



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/29/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb0510/0523

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: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400901

CASE NAME: George Lee Walker

HEARING:

Accounting Review by ***

COUNSEL:

GEORGE LEE WALKER

(DEC)...

JOANN ROBERTS

(PET)...SHEASBY AND ASSOCIATES

STATE OF CALIFORNIA FRANCHISE

(TP)...PRO/PER

VACATE – accounting filed and set for 06/27/18.

(nb)

(sa/lc/ww/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: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500255

CASE NAME: EMIL MARTIN VAN HEULE SR

HEARING:

Hearing re Final Discharge

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 Final Discharge of Co-Administrators Emil Van Heule, Jr. and Jason Van Huele.

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

1. Order Settling First and Final Account entered 05/23/17.
2. Receipts filed.
3. Ex-Parte Petition/Order for Final Discharge received and forwarded for processing.

RECOMMENDATION:

Need to clear notes.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601281

CASE NAME: Barbra Ammon

HEARING:

1st & Final Account and Report of PATRICIA A. SMITH and Petition
for allowance of fees filed.

COUNSEL:

BARBRA AMMON (DEC)...
PATRICIA A. SMITH (PET)...D M DAVIS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Personal Representative, Patricia A. Smith ["Petitioner"].

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

1. Accounting period 10/23/16 to 02/12/18.
2. Assets on Hand \$294,307.22 of which \$22,012.85 in cash; remaining in real and personal property.
3. Statutory fees of \$9,007.81 requested. Calculated.
4. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
5. **Need** bank statement in support of closing balance.
6. Proposed Order 03/26/18 reflects incorrect account period.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, set next hearing for final discharge on **06/05/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700663

CASE NAME: CLAUDIA MAE SPEARMAN

HEARING:

First and Final Account and Report of CHERYL A GLOVER and
Petition for allowance of fees filed.

COUNSEL:

CHERYL A GLOVER (PET)...RICHARD S PRICE
CLAUDIA MAE SPEARMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Cheryl A. Glover ["Petitioner"-granddaughter].

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

1. Accounting period 11/10/03 to 03/20/18.
2. Assets on Hand \$182,265.29 consisting of \$57,285.29 in cash and remaining in real property.
3. Petitioner does not request compensation.
4. Attorney requests statutory fees of \$6,466.83. Calculated.
5. Petitioner requests reimbursement of costs advanced of \$2,622.50. Generally described/Itemized.
6. Petitioner requests her Creditor's Claim filed on 10/10/17 in the amount of \$47,301.99 to be approved. Image in Open Access. **Need** further clarification via verified supplement as to the following:
 - a. Claim includes \$15,217.00 for a Monterey Park HOA;
 - b. Owens & Green General Contractors Inc. for \$26,360.00.
 - c. **Need** Allowance or Rejection of Creditor's Claim form DE-174.
7. **Need** proof of service as to Notice of Proposed Action re sale of John Hancock Account XXX5100.
8. Exhibit "F" Assets on Hand [LF, p. 16] and Exhibit "B" Assets on Hand [LF, p. 20] differ. **Need** further clarification via verified supplement.
9. Proposed Order 03/28/18 reflects different amount for assets on hand and reimbursement of costs.

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

RECOMMENDATION:

Need to clear notes 6-8 then Court's discretion re: Creditors Claim. If approved, set next hearing for final discharge on **06/05/19**.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800032

CASE NAME: Carol Jean Brinks

SEE ALSO 6

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION TO DETERMINE, ETC

COUNSEL:

CAROL JEAN BRINKS (DEC)...

DWAYNE BRINKS (PET)...LINDA ROBERTS ROSS

GENERAL INFORMATION:

Continued from **02/27/18**. Counsel states she will file an amended petition.

Continued from 04/17/18. No appearances. Court notes that if counsel fails to appear at next hearing date, the petition will be dismissed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Amended (03/15/18) Petition to Determine Succession to Real Property (Estates \$150,000 or less) by brother, Dwayne Brinks ["Petitioner"].

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

1. Petitioner requests a determination that decedent's one-half interest in real property located at San Bernardino County pass to petitioner without administration. Petitioner states he is decedent's sibling; tenant-in-common with Decedent; and only heir at law.
2. ~Proposed Form Order 01/22/18.

RECOMMENDATION:

Court's Discretion.

(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: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800032

CASE NAME: Carol Jean Brinks

SEE ALSO 5

HEARING:

Petition to determine succession to Real Property

COUNSEL:

CAROL JEAN BRINKS (DEC)...

DWAYNE BRINKS (PET)...LINDA ROBERTS ROSS

See matter #5.

(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: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800220

CASE NAME: MTR OF PIRI GALOS

HEARING:

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

COUNSEL:

JOSEPH GALOS (PET)...PRO/PER
PIRI GALOS (DEC)...

GENERAL INFORMATION:

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

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

1. Purported sole heir waives bond. Estimated estate valued at \$327,000. The
Court may for good cause require that a bond be given, either before or after
issuance of letters. Pr. C. § 8481(b). JTD.
2. ~Proposed Form Order/Letters 03/07/18.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting Review on
08/06/19. Any account to be filed 30 days in advance of hearing. Note requirements of
Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800330

CASE NAME: Mtr of Phyllis Jean Nix

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

KURT STEWART (PET)...CHRISTOPHER P WALKER
PHYLLIS JEAN NIX (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition Probate of Lost Will and for Letters of Administration with Will Annexed and full authority under IAEA by nephew, Kurt Stewart ["Petitioner"].

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

1. Section 3g(2)(c) to petition re: petitioner's relationship to decedent is incomplete. However, section 8 to petition indicates petitioner is decedent's nephew.
2. Section 8 to petition does not include relationship of Barbara Shuman. **Need** verified supplement.
3. Copy of Will affixed to petition [LF, pgs. 7-15] is not of decedent's. **Need** copy of decedent's Will dated 01/10/12 and handwritten codicil dated 09/19/16.
4. Declaration re: Lost Will is not filed. **Need** declaration to overcome presumption in Pr. C. § 6124.
5. Estimated estate valued at \$179,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
6. No proposed order/letters. Submit after hearing.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **08/16/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800332

CASE NAME: Mtr of Leona Price

HEARING:

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

COUNSEL:

CLAYTON E MCCALL (PET)...PRO/PER
LEONA PRICE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Ancillary** Petition for Letters Testamentary **w/WA** and full authority under IAEA by Arkansas Court-Appointed Counsel. Clayton E. McCall ["Petitioner"].

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

1. Decedent was a nonresident of California and left an estate in San Bernardino County.
2. Proposed Administrator is a third party, appointed by order of the Arkansas Probate Court as named executor and alternate are both deceased.
3. Will is not self-proving per Pr. C. §8220. However, Will has been admitted to Probate in the Superior Court of the State of Arkansas. Authenticated copies of the will and of the order admitting will to Arkansas Probate affixed to petition [LF, pgs. 8-10]. Does Court wish to require Proof of Subscribing Witness?
JTD.
4. Caption is incorrect as it should request probate of will and for letters of administration with will annexed. **Need** verified supplement.
5. Section 3a(2) and 3c to petition [LF, p. 1] does not specify location permitting publication in the Hesperia Reporter or street address, city and county of decedent's residence at time of death. **Need** verified supplement.
6. Section 8 to petition [LF, p. 5] indicates issue James L. Price. Is deceased. Question date James L. Price died and whether he was survived by spouse or issues for notice purposes? **Need** verified supplement.
7. Will waives bond. However, petitioner is a non-resident and Court has discretion to require bond per Pr. C. §8571. Estimated estate valued at less

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than \$20,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**

8. **Need** proof of publication.
9. **Need** Notice of Petition to Administer Estate with proof of service to include son, Rickey L. Price; wife of Rickey L. Price, Myra Sue Price, named in the will; Co-Executrixes to James L. Price Estate, Audrey Otto and Mary E. Price; wife and issue of James L. Price, if applicable.
10. **Question** why an Affidavit re Real Property of Small Value (\$50,000 or Less), form DE-305 was not used? Court to inquire.
11. No proposed order/letters. Submit after hearing.

RECOMMENDATION:

Need to clear notes 4-6 & 8-9 then Court's discretion re: notes 3, 7 & 10. If approved, set future hearing for Accounting Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800381

CASE NAME: PAUL WESLEY SISSON

HEARING:

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

COUNSEL:

GEORGANN WACHTER (PET)...CRAIG M PARKER
PAUL WESLEY SISSON (DEC)...

