



## First Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 05/30/17**

**All corrections/supplements addressing these notes should be filed by 05/23/17.**

Later-filed documents might not be reviewed prior to the hearing and could result in a continuance of your case. Updates to these notes *typically* will be posted three court days prior to the hearing.

### **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](mailto: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.

0509nb

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 05/30/17    TIME: 8:30    DEPT: S35P  
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CASE#: PRO PS1200812

CASE NAME: IN THE MATTER OF ISAAC SHEPHERD

HEARING:

Accounting Review

COUNSEL:

CHRISTI FRIED

(PET)...KEVIN URBATSCH

CHRISTI FRIED

(TEE)...MYERS URBATSCH

CYNTHIA SHEPHERD

(PET)...BARETT BEASLY

CYNTHIA SHEPHERD

(PET)...GREGORY J LEDERMAN

ISAAC SHEPHERD

(MIN)...

ISAAC SHEPHERD 2012 SPECIAL NE

(TRU)...

GENERAL INFORMATION:

**Continued from 04/18/17 at request of counsel. Notice to be given by Kevin Urbatsch's Office.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Second Account approved on 10/31/16; Order Settling Second Account returned for corrections. Need same.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

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

(nb)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1400933

CASE NAME: MTR OF ELIZABETH BACK

HEARING:

Hearing re Final Discharge

COUNSEL:

ELIZABETH BACK

(DEC)...

SHIRLEY ABBEY

(PET)...BYRON D GROVES

Request for Waiver of Court Fees and Costs filed by SHIRLEY ABBEY is GRANTED

**VACATE** – Ex Parte Petition for Final Discharge and Order entered 09/07/16.  
(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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600493

CASE NAME: VANDORA V. HIGGINS

HEARING:

FIRST AND FINAL Account and Report of JUDY FROST and Petition  
for allowance of fees filed.

COUNSEL:

DEPARTMENT OF HEALTH CARE SERVICES (TP) ...  
JUDY FROST (PET) ... JAMES A. BUSSE JR.  
VANDORA V HIGGINS (DEC) ..

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Executrix, Judy Frost ["Petitioner"].

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

1. Accounting period 02/22/16 to 02/16/17.
2. Assets on Hand \$202,064.96 consisting of cash held in attorney's IOLTA account.
3. Statutory fees of \$9,084.89 requested. Calculated.
4. Petitioner requests reimbursement of costs advanced of \$23,112.06. Itemized.  
However, estimate at LF, p. 16 reflects reimbursement in the amount of \$15,818.57.  
Need further clarification and reconciliation via verified supplement.
5. Beginning assets on hand does not match amount on inventory by \$89.72. Does  
Court wish to deem amount de minimus? JTD.
6. Total Charges and Credits reflected on Summary of Account [LF, p. 10] do not  
match by a difference of \$14,076.75. Need corrected summary and affected  
schedules via verified supplement.
7. Account does not include findings as to sole and separate property. Need verified  
supplement.
8. Need bank statement to support date of death balances per Local Rule 20-908.
9. ~Proposed Order 03/30/17.

RECOMMENDATION:

Need to clear notes 4-8 then Court's discretion. If approved, set next hearing for receipts  
and final discharge for **05/29/18**.

(nb)

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included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at  
[ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

**SEE ALSO 8, 9**

HEARING:

Petition for ACCEPTING RESIGNATION OF TRUSTEE, FOR APPOINTMENT  
OF SUCCESSOR

COUNSEL:

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

Currently under review by Legal Research.  
(LR)

Matter continued – notice not re-reviewed.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

**SEE ALSO 6**

HEARING:

Hearing Re: AMENDED PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

PATRICIA ANNETTE REDFERN      (DEC)...  
STEVEN REDFERN                      (PET)...PRO/PER  
SUZETTE A WHITE                      (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SUZETTE A WHITE is GRANTED

See notes on next page

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

**SEE ALSO 5**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL AIAE

COUNSEL:

PATRICIA ANNETTE REDFERN (DEC)...  
STEVEN REDFERN (PET)...PRO/PER  
SUZETTE A WHITE (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SUZETTE A WHITE is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON

- **Petition #1** for Letters of Administration with full authority under IAEA by **Suzette White (daughter)**
- **Petition #2** for Letters of Administration with full authority under IAEA by **Steven Redfern (spouse)**

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

**Petition #1 by Suzette White (daughter) filed 01/30/17:**

1. Petition indicates all heirs waive bond; however, missing bond waivers from Lisa Windbigler (daughter) and Steven Redfern (spouse). Estimated net value of estate is \$65,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Proof of Publication filed 03/17/17.
3. ~Proposed form Order: 01/30/17

**Petition #2 by Steven Redfern (spouse) filed 04/26/17:**

4. Petition indicates all heirs waive bond; however, missing bond waivers from decedent's issue, Suzette White, John Allen III, and Lisa Windbigler. Estimated net value of estate is \$65,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD

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

5. Petitioner Steven Redfern appears to have priority of appointment as decedent's spouse per Pr. C. §8461.
6. Need Proof of Publication.
7. Notice of Petition to Administer Estate filed 04/26/17; however, need to include service to Richard Samuel Price, attorney for competing petitioner, Suzette White.
8. ~Proposed form Order: 04/26/17

**RECOMMENDATION:**

Need to clear notes as to petition #2. Matter is contested. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **08/07/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules 20.901 and 20.908.

(lh)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700273

CASE NAME: PERCY SANDERMAN

HEARING:

Petition for PETITION FOR LETTERS OF ADMINISTRATION WITH FULL  
AIAE

COUNSEL:

ISABELLE SANDERMAN (PET)...PRO/PER  
PERCY SANDERMAN (DEC)...

