



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 05/31/17

All corrections/supplements addressing these notes should be filed by **05/24/17**. Later-filed documents might not be reviewed prior to the hearing and could result in a continuance of your case. Updates to these notes *typically* will be posted three court days prior to the hearing.

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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.

05/04/17lc

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1401023

CASE NAME: Dominic Juarez Special Needs Trust

HEARING:

Hearing Re: STATUS RE ACCOUNTING OF NATALIE BLICKENSTAFF

COUNSEL:

MASS MUTUAL TRUST COMPANY	(PET)...PATRICK MCNALLY
SALVADOR JUAREZ	(PET)...FULLERTON LEMANN SCHAEFER & DO
JAMIE JUAREZ	(PET)...JENNIFER DANIEL
CRAIG E WILSON	(PET)...CRAIG E WILSON
JAMIE JUAREZ	(CT)...JENNIFER DANIEL
DOMINICK JUAREZ	(REBECCA J THYNE)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review for Natalie Blickenstaff.

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

1. Natalie Blickenstaff was appointed Successor Trustee on 03/28/16.
2. Need accounting.

RECOMMENDATION

Inquire status.

(lc)

Future hearing dates: 03/28/18 Final Discharge for Jamie Juarez

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500821

CASE NAME: JUNE MARIE PILLOW

HEARING:
Accounting Review

COUNSEL:
NEAL C. SOUSA (PET)...JOEL F. PIPES & ASSOCIATES
JUNE MARIE PILLOW (DEC)...

GENERAL INFORMATION

Continued from 12/21/16 and 03/29/17 no appearances. Neal Sousa ordered to appear.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Neal Sousa, brother, on 10/21/15, limited authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. **ROA indicates mail to Counsel Joel Pipes was returned to sender.**

RECOMMENDATION

Inquire status.

(lc)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501133

Vacated

CASE NAME: VANDA GLORIA DIAS

HEARING:

Accounting Review

COUNSEL:

EDAWRD G OPERINI (PET)...SCOTT M. SHIELDS

VANDA GLORIA DIAS (DEC)...

ALAN DIAS (PET)...SCOTT M. SHIELDS

EDWARD G OPERINI (PET)...SCOTT M. SHIELDS

Future Hearing: 01/22/18 Hearing Re: Final Discharge

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600422

CASE NAME: MTR OF GLADYS FARRAR HUBBARD

HEARING:

WAIVER OF AND PETITION FOR FINAL DISTRIBUTION Account and
Report of DAUNA GOZA and Petition for allowance of fees filed.

COUNSEL:

DAUNA GOZA (PET)...CALDWELL, KENNEDY & PORTER, A.
GLADYS FARRAR HUBBARD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Dauna Goza, executor.

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

1. All beneficiaries waive accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$6,340 each.
4. Proposed order 03/23/17; however, there must be 3 lines of content above the judge's signature per local rule 20-614(d) and after discovered property clause needs to specify beneficiaries. Submit order after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **06/06/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601195

CASE NAME: PETERSON FAMILY TRUST DATED JULY 6, 2000

SEE ALSO 6 14

HEARING:

Hearing Re: FIRST AND FINAL

COUNSEL:

BEST FRIENDS ANIMAL SOCIETY (PET)...KIPNIS LAW FIRM
THE PETERSONFAMILY TRUST (TRU)...
SUSAN M PRITCHARD (PET)...BRADLEY
TERRI LYNN ARTHUR (PET)...BRADLEY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION:

Continued from 03/21/17 and 04/05/17.

THIS CASE IS SET FOR HEARING ON First Account Current by Co-Trustees of the Wife's Separate Trust Created under The Peterson Family Trust, Susan M. Pritchard and Terri L. Arthur.

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

1. Settlor, Faye Peterson, passed away on 03/04/16.
2. Accounting period 03/14/16 to 12/31/16
3. Assets on Hand \$2,327,004.59 consisting of \$180,916.57 in cash and \$2,146,088.02 in real property, mutual funds and annuities.
4. Trustee fees are not requested; yet to be determined; and to be requested at a later date.
5. No attorney fees requested.
6. Need all trust documentation per Local Rule 20-1502
7. Need copy of bank/financial statements to support beginning and ending balances per Local Rule 20-908.
- 8. Response and objections filed by Best Friends Animal Society on 04/12/17.**
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 5 & 6. Matter is contested. If approved, set next hearing for Accounting Review on **02/27/18**.

