



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 05/30/18**

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](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.

05/14/18 lh; 05/25/18lh

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 05/30/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO DS1100003

CASE NAME: MATILDA ANABELLE HILLS

**SEE ALSO 2, 3**

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$1,500 ON ADMINISTRATOR

COUNSEL:

LOMA LINDA UNIVERSITY

(PET)...CLAYSON, BAINER & SAUNDERS

MATILDA ANABELLE HILLS

(DEC)...

#### GENERAL INFORMATION

**Continued from 04/18/18. No appearance. Court continues matter to 05/30/18; Court sets OSC re Surcharge for \$1,500 on administrator for failure to file accounting and OSC re sanctions on administrator and counsel for \$500 for failure to appear. Court orders personal appearance on representative from Loma Linda University and Counsel for administrator to be present.**

THIS CASE IS SET FOR HEARING ON OSC re Surcharge/Sanctions/Accounting Review re Loma Linda University, Administrator with Will Annexed

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

1. Court approved 5<sup>th</sup> status report on 04/19/17.
2. Accounting filed 05/24/18.

#### RECOMMENDATION

Court's discretion OSC.

(lh)

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: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1100003

CASE NAME: MATILDA ANABELLE HILLS

**SEE ALSO 1, 3**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 ON ADMIN & ATTORNEY

COUNSEL:

LOMA LINDA UNIVERSITY (PET)...CLAYSON, BAINER & SAUNDERS  
MATILDA ANABELLE HILLS (DEC)...

See notes on prior matter #1.

(lh)

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: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1100003

CASE NAME: MATILDA ANABELLE HILLS

**SEE ALSO 1, 2**

**VACATED**

HEARING:

Accounting Review

COUNSEL:

LOMA LINDA UNIVERSITY (PET)...CLAYSON, BAINER & SAUNDERS  
MATILDA ANABELLE HILLS (DEC)...

See notes on prior matter #1.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1100152

CASE NAME: DENEEN WARREN LYNCH

HEARING:

Hearing re Final Discharge

COUNSEL:

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

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Donna B. Lynch,  
administrator

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

1. **Need** receipts from Donna B. Lynch, Tony Lee Lynch, Robin J. Parson, and Deneen A. Lynch.
2. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status.

(lh)

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: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23, 2011

**VACATED**

HEARING:

Petition for to compel trust accounting and to redress breach of trust

COUNSEL:

NORMA RUDAMETKIN	(PET)...CHRISTOPHER B JOHNSON
THE NINA WOOD IRREVOCABLE TRUST (TRU)...	
OLGA RUDAMETKIN	(PET)...CHANDLER LAW FIRM
MAXINE LEWIS	(PET)...CHANDLER LAW FIRM
GARY WOOD	(OBJ)...SHARON M ANDERSON
GLENDIA VASQUEZ	(FULLERTON LEMANN SCHAEFER & DO)

Currently under review by legal research.

(LR)

Notice given.

(nb)

Future Hearings:

06/11/18 Petition to Instruct Trustee  
08/29/18 Readiness Calendar  
10/01/18 Court Trial

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700703

CASE NAME: MTR OF NORMA MAE TINGLER

HEARING:

Petition for partial allowance of compensation for ordinary services to personal representative

COUNSEL:

MICHELE D KELLEY (PET)...THOMAS W DOMINICK  
NORMA MAE TINGLER (DEC)...

**XREF: CONPS1200302** *NORMA MAE TINGLER*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Partial Allowance of Compensation for Ordinary Services to Personal Representative and Counsel, filed by Michele D. Kelley (administrator)

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

1. Letters of Administration with Will Annexed were issued to Michele D. Kelley on 10/18/17.
2. The estimated statutory compensation due to petitioner and counsel is based on Inventory and Appraisal valued at \$326,175.77, for a total of \$9,523.51.
3. Petitioner requests a partial payment of 50% of fees at \$4,750, each, alleging she and Counsel are entitled to receive 50% of fees as a partial allowance.
4. Petitioner alleges the estate is not in a condition to be closed because the public guardian's office has yet to close the conservatorship of the estate of decedent in case number CONPS1200302. Public Guardian has requested another continuance of accounting review to 11/05/18.
5. Notice was given.

RECOMMENDATION

Court's discretion. (lh)

Future Hearing: 12/26/18 Accounting Review

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700821

CASE NAME: MTR OF CLYDE V PRINCE

HEARING:

First and Final Account and Report of GUAY P WILSON and Petition  
for allowance of fees filed.

COUNSEL:

GUAY P WILSON (PET)...GUAY P WILSON  
CLYDE V PRINCE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of  
Executor, Petition for Fees and Final Distribution by Guay P Wilson, atty/executor

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

1. Assets on hand: \$731,729.99, cash
2. Statutory fees of \$23,642 requested. Calculated.
3. **Need** bank statement verifying final balance of estate for Bank of America account ending in x0081, and Provident bank account ending in x4053 per Local Rule 20-908. Note: it appears Bank of America account ending in x0081 with purported balance of \$486,766.05 exceeds FDIC insurance limits.
4. Petitioner requests **reserve of \$2,500**. Note: if approved, need informal account/declaration for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge.
5. Notice was given.
6. ~Proposed order: 04/03/18

RECOMMENDATION:

Need to clear note #3 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **06/06/19**.

(lh)

Future Hearing: 1/24/19 Accounting Review --VACATE



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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800351

CASE NAME: MTR OF JAMES MORTON ARMSTRONG

HEARING:

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

COUNSEL:

GINO ACKERMAN (PET)...PRO/PER  
JAMES MORTON ARMSTRONG (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Lost Will, Letters Testamentary with Full Authority under IAEA by Gino Ackerman, stepson/beneficiary

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

1. Will waives bond; however, not as to petitioner. Also, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Suggested bond \$490,000. **JTD**
2. Petitioner is not a named executor within will. Does Court wish to require an amended petition for probate of lost will and for letters of administration with will annexed to be filed? **JTD**
3. **Need** verified supplement with declaration stating reasons why presumption of intent to revoke will in Pr. C. § 6124 does not apply.
4. **Need** verified supplement confirming dates of death of Rose Marie Armstrong (spouse), Laura Lee Valdez (stepdaughter) and Stephanie Ann Brouwer (stepdaughter). Also, need clarification as to whether deceased stepchildren have issue.
5. **Need** Notice of Petitioner to Administer Estate as to Lizanne Armstrong, Alene Armstrong, and issue of Laura Valdez and Stephanie Ann Brouwer (if any).
6. **Need** proof of publication.
7. **Need** receipt of lodged will.
8. No proposed order submitted.

## RECOMMENDATION

Need to clear notes #3-7 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800372

CASE NAME: Donald Lee Woods

HEARING:

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

COUNSEL:

JOHN L WOODS (PET)...LAW OFFICE OF MARY M. BADER  
DONALD LEE WOODS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by John L. Woods, stepson/sole beneficiary

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

1. Petitioner seeks waiver of bond as sole beneficiary. Estimated value of estate is \$327,600. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b). **JTD**
2. Petitioner alleges to be the named executor in holographic will. The testator did not specifically name an executor; however will states "I...wish that he [petitioner] take care of everything for me." Court to determine whether testator meant to petitioner to be executor. Alternatively, does Court wish to require an amended petition for Probate of Letters of Administration with Will Annexed? **JTD**
3. **Need** Notice of Petitioner to Administer Estate as to David Kappler (son of deceased sister).
4. **Proof of Publication filed 05/18/18 not in LF at time of review. Clerk's office notified 05/25/18.**
5. ~Proposed Form Order: 04/23/18

RECOMMENDATION

Need to clear notes #3-4 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800392

CASE NAME: KYLE WESTLEY SCHMIDT

HEARING:

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

COUNSEL:

VERONICA J SCHMIDT (PET)...PRO/PER  
KYLE WESTLEY SCHMIDT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by Veronica Schmidt, mother

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

1. Petitioner alleges will waives bond. See note #2. Estimated assets consist of \$317,000 in real property and remaining \$1,850 in personal property. Does court wish to require minimum bond of \$20,000 or alternatively based on real property assets of \$318.850? **JTD**
2. **Need** verified supplement with copy of will.
3. **Need** Notice of Petitioner to Administer Estate as to Warren F. Schmidt, and any other individual named in will.
4. **Need** proof of publication.
5. ~Proposed Form Order: 04/25/18

RECOMMENDATION

Need to clear notes #2-4 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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: 05/30/18 TIME: 8:30 DEPT: S35P  
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CASE#: TRU PS1800078

CASE NAME: LENHERT FAMILY TRUST CREATED BY AGREEMENT ETC

HEARING:

Petition for Compelling accounting by Marilyn Mathre and Rex A.  
Mathre trustee of etc

COUNSEL:

PAMELA LENHERT	(PET)...LAMB MORRIS & LOBELLO
JON LENHERT	(PET)...LAMB MORRIS & LOBELLO
LENHERT FAMILY TRUST	(TRU)...