Request for Waiver of Court Fees and Costs filed by ISABELLE SANDERMAN is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Isabelle Sanderman (spouse)

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

1. Petition alleges heirs waive bond; however, need bond waivers using mandatory form DE-142. Estimated net value of estate is \$19,827 based on net value of real property. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Petition, section 8, list of relatives is missing Isabelle Sanderman (spouse/petitioner). Need verified supplement.
3. Proof of Publication filed 04/25/17; however, notice was published with Fontana Herald News which areas of circulation do not include the city of Ontario where decedent resided. Also, notice contains incorrect time of hearing. Need publication in proper newspaper per Pr. C. §8121 with correct hearing information.
4. ~Proposed form Order: 03/24/17

RECOMMENDATION:

Need to clear notes 1-3. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **08/07/18** Any accounting to be filed 30 days in advance.. Note requirements of Local Rules 20.901 and 20.908.

(lh)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 05/30/17      TIME: 8:35      DEPT: S35P  
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CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

**SEE ALSO 4, 9**

HEARING:

Petition for COURT TO TAKE JURISDICTION AND SUPERVISION OF  
SPECIAL NEEDS TRUST

COUNSEL:

THE JORDAAN CLARKE SPECIAL NE  
WELLS FARGO BANK

(TRU)...

(PET)...MUSCARELLA &

**X-REF: CONPS1600162**

Currently under review by Legal Research.  
(LR)

Matter continued – notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/30/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

**SEE ALSO 4, 8**

HEARING:

FIRST AND FINAL Account and Report of WELLS FARGO BANK and  
Petition for allowance of fees filed.

COUNSEL:

THE JORDAAN CLARKE SPECIAL NE (TRU)...  
WELLS FARGO BANK (PET)...MUSCARELLA &  
MITCHELL I ROTH (GAL)

**X-REF: CONPS1600162**

GENERAL INFORMATION:

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

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

1. Accounting period 03/01/16 to 02/28/17.
2. Assets on Hand \$1,612,576.99 consisting of \$99,111.11 in cash and \$919,597.44 in non-cash assets.
3. No bond was required as Petitioner is a corporate fiduciary.
4. Petitioner requests ratification and approval of Trustee's fees paid on account during this accounting period in the sum of \$23,009.56. Billed at 1.50% of the first \$2,000,000 as approved by Order of this Court on 02/17/17 [LF, p. 116]. Generally described [LF, pgs. 7-9]. JTD.
5. During the period of this account, Petitioner paid legal fees without Court Order in the amount of \$15,241.73, pursuant to Article 3.2(s) [LF, p23] that attorney fees may be appropriate and paid without Court Order by the Oregon Court. Does Court wish to ratify payment of legal fees? JTD.
6. Petitioner requests approval, authority and an Order to pay the amount of \$980 to Buchalter Nemer for services in relation to a real estate issue rendered prior to this Court accepting jurisdiction and supervision of the Trust. Invoice provided [LF, p.123]. JTD.

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

7. Attorney requests fees of \$13,425.00. Billed at \$300/hour for 45.50 hours' attorney time. Itemized [LF, pgs.130-133]. JTD.
8. Attorney requests reimbursement of costs advanced of \$822.00. Itemized [LF, p. 135].
9. Receipts – Schedule A [LF, p. 63-70] reflect rental income from Sari E. Lopez (mother) in varying amounts. Need further clarification via verified supplement.
10. Proposed Order 04/25/17 includes resignation of Wells Fargo Bank as trustee; appointment of Successor Trustee, Richard Huntington; includes bond; and additional language which was not prayed for in petition.

**RECOMMENDATION:**

Need to clear notes 5 & 9 then Court's discretion. If approved set next hearing for receipts and final discharge on **06/05/18**.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

HEARING:

Motion Re: Demurrer to 1st & 2nd cause of actn of pet'rs first  
amnded pet Filed by Respondent KATHRYN GAUDREAU, CAROL KILLEN,  
STEPHANIE GAUDREAU

COUNSEL:

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

Currently under review by Legal Research.  
(LR)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 8:35      DEPT: S35P  
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CASE#: PRO PS1700132

CASE NAME: THE EARLY LIVING TRUST

HEARING:

Petition for REMOVAL OF CO-TRUSTEE; PETITION FOR INSTRUCTIONS  
CONCERNING CLAIM AGAINST ETC

COUNSEL:

AGNES FULLER

THE EARLY LIVING TRUST

(PET)...CHUNG & IGNACIO, LLP

(TRU)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIP**

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DATE: 05/30/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1500122

CASE NAME: STEVIE RAY VALENCIA

HEARING:

FIRST Account and Report of GRACIELA VALENCIA and Petition for allowance of fees filed.

COUNSEL:

DESIREE MARIE GONZALEZ	(CP )...PRO/PER
GRACIELA VALENCIA	(PET)...NETT & NETT, P.C.
GRACIELA VALENCIA	(TP )...NETT & NETT, P.C.
STEVIE RAY VALENCIA	(CTP)...DONNASUE ORTIZ

Request for Waiver of Court Fees and Costs filed by DESIREE MARIE GONZALEZ is GRANTED

Fee waiver amount due \$465.00 for filing fees for conservatorship on 05/11/15

Request for Waiver of Court Fees and Costs filed by STEVIE RAY VALENCIA is GRANTED

Fee waiver amount due \$435.00 for filing fees for Ntc of joinder by court appointed attorney on 08/02/16

GENERAL INFORMATION:

At **03/16/16** hearing, Court took jurisdiction over the Graciela Valencia Irrevocable Trust and ordered that the trust's bank account(s) at Chase Bank in Perris, California be frozen and blocked until further order of the court. Court ordered that Graciela Valencia prepare and file an accounting on the Graciela Valencia Irrevocable Trust.