GENERAL INFORMATION:

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

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

1. Non-resident petitioner requests an \$80,000 bond. Appears sufficient. JTD.
2. ~Proposed Form Order/Letters 04/24/18.

RECOMMENDATION:

RFA, \$80,000 bond. If approved, set future hearing for Accounting Review on
08/06/19. Any account to be filed 30 days in advance of hearing. Note requirements of
Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800382

CASE NAME: PAULA MARIE GONZALEZ

HEARING:

Petition to determine succession to Real Property

COUNSEL:

PAULA MARIE GONZALEZ (DEC)...
SHANTLE SHIPP (PET)...JT LEGAL GROUP, APC

X-REF: SBFSS 29416

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by daughters, Shantle Shipp, Lacey Gonzalez and Paula Gonzalez ["Petitioners"].

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

1. Inventory & Appraisal attached to petition has the following issues:
 - a. Numbers 4 & 5 incomplete.
 - b. No signatures on the I&A by Lacey Gonzalez and Paula Gonzalez. **Need** signatures of verification.
2. Petitioners request a determination that decedent's personal property consisting of decedents 50 % interest of ex-husband's pension proceeds per Court Order entered 12/22/16 in the related case. Copy of court order, letter, plan and terms are not affixed as alleged. **Need** same.
3. A petition requesting an order concerning personal property only is not permitted under Pr. C.§13152. Where only personal property is involved, the affidavit procedure under Pr. C.§13100 is the appropriate summary procedure to use.

RECOMMENDATION:

Deny.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701112

CASE NAME: MTR OF THE WILBERT E MCHENRY JR TRUST

HEARING:

Petition for TO INVALIDATE TRANSFER OF FUNDS AND DESIGNATORS OF
DEATH BENEFICIARY

COUNSEL:

LINDA SCHAEFER

THE WILBERT E MCHENRY, JR. TRU

(PET)...BEST BEST & KRIEGER

(TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice is not proper.

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

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

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

(nb)

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000062

CASE NAME: RICHARD GRANT VALENTI

HEARING:

Petition for payment of atty fees & costs advanced to court
appointed guardian ad litem

COUNSEL:

CHRISTOPHER VALENTI	(CPE)...J EGLIN & WRIGHT LLP
CHRISTOPHER VALENTI	(PCR)...DONNASUE ORTIZ
FRANK VALENTI	(CE)...HARTNELL LISTER & MOORE
J DAVID HORSPOOL	(PET)...DAVID J HORSPOOL
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
RICHARD GRANT VALENTI	(CTE)...PRO/PER
RICHARD VALENTI	(CEE)...DAVID J HORSPOOL
THERESA PARKER	(CE)...HARTNELL LISTER & MOORE
THERESA PARKER	(CP)...HARTNELL, LISTER & MOORE

XREF: PROPS1300815 (Richard Grant Valenti)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by
Guardian ad Litem, Mitchell I. Roth ["Petitioner"].

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

- 1 Petitioner was appointed on 06/05/13. Petitioner alleges that services have been rendered for which counsel has not been compensated thru the period ending on 02/07/18. Petitioner requests the Court waive the recently adopted Local Rule that requires attorney fee requests every 2 years.
- 2 Attorney requests discounted fees of \$63,870.00. Billed at \$350-\$375/hour for 173.30 hours' attorney time. Itemized [LF, pgs. 9-157]. **JTD.**
- 3 Attorney requests reimbursement of costs advanced of \$126.30. Itemized.
- 4 Petitioner requests the Conservator, Christopher Valenti, be directed and ordered to pay \$63,996.30 to Law Offices of Mitchell I. Roth for attorney fees and costs incurred, forthwith.

- 5 Attachment with further names and addresses of those served is not included to notice filed on 05/21/18. **Need** same.
- 6 ~Proposed Order 04/17/18

RECOMMENDATION:

Need to clear note 5 then Court's discretion.

(nb)

Future hearing:

07/11/18 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: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 15, 16, 17

HEARING:

Hearing Re: Status re: Reimbursement for Gerald Brown

COUNSEL:

GERALD BROWN

(CEP)...WALTER T. MOORE

HAROLD FLETCHER

(PET)...PRO/PER

HORACE WALLACE

(PET)...PRO/PER

No notes –Status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 14, 16, 17

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,000.00/SURCHARGE \$2,000

COUNSEL:

GERALD BROWN

(CEP)...WALTER T. MOORE

HAROLD FLETCHER

(PET)...PRO/PER

HORACE WALLACE

(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$1,000 and Surcharge of \$2,000 on Horace Wallace for Failure to Comply with Court Order regarding Reimbursement to Gerald Brown at Hearing on 03/21/17.

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

1. Matter set at 03/20/18 hearing.
2. Citation returned served.
3. Notice by Judicial Assistant.
4. Declaration filed 03/26/18 states all payments have been made and affixes copies of rendered Cashier's Check.

RECOMMENDATION:

Court's discretion

(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: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 14, 15, 17

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 ON MARK LEVINSON

COUNSEL:

GERALD BROWN

(CEP)...WALTER T. MOORE

HAROLD FLETCHER

(PET)...PRO/PER

HORACE WALLACE

(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$500 on Attorney Mark Levinson for client, Horace Wallace's Failure to Comply with Court Order regarding Reimbursement to Gerald Brown at Hearing on 03/21/17.

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

1. Matter set at 03/20/18 hearing.
2. **Need** return of Citation.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need return of citation then Court's discretion

(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: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

SEE ALSO 14, 15, 16

HEARING:

Accounting Review by ***

COUNSEL:

GERALD BROWN

(CEP)...WALTER T. MOORE

HAROLD FLETCHER

(PET)...PRO/PER

HORACE WALLACE

(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 03/20/18.

THIS CASE IS SET FOR HEARING ON Accounting Review by Temporary
Conservator of the Person and Estate, Harold Fletcher.

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

1. **Need** First and Final Account beginning 09/24/15 (date of appointment) to
06/02/16 (date oral motion to withdraw estate powers).
2. No accounting. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600222

CASE NAME: MTR OF MARCO ANTONIO FLORES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSA M FLORES

COUNSEL:

MARCO ANTONIO FLORES	(CTP)...LENITA A SKORETZ
ROSA M FLORES	(CP)...PRO/PER
SAUL FLORES JUAREZ	(CP)...PRO/PER

GENERAL INFORMATION

Rosa and Saul Flores appointed Limited Conservators of the person on 10/24/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
- 2 **Need** Statement of Care Plan in accord with Pr.C.§2352.5.
- 3 **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600230

CASE NAME: MARIA SOCORRO CEBALLOS

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

ARTURO CEBALLOS

(CPE)...BUXBAUM & CHAKMAK

LUIS P CEBALLOS

(CPE)...BUXBAUM & CHAKMAK

MARIA SOCORRO CEBALLOS

(CEP)...

FUTURE HEARING DATES:

06/14/18 First Account and Report of ARTURO CEBALLOS

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

SEE ALSO 21

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SHELLY MARIE BURLESON

COUNSEL:

ASHLEIGH FAYE MIRANDA (CEE)...
SHELLY MARIE BURLESON (GPE)...PRO/PER

GENERAL INFORMATION

Continued from **09/05/17**. No appearance. Matter trailed. Notice by Judicial Assistant.

Continued from 04/10/18 at request of conservator. Referred to Legal Aid for assistance.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Shelley Burelson appointed Conservator of the person and estate on 01/31/17, \$75,000 bond.
2. **Amended Notification of Conservatee's Rights filed. However, section 5 to proof of mailing is incomplete. Question whether a conformed Order Appointing Probate Conservator was attached? Court to inquire.**
3. Final Inventory and Appraisal filed.
4. Determination of Conservatee's Appropriate Level of Care filed.
5. SNT filed 04/11/18.
6. Care Plan filed.
7. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION

Need to clear note 7 then Court's discretion re: note 2.

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

SEE ALSO 20

HEARING:

Accounting Review by ***

COUNSEL:

ASHLEIGH FAYE MIRANDA (CEE)...

SHELLY MARIE BURLESON (GPE)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Shelley M. Burleson.

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

1. Conservator of the Person and Estate, Shelley M. Burleson, appointed on 01/31/17, \$75,000 to be placed in blocked account; **first and current account now due.**
2. Proof of Acknowledgment of Money Deposited into Blocked Account filed. However, title is vested in Petitioner's name as Trustee. Question whether there are any assets in the conservatorship estate? **Court to inquire.**
3. No accounting or waiver of account. **Need same.**

RECOMMENDATION:

Inquire status.