(nb/lc)

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601195

CASE NAME: PETERSON FAMILY TRUST DATED JULY 6, 2000

SEE ALSO 5 14

HEARING:

Hearing Re: Preliminary Injunction

COUNSEL:

BEST FRIENDS ANIMAL SOCIETY (PET)...KIPNIS LAW FIRM

THE PETERSONFAMILY TRUST (TRU)...

SUSAN M PRITCHARD (PET)...BRADLEY

TERRI LYNN ARTHUR (PET)...BRADLEY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700063

CASE NAME: MTR OF BETTY L COVINGTON

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

COUNSEL:

KENNETH MARK COVINGTON (PET)...PRO/PER
BETTY L COVINGTON (DEC)...

GENERAL INFORMATION

Continued from 03/22/17.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Kenneth Covington, son.

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

1. Will waives bond. Estate value \$425,539.28 in personal property.
2. Need Notice to Petition to Administer Estate and proof of service; however, as petitioner is seeking IAEA authority, section 5 needs to be checked.
3. Section 8 does not list Trustee. Need verified supplement.
4. Proof of publication filed; however, does not seek IAEA authority. Need corrected publication.
5. The will conditionally incorporates decedent's Trust. Certification of Trust and Trust filed on 03/22/17.
6. ~Proposed Form Order: 02/15/17.

RECOMMENDATION

Need to clear notes 2 - 4, Court's discretion re bond. If approved, set Accounting/Status Review for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700262

CASE NAME: MTR OF GLADYS M DINTELMAN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

KELLIE MOSS (PET)...GREGORY L ZUMBRUNN
GLADYS M DINTERLMAN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Kellie Moss, successor Trustee.

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

1. Petitioner as Trustee seeks 100% interest in the decedent's 100% interest in real property per terms of pour over will.
2. ~Proposed Form Order: 03/16/17.

RECOMMENDATION

RFA.
(lc)

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700263

CASE NAME: MTR OF SHARON LOUISE DELGER

HEARING:

Petition to determine succession to Real Property

COUNSEL:

KELLIE LOUISE MOSS (PET)...GREGORY L ZUMBRUNN
SHARON LOUISE DELGER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Kellie Moss, daughter.

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

1. Petitioner seeks 100% interest in the decedent's 100% interest per terms of the will.
2. ~Proposed Form Order: 03/16/17.

RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700271

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

HEARING:

Petition for 1)BREACH OF FIDUCIARY DUTY 2)REMOVAL OF CO-TRUSTEE
3)IMMEDIATE SUSPENSION OF CO-TRUSTEE

COUNSEL:

NORMA RUDAMETKIN (PET)...CHRISTOPHER B JOHNSON
THE NINA WOOD IRREVOCABLE TRUST (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. Need 30 days' notice of hearing and proof of service to all 23 persons listed on pages 13-15 of petition filed 03/24/17.

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

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS01112

CASE NAME: IN THE ESTATE OF CRESCENCIO ESPINOSA

SEE ALSO 12 13

HEARING:

PETITION FOR FIRST AND FINAL Account and Report of CHRIS
ESPINOSA and Petition for allowance of fees filed.

COUNSEL:

CRESCENCIO ESPINOSA (DEC)...
MANUEL ESPINOSA (PET)...GUAY P WILSON
CHRIS ESPINOSA (PET)...GUAY P WILSON
WILLIAM C ESPINOSA (EXE)...GUAY P WILSON

XREF: SPRSS56361 (predeceased spouse Refugio DOD 08/9/91)

GENERAL INFORMATION:

Continued from **1/5/16** No appearance and **04/28/16**.

**Continued from 7/28/16 counsel requests that this matter be heard with related case
SPRSS56361 and 10/12/16.**

Continued from 01/11/17 and 04/05/17.