Continued from **08/02/16 and 10/18/16** at request of counsel. Court orders Graciela Valencia to be personally present at hearing.

**Continued from 02/28/17. The Court orders Graciela Valencia and Attorney Amy Nett to be present at the next hearing on 5-30-17.**

THIS CASE IS SET FOR HEARING ON **AMENDED (10/13/16)** First Account and Report by Trustee Graciela Valencia (re: Graciela Valencia Irrevocable Trust).

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

1. Accounting period 01/29/13 to **08/31/16**.
2. Assets on hand **\$69,906.07**.

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

3. **Amended Summary of Account [LF, p. 6] reflects a forced “Amount to Balance,” in the amount of \$52.18. Does the Court wish to deem amount de minimus? JTD.**
4. Compensation or fees are not requested.
5. Disbursements indicate Conservatee has a Special Needs Trust. Need further clarification via verified supplement.
6. **During the accounting period, petitioner paid to Vanessa Martinez for care services. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).**
7. Need bank/financial statements to support beginning and ending account periods per Local Rule 20-908.
8. Notice of Joinder by CALPERS filed 08/02/16 indicates conservatee received funds due to the death of his father, Ray C. Valencia.
9. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Need to clear notes 5-7. If approved, set next Accounting Review for **10/24/17**.

(nb)



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

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DATE: 05/30/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500312

CASE NAME: TRAVENA TIARA LEE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of TINA A LEE

COUNSEL:

TINA A LEE (PET)...PRO/PER  
TRAVENA TIARA LEE (CEE)...JENNIFER M DANIEL

Request for Waiver of Court Fees and Costs filed by TRAVENA TIARA LEE is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Tina A. Lee appointed Conservator of the person on 10/25/16.
2. Notice of Conservatee's Rights filed 10/27/16. However, need to include service of notice to Trayveon Lee (brother), Thomas Wilson (brother), Lola Wilson (mgm), and separate notice to William Lee (father).
3. Care Plan and Determination of Conservatee's Appropriate Level of Care filed 11/04/16.

RECOMMENDATION

Need to clear note 2.

(lh)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600162

CASE NAME: JORDAAN MICHAEL CLARKE

**SEE ALSO 15**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SARI LOPEZ

COUNSEL:

JORDAAN MICHAEL CLARKE

(CEE)...MITCHELL I ROTH

SARI LOPEZ

(CP )...SALIM KHAWAJA

**XREF: PROPS1600162**

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Sari Lopez appointed Conservator of the person.
2. Determination of Conservatee's Appropriate Level of filed.
3. Notice of Conservatee's Rights with Proof of Service filed 01/06/17; however Proof of Service is incomplete at item #2 as to address of server, and item #5 as to date of Order. Need amended Proof of Service.
4. Need Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Need to clear notes 3-4.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 8:35      DEPT: S35P  
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CASE#: CON PS1600162

CASE NAME: JORDAAN MICHAEL CLARKE

**SEE ALSO 14**

HEARING:

Hearing Re: STATUS TRACKING

COUNSEL:

JORDAAN MICHAEL CLARKE

(CEE)...MITCHELL I ROTH

SARI LOPEZ

(CP )...SALIM KHAWAJA

**XREF: PROPS1600162**

No notes – Status.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS02302

CASE NAME: MTR RE JENNIFER JOANNE MCKINNEY

HEARING:  
Accounting Review

COUNSEL:

DAN G MCKINNEY (CPE)...REID & HELLYER  
JENNIFER JOANNE MCKINNEY (CEP)...PRO/PER

GENERAL INFORMATION

**Continued from 02/28/17 due to non-appearances. The Court orders Dan G. McKinney and/or counsel to appear at the next hearing on 5-30-17. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Ex-Parte Petition to Dispense with Accounting and Order entered 02/23/16; account now due.
- 2 **Ex Parte petition to Dispense with Accounting and Order returned for corrections. Need same.**

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 05/30/17      TIME: 9:30      DEPT: S35P  
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CASE#: SC SS03151

CASE NAME: MTR OF JEANNE HARRIS

HEARING:

FIFTH AND FINAL Account and Report of DIANE D HARKISON and  
Petition for allowance of fees filed.

COUNSEL:

DIANE D HARKISON      (CPE)...M DANIEL SAYLOR  
JEANNE HARRIS      (CEP)...EDWARD B FISCHER  
JEANNE HARRIS      (DEC)...

Request for Waiver of Court Fees and Costs filed by JEANNE HARRIS is GRANTED  
Fee waiver amount due \$450.00 for Ci fees on n 03/19/15

Request for Waiver of Court Fees and Costs filed by DIANE D HARKISON is GRANTED  
Fee waiver amount due 2270.00  
\$450.00 for Ci fees on 01/26/12  
\$395.00 for accounting on 06/14/12  
\$450.00 for CI fees on 03/18/13  
\$450.00 for CI fees on 01/26/15  
\$525.00 for petition to accept etc on 09/21/16

GENERAL INFORMATION:

Conservatee died on 09/27/16.

**Continued from 02/28/17 at request of counsel. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **Amended** (03/29/17) Fifth and Final Account and  
Petition for Fees by Conservator of the Person and Estate, Diane D. Harkison (PPF).

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

1. Accounting period **08/01/16** to 12/31/16 (pre & post-death periods).
2. Assets on hand \$273.48 consisting of cash.
3. Petitioner indicates it is anticipated that the amount on hand will be less than \$350 and requests the balance of funds on hand to be paid to the Conservator as Conservator's fees (up to \$350). JTD.