Set hearing for Accounting Review re SNT for **06/11/19**. Any account to be filed 30 days before hearing date. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700342

CASE NAME: ENOLA M MUNOZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA DE JESUS MUNOZ

COUNSEL:

ENOLA M MUNOZ	(CTP)...PRO/PER
MARIA DE JESUS MUNOZ	(CP)...PRO/PER

GENERAL INFORMATION

Maria De Jesus Munoz appointed conservator of the person on 10/24/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C. §1830(c).
2. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
3. Care Plan filed

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800041

CASE NAME: MTR OF FRANK PLASENCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

FRANK PLASENCIA	(CEP)...MARK J. FLORY
JIM PLASENCIA	(CPE)...PRO/PER
KRISTIN VILLANUEVA	(CPE)...PRO/PER

GENERAL INFORMATION

Ex Parte Orders granted 02/26/18, person and estate, no bond.

**Continued from 03/27/18. Case referred to Legal Aid for legal assistance.
Attorney Mark J. Flory appointed. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Kristin Villanueva and son, Jim Villanueva ["Petitioners"].

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

- 1 Petitioners request bond to be determined. Suggest bond of \$381,000 (includes recovery). JTD.
- 2 Petitioner seeks medical powers. Capacity Declaration has the following issues:
 - a. Section 2 does not include physician's phone number;
 - b. Section 4 does not include proposed conservatee's name or the last time physician saw him;
 - c. Number 8 does not include number of pages attached;
 - d. Number 10 to Dementia Attachment does not include number of pages attached.**Need** completed Capacity Declaration.
- 3 Petitioner requests dementia powers; **need** report by court-appointed attorney, Mark J. Flory.
- 4 Court Investigator's Report filed.
- 5 **Need** return of Citation.
- 6 Certificates of Completion re Conservatorship Class filed.

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

7 ~Proposed Form Order/Letters 02/09/18.

RECOMMENDATION:

Need to clear notes 2-3 & 5. If approved, set hearing for Compliance Review for **01/08/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800062

CASE NAME: MTR OF COLTON MENARD

VACATED- RE-SET FOR 07/18/18

HEARING:

Petition for Appointment Of Conservator Of The Person
Limited Conservatorship

COUNSEL:

COLTON MENARD

(CTP)...JENNIFER M DANIEL

DEBRA MENARD

(CP)...CHRISTOPHER A POULOS

MARK MENARD

(CP)...JEFFREY A GOTTLIEB

GENERAL INFORMATION

Continued from 04/11/18 at request of counsel.

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Appointment of Limited Conservator person only by Mark Menard, father.

Petition #2: Petition for Appointment of Limited Conservator person only by Debra Menard, mother.

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

Petition #1 by father:

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re: education. **JTD**
2. Petitioner seeks to limit all civil rights described in note #1. **JTD**
3. Petitioner seeks additional Court orders regarding visitation schedule. [Petition, 03/01/18, LFpg13]. **JTD**
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. IRC report filed.

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

7. Court Investigator report filed.
8. **Need** Certificate of Completion of the Conservatorship Training Class.
9. Citation returned served. However need 15 days' notice. **Need** proper service.
10. No proposed order submitted.

Petition #2 by mother:

11. No bond – person only.
12. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
13. **Need** Medical Capacity Declaration.
14. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
15. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
16. **Need** return of Citation.
17. **Need** Court Investigator Report.
18. **Need** Inland Regional Center Report.
19. **Need** Certificate of Completion re Conservatorship Class.
20. Need Notice of Hearing with proof of service.
21. Petitioner requests an Order Waiving all Probate Investigator's assessments for as long as the requirements of Pr. C. §1851.5 are met. **JTD.**
22. ~Proposed Form Order/Letters 04/16/18.

RECOMMENDATION: Court may wish to trail to 07/18/18.

Need to clear notes #4-5, 8-9, 13 & 16-19. If approved, set hearing for Compliance Review for **01/02/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5.

(lh/nb)

Future hearing:

07/18/18 Petition for appointment of conservator by Mark Menard, father

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800073

CASE NAME: Mtr of Jordan Allen Holley

HEARING:

Case Management Conference

COUNSEL:

CECILIA B WOOLFOLK (CP)...PRO/PER

JORDAN ALLEN HOLLEY (CTP)...

GENERAL INFORMATION:

Cecelia B. Woolfolk appointed Limited Conservator of the Person on 02/23/09.

THIS CASE IS SET FOR HEARING ON CMC re Transfer In from LA County.

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

1. **Need** amended Letters.
2. Conservatee is developmentally disabled. Need appointment of counsel and report by same.
3. **Need** IRC Report.
4. **Need** CI Report
5. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear notes.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/29/18 TIME: 9:35 DEPT: S35P

CASE#: CON DS1100017

CASE NAME: BETTY LEVY

HEARING:

Petition for Resignation of the current Trustees; for
appointment of etc

COUNSEL:

BERNARD RUSSELL	(PET)...	HARTNELL LAW GROUP
BETTY LEVY	(CEP)...	EDWARD B FISCHEL &
BETTY LEVY SPECIAL NEEDS TRUST	(TRU)...	
EDWARD B FISCHEL	(PET)...	EDWARD B FISCHEL &
PUBLIC GUARDIAN	(CPE)...	COUNTY COUNSEL

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

SEE ALSO 28, 29, 30, 31, 32

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE RE 2/16/17 FILING

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

Request for Waiver of Court Fees and Costs filed by CAROLYN MARSTON is GRANTED

XREF: CONDS1000212 (Katie A Shirley)

GENERAL INFORMATION

Continued from **10/19/16 and 02/08/17**. No appearance. Court orders that Carolyn Marston be personally present in court on February 22, 2017. Notice by judicial assistant.

Continued from **02/08/17, 04/25/17, 06/21/17 and 08/30/17** to clear notes re accounting period 01/06/13 – 06/30/16.

Continued from 10/18/17 to seek legal assistance to clear notes.

Continued from 01/17/18 No appearance. Judicial Assistant received telephone call that Carolyn Marston was sick and unable to appear. Notice given by Judicial Assistant.

Continued from 03/21/18. No appearance. Carolyn Marston called prior to hearing stating she was sick. Court continued matter, set OSC re Sanctions of \$500 and OSC Surcharge re \$1,500.

Continued from 04/25/18. Court orders Carolyn Marston to be personally present at next hearing and Carolyn Marston states that she understands that

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she is ordered to be personally present on May 29, 2018 at 10:00am in department S35. Court refers this case to Public Administrator

THIS CASE SET FOR HEARING ON OSC Re Sanctions \$500 and Surcharge \$1,500/Amended (02/16/17 & 05/10/17) Summary of Account by Carolyn Marston, daughter administrator.

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

1. Accounting period 01/06/13 to 06/30/16. However, accounting should begin at date of death; 01/05/13. Court may wish to deem as di minimis.
2. **Need** final Inventory and Appraisal where real property is appraised by probate referee, even though it has sold.
 - a. **Inventory and Appraisal submitted from conservatorship showing real property of \$881,090.80 and alleged probate property of \$275,000 [not appraised]. Petitioner alleges that there are no funds to get property appraised for date of death [Sup. 05/10/17 LFpg4-12].**
3. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. **Need** a proper summary of account and accounting schedules.
4. Amendment filed 05/10/17 is not verified per Pr.C. § 1021. **Need** verification.
5. Petitioner alleges that surplus of funds from sale of real property, \$8,938.42, was distributed **and distributions to beneficiaries totaling \$21,901.41 have been made.** 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. Under what authority did petitioner distribute property? **Need** verified supplement explaining why the funds should not be paid back to the estate. **Amendment (02/16/17) indicates funds should not be paid back to the estate because it will have to be given back to petitioner and her sisters and would waste more time and money.**
6. Creditor's Claims by Emma Kresser, CPA \$2,135.00 Attorney Michael Maddux \$38,962.28 appear to be outstanding. Michael Maddux was allegedly hired pro bono.
7. A second petition for Administration was filed by administrator. **Court to inquire as petitioner is already appointed with limited authority.**

RECOMMENDATION

Need to clear notes 2-4. Suggest petitioner seek legal advice.

(lc/nb/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

SEE ALSO 27, 29, 30, 31, 32

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE RE 7/27/16 FILING

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

Request for Waiver of Court Fees and Costs filed by CAROLYN MARSTON is GRANTED

XREF: CONDS1000212 (Katie A Shirley)

GENERAL INFORMATION:

Continued from 04/25/18. Court orders Carolyn Marston to be personally present at next hearing and Carolyn Marston states that she understands that she is ordered to be personally present on May 29, 2018 at 10:00am in department S35. Court refers this case to Public Administrator

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions/Surcharge re 7/27/16 Filing.

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

1. Matter set at 03/21/18 hearing due to failure to appear by Carolyn Marsden.
2. Court noted that it will require a medical report to be submitted the day before April 25, 2018-Additionally, the Court notes that if Carolyn Marston fails to appear or fails to provide Medical report by April 24, 2018 the Court will impose sanctions/surcharge/dismissal as mentioned payable to the estate for failure to comply with the orders of the Court.