Currently under review by legal research.

(LR)

Notice was given.

(lh)

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

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DATE: 05/30/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1300792  
CASE NAME: MTR OF THE ROBERTA MCDONNELL SPECIAL NEEDS TRUST

HEARING:  
THIRD Account and Report of ROBIN J. SHEA and Petition for allowance of fees filed.

COUNSEL:

MARTHA BERMAN (PET)...DENNIS M. SANDOVAL  
THE ROBERTA MCDONNELL SPECIAL TRUST (TRU)...  
ROBIN J. SHEA (PET/TEE)...MAUREEN A LYONS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 3<sup>rd</sup> Account Current; Request to Accept Additional Funds into Trust; Increase Bond; and Petition for Fees by Robin J. Shea, PF

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

1. Accounting period: 01/01/16 to 12/31/17
2. Assets on hand: \$351,909.84 in cash and securities.
3. Petitioner requests fees of \$4,109.00. Billed at \$70 -\$125/hour for various services. Generally itemized [LF, pgs. 42-47]. **JTD**
4. Attorney requests fees of \$1,925. Billed at \$350/hour for attorney time. Itemized [LF, p49]. **JTD**
5. Petitioner requests authorization to deposit additional funds into the trust in the amount of \$125,928.62. Petition indicates said monies have accrued from additional settlement with defendants in the litigation of beneficiary's father's estate that preceded the funding of this trust. **JTD**
6. Petitioner requests authorization to deposit additional funds into the trust in the amount of \$29,380.15, comprised of (3) checks: \$487.14, \$2,604.44, and \$26,288.57, which are expected final payments arising from litigation. **JTD**
7. Current bond is \$266,000. Petitioner requests bond increase to \$432,000. Ok
8. Notice was given.
9. No proposed order submitted.

RECOMMENDATION:

Court's discretion re fees. If approved, set hearing on Accounting Review for **03/20/19**.  
(lh)

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: 05/30/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800021

CASE NAME: SALVATORE J SCANDURA

HEARING:

Petition for TO ESTABLISH SPECIAL NEEDS TRUST PURSUANT TO 42  
U.S.C. SECTION 139p(d)(4)(A)

COUNSEL:

LEONARD M SCANDURA (PET)...BUXBAUM & CHAKMAK  
SALVATORE J SCANDURA SPECIAL NEEDS TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice was given.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 05/30/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700200

CASE NAME: MTR OF DONNA MACIAS

**SEE ALSO 15**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CONNIE G MACIAS

COUNSEL:

CONNIE G MACIAS

(CPE)...PRO/PER

ANNEMARIE AYALA

(CPE)...PRO/PER

DONNA MACIAS

(CEP)...

See notes on next matter #15.

(lh)



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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700200

CASE NAME: MTR OF DONNA MACIAS

**SEE ALSO 14**

HEARING:

Hearing Re: OSC RE SURCHARGE FOR FAILURE TO APPEAR/FILE

COUNSEL:

CONNIE G MACIAS	(CPE)...PRO/PER
ANNEMARIE AYALA	(CPE)...PRO/PER
DONNA MACIAS	(CEP)...

GENERAL INFORMATION

**Continued from 04/04/18. No appearance. As conservators have not completed the compliance review documents and have not appeared at today's hearing, Court sets OSC re surcharge for failure to appear, and failure to file. Court orders conservators to be present at next hearing. Notice given by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Surcharge for FTP/Compliance Review**

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

1. Annemarie Ayala and Donna Macias appointed co-conservators of the person on 08/30/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700343

CASE NAME: MTR OF SHARON ADELE JEGLIN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARVIN H JEGLIN

COUNSEL:

MARVIN H JEGLIN (CPE)...  
SHARON ADELE JEGLIN (CEP)...KARIN E HORSPPOOL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Marvin H Jeglin

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

- 1 Marvin H. Jeglin was appointed Conservator of the person and estate on 10/25/17 with \$36,036 bond, order signed this date.
- 2 Notification of Conservatee's Rights filed 05/10/18; proof of service, item #5, indicates wrong date of order served. **JTD**
- 3 Care Plan filed
- 4 Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
- 5 **Need** final Inventory & Appraisal per Pr.C. §2610.
- 6 **Need** Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 7 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.

(lh)

Future Hearing: 1/02/19 Accounting Review

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800031

CASE NAME: MTR OF ANDRES J MARTINEZ

HEARING:

Hearing Re: CASE MANAGEMENT CONFERENCE

COUNSEL:

ANA ALTAMIRANO (CP)...PRO/PER  
JUAN MARTINEZ (CP)...PRO/PER  
ANDRES J MARTINEZ (CTP)...

GENERAL INFORMATION

**Continued from 04/11/18. Case referred to Legal Aid for legal assistance. Court does not require an IRC report.**

THIS CASE SET FOR HEARING ON Case Management Conference re Limited Conservatorship

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

1. Ana Altamirano and Juan Martinez, parents, appointed Limited Co-Conservators of person only of Andres J. Martinez on 05/30/13 in Los Angeles County, case received on 03/16/18.
2. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)?  
JTD

RECOMMENDATION

Court's discretion.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800053

CASE NAME: MTR OF RAFAEL TORRES JR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

NATIVIDAD TORRES	(CP )...PRO/PER
RAFAEL TORRES	(CP )...
RAFAEL TORRES JR	(CTP)...CANDICE A GARCIA-RODRIGO

#### GENERAL INFORMATION

**Continued from 04/04/18. Court clears note re Citation as proposed conservatee is present in Court this date. Attorney Candice A. Garcia-Rodrigo appointed for Rafael Torres, Jr. Matter continued for receipt of report for appointed counsel. Case referred to Legal Aid for legal assistance. Notice given by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Natividad and Rafael Torres (parents)

#### 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, limit right to contract, and make and consent to all medical decisions. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 02/28/18.
4. Proposed conservatee is developmentally disabled. **Need report of Counsel Candice A. Garcia-Rodrigo.**
5. Proposed conservatee is developmentally disabled. IRC report filed 03/29/18.
6. CI report filed 03/29/18.
7. Proof of completion of Conservatorship Training Class filed.
8. ~Proposed Form Order: 02/28/18

## RECOMMENDATION

Need to clear note #4 then Court's discretion. 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)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800110

CASE NAME: Ricky William Castorena

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

BARBARA OLGA GONZALES (CPE)...PRO/PER  
RICKY WILLIAM CASTORENA (CEP)...SANDRA TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Barbara Olga Gonzales, aunt

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

1. Attachment 1C to petition indicates petitioner is not seeking conservatorship of the estate. Also, petition indicates proposed conservatee is developmentally disabled. Does Court wish to require an amended petition for limited conservatorship of the person only? **JTD**
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
3. CI Report filed 05/21/18.
4. **Need** report of appointed Counsel Sandy Turner.
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. Petition is incomplete at item #3e as to character and estimated value of property. **Need** verified supplement.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. Proof of Personal Service filed 05/09/18 as to Ricky Williams Castorena; however, **need to file return of Citation.**
9. **Need** notice of hearing and proof of service to include 30 days' notice to Inland Regional Center.
10. ~Proposed Form Order: 04/13/18

## RECOMMENDATION

Need to clear notes #4-9. If approved, set hearing for Compliance Review for **01/02/19** for the filing of the required documents and hearing re Accounting Review for **08/07/19** Any accounting to be filed 30 days in advance.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800111

CASE NAME: MTR OF HULICES ALEXIS TAVARES ZARAGOZA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LUPITA TAVARES (CP)...PRO/PER  
HULICES ALEXIS TAVARES ZARAGOZA (CTP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Lupita Taveres, mother

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, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 04/17/18.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Petition is incomplete at item #8 as to whether proposed conservatee will attend hearing. **Need** verified supplement.
7. Confidential Screening Form filed is missing attachment 20 regarding information as to social worker/parole officer/probation officer. **Need** verified supplement.
8. **Need** return of citation.
9. List of required contacts filed 04/17/18; however, missing maternal grandparents. Also, relatives listed should reflect the relationship as to the *proposed conservatee*—not the proposed conservator. **Need** corrected form.
10. **Need** notice of hearing and proof of service to siblings, maternal grandparents, and include 30 days' notice to Inland Regional Center.
11. **CI Report filed 05/23/18.**



12. Proof of Completion of the Conservatorship Training Class filed 05/14/18.
13. ~Proposed Form Order: 04/17/18

#### RECOMMENDATION

Need to clear notes #4-10. 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)

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

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

CASE#: CON PS1800113

CASE NAME: Billie Jean Allen

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
SONJA ALLEN (CP )...  
BILLIE JEAN ALLEN (CTP)...  
SONJA ALLEN (CP )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Sonja Allen (daughter/nominee)