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

4. Attorney makes no fee request for this accounting period, as there are no funds available to pay them.
5. Conservator requests discharge which does not occur until entry of final discharge order.
6. **Need Notice of Hearing with proof of service as to amended account.**
7. Proposed Order 03/29/17 discharges conservator upon filing of receipts and ex parte petition for final discharge instead of upon entry of final discharge order.

RECOMMENDATION:

Need to clear note 6 . If approved, set next hearing for receipts and final discharge for **05/29/18.**

(nb)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**PROBATE**

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

CASE#: PRO PS1500525

CASE NAME: PHYLLIS CAROL BECKLUND

**SEE ALSO 2**

HEARING:

Hearing Re: Restraining Order

COUNSEL:

ANGELA MCVEIGH

(PET)...PRO/PER

KIM COOPER

(PET)...MATTHEW E. SHEASBY

PHYLLIS CAROL BECKLUND

(DEC)...

Request for Waiver of Court Fees and Costs filed by ANGELA MCVEIGH is GRANTED

No notes –Judge to decide.

Future Hearing:

07/18/17 Final Discharge

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

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1500525

CASE NAME: PHYLLIS CAROL BECKLUND

**SEE ALSO 1**

HEARING:

Petition for to replace trustee and deficiency in trust; sanctions

COUNSEL:

ANGELA MCVEIGH	(PET)...PRO/PER
KIM COOPER	(PET)...MATTHEW E. SHEASBY
PHYLLIS CAROL BECKLUND	(DEC)...

Request for Waiver of Court Fees and Costs filed by ANGELA MCVEIGH is GRANTED

Currently under review by Legal Research.  
(LR)

Notice:

Need Notice of Hearing with proof of service to James L. Cooper (son); Joshua P. Cooper (grandchild); Ian J. Cooper (grandchild); Grace Cooper (grandchild); Joseph McVeigh (grandchild); and Trustee, Kim Cooper (daughter).

Future Hearing:

07/18/17 Final Discharge

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



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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

CASE#: PRO PS1601126

CASE NAME: MTR OF GUADALUPE AGUIRRE

HEARING:

OSC re: Dismissal of Petition for Letters of Testamentary filed  
by JOSE ORTIZ

COUNSEL:

GUADALUPE AGUIRRE

(DEC)...

JOSE ORTIZ

(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JOSE ORTIZ is GRANTED

#### GENERAL INFORMATION

Petra Aguirre aka Petra Aguirre Lopez (decedent's sister) appointed Executrix on 11/10/16 in EL Paso, Texas, no bond.

**Continued from 01/17/17 and 03/28/17 due to non-appearance. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON **OSC re: Dismissal** on Petition for ANCILLARY Probate, Letters Testamentary W/WA and Full Authority under IAEA by Jose Ortiz, maternal uncle.

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

1. Petition affixes a copy of the El Paso, Texas Order appointing decedent's sister at LF, p. 15.
2. Need Proof of Subscribing Witness as decedent's will was drafted and executed in El Paso, Texas and not signed "under penalty of perjury under the laws of the State of California."
3. Petitioner alleges named executrix, Martina Aguirre, cannot serve as she is a resident of Mexico; has no passport; and unable to act. However, as Martina Aguirre is named in Decedent's Will [LF, p. 8] as Executrix, it appears she may act under Pr. C. § 8402(b). Need Declination to Act by named Executrix and Nomination of this Petitioner.
4. Petition indicates decedent was a non-resident of California and left an estate in the county named above, at section 3a(2), but, fails to include the address where property is located. Need verified supplement.

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

5. Section 3(c) to petition re: character and estimated value of the property of the estate is incomplete. Need same.
6. Will does not waive bond as to this petitioner. Estimated value of the property of the estate is reflected at \$45,000. Suggest bond of \$45,000. JTD.
7. Section 3(d)(2) to petition alleges all beneficiaries are adults and waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by Martina Aguirre and Petra Aguirre.
8. Need proof of publication in an adjudicated newspaper in San Bernardino County that is generally circulated where property is located at.
9. Beneficiaries include what appears to be a citizen of Durango, Mexico. Need Notice of Petition to Administer Estate with proof of service to include diplomatic or consular office per Pr.C. § 8113.
10. ~Proposed Form Order/Letters 11/10/16.

**RECOMMENDATION:**

Need to clear notes then Court's discretion re: bond. If approved, set next hearing for Accounting Review for **07/31/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules 20.901 and 20.908.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601140

CASE NAME: MTR OF MARY BUDISALOVICH

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

CORINNA C SCHNEPF (PET)...PRO/PER  
MARY BUDISALOVICH (DEC)...

#### GENERAL INFORMATION

Continued **01/24/17**. Matter continued for petitioner to look into attaining a bond and to file a supplement on petition.

**Continued from 04/04/17 due to non-appearance. Petitioner, Corinna C. Schnepf, is ordered to appear at the next hearing. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration, with Limited IAEA, by Corinna C. Schnepf, daughter

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

1. Petitioner seeks limited authority as sole heir and waives bond. Estimated personal property and annual income valued at \$520,163. Petitioner is a nonresident in Idaho; does the court wish to require bond per Pr. C. § 8571?
2. Need verified supplement clarifying item 3c of petition re character and estimated value of property. Personal property is valued at only \$10,000 generating an annual gross income from personal property of \$210,162.56.
3. ~Proposed form Order/Letters: 11/16/16

#### RECOMMENDATION

RFA subject to note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **07/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(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](mailto: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: CYNTHIA LUDVIGSEN

**CONSERVATORSHIP**

-----  
DATE: 05/30/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000312

CASE NAME: EDWARD LE TU

HEARING:

Accounting Review

COUNSEL:

EDWARD LE TU

(CEP)...

