MCFARLING (DEC)...

BRANDON MUNRO (PET)...NANCY E LOFDAHL

Appears to be duplicate setting as accounting review for Brandon Munro is set for **05/14/18**.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501168

CASE NAME: BETTY J ROUCHEAU

HEARING:

Probate status report filed.

COUNSEL:

JOYCE GAGE (PET)...JANIS BRADY MARTINDALE
ELIZABETH JANE ROUCHLEAU (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Joyce Gage, daughter, on 02/11/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Petitioner seeks an additional year to close the estate in order to receive funds from the State Controller.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **05/30/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600497

CASE NAME: THE FRAIZER LIVING TRUST

SEE ALSO 7

HEARING:

Hearing Re: First Amended Petition for Probate Code 850-859

COUNSEL:

| | |
|--------------------------|---------------------------------------|
| JERRY FRAIZER | (PET)...FITZGERALD YAP CREDITOR |
| THE FRAIZER LIVING TRUST | (TRU)... |
| DIXIE J. FRAZIER | (PET)...DAVID A XAVIER |
| DIXIE J FRAIZER | (OBJ)...LAW OFFICES OF DAVID A XAVIER |
| LISA GREEN | (LAW OFFICES OF DAVID A XAVIER) |
| BETTY JANES FRAIZER | (PRO/PER) |

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600497

CASE NAME: THE FRAIZER LIVING TRUST

SEE ALSO 6

HEARING:

Hearing Re: STATUS OF MEDIATION

COUNSEL:

| | |
|--------------------------|---------------------------------------|
| JERRY FRAIZER | (PET)...FITZGERALD YAP CREDITOR |
| THE FRAIZER LIVING TRUST | (TRU)... |
| DIXIE J. FRAZIER | (PET)...DAVID A XAVIER |
| DIXIE J FRAIZER | (OBJ)...LAW OFFICES OF DAVID A XAVIER |
| LISA GREEN | (LAW OFFICES OF DAVID A XAVIER) |
| BETTY JANES FRAIZER | (PRO/PER) |

Status – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017
CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 9

HEARING: Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

JAMES F BAKER (PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM (DEC)...
KURT BECKSTROM (PET)...ROBERT J SPITZ

GENERAL INFORMATION:

Continued from 03/20/17. Court will require bond of \$602,140.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with full authority under IAEA by named executor, **James F. Baker, friend.**
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker.**

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

Petitioner 1 – James Baker.

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Need proof of publication.
- 3 Need Proof of Subscribing Witness.
- 4 Proof of Publication filed 01/23/17 does not include full IAEA language per Pr. C. § 8100. Need proper publication.
- 5 **Objections by Kurt Beckstrom filed 03/03/17.**
- 6 ~Proposed Form Order 01/10/17.

Petitioner 2 – Kurt Beckstrom.

8. Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
9. ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Need to clear notes 2-4; matter is contested. If approved, set future hearing for Accounting/Status Review on **08/01/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb/lc/lh)

Future Hearing: 05/14/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 8

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

| | | |
|------------------------|----------|----------------------|
| JAMES F BAKER | (PET)... | BANKS GARCIA & JANIS |
| ERNEST ALLEN BECKSTROM | (DEC)... | |
| KURT BECKSTROM | (PET)... | ROBERT J SPITZ |

See notes on other matter.

Future Hearing: 05/14/18 Accounting Review

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

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700238

CASE NAME: CYNTHIA S. MCCOMBS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

CASEY M. ROBERTS (PET)...GABRIELLE R RANSELL
CYNTHIA S. MCCOMBS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Casey Roberts, son.

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

1. All heirs waive bond. Final Inventory and Appraisal indicates net assets of \$271,150 of which \$255,000 is real property.
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication.
4. Need verified supplement indicating relationship of decedent for Misty Roberts.
5. Amended petition filed by Misty Roberts; however, does not include petitioner. Court to inquire.
6. ~Proposed Form Order: 03/09/17.

RECOMMENDATION

Need to clear notes 2-4. Court to trail **07/17/17** petition. If approved, set Accounting/Status Review for **08/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future hearing dates: 07/17/17 Petition for Letters by Misty Roberts.

Superior Court of Calif, County of San Bernardino
Page: 10A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700399

CASE NAME: EDUMENIO A MARTINEZ

SEE ALSO 10B

HEARING:

Hearing Re: PTN TO DETERMINE SUCCESSION TO REAL PROPERTY

COUNSEL:

SUZETTE L HOLT (PET)... PAUL HORN
EDUMENIO A MARTINEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Suzette Holt, significant other.

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

1. Petitioner seeks 100% interest in the decedent's 100% interest per terms of the will.
2. No proposed order. Submit after hearing.

RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino
Page: 10B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 05/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700399

CASE NAME: EDUMENIO A MARTINEZ

SEE ALSO 10A

HEARING:

Hearing Re: REQUEST FOR PERMANENT INJUNCTION

COUNSEL:

SUZETTE L HOLT (PET)... PAUL HORN

EDUMENIO A MARTINEZ (DEC)...

No notes – JTD

(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/24/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700237

CASE NAME: THE LUCIANO MAGALLANEZ TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

MARIA ESTHER COON (PET)...ROBERT E PEARSON
THE LUCIANO AND SOLEDAD SHIRLEY MAGALLANEZ (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. Notice filed; court to inquire if there is a mortgage company to notice as title to property will change.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800028

CASE NAME: MTR OF TERRY R LACOSTE

HEARING: NINTH AND CURRENT Account and Report of CHRISTINA ERICKSON-TAUBE and Petition for allowance of fees filed.

COUNSEL:

| | |
|--------------------------|---------------------------|
| CHRISTINA ERICKSON-TAUBE | (CE)...ALEX R BORDEN |
| TERRY R LACOSTE | (CTE)... |
| CHRISTINA ERICKSON-TAUBE | (CPE)...BORDEN LAW OFFICE |
| EDWARD IRVING | (PRO/PER) |

CCP170.6 filed as to CYNTHIA LUDVIGSEN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 9th Account Current and Petition for Allowance of Fees by Christina Erickson Taube.

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

1. Accounting period 02/01/16 – 01/31/17.
2. Assets on hand \$101,850.65 of which \$97,350.65 is cash.
3. Petitioner requests fees of \$10,611.90 for services billed at \$65/115 per hour. Itemized, not totaled. [Acct. 04/12 LFpg 22-31].
4. Attorney requests fees of \$4,444.50 for 14.6 hours at \$135/390 for paralegal and attorney services. Itemized [Acct. 04/12 LFpg 34-36].
5. Petitioner requests a reduction of bond from \$167,000 to \$160,000. Appears ok.
6. Need receipt for case management services from Lance Riley per local rule 20-1406(c).
7. ~Proposed Order: 04/12/17.

RECOMMENDATION

Need to clear note 6, then Court's discretion re fees. If approved, set next hearing re Accounting Review for **04/19/18**, or a biennial Accounting Review for **04/18/19**.

Accounting to be filed 30 days' in advance.

(lc/lh)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400267
CASE NAME: DAVID L HEISS
HEARING: FIRST Account and Report of KAY M ADAMS and Petition for allowance of fees filed.

COUNSEL:

KAY M ADAMS (CPE)...JENNIFER M DANIEL
DAVID L HEISS (CTE)...JEANNE KENNEDY

GENERAL INFORMATION

Continued from 03/16/17.

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees by Kay Adams, sister.

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

1. Accounting period 11/05/14 – 06/30/16.
2. Assets on hand \$300,897.37 of which \$106,297.37 in cash.
3. Attorney requests reimbursement of costs totaling \$78.
4. Attorney requests fees of \$7,242.50 for 30.1 hours at \$125/275 per hour for paralegal and attorney services. Itemized. [Acct.02/08 LFpg27-34].
5. Disbursements indicate \$2,000 in Attorney fees for Attorney Joseph Chora for defending against Mission Home Health [Acct.02/08 LFpg22].
6. Disbursements indicate \$9,295 to renovate conservatee's home [Acct.02/08 LFpg18]. Petitioner alleges that this begun prior to the conservatorship. JTD
7. Disbursements indicate \$6,000 to Margie Fletcher for reimbursement of attorney's fees [Acct.02/08 LFpg18]. There does not appear to be an order. Petitioner alleges these fees were paid to Richard Ghan, attorney for Conservator at time of filing of conservatorship. JTD
8. Supplement is not verified. Need same per Pr.C. § 1021.
9. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear note 8, then Court's discretion. If approved, set hearing on the next accounting review for **09/28/17** (if one year) or **09/27/18** (if two years). Accounting to be filed 30 days in advance.

(lc)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600018
CASE NAME: MTR OF MARCOS ORTIZ BARRERA
HEARING: Petition for Appointment of Conservator

COUNSEL:

MARIA PETRA BARRERA (PET)...PRO/PER
RUTLIO ORTIZ (PET)...PRO/PER
MARCOS ORTIZ BARRERA (PCE)...WALTER T. MOORE

XREF: CONPS1700085 (Diana Ortiz Barrera)

GENERAL INFORMATION

Ex parte orders denied 2/8/16 Attorney Walter Moore is appointed.
Continued from 03/16/16, 05/19/16, 08/02/16, 10/19/16 and 12/21/16. Spanish interpreter.
Capacity Declaration filed that contains doctor's opinion that he cannot make a
recommendation that conservatorship is needed.