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

1. Petitioner was nominated by proposed conservatee, Billie Jean Allen. Nomination attached to Petition at LFpg10.
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. List of required contacts filed 04/18/18; however, relationships of relatives differ from petition, item #11. Relationships should be reflected as to the proposed conservatee, Billie Jean Allen—not proposed conservator Sonja Allen. **Need** verified supplement clarifying relatives within 2<sup>nd</sup> degree.
4. **Need** Certificate of Completion of the Conservatorship Training Class.
5. **Return of Citation filed 05/24/18.**
6. **CI Report filed 05/22/18.**
7. ~Proposed Form Order: 04/18/18

#### RECOMMENDATION

Need to clear notes #2-4. 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)

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

-----  
DATE: 05/30/18 TIME: 1:30 DEPT: S35P  
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CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

**VACATED**

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

PUBLIC GUARDIAN

KATHLEEN SCHAEFFER

(PET)...COUNTY COUNSEL

(CEP/OBJ)...MITCHELL I ROTH

Court trial—no notes—JTD

Future Hearings:

5/31/18 Court Trial (Day 1)

6/01/18 Court Trial (Day 2)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIP**

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

CASE#: CON PS1500004

CASE NAME: MTR OF LUCILLE B BURNS

HEARING:

Accounting Review

COUNSEL:

DORTHEA BURNS-MORRIS

(CPE)...HORSPPOOL & HORSPPOOL

LUCILLE B BURNS

(CEP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Dorthea Burns-Morris, Conservator

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

1. Second Account and Report of Dorthea Burns-Morris approved 12/27/17.
2. **Need** Third Account Current for period commencing 04/01/17.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

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

CASE#: PRO PS1100186

CASE NAME: MATTIE WEAVER

HEARING:

Petition for Final Distribution Pursuant to Judgment Without  
Accounting; etc

COUNSEL:

ROSS A. FOREMAN	(PET)...PRO/PER
MATTIE WEAVER	(DEC)...
REGINA D HOLT	(PET)...PRO/PER
SHARON FOREMAN	(PET/APP)...HORSPOOL & HORSPOOL
STANLEY FOREMAN	(PET/OBJ)...HORSPOOL & HORSPOOL
LYLE STOTELMYRE	(PET)...M DANIEL SAYLOR
LAW OFFICE OF JAMES B. CHURCH (MARK J. ANDREW FLORY)	
CARMEN J QUALLS	

GENERAL INFORMATION:

Letters of Administration with will annexed with full authority issued to Lyle Stotelmyre on 06/12/12.

Order and Judgment entered 08/21/14 against Sharon Foreman awarding return of property to the Estate of Mattie Weaver in the amount of \$187,000, with interest at legal rate on \$94,000 from 06/30/10, and interest at legal rate on \$113,000 from 06/25/14.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution Pursuant to Judgment without Accounting; Ratification of Acts of Administrator; Waiver of Inventory; Allowance of Fees by Lyle Stotelmyre, administrator w/will annexed

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

1. Estate assets consist of a right to receive judgment against Sharon Foreman in the amount of \$187,000, and paintings by decedent of nominal value.
2. Petitioner seeks order waiving Inventory and Appraisal; however, **need statement setting forth good cause justifying waiver; copy of Inventory and Appraisal and proof of service; and notice of hearing to Patrick Wright, assigned probate referee, with copy of petition and attached inventory and appraisal per Pr. C. §8903.**

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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. Statutory fees of **\$6,610**, each, requested by attorney and petitioner. *Calculation based on value of judgment against Sharon Foreman. JTD*
4. Attorney requests reimbursement of costs advanced totaling **\$679**. Itemized [Acct, 4/17/18, LFpg8]. **JTD**
5. Attorney requests extraordinary fees in the amount of **\$51,883.55** regarding attorney services to obtain judgment against Sharon Foreman and appeal for 142.143 hours at \$\$145/350/400 per hour for paralegal and attorney time. **Need** itemization of services per Local Rule 20-904.
6. Petitioner requests extraordinary fees in the amount of **\$6,187.50** for 49.5 hours at \$125 per hour. **Need** itemization of services, including calculation of proposed hourly rate.
7. **Need** waiver of accounting from beneficiaries: Stanley Ray Foreman (son); Ross Alan Foreman (son); Regina Dianne Holt (daughter).
8. Special Notice given to: Law Office of James B. Church & Associates; Carmen J. Qualls & Associates.
9. ~Proposed order: 04/17/18

RECOMMENDATION:

Need to clear notes #3; 5-7 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/06/19**.

(lh)

**XREF:** **CONPS0800284** MATTIE LEE WEAVER  
**CONDS1000220** JOE EDWARD BUSH  
**PROPS1400012** MATTIE WEAVER

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1200234

CASE NAME: MURDO MACKAY

HEARING:

Probate status report

COUNSEL:

JOHN H SCARLATELLA JR	(PET)...MICHAEL D FINLEY
MURDO MACKAY	(DEC)...
LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
DIANE K HADDOCK	(PET)...PHILIP M SAVAGE
DIANE HADDOCK	(PET)...JASON R FAIR
DEPT OF HEALTH CARE SRVCS	(TP )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report by Diane K. Haddock

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

1. Letters of Special Administration issued to Diane K. Haddock on 04/03/12; Letters Testamentary issued 05/09/12 with full IAEA powers; no bond.
2. Petitioner alleges estate is not in a position to close as estate is currently insolvent. Petitioner is working on a plan to deal with administration expense and debts of decedent, including a reduction in claim of Department of Healthcare Services.
3. Petitioner requests an additional 12 months to close the estate.
4. Notice is complete.
5. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **04/17/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

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

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

CASE#: PRO PS1600334

CASE NAME: R NEWBERRY SPECIAL NEEDS TRUST

HEARING:

Petition for attys fees for compensation for services rendered to cnsvtee

COUNSEL:

ROBERT LEE NEWBERRY II (PET)...DIANA J CARLONI  
R NEWBERRY SPECIAL NEEDS TRUST (TRU)...  
ROBIN NEWBERRY (PET)...CALDWELL, KENNEDY & PORTER

#### GENERAL INFORMATION

**Continued from 04/25/18 as that is the date given on petition; notice to be given to all parties.**

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Rose C. Rosado

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

1. Petitioner, Rose C. Rosado, was appointed Counsel for Robin Newberry on 03/16/17.
2. Petitioner requests fees of **\$4,150** for 14.75 hours at \$350/\$300/\$150 for attorney/paralegal services. Itemized. [Petition, 4/16/18, LFpg5-7].
3. Notice was given.
4. ~Proposed Order: 04/16/18

#### RECOMMENDATION

Court's discretion.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 5

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

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

CASE#: PRO PS1700044

CASE NAME: MTR OF ROBERT R LEWIS

HEARING:

Accounting Review

COUNSEL:

LINDA LOUISE LEWIS  
ROBERT R LEWIS

(PET)...MITCHELL I ROTH  
(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Linda Louise Lewis,  
Administrator

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

1. Letters of Administration with full IAEA issued to Linda Louise Lewis on 03/24/17; no bond.
2. Corrected Final Inventory and Appraisal filed 07/11/17.
3. **Need** accounting and status report.

#### RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700166

CASE NAME: BRAD LANE

HEARING:

Hearing Re: Proof of CDL (Sign order for emancipation)

COUNSEL:

CAROL ROSS	(PET)...WILLIAM M NASSAR & ASSOCIATES
BRAD LANE	(DEC)...
ADAM GONZALEZ	(MIN)...
ADAM WAYNE GONZALEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
TYLER WILLIAMS	(STE)...

GENERAL INFORMATION

Continued from **12/20/17**.

**Continued from 02/07/18. Minor has still not completed driver's training and has not obtained a CDL. Matter continued at request of Counsel.**

THIS CASE IS SET FOR HEARING ON Proof of CDL (Sign order for emancipation) re Adam Wayne Gonzalez (age 17, DOB 06/25/00)

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

1. Matter set on 09/13/17. Court indicated it will grant petition for emancipation under the condition that Adam Gonzalez gets a valid CA driver's license. Order will not be signed until this is done.
2. Note: minor will reach age of majority on 06/25/18.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700184

CASE NAME: RHEA EDGAR

HEARING:

First and Final Account and Report of ROBERT L COHEN and  
Petition for allowance of fees filed.

COUNSEL:

ROBERT L COHEN (PET)...LAW OFFICES OF ROBERT L. COHEN  
RHEA EDGAR (DEC)...  
AUCTION-CA FINANCIAL SERVICES (ASG)...PRO/PER  
APPROVING INHERITANCE CASH,INC (TP )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of  
Administrator; Petition for Statutory Fees, Extraordinary Fees, Reimbursement, Final  
Distribution and for Final Discharge by Robert L. Cohen, atty/administrator

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

1. Accounting period: 11/24/11 to 03/30/18; however, accounting period should start as of date of issuance of Letters on 05/02/17. **JTD**
2. Assets on hand: \$101,191.32
3. **Need** bank/investment statements verifying final ending balance per Local Rule 20-908.
4. Statutory fees of \$6,998.07 requested. Calculated.
5. Attorney requests extraordinary fees of \$4,235 for 12.10 hours at \$350 per hour regarding sale of real property and resolving tax sale. Itemized. [Acct, 04/18/18, LFpg25]. **JTD**
6. Attorney requests reimbursement of costs advanced totaling \$2,875. Itemized. [Acct, 04/18/18, LFpg16]. **JTD**
7. Petitioner requests reserve of \$1,000. **JTD**
8. Requests for Special Notice filed by Auction CA Financial Services, and Paul Wilkins.
9. ~Proposed order: 04/18/18

**RECOMMENDATION:**

Need to clear note #3 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/06/19**.