EDWARD LE TU

(CP )...

HOA LIEU

(CP )...PRO/PER

JEANNE E KENNEDY

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

SOPHIA TU

(CP )...PRO/PER

Request for Waiver of Court Fees and Costs filed by HOA LIEU is GRANTED

Request for Waiver of Court Fees and Costs filed by EDWARD LE TU is GRANTED

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved the first account on 06/02/15 through the period of 02/28/15; need Order after Hearing.
2. Second account now due. **Petition for withdrawal of funds filed 05/01/17 (no hearing date) affixes a summary of account that does not begin with assets on hand at end of prior period or balances; reflects incorrect accounting period and schedules; and is not verified. Need proper account per Pr. C. § 1060 et seq. to be filed separately and set on first check calendar no sooner than 07/18/17.**
3. Notice filed 05/01/17 reflects incorrect accounting period and signature to proof of service is incomplete. Need proper notice and service.

RECOMMENDATION:

Need to clear notes.

(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](mailto: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: CYNTHIA LUDVIGSEN

-----  
DATE: 05/30/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1100136

CASE NAME: IN MATTER OF MARJORIE A SANSOM

HEARING:

FOURTH AND FINAL Account and Report of CHRISTOPHER P SLADE and  
Petition for allowance of fees filed.

COUNSEL:

CHRISTOPHER P SLADE (CPE)...NICOLE A VETTRAINO  
MARJORIE A SANSOM (CEP)...

**X-REF: PROPS1601085**

GENERAL INFORMATION

Conservatee passed away on 08/18/16.

**Continued from 04/04/17 at request of counsel to trail petition to determine  
succession to real property set on 04/19/17.**

THIS CASE IS SET FOR HEARING ON Fourth and Final Account and Petition for Fees  
and Distribution by Conservator of the Person and Estate, Christopher P. Slade.

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

1. Accounting period 01/01/15 to 11/10/16 (pre and post death periods).
2. Assets on hand \$112,184.42 consisting of \$95,684.42 in cash and \$16,500 in real property.
3. Petitioner waives compensation.
4. Attorney requests fees of \$3,850.00 plus \$700 if an appearance by attorney is required; billed at \$350/hour for 11 hours. Itemized [LF p. 7]
5. Attorney requests reimbursement of \$465 for filing fee.
6. Disbursements – Schedule C [LF, p. 35] reflects a retainer agreement payment of \$3,500 to attorney for Summary Proceedings in related case.
7. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
8. Need full legal description and APN number for real property sold during this administration per Local Rule 20-610.
9. Need mailing addresses for distributees receiving real property per Local Rule 20-612.

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

10. Petitioner requests an order to transfer all remaining assets equally to Suzanne C. Avila and Christopher P. Slade pursuant to an Order Determining Succession to Real and Personal Property filed in the related case.
11. Petitioner requests discharge and bond exoneration upon filing of receipts and Ex-Parte Application for Discharge. However, discharge does not occur until the entry of a final discharge order.
12. Notice given.
13. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 7-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **04/10/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/30/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400096

CASE NAME: ROBERT EUGENE MATTISON

HEARING:  
Accounting Review

COUNSEL:

ALICIA M MATTISON	(CP )...PRO/PER
ROBERT E MATTISON	(CPE)...KARIN E HORSPPOOL
ROBERT EUGENE MATTISON	(CEE)...KARIN HORSPPOOL

Request for Waiver of Court Fees and Costs filed by ALICIA M MATTISON is GRANTED

GENERAL INFORMATION

**Continued from 11/08/16, 01/17/17 and 03/28/17. Non-appearance by conservator nor has an accounting been filed. Citation issued as to Alicia Mattison. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Previous waiver of Account approved on 10/29/15.
2. Waiver of Account per Pr.C. § 2628 returned for corrections. Need corrected waiver.
- 3. Need return of citation.**

RECOMMENDATION

Inquire status.  
(lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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

CASE#: CON PS1400366

CASE NAME: Maria Teresa Bitner

**SEE ALSO 9**

HEARING:

Accounting Review

COUNSEL:

DENNIS BITNER

MARIA TERESA BITNER

SURETEC INSURANCE COMPANY

(CPE)...CRAIG M PARKER

(CEP)...MITCHELL I ROTH

(PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered 08/16/16; second accounting now due covering the period 04/01/16 to 03/31/17.
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: CYNTHIA LUDVIGSEN

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

CASE#: CON PS1400366

CASE NAME: Maria Teresa Bitner

**SEE ALSO 8**

HEARING:

Accounting Review

COUNSEL:

DENNIS BITNER

MARIA TERESA BITNER

SURETEC INSURANCE COMPANY

(CPE)...CRAIG M PARKER

(CEP)...MITCHELL I ROTH

(PET)...PRO/PER

**VACATE** – duplicate setting.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/30/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700036

CASE NAME: MTR OF LETICIA ALONSO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LETICIA ALONSO (CP)...PRO/PER  
LETICIA ALONSO (CTP)...MELVIN L FRIEDLAND

Request for Waiver of Court Fees and Costs filed by LETICIA ALONSO is GRANTED

#### GENERAL INFORMATION

**Continued from 03/21/17. The Court clears notes #5, #6 and #8. Melvin L. Friedland appointed. Petitioner orally requests the court to allow conservatee to be taken out of the state for a vacation. The Court grants petitioner's oral request to take the conservatee out of state for a vacation in July in Laughlin, Nevada. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Leticia Alonso (mother)