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.

3. Notice by Judicial Assistant.

RECOMMENDATION:
Court's discretion re OSC.
(/nb)

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

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY
SEE ALSO 27, 28, 30, 31, 32

HEARING:
Hearing Re: OSC RE SANCTIONS/SURCHARGE RE 10/19/16 FILING

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

XREF: CONDS1000212 (Katie A Shirley)

GENERAL INFORMATION:

Continued from 04/25/18. Court orders Carolyn Marston to be personally present at next hearing and Carolyn Marston states that she understands that she is ordered to be personally present on May 29, 2018 at 10:00am in department S35. Court refers this case to Public Administrator.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$500/Surcharge of \$1,500 re 10/19/16 Filing.

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

1. Matter set at 03/21/18 hearing due to failure to appear by Carolyn Marsden.
2. Court noted that it will require a medical report to be submitted the day before April 25, 2018-Additionally, the Court notes that if Carolyn Marston fails to appear or fails to provide Medical report by April 24, 2018 the Court will Impose sanctions/surcharge/dismissal as mentioned payable to the estate for failure to comply with the orders of the Court.
3. Notice by Judicial Assistant.

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

RECOMMENDATION:
Court's discretion re OSC.
(/nb)

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

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

SEE ALSO 27, 28, 29, 31, 32

HEARING:

SUMMARY Account and Report of CAROLYN MARSTON and Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

Request for Waiver of Court Fees and Costs filed by CAROLYN MARSTON is GRANTED

XREF: CONDS1000212 (Katie A Shirley)

See notes on prior matter #27.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

SEE ALSO 27, 28, 29, 30, 32

HEARING:

SUMMARY Account and Report of CAROLYN MARSTON and Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

Request for Waiver of Court Fees and Costs filed by CAROLYN MARSTON is GRANTED

XREF: CONDS1000212 (Katie A Shirley)

See notes on prior matter #27.

(lh/nb)

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

DATE: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY
SEE ALSO 27, 28, 29, 30, 31

HEARING:
ACCOUNTING SUMMERY Account and Report of CAROLYN MARSTON and
Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSDEN	(PET)...PRO/PER
CAROLYN MARSDEN	(PLA)...PRO/PER
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORPORATIO	()...
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
WOODROW SHIRLEY	()...

Request for Waiver of Court Fees and Costs filed by CAROLYN MARSTON is GRANTED

XREF: CONDS1000212 (Katie A Shirley)

See notes on prior matter #27.

(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: 05/29/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500193

CASE NAME: ROBERT OLSEN

HEARING:

Petition for DETERMINATION TO ENTITLEMENT TO DISTRIBUTION

COUNSEL:

PUBLIC ADMINISRTATOR (PET)...C/O PUBLIC ADMINISTRATOR

ROBERT OLSEN (DEC)...

W.C. COX AND COMPANY, AN ARIZO (PET)...LAYNE A BARTHOLOMEW

W.C. COX AND COMPANY, AN ARIZO (TP)...LAYNE A BARTHOLOMEW

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC

DATE: 05/29/18 TIME: 1:30 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

HEARING:

Hearing Re: COURT TRIAL ON PETITION FOR CONSERVATORSHIP

COUNSEL:

KATHLEEN SCHAEFFER

(CEP)...MITCHELL I ROTH

KATHLEEN SCHAEFFER

(OBJ)...MITCHELL I ROTH

PUBLIC GUARDIAN

(PET)...COUNTY COUNSEL

No notes – Court Trial.

(nb)

Future hearing:

05/30/18 Court Trial

05/31/18 Court Trial

06/01/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

SEE ALSO 2

VACATED

HEARING:

Hearing re Final Discharge

COUNSEL:

ALEX R BORDEN	(PET)...BORDEN LAW OFFICE
ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT	(TP)...LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

SEE ALSO 1

HEARING:

Hearing Re: Status of second & final account by S. Dimeff

COUNSEL:

ALEX R BORDEN	(PET)...BORDEN LAW OFFICE
ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT	(TP)...LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

GENERAL INFORMATION

Matter reset on 2/1/17, court noted that 2nd and Final Account filed by Suzanne Dimeff, matter is contested and set for 08/16/17. Status of account was set for this date. Continued from 03/30/17, 06/29/17 and 07/06/17. **Matter is contested and set for trial.**

Continued from **09/21/17**. Matter set for status to set mediation date.

Continued from **10/19/17 and 12/07/17**. Matter is contested. Notice waived.

Continued from 03/27/18 at request of counsel. Matter settled with former Trustee. NOPA to be submitted. Counsel for Marilyn Kriebel to give notice.

THIS CASE SET FOR HEARING ON Second Amended **(03/24/16)** First and Final Account by **prior administrator, Suzanne Cowan Dimeff:**

1. Accounting period 01/16/10 to 11/24/15 (5.10 years)
2. Zero assets on hand.
3. Partial No.1 and corrected I&As filed. **Need** Final Inventory and Appraisal.
4. Petitioner does not seek compensation.
5. Petitioner requests extraordinary fees of \$81,993.00 for years of work, and reimbursement of costs totaling \$41,872.46 including cost of legal counsel which her law firm advanced [LF, p. 41-49]. Billed at the lower rate of \$375

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.

/hour for attorney time, \$65/hour for administrative support and reduced paralegal fees of \$75/hour. Itemized [LF, pgs. 29-40]. JTD.

6. Petitioner requests the total amount of compensation in the sum of \$123,865.46 to be a lien against Trust Assets. JTD.
7. Petitioner informs the Court that Successor Personal Representative, Alex Borden, was appointed Special Administrator by Ex Parte Application, without bond on 11/06/14, for the express purpose of substituting into Los Angeles Civil Action, Case Number YC069475, wherein, the petitioner estimates the value of decedent's one-half interest in these community property assets in exclusive control of the estranged spouse to be \$1,694,500.00. Petitioner indicates that on 06/26/15, with no Notice or explanation to this Court, Administrator Borden dismissed this Civil Action, without prejudice. Estranged spouse, Anders Ljungwe then transferred a \$1M annuity, titled in the name of the Ljunge Family Trust, and declared by Siv Ljungwe as having her one-half interest funded into her separate trust, and into his personal name. Does Court wish to set a Surcharge Hearing? JTD
8. Copy of the Siv Ljungwe Trust filed 06/24/10 and 07/06/15.
9. **Objections to First Accounting filed 6/1/15 by Alex Borden administrator, CTA to prior accounting. Supplement to Objections filed 8/19/15**
10. **Response to Objections filed 09/03/15 and 09/13/16 by Suzanne Dimeff.**
11. **Objections to 2nd Amended First Account filed 9/6/16 by Marilyn Kriebel.**
12. **Notice of lodgment in support of objections filed on 09/07/16.**
13. **Request for judicial notice filed 10/28/16 re San Diego Case and appeal.**
14. **Statement of issues filed 10/28/16.**
15. **Status Conference Report filed by Marilyn Kriebel.**

RECOMMENDATION:

Need to clear note 3. Matter is opposed. If approved, set hearing for receipts and final discharge for **04/08/19**.

(sa/lc/ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700035

CASE NAME: Fred D. Utley

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

CHERYL UTLEY

(PET)...DAVID E SIMON

FRED D. UTLEY

(DEC)...

FUTURE HEARING DATES:

07/25/18 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700476

CASE NAME: MTR OF JUAN JOSE CUEVAS 2015 TRUST

HEARING:

Accounting Review by ***

COUNSEL:

DAWN MILLS

(PET)...TAMILA C JENSEN

JUAN JOSE CUEVAS

(TRU)...

NORINE BOEHMER

(PET)...TAMILA C JENSEN

SUSAN GHORMLEY

(PET)...TAMILA C JENSEN

VACATE – matter transferred to LA County.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700926

CASE NAME: ALLIDA STACIE ZELLMAN SCHAAB

HEARING:

Petition for final distribution & waiver of Account and Report
of KARA TENNISON and Petition for allowance of fees filed.

COUNSEL:

ALLIDA STACIE ZELLMAN SCHAAB (DEC)...
KARA TENNISON (PET)...DARLING LAW OFFICES

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator w/WA, Kara Tennison ["Petitioner"-daughter].

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

1. All beneficiaries waive accounting.
2. Accounting period 08/01/17 to 03/31/18.
3. Assets on hand \$226,333.23 consisting of \$833.23 in cash and remaining in
real and personal property.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$7,526.66. Calculated.
6. Petitioner requests authority to withhold \$480 as a reserve for closing costs.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge on
06/05/19.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701174

CASE NAME: THE GERALDINE R HENDON TRUST

HEARING:

Petition for Determine the Existence of a Trust; to Compel the
Trustee to Provide a Copy of Terms

COUNSEL:

KEVIN TODD HENDON

THE GERALDINE R HENDON TRUST

(PET)...RICHARD G ANDERSON

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800316

CASE NAME: Misch vs Misch

HEARING:

Petition for complaint for partition of real property

COUNSEL:

BRUCE MISCH	(DEF)...
LEWIS MISCH	()...
MICHELLE MISCH	()...
TONY MISCH	(PET)...LINDA ROBERTS ROSS

Currently under review by Legal Research.