(lh)

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

HEARING:

Hearing re Final Discharge

COUNSEL:

ANGELICA GUERRA	(PET)...E. MARIE HENNING
NATALIA GUERRA	(DEC)...
JUAN D GUERRA	(TP )...JOHN THEODORE DEAN

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Angelica Guerra

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

1. Matter set on 02/28/18 at mediation settlement conference, wherein, court approved a stipulation for settlement regarding an unlawful detainer action and objections to probate. Order for Mutual Release filed same date. Court set hearing re Final Discharge for 05/30/18.
2. Waiver of Account and Petition for Final Distribution by Angelica Guerra filed 04/26/18 and set for hearing on 06/12/18.
3. Matter appears premature. Suggest Court trail to 06/12/18.

#### RECOMMENDATION

None.

(lh)

Future Hearings:

06/12/18 Petition for Final Distribution on Waiver of Account & Report

11/05/18 Accounting Review

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

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

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 10, 11**

HEARING:

Petition for Will Contest and Grounds of Opposition to Probate of Will

COUNSEL:

JOAQUIN RECIO (PET/RES)...VELASCO LAW GROUP  
ALFONSO SANCHEZ VILLA (DEC)...  
MARIA NOBLE (PET)...GREGORY T ANNIGIAN  
JOAQUIN RECIO AS SUCCESSOR TRUSTEE  
MARTHA RODRIGUEZ  
ALICIA ZUNIGA  
FABIOLA ZUNIGA  
EDGAR GOMEZ  
CLAUDIA GOMEZ

GENERAL INFORMATION:

**Continued from 02/13/18. Counsel accepts service as to Joaquin Recio as an individual and trustee. Hearing continued at request of Counsel due to ongoing discovery.**

THIS CASE IS SET FOR HEARING ON Will Contest and Grounds of Opposition to Probate of Will by Maria Noble ["Petitioner"].

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

1. Petitioner indicates she is the only living issue of the Decedent and alleges that probate of the purported will should be denied as the Decedent was not of sound and disposing mind; the purported will was not executed by Decedent in the manner and form required by law for execution of a will; and claims the purported will is invalid because it was the product of undue influence as defined by Pr. C. § 86 and Welfare and Institutions Code Section 15610.70.
2. Petitioner prays that the purported will be denied probate and for costs.
3. **Objection to Will Contest by Joaquin Recio filed 02/09/18.**

RECOMMENDATION:

Matter is contested.

(nb/lh)

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

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

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 9, 11**

HEARING:

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

COUNSEL:

JOAQUIN RECIO	(PET/RES)...VELASCO LAW GROUP
ALFONSO SANCHEZ VILLA	(DEC)...
MARIA NOBLE	(PET)...GREGORY T ANNIGIAN
JOAQUIN RECIO AS SUCCESSOR TRUSTEE	
MARTHA RODRIGUEZ	
ALICIA ZUNIGA	
FABIOLA ZUNIGA	
EDGAR GOMEZ	
CLAUDIA GOMEZ	

#### GENERAL INFORMATION

**Continued from 12/28/17** to be heard with related petition.

**Continued from 02/13/18 at request of Counsel due to ongoing discovery.**

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Probate, Letters Testamentary with **Limited** Authority under IAEA by Joaquin Recio, nephew-in-law/Trustee.

Petition #2: Petition for Probate, Letters of Administration with Full Authority under IAEA daughter, by Maria Noble.

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

Petition #1 by Joaquin

1. Will waives bond. Estate consists of \$449,450 in personal property.
2. **Opposition to Probate of Will filed by Maria Noble.**
3. ~Proposed Form Order: 11/16/17.

Petition #2 by Maria

4. **Need** Attachment 3g(2)(a) explaining priority.

5. **Need** Duties and Liabilities form.
6. Petitioner alleges she is the only heir at law and waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. Estimated estate valued at \$450,000. Need Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). JTD.

#### RECOMMENDATION

Need to clear notes #4-5. Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/lh)



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

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

CASE#: PRO PS1701157

CASE NAME: ALFONSO SANCHEZ VILLA

**SEE ALSO 9, 10**

HEARING:

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

COUNSEL:

JOAQUIN RECIO (PET/RES)...VELASCO LAW GROUP  
ALFONSO SANCHEZ VILLA (DEC)...  
MARIA NOBLE (PET)...GREGORY T ANNIGIAN  
JOAQUIN RECIO AS SUCCESSOR TRUSTEE  
MARTHA RODRIGUEZ  
ALICIA ZUNIGA  
FABIOLA ZUNIGA  
EDGAR GOMEZ  
CLAUDIA GOMEZ

See notes on prior matter #10.

(lh)

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

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

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

**SEE ALSO 13, 14**

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

**SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN DEPT. S34**

GENERAL INFORMATION:

Special Letters of Administration issued to Takisha Brown, \$100,000 bond, on 12/22/17. **Continued from 01/23/18.** Ms. Qualls represents that the order for special administration was incorrect and request that the Court sign the corrected order. The Court signs the corrected order for special administration this date.

**Continued from 02/26/18 at request of parties. Parties agree to continue this matter to be heard with the competing petition. Parties also agree to have these matters be heard on 03/13/18 due to counsel's inability to appear on 03/12/18.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Letters of Limited Administration with full authority under IAEA by daughter and sister, Yolanda Briscoe and Takisha Brown [Petitioners].

Petition #2: Petition for Letters of Administration with Limited Authority under IAEA by son, Justin Briscoe ["Petitioner"].

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

Petition #1 by Yolanda Briscoe and Takisha Brown:

1. Petitioner Yolanda Briscoe alleges she is decedent's attorney-in-fact. Does Court wish to require a copy of subject Power of Attorney? **JTD.**
2. Petitioners request no bond as any assets will be deposited into a blocked account. **JTD.**

3. **Objections filed by Justin Briscoe, son, filed 02/05/18; however, need proof of service.**
4. **Amended Objections of Cherly Briscoe to Appointment of Takisha Brown filed 03/02/18 and 03/13/18.**
5. ~Proposed Form Order 12/19/17

Petition #2 by Justin Briscoe:

6. Sections 2b and 3c are incomplete. **Need** same.
7. Petitioner requests monies to be held in blocked account in lieu of bond. Estimated value of estate \$420,000. 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. Nomination of this petitioner by siblings Travis and Marcus Briscoe affixed to petition [LF, pgs. 8-9].
9. **Need** proof of publication.
10. Notice filed 03/13/18 is incorrect. **Need** Notice of Petition to Administer Estate with proof of service.
11. **Need** Notice of Change of Address form.
12. **Objections to Justin Briscoe's Petition by Takisha Brown filed 03/12/18.**

RECOMMENDATION: Set for contested hearing.

Need to clear notes 6, 9-11. Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/07/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/nb/lh)

Future Hearings:

- 6/14/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)
- 6/14/18 Readiness Calendar
- 6/25/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)
- 6/25/18 Court Trial Set for Petition for Probate of Yolanda A Briscoe

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

**SEE ALSO 12, 14**

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

**SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN DEPT. S34**

See notes on prior matter #12.

(lh)

Future Hearings:

6/14/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)  
6/14/18 Readiness Calendar  
6/25/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)  
6/25/18 Court Trial Set for Petition for Probate of Yolanda A Briscoe

Superior Court of Calif, County of San Bernardino

Page: 14

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

**SEE ALSO 12, 13**

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

**SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN DEPT. S34**

See notes on prior matter #12.

(lh)

Future Hearings:

6/14/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)  
6/14/18 Readiness Calendar  
6/25/18 Hearing Re: Petition for Letters of Admin w/ Limited Authority (x3)  
6/25/18 Court Trial Set for Petition for Probate of Yolanda A Briscoe

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800260

CASE NAME: DENNIS JAMES FINLEY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

STEVEN JAMES FINLEY (PET)...PRO/PER  
DENNIS JAMES FINLEY (DEC)...