THIS CASE IS SET FOR HEARING ON Petition for First and Final Account of Deceased
Executor (Manuel Espinosa) by the Attorney for the Estate; First and Final Account of First
Successor Executor (William Espinosa; and First and Final Account of Successor
Administrator (Chris Espinosa); and Petition for Fees.

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

**First and Final Account of Deceased Executor (Manuel Espinosa), full authority, no
bond; by Attorney for the Estate;**

1. Accounting period 11/07/94 to 07/06/10.
2. Assets on Hand \$133,245.92 consisting of \$5,745.92 in cash and \$127,500 in in
real property located in Loma Linda, CA.
3. Statutory fees of \$12,064.00. Calculated.
4. Petition indicates Executor received the sum of \$2,500 on account of his statutory
commissions and Attorney Wilson, was paid the sum of \$4,000. Petition further
indicates no further compensation will be accepted by the attorney or any
Successor Representative.

5. Petition indicates Executor made preliminary distributions of cash totaling \$48,900 to each of the six residual distributees, totaling \$293,400 [LF, pgs. 24-25], under the IAEA.
 - a. Ex Parte Order Approving Preliminary Distributions, totaling \$142,000, entered 12/31/95 [see batch filing, LF, pgs. 9-10].
6. Executor passed away on 07/06/10.
7. ~Proposed Order: 03/29/17.

First and Final Account of First Successor Executor (William Espinosa), full authority, no bond:

8. Accounting period 07/06/10 to 10/25/12.
9. Assets on Hand \$132,045.92 consisting of \$4,545.92 in cash and \$127,500 in real property.
10. Petition alleges reimbursement to attorney for filing fees was the only activity performed during this account period.
11. Successor Executor was granted Leave to Resign on 10/25/12.
12. ~Proposed Order: 03/29/17.

First and Final Account of Second Successor Administrator (Chris Espinosa), limited authority, \$20,000 bond;

13. Accounting period 10/25/12 to 01/15/15.
14. Assets on Hand \$ 132,033.92 consisting of \$4,533.92 in cash and \$127,500 in real property.
15. Balance of any statutory fees or executor commissions waived.
16. Petitioner alleges the intent of the Will can be carried out by giving Paul Espinosa an additional 18% undivided interest in the land and proposed distribution is given at LF, p. 19.
 - a. Petitioner has limited authority. Question whether proposed distribution is court approved? **Supp: Petitioner states this is not an action under IAEA, instead petition to approve distribution in accordance with testator's intent expressed in his will.**
17. ~Proposed Order: 03/29/17.

RECOMMENDATION:

Court's discretion. If approved, set hearing for receipts and final discharge for each executor **06/06/18**.

(nb/sa/lc/lh/lc)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS01112

CASE NAME: IN THE ESTATE OF CRESCENCIO ESPINOSA

SEE ALSO 11 13

HEARING:

First & Final Account and Report of WILLIAM C ESPINOSA and
Petition for allowance of fees filed.

COUNSEL:

CRESCENCIO ESPINOSA	(DEC)...
MANUEL ESPINOSA	(PET)...GUAY P WILSON
CHRIS ESPINOSA	(PET)...GUAY P WILSON
WILLIAM C ESPINOSA	(EXE)...GUAY P WILSON

XREF: SPRSS56361

See notes on matter 11.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 05/31/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS56361

CASE NAME: IN THE ESTATE OF REFUGIO ESPINOSA

SEE ALSO 11 12

HEARING:

Hearing Re: ON ACCOUNT FILED ON AUGUST 3, 2016

COUNSEL:

REFUGIO ESPINOSA (PLA)...

XREF: SPRSS01112

See notes on matter 11.