Continued from 03/15/17. Counsel will assist with Capacity Declaration.

THIS CASE IS SET FOR HEARING ON **Amended** (05/23/16) Petition for Limited
Conservatorship, person only, by Maria Barrera & Rutlo Ortiz, parents

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

1. Petitioners request medical powers and specific orders under §§ 2351-2358.
Capacity Declaration filed 12/21/16. However, court requires another Capacity
Declaration.
2. Need report of court-appointed counsel, Walter Moore.
3. Citation returned served; however, section 5 is incomplete as to verification. Need
same.
4. Proposed conservatee is developmentally disabled. Report filed 02/01/17.
5. Court Investigator report filed 3/8/16.
6. Certificates of Completion of the Conservatorship Training Class. Filed 01/05/17
7. No proposed order.

RECOMMENDATION:

Need to clear notes 1-3. If approved, set hearing for Compliance Review for **12/27/17** for
the filing of the following: proof of service of Order with Notification of Conservatee's rights
per Pr.C. §1830(c); and Level of Care and Care Plan per Pr.C. §2352.5.
(sa/lc/nb/lc)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700048
CASE NAME: MAURA GARIBAY
HEARING: Petition for Appointment of Conservator

COUNSEL:

CATALINA GARIBAY (CP)...PRO/PER
MAURA GARIBAY (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 03/15/17. Spanish Interpreter. IRC report requested. Sandy Turner appointed counsel.

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

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

1. Petitioner seeks medical powers. Capacity Declaration filed 02/09/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Proposed conservatee is developmentally disabled. IRC report filed 03/13/17 & 03/28/17.
5. Proposed conservatee is developmentally disabled. Report of Counsel Turner filed 03/29/17.
6. Certificate of Completion of the Conservatorship Training Class filed 04/06/17.
7. Citation returned served.
8. Court Investigator report filed 03/08/17.
9. ~Proposed Form Order: 02/09/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **12/27/17** 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)

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700119

CASE NAME: MTR OF CHRISTOPHER MICHAEL VALLET

HEARING:

Petition for Appointment of Conservator

COUNSEL:

| | |
|----------------------------|-----------------|
| DEOTTIS L VALLET | (CPE)...PRO/PER |
| CHRISTOPHER MICHAEL VALLET | (CEP)... |
| DEOTTIS L VALLET | (CPE)...PRO/PER |

GENERAL INFORMATION

Temporary hearing taken off calendar as there was no appearance.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by DeOttis Vallet, mother.

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

1. Father and grandparents are deceased.
2. Petitioner seeks bond no bond. Proposed conservatee will allegedly inherit real property from his deceased father worth approximately \$108,000. All other funds appear to be public benefits with exception of \$11,000 death benefit.
 - a. Court to inquire if related case.
 - b. Court may wish to revisit bond at a later date as the present assets would qualify for no bond under Pr.C. § 2323.
3. Petitioner seeks Pr.C. § 2590 powers. It appears that petitioner is seeking all powers. [Pet.4/5 LFpg12]. Court to inquire necessity.
4. Petitioner seeks Pr.C. § 1873 powers re: entering into transactions. JTD
5. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351-2358 JTD
6. Petitioner seeks medical powers. Need Capacity Declaration.
7. Petitioner seeks dementia powers. Need appointment of counsel for report.
8. Need return of citation.
9. Need notice of hearing and proof of service.
10. Need Court Investigator report.
11. **Certificate of Completion of the Conservatorship Training Class filed 05/04/17.**
12. ~Proposed Form Order: 04/05/17

RECOMMENDATION

Need to clear notes 6-10. If approved, set hearing for Compliance Review for **12/27/17** for the filing of the required documents and hearing re Accounting Review for **08/01/18**. Any accounting to be filed 30 days in advance.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700129
CASE NAME: MTR OF LYNN KIELE ANDERSON
HEARING: Petition for Appointment of Conservator

COUNSEL:

LORRAINE DOTSON (CP)...JENNIFER M DANIEL
LYNN KIELE ANDERSON (CTP)...

Moved to S35

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

DATE: 05/24/17 TIME: 9:30 DEPT: S37P

CASE#: VC VS00549

CASE NAME: MATTER OF ELIZABETH COWDERY

HEARING:

Hearing Re: TRANSFER TO RIVERSIDE

COUNSEL:

GREGORY COWDERY (PET)...THOMAS E THAXTER, ESQ.
ELIZABETH COWDERY\ (CPE)...SHERRI L KASTILAHN

GENERAL INFORMATION

Continued from 12/07/16. No appearance. Conservator Gregory Cowdery and counsel to appear at next hearing.