#### GENERAL INFORMATION

**Continued from 04/25/18 at request of petition to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Steven Finley, sole beneficiary/son

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

1. Petitioner seeks 100% interest in decedent's 100% interest in real property per terms of the will.
2. **Need** proof of subscribing witness. Attached copy of will is not self-proving as the attestation clause does not meet requirements of Pr. C. §6110(c)(1).
3. **Need** Notice of Hearing and proof of mailed service as to Mary Helen Manharth (executor), Jamie M. Burnight (contingent beneficiary) named in will.
4. ~Proposed Form Order: 03/19/18

#### RECOMMENDATION

Need to clear notes #2-3 then Court's discretion.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 05/30/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1600136

CASE NAME: STEPHANIE CORTEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JUAN PAEZ CORTEZ

COUNSEL:

JUAN PAEZ CORTEZ

(CPE)...PRO/PER

STEPHANIE PAEZ CORTEZ

(CEE)...MITCHELL I ROTH

GENERAL INFORMATION

**Continued from 03/28/18 at request of Counsel. Court orders Juan Perez Cortez to be present at next hearing.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Juan Coretez, father, appointed Conservator of the person on 08/21/17.
2. Notification of Conservatee's rights filed 08/23/17.
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

HEARING:

First Account and Report of Conservator, ARTHUR CHARLES EWING, and Petition for allowance of fees

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE  
LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Report of *Conservator*, Petition for Fees and Reimbursement by Arthur Charles Ewing, conservator

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

1. Accounting period: 10/06/16 to 10/26/17
2. Assets on hand: \$827,121.05, consisting of \$367.06 in cash; remaining in real property, furnishings, and securities.
3. Petitioner requests attorney's fees of \$8,400, less retainer fee of \$3,500, totaling **\$4,900** for 22.4 hours at \$375 per hour. Attorney requests fees to be paid from Wells Fargo Account ending in 9256 [ending balance of \$167.06 as of 10/26/17]; however, it does not appear there are sufficient funds to cover requested fees. **Need itemization of services and clarification as to how attorney intends to be compensated.**
4. Conservatee currently resides with conservator. Estate assets partly consist of two parcels of improved real property in Diamond Bar, CA, and Glendale, AZ. Question status of properties and whether rent is being collected on these properties to produce income? **Need verified supplement.**
5. Schedule C disbursements include periodic cash withdrawals for payment to a caregiver. **Need verified declaration from caregiver stating services performed and payment received per Local Rule 20-1406(c).**
6. Notice was given.



7. Note: it appears accounting review re trust was inadvertently vacated by clerk's office upon filing of conservatorship accounting. **Court to reset accounting review re trust in 60 days on Wednesday calendar.**
8. ~Proposed order: 04/17/18

RECOMMENDATION:

Court to reset Accounting Review re Trust in 60 days on Wednesday calendar.

Need to clear notes #3-5 then Court's discretion. If approved, court to set next accounting review re conservatorship for **02/27/19**.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700025

CASE NAME: BETTY J ALTHER

**SEE ALSO 19**

HEARING:

Hearing Re: Proof of Blocked Account

COUNSEL:

JANET E SACKWAR	(CPE)...	JOELLE LEE A. NICHOL
BETTY J ALTHER	(CEP)...	PRO/PER
LIBERTY MUTUAL INSURANCE	(TP )...	

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Proof of Blocked Account

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

1. Janet Sackwar (sister) appointed conservator of person and estate of Betty J. Alther on 04/27/17 with \$1,091,021 bond.
2. Matter was set on 04/25/18, wherein, Court confirmed sale of real property at \$625,000 with proceeds of sale to be placed in a blocked account.
3. **Need** proof of blocked account.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700025

CASE NAME: BETTY J ALTHER

**SEE ALSO 18**

HEARING:

FIRST Account and Report of JANET E SACKWAR and Petition for allowance of fees

COUNSEL:

JANET E SACKWAR	(CPE)...JOELLE LEE A. NICHOL
BETTY J ALTHER	(CEP)...PRO/PER
LIBERTY MUTUAL INSURANCE	(TP )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Report of Conservator of the Person and Estate; Petition for Fees and Reimbursement by Janet Sackwar, conservatee

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

1. Accounting period: 02/01/17 to 12/31/17
2. Assets on hand: \$1,451,239.78 consisting of cash and real property.
3. Petitioner requests payment of attorney's fees of previous Counsel, Roberta L. Taylor for \$1,250, plus costs of \$736 totaling **\$1,986** for 25.50 hours at \$120/\$280/\$300 per hour for paralegal/attorney services. Itemized. [Acct, 04/18/18, LFpgs 33-36]. **JTD**
4. Petitioner requests payment of attorney's fees of Joelle Lee A. Nicol of ArchAngel Estate Planning & Trust Services for \$1,965, plus costs of \$603.50, totaling **\$2,568.50** for 7.50 hours at \$120/\$300 per hour for paralegal/attorney services. Itemized. [Acct, 04/18/18, LFpgs 38-43]. **JTD**
5. Petitioner requests reimbursement of funds advanced for conservatee totaling \$10,284.50. Itemized. [Acct, 4/18/18, LFpg45].
6. Petitioner requests **\$2,400** for 120 hours at \$20 per hour for conservator services. Need itemization of services via verified supplement. **Supp 05/23/18 petitioner did not maintain a detailed log of services, but reiterated generalized services rendered during accounting. JTD**
7. Notice is complete.
8. ~Proposed order: 04/18/18

**RECOMMENDATION:**

Court's discretion. If approved, court to set next Accounting Review on **03/06/19**. Accounting to be filed 30 days in advance.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700176

CASE NAME: ANDREW RAMIREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JOSE L RAMIREZ

COUNSEL:

JOSE L RAMIREZ	(PET)...PRO/PER
YOLANDA RAMIREZ	(PET)...PRO/PER
ANDREW RAMIREZ	(CTP)...WALTER T. MOORE

GENERAL INFORMATION

**Continued from 03/28/18 at request of Counsel to clear probate notes.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Jose L. Ramirez and Yolanda Ramirez (parents) were appointed co-conservators of the person of Andrew Ramirez on 08/22/17.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
3. **Need** a Determination of Conservatee's Appropriate Level of Care per Pr.C.§ 2352.5 (form GC-355).
4. **Need** Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700265  
CASE NAME: MTR OF PEGGY ANN CHRISTIAN

HEARING:  
Accounting Review

COUNSEL:  
PAUL EDWARD CHRISTIAN (CPE)...SKOUSEN LAW  
PEGGY ANN CHRISTIAN (CEP)...WALTER T. MOORE

#### GENERAL INFORMATION

**On 03/28/18, Court was informed conservatee passed away [on 01/05/18].  
Petition to Terminate Conservatorship to be filed by Mr. Skousen. Court vacates  
accounting review set for 10/31/18 and resets to 05/30/18.**

THIS CASE SET FOR HEARING ON Accounting Review

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

1. Paul Edward Christian (son) was appointed conservator of the person and estate of Peggy Ann Christian on 08/23/17; \$77,500 bond filed 09/07/17; letters issued 11/16/17.
2. **Need** final Inventory & Appraisal per Pr.C.§2610.
3. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
4. 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.
5. **Need Final Accounting for pre-death and post-death accounting periods per Pr. C. §2620.**
6. Petition to Terminate Conservatorship filed 05/07/18. Court may wish to trail to 06/13/18.

#### RECOMMENDATION

Inquire status. Court to trail to 06/13/18.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800064

CASE NAME: MTR OF GREGORIO LOPEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARGARITA LOPEZ (CPE)...PRO/PER  
GREGORIO LOPEZ (CEE)...JEANNE E KENNEDY

GENERAL INFORMATION

Jeanne Kennedy appointed GAL on 03/15/18 temporary hearing.

**Continued from 04/19/18. Margarita Lopez appointed Temporary Conservator of the person and estate; no bond.**

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

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

1. Petitioner seeks no bond on basis that cannot afford bond premium. However, this is not a basis for waiving bond. Petition reflects \$0 assets. Court to inquire need for estate powers.
2. Petitioner seeks medical powers. Capacity Declaration filed 03/08/18.
3. **Report of GAL Jeanne Kennedy filed 04/16/18.**
4. List of required contacts form filed 04/19/18; however, form is missing petitioner, Margarita Lopez (daughter). **JTD.**
5. Return of Citation with proof of mailed service filed 04/24/18; however, **signed acknowledgment of receipt not attached as alleged. Also, proof of service is missing address where party was served at item #2c. Need proper service and proof.**
6. Notice of hearing and proof of service filed 04/19/18; however, item #5 of proof of service does not indicate of copy of petition was served with notice. Also, missing attachment with additional persons served. **Need proper notice and service as to all relatives listed in item #11 of petition.**
7. Court Investigator report filed 04/09/18.
8. Certificate of completion of Conservatorship Training class filed 04/05/18.

9. **Objection to Appointment filed by Gregorio Lopez, Jr, filed 05/18/18 not in LF at time of review.**
10. ~Proposed Form Order: 03/08/18.

RECOMMENDATION

Need to clear notes 5-6. If approved, set hearing for Compliance Review for **01/02/19** for the filing of the required documents and hearing re Accounting Review for **08/07/19**. Any accounting to be filed 30 days in advance.