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

DATE: 05/31/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601195

CASE NAME: PETERSON FAMILY TRUST DATED JULY 6, 2000

SEE ALSO 5 6

HEARING:

Hearing Re: PETITION TO INVALIDATE TRUST AMENDMENT

COUNSEL:

BEST FRIENDS ANIMAL SOCIETY (PET)...KIPNIS LAW FIRM
THE PETERSONFAMILY TRUST (TRU)...
SUSAN M PRITCHARD (PET)...BRADLEY
TERRI LYNN ARTHUR (PET)...BRADLEY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by legal research

NOTICE

1. Notice sufficient.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 05/31/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500291

CASE NAME: MTR OF JOSHUA GEOFFREY CAMERON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PATRICIA GAIL MIKALOUSKIS

COUNSEL:

PATRICIA GAIL MIKALOUSKIS (CP)...PRO/PER
JOSHUA GEOFFREY CAMERON (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Patricia Mikalauski, step paternal grandmother, appointed **limited** conservator of the person only on 10/26/16.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 04/19/17; however, section 5 is incomplete as to service of order.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 04/19/17.

RECOMMENDATION

Need to clear note 2.

(lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700131

CASE NAME: MTR OF JIMMIE V SMITH

HEARING: Petition for Appointment of Conservator

COUNSEL:

FRED SMITH (CPE)...JEANNE E KENNEDY
JIMMIE V SMITH (CEP)...

GENERAL INFORMATION

Fred Smith appointed temporary Conservator of person and estate on 04/26/17; \$120,000 bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Fred Smith, grandson.

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

1. **Temporary letters have not issued yet, as bond has not posted at time of review on 05/09/17.**
2. Petitioner seeks bond of \$1,149,984.00.
3. Petitioner seeks medical powers. Capacity Declaration filed 04/12/17.
4. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
5. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351-2358 JTD
6. Citation returned served.
7. Petitioner seeks dementia powers. Need appointment of counsel for report.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need Court Investigator report.
10. ~Proposed Form Order: 04/12/17

RECOMMENDATION

Need to clear notes 7-9, inquire status of temporary bond. If approved, set hearing for Compliance Review for **01/03/18** for the filing of the required documents and hearing re Accounting Review for **08/08/18**. Any accounting to be filed 30 days in advance.

(lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700143
CASE NAME: MTR OF TERESA CARLSON
HEARING: Petition for Appointment of Conservator

COUNSEL:

BRYAN H WOODS (CPE)...PRO/PER
TERESA CARLSON (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Bryan Woods, son.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 04/14/17.
2. Petitioner seeks bond be waived as petitioner is son of proposed conservatee. This is not sufficient cause for bond waiver. There is \$25,000 in personal property and Social Security benefits. Pension is not clear if \$3,276 is monthly or yearly. Need verified supplement.
3. Petitioner seeks dementia powers. Need appointment of counsel for report.
4. Need list of required contacts (Local form SB-12224).
5. Need return of citation.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need notice of hearing and proof of service.
8. Need Court Investigator report.
9. ~Proposed Form Order: 04/14/17.

RECOMMENDATION

Need to clear notes 2-8. If approved, set hearing for Compliance Review for **01/03/18** for the filing of the required documents and hearing re Accounting Review for **08/08/18**. Any accounting to be filed 30 days in advance.

(lc)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **MISC.**

DATE: 05/31/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500220

CASE NAME: MTR OF REYES GONZALES

HEARING:

Hearing Re: COURT TRIAL (2ND DAY)

COUNSEL:

CANDELARIO PARTIDA	(PET)...MOISES A AVILES
REYES GONZALES	(DEC)...
REYLENE GONZALES	(PET)...HARTNELL LAW GROUP
PUBLIC ADMINISTRATOR	(ADM)...CRAIG M PARKER

Trial – No notes – JTD

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 05/31/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300805

CASE NAME: Twana R. McCallon

HEARING:

Probate status report filed.

COUNSEL:

AURELL P CATER (PET)...PRO/PER
TWANA R MCCALLON (DEC)...

GENERAL INFORMATION:

Continued from 09/06/16, 11/22/16 and 01/31/17.