(LR)

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800344

CASE NAME: DORIS WEST

HEARING:

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

COUNSEL:

DORIS WEST (DEC)...
MARY BECKER (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petition alleges all heirs waive bond. However, **need** Mandatory Waivers of Bond by Heir David West, form DE-142/DE-111
2. Estimated estate valued at -\$110,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 04/13/18 & 04/19/18

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800345

CASE NAME: MTR OF ROBERT LAWRENCE SZEPESSY

HEARING:

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

COUNSEL:

AMY CONWAY (PET)...CHRISTOPHER JAMES MURTAGH
ROBERT LAWRENCE SZEPESSY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix/granddaughter, Amy Conway ["Petitioner"].

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

1. Will waives bond. Estimated estate valued at \$353,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. Will disinherits "other grandchildren" but does not specifically name them. **Need** same for notice purposes via verified supplement.
3. **Need** proof of publication.
4. Service does not include "other grandchildren." **Need** proper service.
5. ~Proposed Form Order/Letters 04/13/18.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion. If approved, set future hearing for Accounting Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800395

CASE NAME: ALLEN THOMAS PERKINS

HEARING:

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

COUNSEL:

ALLEN THOMAS PERKINS

(DEC)...

SYLVIA A LEAP

(PET)...STEPHEN K. HALL & ASSOCIATES

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Sylvia A. Leap ["Petitioner"].

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

1. Petitioner requests a bond of \$472,267 to be fixed. Appears sufficient. **JTD.**
2. Court address is incorrect on petition for probate and county is not included at section 3c. **Need** verified supplement.
3. Court address is incorrect on duties and liabilities form and petitioner's phone number is not included. **Need** corrected duties form.
4. ~Proposed Form Order/Letters 05/09/18.

RECOMMENDATION:

Need to clear notes 2-3, \$472,267 bond. If approved, set future hearing for Accounting Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800396

CASE NAME: CARMEN H KOLESSER

HEARING:

Spousal Property Petition hearing.

COUNSEL:

CARMEN H KOLESSER (DEC)...
GARALD A KOLESSER (PET)... HOWARD R HAWKIN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Gerald A. Kolessar ["Petitioner"].

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

1. Petitioner requests determination and confirmation of property passing to the surviving spouse as community property. Specifically, real property at Rancho Cucamonga, in San Bernardino County.
2. Attachment 7 [LF, p. 4] to petition indicates the decedent owned the single family residence at the date of marriage. It appears the subject property is decedent's separate property. **Need** copy of vesting document.
3. Decedent died intestate with three adult issue who would also share a two-thirds distribution in the estate per Pr.C. §6401, if the real property is the separate property of decedent.
4. ~Proposed Form Order 04/23/18.

RECOMMENDATION:

Deny. Require proper petition.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 05/29/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800050

CASE NAME: JEAN F. JOHNSON REVOCABLE TRUST U/D/T ETC

HEARING:

Petition for Invalidate trust based on undue influence and
incapacity

COUNSEL:

ERICA DURAN

(PET)...DAVID D JONES

JEAN F. JOHNSON RECOVABLE TRUS (TRU)...

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000244

CASE NAME: JOSE RIGOBERTO SILVA

HEARING:

Hearing Re: CI REPORT

COUNSEL:

JOSE RIGOBERTO SILVA

(CTP)...MITCHELL I ROTH

RIGOBERTO SILVA

(CP)...PRO/PER

GENERAL INFORMATION:

Continued from 04/24/18. Notice given by Attorney Mitchell Roth.

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on Courts motion upon receipt and review of CI Report filed 04/03/18.
2. Court re-appoints Attorney Mitchell I Roth as attorney for conservatee. **Need** report.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need report by court-appointed counsel then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900186

CASE NAME: RYAN GEIB

HEARING:

Accounting Review by ***

COUNSEL:

DIRK GEIB

(CE)...LENITA A SKORETZ

DIRK GEIB

(CPE)...LENITA A SKORETZ

RYAN GEIB

(CEP)...JACK B OSBORN

RYAN GEIB

(CEP)...PRO/PER

GENERAL INFORMATION:

Continued from 02/27/18 and 04/24/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Dirk Geib (father).

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

1. Order Settling Sixth Account entered 08/29/17; seventh account now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500095

CASE NAME: Hsuehju Sheu

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

HSUEHJU SHEU	(CEP)...MARK J. FLORY
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHARON HSAINGYAN CHEN	(OBJ)...PRO/PER
SHARON HSIANGYUAN CHEN	(PET)...PRO/PER
SOLOMON C CHEN	(PET)...FIDUCIA LEGAL

Address: 26226 Cambria Lane, Loma Linda, CA 92354

Appraised Value: \$288,000

Sale price: \$305,000

First overbid: \$320,750

Deposit: \$30,500

Commission: 6% = \$18,300

Additional bond: Current bond of \$50,000. **Need** bond increase of \$285,500 for a total bond of \$335,500.

Reason for Sale: Necessary to pay debts and expenses of administration.

Exposure to Market: MLS and multiple websites.

Notice: Posted and given. **Need** proof of publication.

Future hearing: 07/09/18 Accounting Review

No proposed order. Submit Order after Hearing.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500364

CASE NAME: JAMES T CAWTHORN III

HEARING:

Petition for to authorize proposed action to restate the James T
Cawthorn III & Lois A Cawthorn Trust

COUNSEL:

JAMES T CAWTHORNE III	(CTE)...JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER, A.
LOIS CAWTHORN	(CPE)...LAYNE A BARTHOLOMEW

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

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

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

HEARING:

Accounting Review by ***

COUNSEL:

DAVID LANDO	(CP)...PRO/PER
DAVID LANDO	(PET)...ROBERTA L. TAYLOR &
GLORIA THORNTON	(CEE)...JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 11/08/17, 01/24/18 and 03/20/18. Notice given by Attorney Daniel.

THIS CASE IS SET FOR HEARING ON Accounting Review of Conservator Natalie Blickenstaff

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

1. Natalie Blickenstaff appointed Conservator of the person and estate on 07/07/16 \$100,000 bond, and was also appointed Successor Trustee on same day.
2. **Need** first accounting or waiver for conservatorship estate.

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: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

HEARING:

Accounting Review by ***

COUNSEL:

DAVID LANDO	(CP)...PRO/PER
DAVID LANDO	(PET)...ROBERTA L. TAYLOR &
GLORIA THORNTON	(CEE)...JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 11/08/17, 01/24/18 and 03/20/18.

THIS CASE IS SET FOR HEARING ON Accounting Review of Successor Trustee,
Natalie Blickenstaff

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

1. Natalie Blickenstaff was appointed Successor Trustee on 07/07/16.
2. **Need** first accounting of trust.

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: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700295

CASE NAME: MTR OF BILLIE HARGROVE BROWN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of GREGORY L BROWN

COUNSEL:

BILLIE HARGROVE BROWN (CEP)...JAMES B CHURCH

GREGORY L BROWN (CPE)...MCCLELLAN & WILSON

GENERAL INFORMATION

Gregory L. Brown appointed conservator of the person and estate on 09/09/17,
\$244,200 bond.

**Continued from 04/24/18. No appearances. Counsel and the conservator are
ordered to appear at the next hearing. Notice given by Judicial Assistant**

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. However, Section 5 to Proof of Mailing is incomplete. Question whether a conformed copy of the Order Appointing Probate Conservator was attached to notice? JTD.
- 2 Care Plan filed.
- 3 Need a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).
- 4 Need final Inventory & Appraisal per Pr.C. §2610.
- 5 Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
- 6 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.

RECOMMENDATION:

Inquire status.

(nb)

Future hearing:

11/27/18 Accounting review

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

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

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS00260

CASE NAME: DOMINIQUE BEASLEY

HEARING:
Hearing Re: CI Report

COUNSEL:
DOMINIQUE BEASLEY (PCE)...BRYAN C. HARTNELL
RONALD L BEASLEY (PET)...MALCOLM S MACMILLAN

GENERAL INFORMATION:

Continued from 04/24/18 for court-appointed counsel to make contact with the conservator and investigate placement issues. Written report received from court-appointed counsel.