(lc/lh)



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

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DATE: 05/30/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800115

CASE NAME: Gabriel R Baeza

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
JOAQUIN RODRIGUES BAEZA (CPE)...  
GABRIEL R BAEZA (CEP)...J DAVID HORSPOOL

GENERAL INFORMATION

**Continued from 05/01/18. Joaquin Rodrigues Baeza appointed Temporary Conservator of the person and estate; \$30,000 bond.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Joaquin Rodrigues Baeza, brother

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

1. Petitioner seeks bond of \$30,000. Estate assets appear to consist primarily of public assistance benefits, automobiles, and personal property totaling \$30,000. Question if proposed conservator is the representative payee; if so, question need for estate powers?
2. Petitioner requests orders authorizing powers under Pr. C. §2590. However, **need attachment 1d specifying powers and facts.**
3. Petitioner requests orders relating to capacity of proposed conservatee under Pr. C. §1873 or §1901; however, **need attachment 1e with specified orders and facts.**
4. Petitioner requests orders relating to powers and duties under Pr. C. §2351-2358; however, **need attachment 1f with specified orders and facts.**
5. Petitioner seeks medical powers. **Need Capacity Declaration.**
6. Petitioner, Joaquin Baeza, alleges he was appointed guardian of proposed conservatee in the State of Nevada in 2015, case number G-15-041595-A. Court to inquire. See Petition, 4/18/18, LFpg12.
7. **Need Confidential Screening form.**
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. CI Report filed 05/15/18.
12. ~Proposed Form Order: 04/18/18

#### RECOMMENDATION

Need to clear notes #2-10. If approved, set hearing for Compliance Review for **01/02/19** for the filing of the required documents and hearing re Accounting Review for **08/07/19**. Any accounting to be filed 30 days in advance.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 05/30/18      TIME: 8:30      DEPT: S37P  
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CASE#: CON PS1300127

CASE NAME: ROSIE MAE LYTKOWSKI

HEARING:

Petition for TO DETERMINE TITLE AND TO REQUIRE TRANSFER OF  
INTEREST IN REAL PRTY ETC

COUNSEL:

REGINA M O'DOUGHERTY	(CPE)...HORSPPOOL & HORSPPOOL
ROSIE MAE LYTKOWSKI	(CEP)...MARK J. ANDREW FLORY
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to Determine Title and to Require Transfer of Interest in Real Property to Conservatorship Estate by Regina O'Dougherty, Conservator

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

1. Petitioner, Regina O'Dougherty, was appointed conservator of the person and estate of Rose Mae Lytkowski on 05/15/14.
2. Petitioner alleges that prior to conservatee's incapacitation and establishment of conservatorship, Rosie Mae Lytkowski executed a Grant Deed on 05/05/07 conveying real property ["Fremont property"] from herself, as sole owner, to: (1) Rose Mae Lytkowski (herself); (2) Regina Dougherty (petitioner/daughter); and (3) Randall P. Key (son).
3. Petitioner alleges conservatee did not seek counsel when executing the Grant Deed as it is handwritten on a generic form, and the document does not describe the manner in which title is held. Therefore, the presumption is that title was held as Tenants in Common.
4. Petitioner alleges it was conservatee's intention for the transfer to serve as a testamentary document in order to avoid a formal probate in the event she passed away. The phrase, "as joint tenants with right of survivorship" should have been added.
5. Petitioner alleges Randall P. Key (son) passed away on 10/18/14 and believes he died intestate. He was survived by a spouse, Marie Rose Key, but no issue. Marie Rose Key is entitled to a 1/6<sup>th</sup> interest in the Fremont property via

intestate succession and has refused to assign interest to the conservatorship estate.

6. The Fremont property has been listed on the market for several months but title needs to be cleared prior to sale. Proceeds will be used to relocate conservatee to New Hampshire to be near petitioner, and to pay for conservatee's ongoing care.
7. Petitioner seeks Court to issue an Order determining all of Randall P. Key's right, title and interest in Fremont property transfer to Rosie Mae Lytkowski and Regina O'Dougherty as surviving joint tenants.
8. Petitioner further requests recording a certified copy of this order to be sufficient to vest title to Fremont property in the names of: Rosie Mae Lytkowski, a single woman, and Regina O'Dougherty, a married woman as her sole and separate property as joint tenants with right of survivorship.
9. Notice was given.
10. ~Proposed Order: 04/12/18

## RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 8/13/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 05/30/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1400199

CASE NAME: Kenneth Wayne Horne

**SEE ALSO 13, 14**

HEARING:

Accounting Review

COUNSEL:

MARCUS RAY JONES

(PET)...E. LAWRENCE BROCK

KENNETH WAYNE HORNE

(DEC)...

See notes on next matter #13.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600489

CASE NAME: MTR OF SUMIYO NAGAO REYNOLDS

HEARING:

Probate status report filed.

COUNSEL:

ARTHUR REYNOLDS (PET)...LAW & STEIN  
SUMIYO NAGAO REYNOLDS (DEC)...

GENERAL INFORMATION:

**Continued from 01/30/18.** Attorney Roth was appointed for Arthur Reynolds. Attorney Roth is to provide a report on the special needs by next hearing.

**Continued from 03/14/18. Notice to be given by Mr. Luang.**

THIS CASE IS SET FOR HEARING ON Status Report by Administrator/son Arthur Reynolds ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner recently was informed by New York Life Insurance that the Decedent's life insurance policy did not include designated beneficiaries and will need to be included in the probate estate. Furthermore, Petitioner's brother, who is the only other heir of the estate has special needs and Petitioner is currently working with an estate planning attorney to determine how assets should be distributed. **Supp 02/26/18** alleges NY Life Insurance policy is not an asset of the estate as it was discovered the policy was payable on death. **Supp 04/20/18 petitioner alleges Partial Inventory and Appraisal filed 09/22/17 contains all assets of the estate and shall be deemed the final Inventory and Appraisal. Does Court wish to require an amended final I&A? JTD**
2. Petitioner requests an additional 3-4 months to close the estate. **Supp. 02/26/18** alleges estate is now in a condition to be closed. An accounting will be filed upon approval of Status Report.
3. **Report of Attorney Roth filed 05/01/18. JTD**
4. **Response to Report by Attorney Mitchell Roth filed by Arthur Reynolds on 05/15/18. JTD**
5. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for Accounting Review on **07/25/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/lh)

Superior Court of Calif, County of San Bernardino  
Page: 4  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601097

CASE NAME: MTR OF CARROLL MCKINNEY

HEARING:  
Probate status report filed.

COUNSEL:  
GREG ROSEVINK (PET)...JOSEPHINE A RICH  
CARROLL MCKINNEY (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report by Greg Rosevink,  
Administrator

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

1. Letters of Administration issued to Greg Rosevink on 01/25/17; \$25,000 bond.
2. Estate solely consists of a 10% interest in the 2007 Alma Laverne Zulch Revocable Trust. As of date, \$370,000 has been distributed from Trust. All assets are expected to be distributed by end of 2018.
3. Partial #1 Inventory and Appraisal filed 02/08/18. However, attachment #1 reflects 'cash assets' of \$370,000. **Need** corrected Final Inventory and Appraisal with attachment 2 to reflect "estate's right to receive 10% interest in 2007 Alma Laverne Zulch Trust" to be appraised by probate referee. **Supp filed 05/23/18 on day of deadline, not in LF at time of review. Clerk's office notified 05/25/18.**
4. Petitioner requests an additional 12 months to close the estate.
5. Notice is completed.
6. ~Proposed Order: 03/29/18

#### RECOMMENDATION:

Need to clear note #3 then Court's discretion. If approved, set next hearing for Accounting Review for **06/05/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)



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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601118

CASE NAME: MTR OF ROY LEE PELTS

HEARING:

Hearing Re: AMENDED PET FOR PROBATE OF WILL AND LETTERS

COUNSEL:

TROY MICHAEL PELTS (PET)...PRO/PER  
ROY LEE PELTS (DEC)...

GENERAL INFORMATION

Continued from **09/11/17 and 11/20/17.**

**Continued from 01/30/18.** No appearance. Court ordered Troy Michael to appear at next hearing. Notice given by Judicial Assistant.

**Continued from 03/14/18 at request of Court to clear probate notes. Court confirms full IAEA powers are requested. Court is informed Melody Pelts was still the wife of Roy Pelts, although they were separated at time of death.**

THIS CASE SET FOR HEARING ON **Amended [06/23/17]** Petition for Probate, Letters Testamentary with Full Authority under IAEA by Troy Pelts, son/executor

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

1. Will waives bond. The estate consists of \$330,000 in real property. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
2. **Need** Notice to Petition to Administer Estate and proof of service
3. The will conditionally incorporates decedent's Trust.
  - a. The Certificate of Trust attached to the **amended** petition states that there is a list of trust beneficiaries also attached but one is not attached. **Need** list of trust beneficiaries.
  - b. **Need copy of trust per Local Rule 20-1502.**
4. A copy of the will must be attached to the **amended** petition as attachment 3f(2); however, it is attached to the initial petition. **JTD**
5. ~Proposed Form Order: 11/08/16

## RECOMMENDATION

Need to clear notes 2 & 3. Court's discretion re bond and note #4. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs/nb/lh)

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

-----  
DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601218

CASE NAME: WANDA LEE ROGERS

HEARING:

Waiver of account and for final distribution.