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201.
Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. This form of notice is mandatory.
2. Amended inventory filed 05/23/16 is not dated by petitioner. Need dated form.
3. Status Report indicates real property has already been distributed. See final discharge filed prematurely on 04/12/16; deed attached.
4. Petitioner alleges the estate is not in a condition to be closed as responses by the IRS; FTB; and DHS have not been received.
5. Petitioner requests an additional 2 months to close the estate. Suggest 12 months.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 1-2 then Court's discretion. If approved, set next Accounting Review for **02/06/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

DATE: 05/31/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200272

CASE NAME: MTR OF RONALD MALLINGER

HEARING:

Accounting Review

COUNSEL:

TAWNY L COCKRUM	(CPE)...	FULLERTON LEMANN SCHAEFER & DO
RONALD MALLINGER	(CEP)...	
RONALD MALLINGER	(CEE)...	

GENERAL INFORMATION

Continued from 1/11/17 and 03/15/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2nd Account approved on 02/17/16. Next accounting to include only fees for that accounting period.
2. Need 3rd Account beginning with 01/01/15.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600135

CASE NAME: ALONDRA RUIZ CONTRERAS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of NORMA IRENE CONTRERAS

COUNSEL:

NORMA IRENE CONTRERAS (CP)...PRO/PER
ALONDRA RUIZ CONTRERAS (CTP)...JEANNE KENNEDY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Norma Contreras, mother, appointed **limited** conservator of the person only on 10/27/16.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/29/17; however, section 5 is incomplete as to service of order.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 03/29/17.

RECOMMENDATION

Need to clear note 2.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: CIV DS1616871

CASE NAME: IN RE: 3442 GRAY STREET

HEARING:

Hearing Re: CLAIM FOR SURPLUS FUNDS BY MARLO R MARTINEZ

COUNSEL:

WESTERN PROGRESSIVE, LLC (PET)...ZIEVE, BRODNAX & STEELE, LLP
MANUEL A. LEO (CLA)...PRO/PER
ANTHONY HENRY MARTINEZ (PRO/PER)
STATE OF CALIFORNIA (PRO/PER)
JAN C. STURLA, DEPUTY (PRO/PER)
DISTRICT ATTORNEY CHILD SUPPORT (PRO/PER)
FAMILY SUPPORT DIVISION (PRO/PER)
GROVER TRASK DISTRICT ATTORNEY (PRO/PER)
L. ART, CHIEF ATTORNEY (PRO/PER)
ADVANCE DISPOSAL COMPANY (PRO/PER)
PHIL LOWE ATTORNEY (PRO/PER)
JEFFREY SCHROER (PRO/PER)
EDWARD J. MCCUE (PRO/PER)
JENNIFER A. COULTAS (PRO/PER)
COLIN S. ANDERSON (PRO/PER)
HUNT & HENRIQUES (PRO/PER)
LAW OFFICES OF KENOSIAN & MIEL (PRO/PER)
NEUHEISEL LAW FIRM, P.C. (PRO/PER)
MARLO R. MARTINEZ, ADMINISTRATION (MICHAEL C MADDUX)

XREF: PROPS140108

No notes – JTD

(LR)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1500269

CASE NAME: JORDAN ALAN WASHINGTON

SEE ALSO 3

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of RONALD WASHINGTON

COUNSEL:

RONALD WASHINGTON (CPE)...GUY A BOVEE
VERNETTE WASHINGTON (CPE)...GUY A BOVEE
JORDAN ALAN WASHINGTON (CEP)...SHERRI L KASTILAHN

GENERAL INFORMATION

Continued from 02/08/17 and 03/22/17.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Ronald and Vernetta Washington, parents appointed conservator of the person and estate on 07/06/16, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/06/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Plan in accord with Pr.C.§2352.5 filed 08/01/16.
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 4-6.

(lc)

Future hearing dates: 09/13/17 Accounting review.