Continued from 02/22/17. Matter ordered transferred. Sherri Kastilahn to prepare order for transfer.

THIS CASE SET FOR HEARING ON re Why Case Should not be Transferred to Riverside.

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

1. Court set matter on calendar after review of Court Investigator report indicating conservatee resides in Norco, Riverside County.
2. Need order for transfer.
3. Need receipt and acknowledgment from Riverside with new case number stated.

RECOMMENDATION

Need order and receipt.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/24/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA

SEE ALSO 20 21

HEARING: Hearing Re: Petition for First and Final Accounting

COUNSEL:

| | |
|-------------------------------|----------------------------|
| ANTONIO C CADENA | (DEC)... |
| AUCTION-CA FINANCIAL SERVICES | (TP)... |
| GREGORY L ZUMBRUNN | (PET)...ZUMBRUNN LAW |
| JESUS JESSE CADENA | (PRO/PER |
| RAMON CADENA | (PET)...GREGORY L ZUMBRUNN |

Request for Waiver of Court Fees and Costs filed by JESUS JESSE CADENA is GRANTED

GENERAL INFORMATION

Continued from 08/10/16. Closed hearing with only Jesus Cadena. Jesus to pay \$50 monthly payments commencing 9/6/16. Re-appraisal needs to be filed on real property and vehicles.

Continued from **11/02/16, 03/02/17 and 04/20/17.**

Continued from 05/11/17. Matter set for trial.

THIS CASE IS SET FOR HEARING ON 1st & final account and petition for fees and final distribution by **Ramon Adena.**

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

1. Petitioner alleges accounting period begins 12/17/14; however, the accounting should begin as of date of death. Need an amended accounting.
2. Date of death listed in the Petition for Appointment is 10/15/14 and in this accounting petitioner state decedent died 10/7/14; yet a partial I&A lists date of death as 10/15/14 and the Final I&A states the date of death is 10/7/14. **Need verified supplement as to when decedent died** and corrected I&As reflecting date of death values. **Date of death is confirmed as 10/07/14. Values do not appear to have a change in the 8 days.**
3. Corrected Inventory and Appraisal filed; however, it appears to be a supplemental as the Hickory Ave real property is not listed in prior Inventory and Appraisal.
4. Petitioner and attorney request statutory fees of \$13,960.75. ok

5. Petitioner requests to Partition or Allot Undivided Interests in Property due to one heir's reductants to keep the residence and objection to sale of vehicles.
(Pr.C.§11950 et. seq.) [LF p.7-8].
6. Petitioner requests to withhold \$2,000 for closing expenses.
7. Proposed order submitted 5/11/16 needs correction as to the accounting period and date of death.
8. **Objection filed by Jesus Cadena on 08/09/16.**
9. ~Proposed Order: 09/26/16.

RECOMMENDATION:

Matter is contested. If approved, court to set hearing re filing receipts and final discharge for **05/1718.**

(sa/lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/24/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA

SEE ALSO 19 21

HEARING: Hearing Re: Petition for Attorney's Fees

COUNSEL:

| | |
|-------------------------------|----------------------------|
| ANTONIO C CADENA | (DEC)... |
| AUCTION-CA FINANCIAL SERVICES | (TP)... |
| GREGORY L ZUMBRUNN | (PET)...ZUMBRUNN LAW |
| JESUS JESSE CADENA | (PRO/PER |
| RAMON CADENA | (PET)...GREGORY L ZUMBRUNN |

GENERAL INFORMATION

Continued from 03/02/17, 04/20/17 and 05/11/17. Matter set for trial.

THIS CASE SET FOR HEARING ON Petition for Extraordinary Fees.

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

1. Petitioner, Gregory Zumbunn, is counsel for administrator Ramon Cadena.
2. Petitioner seeks extraordinary fees in relation to real and personal property to be determined by the court. The currently statutory fees would be approximately \$13,960.75.
3. Need notice of hearing and proof of service for the **03/02/17** hearing date.
4. ~Proposed Order: 12/13/16.

RECOMMENDATION

Need to clear note 3.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/24/17 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1400947

CASE NAME: ANTONIO C CADENA AKA ANTONIO CASTRELLON CADENA

SEE ALSO 19 20

HEARING: Court Trial set for PETITION FOR PROBATE of RAMON CADENA

COUNSEL:

ANTONIO C CADENA

(DEC)...

AUCTION-CA FINANCIAL SERVICES

(TP)...

GREGORY L ZUMBRUNN

(PET)...ZUMBRUNN LAW

JESUS JESSE CADENA

(PRO/PER

RAMON CADENA

(PET)...GREGORY L ZUMBRUNN

Trial – No notes – JTD