COUNSEL:

PHYLLIS ANN SCHMALHOFER (PET)...PRO/PER  
WANDA LEE ROGERS (DEC)...

GENERAL INFORMATION:

**Continued from 03/14/18 to clear probate notes. Petitioner reports there is an error in the date of death listed on petition. Verified petition to be filed. Notice to be given by Ms. Schmalhofer.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution on Waiver of Account and for fees by Phyllis Schmalhofer, executor

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

1. Assets on hand: \$0
2. Petitioner does not request statutory fees.
3. Real property had negative equity and was encumbered by a reverse mortgage of \$180,875.35. Property was sold via short sale to beneficiary Charles Delwyn Rogers for \$152,000 per consent of all beneficiaries. All cash was used to pay decedent's debts and administrative expenses.
4. Notice was given.
5. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing re final discharge for **03/20/19**.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700367

CASE NAME: MTR OF VIRGINIA P ALDERMAN-MONIET

HEARING:

Spousal Property Petition hearing.

COUNSEL:

CHRISTOPHER EDWARD MOINET (PET)...PRO/PER  
VIRGINIA P ALDERMAN-MOINET (DEC)...

GENERAL INFORMATION:

**Continued from 07/03/17 and 11/20/17.** The Court urges petitioner to speak with counsel as this may not be the appropriate petition to be filed in this matter. The Court orders all deeds including the current vesting deed and a copy of judgment in the dissolution matter be filed. The Court further orders written assignments from the children to be filed.

**Continued from 01/30/18.** No appearance. Court set OSC re dismissal for 03/14/18. Notice given by Judicial Assistant.

**Continued from 03/14/18 at request of Counsel to clear probate notes. Petitioner to file a corrected petition. No fees to be charged for corrected petition.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Christopher E. Moinet ["Petitioner"].

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

1. Declarations indicate petitioner and decedent were married in 1984, became divorced in 2005, and remarried on 11/11/13. Marriage Certificate affixed [LF, p.7].
2. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically, real property at Victorville, CA, in San Bernardino County. .
3. Declaration of Petitioner filed 11/07/17 indicates subject property was an inheritance to Linda Crook (decedent's sister) and decedent. Linda Crook sold her one-half of said property to decedent while she was married to petitioner. They took out a home loan in the amount of \$45,000 on 08/21/95 under both

their names to repay Linda Crook for her one-half of the property. Petitioner further indicates delinquent taxes for 2009 – 2012 were paid by petitioner.

4. Petition has the following issues:

- a. Section 7a is marked instead of 7b;
- b. Section 13 is incomplete; and
- c. Signatures are not dated.

**Need corrected petition.**

5. Grant Deed affixed [LF, p. 5] to petition, indicates property was titled solely in Decedent's name. Notwithstanding subject grant deed, it appears parties may have formerly held subject property jointly. Supp filed 09/06/17 provides a copy of Metroscan Property profile indicating joint tenant vesting.

6. Decedent died intestate with 4 issue who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real property is separate property of decedent.

However, declarations filed by all issue agree that Petitioner should inherit Decedent's property. Does Court wish to require proper assignments? JTD.

7. ~Proposed Form Order 04/14/17.

**RECOMMENDATION:**

Need to clear note 4 then Court's discretion.

(nb/cs/nb/lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800368

CASE NAME: Carmen Pacheco

HEARING:

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

COUNSEL:

MANUEL PACHECO Jr	(PET)...BEZAIRE, LEDWITZ & ASSOCIATES
ROSEMARIE ANDERSON	(PET)...BEZAIRE, LEDWITZ & ASSOCIATES
CARMEN PACHECO	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Manuel Pacheco, Jr (son) and Rosemarie Anderson (daughter), co-executors/co-trustees

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

1. Will waives bond. Estate assets consist of \$200,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b). **JTD**
2. Petition, item #3g is incomplete as to appointment of personal representative; however, the will appoints petitioners as co-executors.
3. Petition, item #8, does not identify co-trustees. **Need** verified supplement.
4. **Need** proof of publication.
5. ~Proposed Form Order: 04/19/18

RECOMMENDATION

Need to clear notes #3-4. Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800390

CASE NAME: MTR OF BRADLEY KINGSTON

HEARING:

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

COUNSEL:

BRANDON STEELE (PET)...CALDWELL, KENNEDY & PORTER, A.  
BARDLEY KINGSTON (DEC)...

#### GENERAL INFORMATION

**Ex parte orders granted 05/02/18. Brandon Steele appointed Special Administrator, any cash funds to be placed into an estate account rather than trust account. Order signed this date.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Brandon Steele, executor/sole beneficiary

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

1. Will waives bond. Cash proceeds to be placed in estate
2. Notice of Petitioner to Administer Estate filed 05/09/18. **Need** individual notice to minor heir, Melonie Kingston (daughter), per CRC 7.51(a) and 7.51(d).
  - a. Does Court wish to appoint GAL for minor intestate heir?
3. **Need** proof of publication.
4. ~Proposed Form Order: 04/25/18

#### RECOMMENDATION

Need to clear notes #2-3. Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800408

CASE NAME: WINSTON ROCKE

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

LYRETTE PATRICIA ROCKE (PET)...DIANE E ROBBINS  
WINSTON ROCKE (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Lyrette Patricia Rocke (sister/nominee)

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

1. All heirs waive bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Estimated value of estate is \$75,000, real property only.

**JTD**

2. No proposed order submitted.

#### RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)



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

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800409

CASE NAME: ALFREDO FERNANDO CHRISTIANSEN

HEARING:

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

COUNSEL:

LANCE GOODLING (PET)...SELTERS & SELTERS  
ALFREDO FERNANDO CHRISTIANSEN (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Lance Goodling (nominee)

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

1. Both heirs waive bond. Estimated value of estate is \$174,000 based on real property and income from real property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b) **JTD**)
2. ~Proposed Form Order: 05/04/18

#### RECOMMENDATION

RFA, Court's discretion. If approved, set Accounting/Status Review for **08/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino  
Page: 11A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 05/30/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400908

CASE NAME: RICHARD V. SMITH TRUST DATED 7/14/98

HEARING:

Hearing Re: OBJECTION TO EX PARTE COMMUNICATION

COUNSEL:

CAROL STEINBRENNER (PET)...WARD & WARD  
RICHARD V. SMITH TRUST (TRU)...  
MELODIE SCOTT (PET/STE)...J. DAVID HORSPPOOL  
AMERICAN CANCER SOCIETY ARTHRITIS FOUNDATION (PET)...TARA L COO  
CITY OF HOPE (RODRIGUEZ, HORII, CHOI & CAFFE)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Objection to Ex Parte Communication  
submitted by Mark Steinbrenner

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

1. At hearing on 05/02/18 re First Current Account and Report, Mark Steinbrenner supplied a letter to the Court ex parte. J. David Horspool provided a copy of letter in Court and is to give Tara Cooper a letter. Mr. Steinbrenner to give Counsel, Mr. Ward, a copy. Parties to file written objections directly in Court room by 05/07/18, if any party objects to Court reading the letter.
2. Matter set on 05/14/18 upon Court having reviewed the Objection to the Court Reading a Letter submitted to the Court ex parte by Mark Steinbrenner. Court has not read the letter.

RECOMMENDATION

Court's discretion.

(lh)

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: 05/30/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1100838

CASE NAME: AIDAN JAMES BURCHIT SPECIAL NEEDS TRUST

HEARING:

Fourth Account and Report of MIDLAND STATES BANK and Petition  
for allowance of fees filed.

COUNSEL:

SECURANT BANK & TRUST	(PET)...SUSAN A KATZEN
AIDAN JAMES BURCHIT SPECIAL NEEDS TRUST (TRU)...	
AIDAN JAMES BURCHIT	(MIN)...DONNASUE ORTIZ
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
MIDLAND STATES BANK	(PET/STE)...MELINDA S BELL

Fourth Account filed 04/13/18 not in LF at time of review on 05/17/18 and 05/25/18.  
Clerk's office notified 05/17/18 and 05/25/18.

(lh)

Future Hearing: 7/12/18 Accounting Review

///

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

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DATE: 05/30/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1400199

CASE NAME: Kenneth Wayne Horne

**SEE ALSO 2, 14**

HEARING:

Hearing Re: SUSPENSION OF LETTERS OF ADMINISTRATION

COUNSEL:

MARCUS RAY JONES (PET)...E. LAWRENCE BROCK  
KENNETH WAYNE HORNE (DEC)...