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1500269

CASE NAME: JORDAN ALAN WASHINGTON

SEE ALSO 2

HEARING:

Petition for Substituted Judgment to Create a Special Needs Trust

COUNSEL:

RONALD WASHINGTON (CPE)...GUY A BOVEE
VERNETTE WASHINGTON (CPE)...GUY A BOVEE
JORDAN ALAN WASHINGTON (CEP)...SHERRI L KASTILAHN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearing: 09/13/17: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200099

CASE NAME: RUTH M SNYDER

HEARING:
Accounting Review

COUNSEL:

GARY R SNYDER	(PET)...JACK B OSBORN
RUTH M SNYDER	(DEC)...
DANIEL SNYDER	(BEN)...THOMAS C. WATTS
GARY R SNYDER	(PET)...E JOAN NELMS

GENERAL INFORMATION:

Continued from **4/13/16, 6/15/16, 08/17/16, 11/16/16, 01/11/17 and 03/22/17**. No asset declaration being prepared.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration W/WA issued to Gary Snyder, son, on 09/04/13; full authority, no bond.
2. Previous status report approved on 04/08/15.
3. Need accounting or next status report.

RECOMMENDATION

Inquire status.
(lc/sa/lc)

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400897

CASE NAME: Faye Quesada Carrera

HEARING:

Probate status report filed.

COUNSEL:

CORRINE C GARCIA (PET)...JACK B OSBORN
FAYE QUESADA CARRERA (DEC)...
JANET VASQUEZ (TP)...ELISABETH KEMPE-OLINGER
BRYAN C. HARTNELL Esq (HARTNELL LAW GROUP)

GENERAL INFORMATION

Continued from 03/22/17 for notice.

THIS CASE SET FOR HEARING ON Status report by Corinne Garcia, daughter.

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

1. Letters of Administration issued to Corinne Garcia on 06/03/15, limited authority \$20,000 bond.
2. Petitioner requests an additional year to close the estate in order to liquid the remaining assets.
3. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **03/28/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

HEARING:
Accounting Review

COUNSEL:
WAYNE FAWCETT (PET)...J. PETER WAKEMAN
MARILYN MILLER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Wayne Fawcett/Trustee, on 04/05/16; full authority, \$540,000 bond.
2. Final Inventory and Appraisal filed 05/27/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600757
CASE NAME: MTR OF VERNON JEROME PETERSON
HEARING: Petition for REMOVAL OF ADMINISTRATOR AND REVOCATION
LETTERS OF ADMINISTRATION; SURCHARGE AND REMOVAL ETC

COUNSEL:

KIMBERLY P TREBING	(PET)...JOHN STYSKAL
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES LAW GROUP
LARRY PETERSON	(TP)...DAMIEN J SNOW
INHERITANCE FUNDING COMPANY	(PRO/PER)
SURETEC INSURANCE COMPANY	
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator and Revocation of Letters Pr.C. § 8503A, Surcharge for Breach or in the Alternative, appointment of independent Pr.C. § 16000 and Petition for Allowance of Fees by Randall Peterson, son.

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

1. Letters of Special Administration issued to Kimberly Trebing on 09/07/16 and general Administration on 12/29/16; limited authority \$250,000 bond.
2. Petitioner seeks removal of administrator Kimberly Trebing. Petitioner alleges that Kimberly has not taken any action relating to the decedent's rental property insurance. Petitioner further alleges that grounds for removal are based on wasted or mismanagement of estate. Rental property have reportedly past due utilities etc. No supporting documentation has been filed.
3. Petitioner seeks appointment as successor; however, no petition for successor has been filed.
4. Bonding company has been noticed.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearings: 06/06/17: Report of Account by **Kimberly Trebing as special administrator**, 02/21/18: Accounting Review for **general administrator**.

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

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700180

CASE NAME: THE PATRICK CAMERON LANE TRUST DATED 01/14/17

HEARING:

Petition for QUIET TITLE; ORDER THAT TRUST SIGNED BY DECEDENT ON
JANUARY 14 2017 WAS OBTAINED BY UNDUE ETC

COUNSEL:

ERIC LANE (PET)...NEIL R HEDTKE, ESQ
BRIAN LANE (PET)...NEIL R HEDTKE, ESQ
THE PATRICK CAMERON LANE TRUST(TRU)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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

DATE: 05/31/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700248

CASE NAME: MAURA QUEZADA

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AIAE

COUNSEL:

SYLVIA DELGADO (PET)...PRO/PER
MAURA QUEZADA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Sylvia Delgado, daughter.