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on Courts motion upon receipt and review of CI Report filed 04/04/18.
2. Court appoints Attorney Bryan Hartnell as attorney for conservatee. Reports filed.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS01984

CASE NAME: MTR OF ROBERTA L. GLASS

HEARING:

Petition for appointment of successor conservator of the person
and estate

COUNSEL:

CHRISTOPHER NIEVES	(CPE)...
LAWRENCE A. DEAN II	(CPE)...SHERRI L KASTILAHN
MARY CYNTHIA GLASS	(PET)...JENNIFER M DANIEL
MARY NIEVES	(PET)...PRO/PER
MELODIE Z SCOTT	(TP)...PRO/PER
ROBERTA L. GLASS	(CEP)... SCOT D STIRLING
ROBERTA L. GLASS	(PET)...J BENJAMIN SELTERS III

Hearing not calendared per register of actions.
(nb)

FUTURE HEARING DATES:

06/05/18 Petition for appointment of successor conservator of the person and estate

06/05/18 Hearing Re: Possible Appointment of the PG (person only)

06/05/18 Petition for appointment of successor conservator of the estate

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02814

CASE NAME: MTR OF TIFFANY MCDOWELL

HEARING:

Hearing Re: CONCERNS FROM THE CI REPORT

COUNSEL:

L'TANYA M NEWMAN (CPE)...PRO/PER
TIFFANY MCDOWELL (CEP)...MITCHELL I ROTH

GENERAL INFORMATION:

Continued from 04/24/18 for Attorney Roth to speak to his client and submit a report.

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on Courts motion upon receipt and review of CI Report.
2. Court re-appoints Attorney Mitchell I Roth as attorney for conservatee.
Supplemental Report filed 03/14/17.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0800367

CASE NAME: JOHN JOSEPH MCCARTHY

HEARING:

Accounting Review by ***

COUNSEL:

GWENDOLENE MCCARTHY	(PET)...PRO/PER
GWENDOLY MCCARTHY, AS ADMINIST	(DEF)...ANNE ZIMMERMAN
GWENDOLYN MCCARTHY	(PET)...ANNE ZIMMERMAN
JOHN JOSEPH MCCARTHY	(DEC)...
MARY IRENE MCCARTHY	(PLA)...SCHREIBER & SCHREIBER
ROBERT MCCARTHY	(PET)...SCHREIBER & SCHREIBER,

GENERAL INFORMATION:

Continued from 03/13/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review by Successor Administrator, Robert McCarthy (son).

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

1. Status Report approved on 05/09/17, Petitioner waiting for house to be sold; **need** Order after Hearing.
2. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500787

CASE NAME: MTR OF PAUL R HANLEY(MASTERFILE)

HEARING:

FINAL REPORT ON WAIVER OF Account and Report of ALEXANDRIA
TOPPING and Petition for allowance of fees filed.

COUNSEL:

ALEXANDRIA TOPPING	(OBJ)...PECCORINI & PECCORINI
ALEXANDRIA TOPPING	(PET)...PECCORINI & PECCORINI
PAUL R HANLEY	(DEC)...
TRACY LYN COX	(PET)...JANIS B MARTINDALE
TYLER TOPPING	(PECCORINI & PECCORINI)

X-REF: PRFOPS 1501103

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Co-Administrators, Alexandria Topping and Tracy L. Cox ["Petitioners"].

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

1. **Second request for continuance filed 05/11/18. JTD.**
2. Petition alleges all heirs waive accounting. **Need** same.
3. Accounting period 05/03/15 to 11/11/17.
4. **Need** balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614.
5. Petitioners waive statutory compensation.
6. Attorney Martindale and Attorney Peccorini request one-half statutory fees of \$10,004.06 or \$5,002.03 each. Calculated.
7. Attorney Martindale requests reimbursement of costs advanced of \$1,057.50. Generally described.
8. Attorney Peccorini requests reimbursement of costs advanced of \$156.00. Generally described.
9. Mark Hanley (brother) requests reimbursement of costs advanced of \$14,464.95. Generally described.

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

10. Tracy requests reimbursement of costs advanced of \$4,286.53. Generally described.
11. Alexandria requests reimbursement of costs advanced of \$1,629.93. Generally described.
12. Petition indicates that in or about November 2017, heirs agreed to a Transfer and Distribution Agreement under which Alexandria and Tyler would acquire the House from the estate and an offsetting cash distribution of \$50,000 would be made to Tracy. It was agreed, without prior court authorization, that such acquisition and offsetting cash distribution would be made prior to hearing of this Petition to limit the estate's liability as owner of the House. Does Court wish to ratify subject Agreement? **JTD.**
13. Petition indicates all cash of the estate, in the Estate account, is not interest bearing. **Need** further clarification via verified supplement.
14. Petitioner requests authority to withhold \$1,000 as a reserve for closing costs. **JTD.**
15. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 2, 4 & 13 then Court's discretion re: notes 1, 12 & 14. If approved, set next hearing for receipts and final discharge for **06/05/19**.

(nb)

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600138

CASE NAME: ANGELA ROSARIO ELDER

HEARING:

Accounting Review by ***

COUNSEL:

ANGELA C ELDER	(CAD)...THOMAS W DOMINICK
ANGELA ROSARIO ELDER	(DEC)...
CECILIA GUERRA	(TP)...DICKER & DICKER
EDWIN O. ELDER	(PET)...THOMAS W DOMINICK

GENERAL INFORMATION

Continued from **06/13/17 and 10/10/17**. Property in escrow, waiting for escrow to close.

Continued from 03/13/18 at request of counsel. Waiting for collection action in Washington. Notice given by Mr. McGuire.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Edwin O. Elder and Angela C. Elder on 04/04/16, with limited authority and no bond.
2. No accounting or status report of administration. 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: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600187

CASE NAME: MTR OF TIODOLA WILSON MADRID

HEARING:

First and final Account and Report of CIPRIANO M LOERA and
Petition for allowance of fees filed.

COUNSEL:

ALICIANA LADD (PET)...PRO/PER
CIPRIANO M LOERA (PET)...HORSPPOOL & HORSPPOOL
THOMAS W DOMINICK (TP)...FULLERTON LEMANN SCHAEFER & DO
TIODOLA WILSON MADRID (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Successor Executor, Cipriano M. Loera ["Petitioner"-son].

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

1. Status Report approved on 03/14/18. **Need** Order.
2. At hearing held on 03/14/18, counsel indicated that former Executrix, Alicianna Ladd never took possession of the assets. Suggest Court require a verified statement that no assets were marshaled, in which case an accounting will not be necessary. **JTD.**
3. Final Inventory and Appraisal by former executrix filed. Does Court wish to require a final inventory by this petitioner. **JTD.**
4. All beneficiaries waive accounting.
5. Accounting period 11/10/15 to 02/24/18.
6. Assets on Hand \$297,135.56 consisting of \$296,535.56 in cash and remaining in a 1997 Chevrolet Cavalier.
7. Petitioner has agreed to accept the 1997 Chevrolet Cavalier at its appraised value of \$600 as part of his statutory compensation. Petitioner requests authority to distribute said vehicle to himself and to pay the sum of \$9,129.41 to himself as the balance of the statutory compensation due him. **JTD.**
8. Statutory fees of \$9,729.41 to be split between Attorney Dominick and Attorney Horspool per agreement by parties. Calculated.

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

9. Petitioner requests extraordinary fees of \$1,593.75 for services rendered in connection with the sale of real property. Billed at \$25/hour for a total of 63.75 hours' time. Itemized [LF, pgs. 19-30]. **JTD.**
10. Attorney Horspool requests extraordinary fees of \$7,735.00 for services rendered in connection with the suspension and removal of prior executrix; sale of real property; and settlement reached by beneficiaries to resolve the objections to the status report filed by prior executrix. Billed at \$425/hour for a total of 18.20 hours' attorney time. Itemized [LF, pgs. 32-34]. **JTD.**
11. Attorney Dominick requests extraordinary fees of \$648.00 for services rendered in clearing title to the real property. Billed at \$350/hour for 1.6 hours' attorney time and \$110/hour for .80 hours' paralegal time. Itemized [see decl. filed 04/10/18-image in open access]. **JTD.**
12. Petitioner requests authority to withhold \$3,000 as a reserve for closing costs. **JTD.**
13. Petition does not address the status of the miscellaneous items listed on inventory and appraisal. **Need** verified supplement.
14. ~Proposed Order 04/10/18.