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

1. Petitioner seeks powers to fix residence, authority to access confidential records, control contracts, make and consent to medical decisions under Pr. C. §2351.5.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed 04/10/17.**
5. **Report by court-appointed counsel, Melvin Friedland, filed 04/14/17.**
6. **IRC report filed 03/17/17.**
7. Court Investigator report filed 03/09/17.
8. Notice was served.
9. Certificate of Completion of the Conservatorship Training Class filed 03/02/17.
10. ~Proposed Form Order: 01/31/17

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

## RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **12/26/17** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.  
(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](mailto: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: CYNTHIA LUDVIGSEN

-----  
DATE: 05/30/17 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS01795

CASE NAME: MTR RE VERONICA ISABELLE COLE

HEARING:

Hearing Re: OSC Re: Sanctions

COUNSEL:

CYNTHIA S CARROLL (CPE)...HARTNELL LAW GROUP  
VERONICA ISABELLE COLE (CEP)...

#### GENERAL INFORMATION

Conservatee passed away on 07/22/16.

**Continued from 03/21/17 due to not appearances. The Court orders Cynthia S. Carroll and/or counsel to be present at the next hearing on 5-30-17. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions** on Eighth and Final Account and Petition for Fees.

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

1. Accounting covers 05/11/13 to 07/22/16. Missing post death accounting per Pr. C. § 2620(b). Need same.
2. Assets on hand: \$112,977.36 (cash of \$10,477.36, personal household items with a carry value of \$2,500 and the balance in carry value of real property)
3. Petitioner requests ratification of payment for her services as a 24-hour caregiver of \$1,250/month, as previously authorized by the court. Services are generally itemized (LF p5). JTD
4. Attorney requests fees of \$8,080.00. Billed at \$250-\$375/hour for attorney time and \$50-\$125/hour for paralegal time totaling 57.7 hours. Itemized [LF, pgs. 36-42]. Incomplete LF images. Clerk's office notified.
5. Receipts – Schedule A [LF, p. 13-14] requires a verified supplement as to the following:
  - a. Missing rents for 09/13, 06/14, 11/14, 12/14, 02/16.
  - b. Missing civil service retirement income for 02/16, 07/16.
6. Disbursements – Schedule C [LF, p. 16] requires a verified supplement as to the following:
  - a. \$1,600.00 payments to Cynthia S. Carroll;

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

- b. \$6,400.00 payment to Cynthia S. Carroll.
- 7. During the accounting period, petitioner paid to Carol Nevarez, Sharon Clark and Lyn Brown for house cleaning. Need verified declarations for acknowledgment of receipt of fees per Local Rule 20-1406(c).
- 8. Notice filed 11/21/16.
- 9. Proposed Order 11/07/16 does not include post-death period and discharges upon filing of declaration for discharge and receipts instead of upon entry of final discharge order.

**RECOMMENDATION:**

Need to clear notes then Court's discretion re: fees. If approved, set next hearing for receipts and final discharge for **05/29/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1100367

CASE NAME: MTR OF WALTER RICHARD QUIGLEY

**SEE ALSO 2**

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT AGREEMENT

COUNSEL:

DIANA J CARLONI	(DIANA J CARLONI
HAROLD ADAMS	(PET)...DIANA J CARLONI
JOHN G WURM	(JOHN G WURM
KIM WILLIAMS	(PET)...DIANA J CARLONI
LAYNE A. BARTHOLOMEW	(PET)...LAYNE A BARTHOLOMEW
PATRICIA QUIGLEY	(OBJ)...DON C GONZALES
WALTER RICHARD QUIGLEY	(DEC)...

See next matter.

(nb)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1100367

CASE NAME: MTR OF WALTER RICHARD QUIGLEY

**SEE ALSO 1**

HEARING:

Accounting Review

COUNSEL:

DIANA J CARLONI	(DIANA J CARLONI
HAROLD ADAMS	(PET)...DIANA J CARLONI
JOHN G WURM	(JOHN G WURM
KIM WILLIAMS	(PET)...DIANA J CARLONI
LAYNE A. BARTHOLOMEW	(PET)...LAYNE A BARTHOLOMEW
PATRICIA QUIGLEY	(OBJ)...DON C GONZALES
WALTER RICHARD QUIGLEY	(DEC)...

GENERAL INFORMATION:

Notice of Settlement of Entire Case entered 01/11/17.

**Continued from 04/11/17 at request of counsel for settlement to be filed. Settlement includes agreement to a waiver of accounting. Notice given by Attorney Bartholomew.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Order Settling Second Account entered 02/02/16; third and final account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

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

(nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300677

CASE NAME: WILFRIED JOHANN KREIDL

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report  
of ALEXANDER WILLIAM KREIDL and Petition for allowance of fees  
filed.

COUNSEL:

ALEXANDER WILLIAM KREIDL (PET)...PRO/PER  
WILFRIED JOHANN KREIDL (DEC)...  
WILLIAM ALEXANDER KREIDL (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by ALEXANDER WILLIAM KREIDL is  
GRANTED

Fee waiver amount due \$465.00 for petition for probate on 08/20/16

GENERAL INFORMATION:

Continued from **05/17/16 and 08/02/16** (no appearance). Citation issues as to Alexander  
W. Kreidl who is cited and required to appear.

Continued from **10/04/16 and 12/20/16** to clear notes. Court recommends petitioner to  
seek legal advice.

**Continued from 04/11/17 due to no appearance. Alexander William Kreidl ordered to  
be present at next hearing. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees.