#### GENERAL INFORMATION

**Continued from 10/03/17 and 12/05/17** at request of counsel. Counsel reports her client is not participating and denies probate has been opened. Counsel will be filing a motion to be relieved. Marcus Jones is cited to appear at the next hearing. Should he fail to appear a bench warrant may be issued for his arrest. Citation issued to: Marcus Ray Jones who is cited and required to appear on 03/05/18. Notice by Judicial Assistant.

**On 03/14/18**, Court suspended Letters of Administration as to Marcus Ray Jones. **Continued from 04/03/18**. Counsel reports both homes have sold. There is a motion to be relieved as counsel on calendar for 05/31/18. Hearing continued at request of Counsel to file accounting and return of citation.

THIS CASE SET FOR HEARING ON Accounting Review/Suspension of Letters of Admin

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

1. Letters of Administration issued to Marcus Ray Jones, step-grandson, on 04/29/14; full authority, no bond. Letters were suspended on 03/14/18.
2. Final Inventory and Appraisal filed 08/31/15. However, the sole asset reflected is 100% interest in proceeds from a medical class action lawsuit held in Federal Court. No other assets, including the two homes mentioned in minute order dated 04/03/18 are reflected. **Need Corrected/Supplemental Final Inventory and Appraisal.**
3. Order on First Report of Status entered on 11/12/15. Court granted continuance for two years to December, 2017 to resolve medical malpractice action. **Court to inquire status.**

4. **Need** accounting or status report by attorney. *Note duty of attorney to file an accounting per Pr. C. §10953(c).*
5. Return of unserved Citation filed 01/31/18.

#### RECOMMENDATION

Inquire status.

(lh)

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: 05/30/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1400199

CASE NAME: Kenneth Wayne Horne

**SEE ALSO 2, 13**

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner MARCUS  
RAY JONES

COUNSEL:

MARCUS RAY JONES (PET)...E. LAWRENCE BROCK  
KENNETH WAYNE HORNE (DEC)...

GENERAL INFORMATION:

**Continued from 03/14/18 for notice of motion to be relieved to be filed. Court orders letters of administration of Marcus Ray Jones suspended effective immediately.**

THIS CASE IS SET FOR HEARING ON Motion to be Relieved as Counsel by Kariann Voorhees ["Petitioner"].

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

1. Petitioner, Kariann Voorhees, seeks to be relieved as counsel despite a status report/accounting are due as client, Marcus Ray Jones, has been uncooperative with Counsel. Client remains unresponsive despite Counsel's various attempts to contact via telephone, email and mailed correspondence.
2. See notes on prior matter regarding accounting due. Court to rule on prior matter #13 prior to relieving Counsel.
3. No proposed order submitted.

RECOMMENDATION:

Court to rule on accounting issue prior to approving motion.

(lh)

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: 05/30/18 TIME: 8:35 DEPT: S37P  
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CASE#: TRU PS1800089

CASE NAME: The Robert Eugene Curtis and Gloria F Curtis Trust

HEARING:

Petition for Successor Trustee for Order Determining Title to  
Property within Trust

COUNSEL:

BENNETT R CURTIS (PET)...GUAY P WILSON  
THE ROBERT EUGENE CURTIS AND GLORIA F CURTIS TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice was given.

(lh)

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

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DATE: 05/30/18 TIME: 8:35 DEPT: S37P  
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CASE#: TRU PS1800090

CASE NAME: THE LEE M GILL AND VIRGINIA M GILL TRUST

HEARING:  
Petition for an Order Confirming Trust Assets

COUNSEL:  
JEFFERY L GILL (PET)...LAW OFFICES OF LINDA ROBERTS-R  
THE LEE M GILL AND VIRGINIA M (TRU)...PRO/PER

Currently under review by legal research.

(LR)

Notice of Hearing and Proof of Service filed 04/26/18; however, notice does not include description of subject property or statement advising interest parties that they may file a response per Pr. C. §851.

Proof of Service to Notice of Hearing filed 05/08/18 does not include at least 30 days' notice.

**Need proper service.**

(lh)



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## CONSERVATORSHIPS

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DATE: 05/30/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

### **SEE ALSO 18**

HEARING:

Hearing Re: REVIEW

### COUNSEL:

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

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON REVIEW

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

1. Matter set on 02/14/18. Court was informed conservatee, Todd Koerber, has not completed a 90-day program as Court requested; however, is currently attending MFI and MTW outpatient programs. Court ordered programs to provide reports to conservator, Christie Davidson and to the Court. Court ordered conservatee to remain in dual-diagnosis programs. **MFI Recovery Center Report filed 04/10/18.**
2. Court ordered no further monies to be released to conservatee's family without Court approval.
3. Court authorized new clothing, monies to paint room and bedroom furniture, including desk, chair, computer, and cell phone blocking international calls. Court orders should anything happen to computer, it will not be replaced. Order releasing funds and authorizing purchases to be filed and approved by Court. Conservatee and Conservator are to work together in making budget for these expenses. **Inquire status.**
4. Court ordered current allowance of \$30 per week to remain.
5. Petitioners questioned whether conservatorship is necessary. No new Capacity Declaration as of review.

RECOMMENDATION  
Court's discretion.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

**SEE ALSO 17**

HEARING:

Accounting Review

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Christie Davidson,  
Conservator/trustee

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

1. Court approved 7<sup>th</sup> Account and Report of Christie Davidson on 09/06/17 for period ending 02/28/17.
2. **Need** 8<sup>th</sup> account current.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600047  
CASE NAME: VICTORIA ESQUIVEL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of STELLA ESQUIVEL

COUNSEL:

STELLA ESQUIVEL (PET)...PRO/PER  
VICTORIA ESQUIVEL (CEE)...WALTER T. MOORE

GENERAL INFORMATION

**Continued from 07/12/17 and 08/30/17.** No appearance. Court orders Stella Esquivel and Attorney Walter Moore to be present.

**Continued from 11/01/17** at request of Counsel to clear probate notes.

**Continued from 12/20/17.** Stella Esquivel was ordered to be present at next hearing if compliance documents are not filed. Mr. Moore will assist in preparing documents and amended/completed letters. Clerk's office to accept amended/corrected letters.

**Continued from 02/21/18.** Report of Court Investigator was read and considered by the Court. Attorney Moore has not received a copy of CI Report. Hearing continued at request of Court for attorney Moore to review CI report and visit client.

**Continued from 03/07/18 at request of Counsel to clear probate notes. Counsel reports he has visited the home and the home is satisfactory.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Stella Esquivel, sister appointed conservator of the person only on 12/06/16. Letters issued 12/06/16 appear to be incomplete as to section 1 and 5. **Need** amended letters
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 1-4 and Court's discretion re note 1.

(lc/ww/lh)

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of THOMAS BEFERT

COUNSEL:

THOMAS BEFERT	(PET)...HARTNELL LAW GROUP
MARIE J HUMPHREY	(PET)...HARTNELL LAW GROUP
JOYCE ELLEN GOBBEL	(CEP)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 03/14/18 at request of Counsel to clear probate notes.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Thomas Befert and Marie Humphrey appointed co-conservators of the person and estate of Joyce Ellen Gobbel on 08/09/17; no bond is required.
2. Notification of Conservatee's Rights filed 08/21/17.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. **Need** Care Plan in accord with Pr. C. §2352.5.
5. Final Inventory and Appraisal filed.; however, **need** proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 10/17/18 Accounting Review

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

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DATE: 05/30/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800108

CASE NAME: MTR OF BETTY NICOLE SLADWICK

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DANIEL C ZAMORANO JR (CP)...PRO/PER  
BETTY NICOLE SLADWICK (CTP)...JENNIFER M DANIEL

#### GENERAL INFORMATION

Ex parte hearing held on 04/19/18. Court finds the 5-day notice has not been given. Attorney Jennifer Daniel appointed for Betty Nicole Sladwick. Matter continued for petition to give notice and for Counsel to speak with client. Current hearing continued to 05/03/18

Court denied orders for temporary conservatorship on 05/03/18. Competing petition will be filed. Competing petition to be set 05/30/18 to trail this petition. Case referred to Legal Aid for assistance.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Daniel C. Zamorano, Jr.

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

1. Petition is incomplete at item # as to whether proposed conservatee is developmentally disabled. However, based on Supplemental Information form filed 04/13/18, it appears proposed conservatee is developmentally disabled. Does Court wish to require an amended petition for limited conservatorship of the person only? **JTD**
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
4. Court may wish to clarify additional orders requested. No statutory basis provided [See petition, 4/13/18 LFpg10]. **JTD**

5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. **Need** Court Investigator report.
7. Return of citation with proof of mailed service filed 04/24/18; however, signed Notice and Acknowledgment of Receipt not attached as alleged. **Need** proper personal service.
8. **Need** notice of hearing and proof of service to include 30 days' notice to Inland Regional Center.
9. Proof of Completion of Conservatorship Training Class filed 05/03/18.
10. ~Proposed Form Order: 04/16/18

#### RECOMMENDATION

Need to clear notes #5-8. 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)