RECOMMENDATION

Need to clear notes 1 & 13 then Court's discretion. If approved, set next hearing for receipts and final discharge on **06/05/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

SEE ALSO 6

HEARING:

Hearing Re: APPROVAL OF PROPOSED ACTION RE CAL REAL PROP
COUNSEL:

GLORIA YVONNE ELLIOTT	(DEC)...
JONOVA KNICKERBOCKER	(PET)...DAVID M SENA
LISA HOEFGEN	(PET)...ROBERT J SPITZ

GENERAL INFORMATION:

Ex parte orders denied 07/11/17. Mr. Sheasby reports 850 petition will be filed. The Court orders the tenant to maintain the property and pay home owners insurance. Continued from 08/21/17 on courts motion. Running Springs realtor to be hired. Continued from **10/30/17 and 11/16/17** to trail demurrer hearing.
Continued from 12/19/17 on court's motion.

THIS CASE IS SET FOR HEARING ON Approval of Proposed Action re California Real Property by Administrator, Lisa Hoefgen ["Petitioner"].

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

- 1 Petitioner requests authority to issue all required notices and initiate and prosecute all required court proceedings to evict the current tenant(s) occupying the subject property; and list the subject property for sale for the price of \$159,000.
- 2 **Objections to Petition filed 08/18/17 by beneficiary, Jonova Knickerbocker. P's & A's filed in support.**
- 3 Supp. (09/13/17) provides the Court with additional information in support of Petitioner's Petition.
- 4 **Order on Ex Parte Petition for Approval of Proposed Actions re CA Real Property entered 04/05/18.**

RECOMMENDATION: Matter appears moot.

Set for contested hearing.

(nb)

Future hearing: 08/20/18 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

SEE ALSO 5

HEARING:

Petition for RETURN OF REAL PROPERTY

COUNSEL:

GLORIA YVONNE ELLIOTT (DEC)...

JONOVA KNICKERBOCKER (PET)...DAVID M SENA

LISA HOEFGEN (PET)...ROBERT J SPITZ

Currently under review by Legal Research.
(LR)

Notice given.
(lc/nb)

Future hearing:
08/20/18 Accounting review

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

SEE ALSO 8

HEARING:

Hearing Re: PTN FOR LETTERS OF ADMINS W/FULL IAEA BY S DAVIS

COUNSEL:

DIANE YOUNG DAVIS	(PET)...PRO/PER
JASMINE ELISE VERRETTE	()...
JEANETTE DAVIS	(OBJ)...PRO/PER
JEROME DAVIS	(DEC)...
SHAUN JEROME DAVIS	(PET)...PRO/PER

GENERAL INFORMATION

Continued from **08/21/17**. Objection and competing petition filed.

Continued from **10/30/17** at request of court for competing petitions to be heard together.

Continued from 12/19/17 on court's motion for verification of response to be filed.

THIS CASE SET FOR HEARING ON

- Petition for Letters of Administration with Full Authority under IAEA by Diane Young Davis, spouse
- Petition for Letters of Administration with Full Authority under IAEA by Jerome Davis, son

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

Petition by Diana Young, spouse

1. Bond in the amount of \$350,473 is being requested. Ok.
2. **Objection by Shaun Davis, son, filed 08/16/17.**
3. **Response by Diane Young Davis filed 10/12/17. Need verification by same.**
4. **Objection by Jeanette Davis, daughter, filed 10/25/17.**

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

5. **Objection by Jasmine Verrette, daughter, filed 10/27/17.**
6. ~Proposed Form Order: 05/24/17

Petition by Jerome Davis, son

7. Petitioner requests bond to be determined by Court.
8. It appears Diana Young, spouse/competing petitioner, has priority of appointment per Pr. Code §8461. JTD
9. Need Duties and Liabilities.
10. Need Notice of Petition to Administer Estate
11. **Objection by Diane Young, spouse, filed 10/12/17.**
12. No proposed Order submitted by Jerome Davis.

RECOMMENDATION

Matter is contested.

Need to clear notes 9-10 as to Petition by Jerome Davis. If approved, Court to set Accounting Review Hearing on **08/12/19**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.
(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: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

SEE ALSO 7

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANE YOUNG DAVIS	(PET)...PRO/PER
JASMINE ELISE VERRETTE	()...
JEANETTE DAVIS	(OBJ)...PRO/PER
JEROME DAVIS	(DEC)...
SHAUN JEROME DAVIS	(PET)...PRO/PER

See prior matter #7.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700637

CASE NAME: MARY A CUMMINGS

HEARING:

First and Final Report on Waiver of Account and Report of THERESA LEA CUMMINGS and Petition for allowance of fees filed.

COUNSEL:

MARY A CUMMINGS (DEC)...
THERESA LEA CUMMINGS (PET)...DEBRA S POPINEAU

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Executrix, Theresa L. Cummings ["Petitioner"-daughter-co-trustee].

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

1. Sole devisee waives accounting.
2. Accounting period 06/20/16 to 03/22/18.
3. Assets on Hand \$235,000 consisting of real property.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$7,700.00. Calculated.
6. ~Proposed Order 04/12/18.

RECOMMENDATION

RFA. If approved, set next hearing for receipt and final discharge for **06/05/19**.
(nb)

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701168

CASE NAME: MTR OF PAUL FRANCIS AGLIO

HEARING:

Petition for letters of administration with full authorization
to administer under IAEA

COUNSEL:

FRANCIS A AGLIO JR	(ADM)...PRO/PER
PAUL FRANCIS AGLIO	(DEC)...
SHERRY MCGRANN	(VOGT, RESNICK & SHERAK

XFREF: CONPS1700363 (Paul Francis Aglio)

GENERAL INFORMATION:

Continued from **12/19/17**. The Court deems Sherry McGrann served by her counsel's appearance today. Counsel reports written objections will be filed. Proof of publication shown to the court and will be filed. The Court orders vehicle in the possession of Sherry McGrann returned to the estate immediately. The Court further orders Sherry McGrann to prepare a list of property she believes was removed from the home and an explanation of why she believes it is her property.

Continued from 03/13/18 at request of Court to correct proof of publication.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother, Francis A. Aglio, Jr. ["Petitioner"].

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

1. Petitioner alleges that petitioner is the sole heir and waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). Estimated value of estate is \$409,000. JTD.
2. **Proof of publication names Decedent as Petitioner. Need corrected publication.**

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **05/21/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800319

CASE NAME: OLGA SMITH LEE (LIESKE)

HEARING:

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

COUNSEL:

BONNIE JEAN LEE (PET)...PRO/PER
OLGA SMITH LEE (LIESKE) (DEC)...
ROBERT LOWELL GETZLAFF (PET)...PRO/PER
WILBUR FREDERICK GETZLAFF (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by issues, Robert L. Getzlaff (named executor), Bonnie J. Lee and Wilbur F. Getzlaff ["Petitioners"].

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

1. Will waives bond. Estimated estate valued at \$92,000. However, named executor is a non-resident and Court has discretion to require bond per Pr. C. §8571. Suggest bond in the amount of \$92,000. **JTD.**
2. **Need** receipt for "lodging" of original will.
3. Will is not self-proving [not signed under penalty of perjury "under the laws of the State of California." **Need** Proof of Subscribing Witness.
4. **Need** Proof of Holographic Instrument.
5. Duties and Liabilities form is not signed by Bonnie J. Lee and Wilbur F. Getzlaff. **Need** same.
6. **Need** Notice of Petition to Administer Estate with proof of service.
7. ~Proposed Form Order/Letters 04/06/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800378

CASE NAME: Mtr of Alejandro C Razo

HEARING:

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

COUNSEL:

ALEJANDRO C RAZO

(DEC)...

ROSA M GOMEZ

(PET)...CHARISE L STEWART

X-REF: CONPS0900063

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by sister, Rosa M. Gomez ["Petitioner"].

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

1. Petitioner requests a bond of \$234,000 to be fixed. Insufficient. Suggest bond of \$520,000. **JTD.**
2. Petition, Attachment 8 [LF, p. 6], does not appear to include relatives listed in related case. **Need** verified supplement.
3. Character and estimated value of the estate total, Section 3d(7), is incorrect. **Need** verified supplement.
4. Section 7 to petition is incomplete. **Need** verified supplement.
5. Notice does not appear to include relatives listed in related case. **Need** proper service.
6. ~Proposed Form Order 04/18/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800379

CASE NAME: MICHAEL LOUIS HUFFSTUTLER

HEARING:

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

COUNSEL:

CHERYL JEAN HUFFSTUTLER (PET)...PRICE LAW FIRM, APC
MICHAEL JEAN HUFFSTUTLER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by wife, Cheryl J. Huffstutler ["Petitioner"].

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

1. Petitioner alleges all heirs waive bond. **Need** Mandatory Waivers of Bond by
Heirs, form DE-142/DE-111, by petitioner, issues Gerald Huffstutler and Bonnie
Ryan. **Alternatively**, require bond in the amount of \$332,000. **JTD.**
2. ~Proposed Form Order/Letters 04/24/18.