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

1. Need Notice to Petition to Administer Estate and proof of service.
2. All heirs waive bond. Estate consists of \$950,000 of which \$600,000 is personal property.
3. ~Proposed Form Order: 03/17/17.

RECOMMENDATION

RFA subject to note 1, Court's discretion re bond. If approved, set Accounting/Status Review for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700247

CASE NAME: ROBERT D. BAILY, udt dated May 19,1998

HEARING:

Petition for APPOINTMENT OF SUCCESSOR TRUSTEE

COUNSEL:

IAN BAILY (PET)...DALE K BETHEL
TRUST OF ROBERT D. BAILY (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700097

CASE NAME: SHEREE D. KINSEY

HEARING:

Hearing Re: TRANSFER TO RIVERSIDE

COUNSEL:

KENNETH R KINSEY	(CP)...CHRISTOPHER A POULOS
MELISSA S KINSEY	(CP)...CHRISTOPHER A POULOS
SUSAN VAN VOORHIS	(CP)...CHRISTOPHER A POULOS
SHEREE D KINSEY	(CTP)...JAMES B CHURCH

GENERAL INFORMATION

Continued from 01/11/17. No appearance. Parties to appear at next hearing. James Church appointed counsel for conservatee.

Continued from 03/22/17. Matter ordered transferred.

THIS CASE SET FOR HEARING ON Transfer to Riverside.

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

1. Kenneth and Melissa Kinsey & Susan Van Voorhis, parents and aunt, appointed Conservators on 07/30/07. Conservatee resides in Riverside. Matter ordered transferred on 03/22/17.
2. Need report of Counsel Church.
3. Need receipt and acknowledgement of transfer indicating new case number.

RECOMMENDATION

Need report and receipt of transfer.

(lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200270

Vacated

CASE NAME: HOLLEY GRAHAM

SEE ALSO 13 17

HEARING:
Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
HOLLEY GRAHAM	(CEP)...CHO, SHEASBY, CHUNG & IGNACIO
PATRICIA LARRY	(CP)...PRO/PER
NATALIE BLICKENSTAFF	(CE)...PRO/PER
HOLLEY GRAHAM	(PET)...LINDA M BATTRAM
RAYMOND L TOWNE	(CP)...PRO/PER
HOLLEY GRAHAM	(PET)...MATTHEW E SHEASBY
PATRICIA LARRY	(PCR)...
JOHNIE B SEALS	(PCR)...
MATTHEW E. SHEASBY	(PET)...CHO, SHEASBY, CHUNG & IGNACIO
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
JOHNIE B SEALS	(PET)...MITCHELL I ROTH

XREF: PROPS1401080

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

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200270
CASE NAME: HOLLEY GRAHAM

SEE ALSO 12 17

HEARING: FIRST AND FINAL Account and Report of JOHNIE B SEALS and
Petition for allowance of fees filed.

COUNSEL:

HOLLEY GRAHAM (CEP)...CHO, SHEASBY, CHUNG & IGNACIO
PATRICIA LARRY (PCR)...
JOHNIE B SEALS (PET)...MITCHELL I ROTH

XREF: PROPS1401080(Estate of Holley Graham)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st and Final Account and Petition for Fees and
Costs by Johnie Seals

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

1. Accounting period 10/09/14 – 10/19/14 (10 days). Conservatee passed away on 10/19/14.
2. Assets on hand \$49,643.30; cash.
3. Final Inventory and Appraisal does not appear to be filed; however, court may waive requirement per Pr.C. § 2633. JTD
4. Petitioner proposes distribution to himself as administrator of conservatee's estate PROPS1401080.
5. Attorney Roth requests fees of \$21,935.50 for 65.9 hours at \$325 per hour. Fees go beyond accounting period through 06/07/17. Itemized [Acct. 03/16 LFpg 16-36]. JTD
6. Petitioner requests reimbursement of costs totaling \$1,673.68. Itemized [Acct. 03/16 LFpg38]. JTD
7. Need financial statements per local rule 20-1404(c) and Pr. C. § 2620(c).
8. Need notice of hearing and proof of service.
9. Current bond is \$250,000. Ok.
10. ~Proposed Order: 03/16/17.