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

1. Purported account, consisting of 3 pages, filed 03/19/16, includes waiver of account  
by sole heir [LF, p4]. However, notwithstanding said waiver, petitioner must file a  
final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1). Need  
amended account.
2. Petitioner does not request compensation.
3. Need statement regarding family or affiliate relationship between the fiduciary and  
any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)). File verified supplement.
4. Please indicate if cash has been invested and maintained in an interest bearing  
account? Pr.C.§ 1064(a)(5).

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



5. Was a due and diligent search conducted to determine known or reasonably ascertainable creditors? Were any creditor's claims actually filed? If so, by whom, what was the amount of the claim, what was paid on the claim?
6. Need statement regarding notice to Director of Health Care Services. Alternatively, notice per Pr. C. § 9202(a).
7. Need statement regarding notice to California Victim and Compensation and Government Claims Board. Alternatively, notice per Pr. C. § 9202(b).
8. Need statement regarding notice to Franchise Tax Board. Alternatively, notice per Pr. C. § 9202(c)(1).
9. Need description of assets on hand per Local Rule 20-906.
10. Need manner of distribution per Local Rule 20-907.
11. Need bank/financial statements to support date of death and closing balances per Local Rule 20-908.
12. Need return of citation.
- 13. Status report filed and set for 06/21/17.**

#### RECOMMENDATION

Need amended account to be filed on first check calendar on **07/18/17** or thereafter. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.  
(nb)

Future Hearing:  
06/21/17 Status report

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400629

CASE NAME: DUANE EDWIN SKOKUT

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION  
WITH WILL ANNEXED WITH FULL IAEA

COUNSEL:

DUANE EDWIN SKOKUT (DEC)...  
JUSTIN HART ROBISON (PET)...PRO/PER  
MARSHA G ROBINSON (PET)...PRO/PER

GENERAL INFORMATION:

Personal Representative, Marsha G. Robinson, died on 01/21/17.

THIS CASE IS SET FOR HEARING ON Petition for Probate of Lost Will and for Letters of **Successor** Administration with Will Annexed, with full authority under IAEA, by Justin Hart Robinson [nephew & "Petitioner"].

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

1. Petitioner is a nominee of a person entitled to letters. Nomination affixed [LF, p.12].
2. Will waives bond.
3. Proof of publication filed.
4. ~Proposed Form Orders/Letters 03/10/17.

RECOMMENDATION:

RFA. If approved, set future hearing for Accounting/Status Review on **06/05/18**. 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

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DATE: 05/30/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1400808

CASE NAME: Henry Suarez

HEARING:

Hearing re Final Discharge

COUNSEL:

ZORA KALTENEKKERR                      (PET)...SU P CHEAH

HENRY SUAREZ                              (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 10/16/15.
2. Receipts filed..
3. Ex-parte Petition/Order for Final Discharge forwarded to clerk's office for processing per register of actions.

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501070

CASE NAME: Richard L Sampson

HEARING:  
Accounting Review

COUNSEL:  
RICHARD L SAMPSON (DEC)...  
WILLIAM SAMPSON (PET)...MATTHEW G PFAU

GENERAL INFORMATION:

**Continued from 03/21/17. No appearances. WILLIAM SAMPSON and/or counsel are ordered to appear at the next hearing if accounting is not filed. Notice by Judicial Assistant.**

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 01/12/16, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600682

CASE NAME: CARL H HOEFS

HEARING:

Petition for ORDER TERMINATING PROCEEDINGS IN ABSENCE OF ASSETS  
SUBJECT TO PROBATE

COUNSEL:

CARL H HOEFS (DEC)...  
MARY MARGARET BAWDEN (PET)...ELIZABETH A BAWDEN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Termination of Further Proceeding and for Discharge of Administrator of Estate with No Assets [Pr. C. 12251] by Mary M. Bawden.

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

1. Letters Testamentary issued 11/04/16, full authority, no bond.
2. Petitioner seeks to terminate this administration per Pr. C. § 12251 on the basis that Petitioner has diligently searched for all assets of the Decedent but has failed to discover any property of any kind belonging to the estate that is subject to administration.
3. Petitioner requests termination of further proceedings for the administration of the estate and discharge from further duties and responsibilities as Administrator of the Estate.
4. ~Proposed Order 03/15/17.

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: TARA REILLY

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DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601198

CASE NAME: DYLAN JESSE GRAHAM SNT

HEARING:  
Accounting Review

COUNSEL:

DYLAN JESSE GRAHAM	(MIN)...DOREATHA L MILLER
ERIN ANN MCDERMOTT	(PET)...DONAHUE & HORROW,LLP
MIDLAND STATES BANK	(PET)...MELINDA S. BELL
MIDLAND STATES BANK	(TEE)...MELINDA S. BELL

GENERAL INFORMATION:  
Case transferred from Riverside County.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Third Account entered 09/07/16 in Riverside County for period through 03/31/16; Fourth Account now due.
2. No accounting or status report of administration. 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

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DATE: 05/30/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700069

CASE NAME: MICHAEL BRUCE JOHNSON

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

MICHAEL BRUCE JOHNSON      (DEC)...

PATRICIA JOHNSON              (PET)... LEAH L. DIXON

**VACATE** – bond in the amount of \$121,110.00 posted 05/08/17.  
(nb)

Future Hearing:

06/19/18 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](mailto: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

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DATE: 05/30/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700089

CASE NAME: RICHARD A NEWCOMER

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

RICHARD A NEWCOMER

(DEC)...

TERRA HAGEL

(PET)...BLAKE D THOMPSON

**VACATE** – bond in the amount of \$137,292.00 posted on 05/09/17 per register of actions.

(nb)

Future Hearing:

06/19/18 Accounting Review.