RECOMMENDATION:

Court's discretion re bond. If approved, set future hearing for Accounting Review on
08/06/19. Any account to be filed 30 days in advance of hearing. Note requirements of
Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800388

CASE NAME: EVA V. GONZALEZ

HEARING:

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

COUNSEL:

EVA V GONZALEZ

(DEC)...

SALVADOR GONZALEZ

(PET)...FULLERTON LEMANN SCHAEFER & O

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by spouse, Salvador S. Gonzalez ["Petitioner"].

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

1. Petitioner requests no bond to be set, but does not specify why. Estimated estate valued at \$0.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. **Need** proof of publication.
3. Proof of Service affixed to notice filed 04/27/18 is not dated at signature line. **Need** proper service.
4. ~Proposed Form Letters 04/24/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **08/06/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800397

CASE NAME: DONALD W. PARRISH

HEARING:

Spousal Property Petition hearing.

COUNSEL:

DONALD W PARRISH (DEC)...

REBEKAH PRUTSMAN (PET)...HORSPPOOL & HORSPPOOL

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 05/29/18 TIME: 8:30 DEPT: S37P

CASE#: TRU PS1800080

CASE NAME: Marian A Bowen Family Trust Dated March 4 1998

HEARING:

Petition for Ptn for Order Determining Title to Real Prop in the
Marian A Bowen Family Trust

COUNSEL:

JULIA N LANTZ

(PET)...HOWARD R HAWKINS

MARIAN A BOWEN FAMILY TRUST DA(TRU)...

Currently under review by Legal Research.

(LR)

Notice

Need Notice of Hearing with proof of service to son/beneficiary, Mark L. Bowman.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0600079

CASE NAME: STEVEN WESTERFIELD HOLMAN

HEARING:

Accounting Review by ***

COUNSEL:

ALMA D LUJAN	(PET)...PRO/PER
DAVID W HOLMAN	(CPE)...PRO/PER
STEVEN WESTERFIELD HOLMAN	(CEP)...
WESLEY G HOLMAN	(PET)...PRO/PER

GENERAL INFORMATION:

It came to the Court's attention that this matter was erroneously set for 4/26/16, the Court places matter back on calendar and orders Conservator to be present at next hearing to show why accounting has not been filed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Estate, David W. Holman.

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 03/02/16; account now due beginning 01/01/16.
2. No accounting or waiver of account. **Need same.**

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700168

CASE NAME: HUMBERTO AGUILAR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALMA MARRUJO DE SMITH

COUNSEL:

ALMA MARRUJO DE SMITH (PET)...PRO/PER
HUMBERTO AGULIAR (CEE)...WALTER T. MOORE

GENERAL INFORMATION

Mother, Alma Marrujo De Smith, appointed Limited Conservator of the Person on
10/24/17, no bond.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights; Determination of Conservatee's
Appropriate Level of Care; and Care Plan filed.
2. Proof of Mailing to Post-Move Notice of Change of Address is incomplete.
Need proper service.

RECOMMENDATION:

Need to clear note 2
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700380

CASE NAME: GARY HOUGHTON

SEE ALSO 19

HEARING:

First and final Account and Report of THOMAS N JACOBSON and
Petition for allowance of fees filed.

COUNSEL:

GARY HOUGHTON	(CEP)...DONNASUE ORTIZ
GARY HOUGHTON	(CTE)...PRO/PER
THOMAS N JACOBSON	(CE)...THOMAS N. JACOBSON
THOMAS N. JACOBSON	(TC)...THOMAS N. JACOBSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Temporary Conservator of the Estate, Thomas N. Jacobson ["Petitioner"].

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

1. Petitioner has not used the mandatory Summary of Account (GC-400/405).
Court may wish to direct petitioner to use mandatory form(s) on future
accountings.
2. Accounting period 10/30/17 to 03/31/18.
3. Assets on Hand \$320,319.73 consisting of cash held in attorney's IOLTA
account.
4. Current bond of \$330,000.
5. Petitioner is not requesting compensation.
6. Attorney requests fees of \$7,505.00. Billed at \$395/hour for 19 hours' attorney
time and \$45/hour for 43.10 hours' paralegal time. Itemized [LF, pgs. 20-28].
JTD.
7. Attorney requests reimbursement of costs advanced of \$5,120.83. Itemized
[LF, p. 7].
8. Petitioner requests authority to distribute the funds to the permanent
Conservator of Gary Houghton, Hugh Adrian Scott Jones.

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

9. Proposed Order 04/16/18 indicates Riverside County instead of San Bernardino County.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge on **06/05/19**.

(nb)

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

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700380

CASE NAME: GARY HOUGHTON

SEE ALSO 18

HEARING:

Petition for fees and for order directing payment to court
appointed guardian ad litem

COUNSEL:

GARY HOUGHTON	(CEP)...DONNASUE ORTIZ
GARY HOUGHTON	(CTE)...PRO/PER
THOMAS N JACOBSON	(CE)...THOMAS N. JACOBSON
THOMAS N. JACOBSON	(TC)...THOMAS N. JACOBSON

GENERAL INFORMATION:

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

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

1. Petitioner was appointed on 10/30/17. Petitioner alleges that services were rendered for which counsel has not been compensated for the period 11/07/17 to 05/29/18.
2. Attorney requests fees of \$3,089.75. Billed at \$395/hour for 7.30 hours' attorney time and \$125/hour for 1.65 hours' paralegal time. Itemized [LF, p. 7].
JTD.
3. Petitioner requests that the Temporary Conservator, Thomas Jacobson, be directed and ordered to pay the attorney fees as requested.
4. ~Proposed Order 04/25/18.

RECOMMENDATION:

Court's discretion.

(nb)

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

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700408

CASE NAME: GEORGE GARCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GEORGE GARCIA	(CTP)...MARK J. FLORY
KARINA ROMERO	(PET)...PRO/PER
ROMULO GARCIA	(PET)...PRO/PER

GENERAL INFORMATION

Continued from **12/11/17** at request of court. Attorney Mark J. Flory appointed. The Court requests IRC to prepare report for the court. Notice by Judicial Assistant.

Continued from 03/06/18 on courts motion. Proofs of completion of conservatorship training class are shown to the Court.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Romulo Garcia and Karina Romero, mother and father.

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, power to withhold medical consent, control social/sexual contacts, and make decisions re: education. JTD
2. Petitioner seeks civil rights be limited without court order. JTD
3. Court to see Confidential Conservator Screening form by petitioners, [LF p. 3/4].
4. Petitioner seeks medical powers. Capacity Declaration, section 4 is incomplete. **Need** same.
5. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Mark J. Flory filed.
6. Proposed conservatee is developmentally disabled. IRC report filed.
7. Certificates of Completion of the Conservatorship Training Class shown to Court.

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

8. Court Investigator report filed.
- 11.~Proposed Form Order: 11/01/17

RECOMMENDATION

Need to clear note 4. If approved, set hearing for Compliance Review for **01/07/19** 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.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/29/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800117

CASE NAME: Steven Rodriguez

HEARING:
Petition for Appointment of Conservator

COUNSEL:
LYDIA E MCGUIRE (CPE)...PRO/PER
STEVEN RODRIGUEZ (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by sister, Lydia E. McGuire ["Petitioner"]

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

1. Petitioner requests no bond be required as proposed conservatee receives SSI of \$800/month. **JTD.**
2. Estimated value of the property of the estate indicates public assistance of \$819.68. Question the need for estate powers? **Court** to inquire.
3. Section 1 to petition does not indicate the powers being sought. **Need** completion of same.
4. Section 5e re Confidential Supplemental Information to petition is incomplete. **Need** same.
5. Sections 9b & 9d re; capacity declaration and religion are incomplete. **Need** same.
6. Section 11a re: listed relatives, below is incomplete. **Need** same.
7. Petitioner appears to seek medical powers. **Need** Medical Capacity Declaration.
8. Report of No Report filed.
9. **Need** return of Citation.
10. **Need** Certificate of Completion re Conservatorship Class.
11. **Need** Notice of Hearing and proof of service.
12. ~Proposed Form Order/Letters 04/19/18.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **01/08/19** for the filing of the following: proof of service of Order with Notification of Conservatee's **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.**

Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355; and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re: Accounting Review for **07/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC

DATE: 05/29/18 TIME: 1:30 DEPT: S37P

CASE#: CIF DS1700118

CASE NAME: BOBRINK -V- BARELA

HEARING:

Court Trial set for ELDER/DEPENDANT ADULT ABUSE of BOBRINK

COUNSEL:

HOLLIE SUE BARELA (RES)...LAW OFFICE OF LAUREN LAUNDIS

TED BERNARD BOBRINK (PET)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

No notes – Court Trial.

Need Notice of Hearing with proof of personal service on Respondent, Hollie Sue Barela.

(cs/nb)