RECOMMENDATION

Need to clear notes 7-8, then Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **06/06/18**.

(lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700058

CASE NAME: IVAN SAUCEDO

HEARING: Petition for Appointment of Conservator

COUNSEL:

NANCY SAUCEDO (CP)...PRO/PER
IVAN SAUCEDO (CTP)...MELVIN L FRIEDLAND

GENERAL INFORMATION

Continued from 03/22/17. Melvin Friedland appointed counsel.

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 02/22/17.
4. Proposed conservatee is developmentally disabled. Need report of Counsel Friedland.
5. Proposed conservatee is developmentally disabled. Need IRC report. **30 day continuance requested on 03/16/17.**
6. Citation returned served.
7. Certificate of Completion of the Conservatorship Training Class filed 03/02/17.
8. CI report filed 03/08/17.
9. ~Proposed Form Order: 02/22/17.

RECOMMENDATION

Need reports by counsel and IRC. If approved, set hearing for Compliance Review for **01/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/lc)

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

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700059
CASE NAME: LARDINE ROBINSON
HEARING: Petition for Appointment of Conservator

COUNSEL:

TYTIANA DAWSON (CPE)...PRO/PER
LARDINE ROBINSON (CEP)...JAMES B CHURCH

GENERAL INFORMATION

Temporary orders denied on 02/28/17; no emergency.

Continued from 03/22/17. James Church appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Tytiana Dawson, daughter.

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

1. Petitioner seeks no bond. It appears that the estate would qualify for a waiver as assets consist of public benefits; Pr.C. § 2323.
2. Notice of hearing and proof of service filed; however, need section 5 completed as to service of petition per Pr.C. § 1822.
3. Petitioner requests 2590 powers. However, attachment does not state the specific powers requested per Pr.C. § 2591 or the reason each power is needed. As the estate contains minimal assets, question the need for any powers under Pr.C. § 2591. Need verified supplement.
4. Petitioner seeks medical powers. Capacity Declaration filed on 03/20/17; however, 1st and last page are not dated at signature line, section 7b is not initialed, section 1 does not indicate physician's name, and section 4 does not indicate if proposed conservatee is a patient. Need completed form.
5. Petitioner seeks dementia powers. Need report of Counsel James Church.
6. Need Duties.
7. Need return of citation.
8. Certificate of Completion of the Conservatorship Training Class filed 04/10/17.
9. CI report filed 03/03/17.
10. ~Proposed Form Order: 02/22/17

RECOMMENDATION

Need to clear notes 2-7. If approved, set hearing for Compliance Review for **01/03/18** for the filing of the required documents and hearing re Accounting Review for **08/18/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: VC VS408

CASE NAME: IN THE MATTER OF TOM W BROWN JR

HEARING:
Accounting Review

COUNSEL:
TOM W BROWN (CEP)...SHERRI L KASTILAHN
GRACE BROWN (CPE)...DIANA J. CARLONI ATTORNEY AT L

GENERAL INFORMATION
Continued from 03/22/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 12th Account of Grace Brown, mother, approved on 05/23/16.
2. Need 13th Account beginning with 11/01/15.

RECOMMENDATION
Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 05/31/17 TIME: 9:30 DEPT: S37P

CASE#: PRO PS1401080

CASE NAME: HOLLEY GRAHAM

SEE ALSO 12 13

HEARING:

Accounting Review

COUNSEL:

JOHNIE SEALS

(PET)...MITCHELL I ROTH

HOLLEY GRAHAM

(DEC)...

HUNTLEY GRAHAM

(PET)...MARK MOKTARIAN

XREF: CONPS1200270

XREF: CONPS1200270(Holley Graham)

GENERAL INFORMATION

Continued from 07/27/16 and 03/16/17 to trail CONPS1200270.

THIS CASE IS SET FOR HEARING ON Accounting review

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

1. Letters of administration with will annexed issued to Johnie Seals on 2/17/15.
2. Partial Inventory and Appraisals filed. Need Final Inventory and Appraisal.
3. Need accounting or probate status report.

RECOMMENDATION

Inquire status.

(ds/sa/lc)