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

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DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700097

CASE NAME: MICHAEL L. HALL

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:

CARLTON RUSSELL (PET)...PRO/PER  
LINDA HALL (PET)...MAUREEN MURATORE  
MICHAEL L HALL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Order Appointing Administrator, Carlton Russell, with full authority, entered 04/11/17.
2. Need bond in the amount of \$225,345.00 as directed by Court.

RECOMMENDATION:

Need proof of bond.  
(nb)

Future Hearing:  
06/19/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 05/30/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700239

CASE NAME: MTR OF HOLLIS EARL RICKLES

HEARING:

Petition for ORDER AUTHORIZING PARTICULAR TRANSACTIONS

COUNSEL:

HOLLIS EARL RICKLES      (INC)...

REBECCA A RICKLES      (PET)...DAVID M GROSSMAN

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

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DATE: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: SPR SS06389

CASE NAME: EST OF MARY LOUISE TURNER

**SEE ALSO 14**

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY LOUISE TURNER	(DEC)...
RUTH L HENRICKS	(PET)...HARTNELL LAW GROUP
STATE OF CALIF FRANCHISE TAX B	(TP )...

GENERAL INFORMATION:

Continued many times **since 6/16/08**.

Continued from **5/14/15** Law Firm of Bryan Hartnell is ordered to prepare and submit a written status report by the next hearing as to why this estate has not closed after 7 years.

Continued from **8/19/15** Counsel has failed to file a status report as ordered. Court sets matter for a hearing regarding sanctions pursuant to Code of Civil Procedure 177.5 for failure to comply with court order.

Continued from **09/30/15** at request of counsel to be heard with status report.

**Continued from 11/17/15, 10/04/16 and 03/21/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final accounting approved 6/11/07.
2. Need receipts of distribution.
3. Need Ex-parte petition/order for final discharge.
4. Creditor Claim filed 2/25/08 by the Franchise Tax Board. Court may wish to inquire the status of this claim and receipt if applicable. **Supp. (09/29/15) alleges the FTB claim was not timely filed; disputed; and has since been determined no monies are owed to the FTB.**
5. Status re final discharge filed 11/6/08. Petitioner indicates that an ancillary administration was commenced in New Mexico. Court may wish to inquire status. **Supp. (09/29/15) alleges the New Mexico ancillary probate administration has not been settled. Question how this case can be closed? Need verified supplement.**

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

**RECOMMENDATION:**

**Need to clear notes.**

(kra/gls/kra/cbr/tax/cbr/kra//vet/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](mailto: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: 05/30/17 TIME: 8:30 DEPT: S37P  
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CASE#: SPR SS06389

CASE NAME: EST OF MARY LOUISE TURNER

**SEE ALSO 13**

HEARING:

Probate status report filed.

COUNSEL:

MARY LOUISE TURNER	(DEC)...
RUTH L HENRICKS	(PET)...HARTNELL LAW GROUP
STATE OF CALIF FRANCHISE TAX B	(TP )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Ruth L. Hendricks.

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

1. Petitioner alleges the estate is not in a condition to be closed as there are pending Unclaimed Property Claims in the name of Decedent's predeceased spouse, Paul E. Turner, which are assets belonging to the Decedent's estate. Petitioner states that until these claims have been resolved, this matter needs to remain open. In addition, petition indicates the New Mexico ancillary probate administration has not been settled.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/21/17 indicates notice of hearing has been dispensed with.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **06/05/18**

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

-----  
DATE: 05/30/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1100265

CASE NAME: KATIE M GREEN

HEARING:

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

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
KATIE GREEN	(CPE)...MITCHELL I ROTH
KATIE M GREEN	(CEP)...MITCHELL I ROTH
KELLIE N BOCANEGRA	(OBJ)...BANKS GARCIA & JANIS
MARLA M GREEN	(CPE)...PRO/PER
MITCHELL I ROTH	(CAC)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by  
Successor Trustee, Christina Erickson-Taube ["Petitioner"].

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

1. Accounting period 03/01/16 to 02/28/17.
2. Assets on Hand \$124,399.31 in cash.
3. Current bond of \$150,000. Petitioner alleges bond is excessive and requests a reduction of \$25,000 for a total bond of \$125,000. Insufficient. Suggest bond reduction by \$12,500 for a total bond of \$137,500 (includes recovery). JTD.
4. Petitioner requests fees of \$3,395.25. Billed at different rates not exceeding \$115/hour. Itemized [LF, pgs. 15-18]. JTD.
5. Attorney requests fees of \$2,677.50. Billed at \$350/hour for 7.65 hours' attorney time. Itemized [LF, pgs. 19-20]. JTD.
6. Proposed Order reduces bond to \$125,000.

RECOMMENDATION:

Court's discretion. If approved, set hearing on the next accounting review for **04/24/18** (if one year) or **04/16/19** (if two years). Accounting to be filed 30 days in advance.

(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](mailto: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

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DATE: 05/30/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700097

CASE NAME: DANIEL DARWAZEH

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
CHRISTINE DARWAZEH (PET)...PRO/PER  
DANIEL DARWAZEH (CEE)...  
DAVID DARWAZEH (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by DANIEL DARWAZEH is GRANTED

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by David Darwazeh and Christine Darwazeh (parents)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/21/17.
2. Petitioner seeks powers under Pr. C. §2351.5 to fix residence, access confidential records, consent to marriage, control right to contract, give or consent to medical treatment, control sexual and social contacts, and make decisions re education. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Need Court Investigator report.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need return of Citation.
10. Need Notice of Hearing and Proof of Service.
11. ~Proposed Form Order: 03/21/17

## RECOMMENDATION

Need to clear notes 5-10. If approved, set hearing for Compliance Review for **01/02/18** 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)

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