



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/05/17

All corrections/supplements addressing the notes should be filed by **05/26/17**. 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.

nb0515

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000071

CASE NAME: LASONDRA HOWARD

HEARING:

SEVENTH Account and Report of INLAND COUNTIES REGIONAL CENTER,
INC. and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTER (PET)...STEVEN K BECKETT
LASONDRA HOWARD (BEN)...
LASONDRA HOWARD (TRU)...
SURETEC INSURANCE COMAPNY (TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Sixth Account Current and Petition for Fees
by IRC, Trustee of the Special Needs Trust ["Petitioner"].

THE FOLLOWING ISSUES/DEFICIENCIES IN THE PAPERS ARE NOTED.

1. Accounting covers: 01/01/16 to 01/31/17.
2. Assets on hand: \$84,223.91 consisting of cash in a pooled investment fund held in Master Trust.
3. Current bond of \$95,000. Appears sufficient. JTD.
4. Petitioner requests approval of fees already taken in the amount of \$2,132.82. Billed at \$1,000 for first \$50,000, 2% of next \$250,000. Generally itemized. JTD.
5. Petitioner requests authority to continue taking future annual fees [LF, p. 51] of \$1,250/year for the first \$50,000 and 2% of the next \$250,000 held in trust, plus 1.65% of the next \$450,000 held in trust and to take the annul trustee fees in quarterly payments. JTD.
6. Attorney requests fees of \$1,245.00 for 13.05 hours billed at \$250/hour for 2.30 hours' attorney time and \$100/hour for 6.70 hours' paralegal time. Itemized [x-ref. supp. filed 03/20/17]. JTD.
7. Petitioner has proposed a revised Master Trust of California Agreement [LF, p. 51] to include language concerning reimbursement for any benefits paid any other state's Medicaid program and notice to same rather that by California's

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Medi-Cal Program. Petitioner requests that the court approve the revisions to the proposed revised Master Trust of California Agreement.

8. ~Proposed Form Order 03/20/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing re Accounting Review for **03/26/18**. Account to be filed 30 days' in advance of hearing.

(nb)

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300511

CASE NAME: RUTH ELLA JEFFERY

HEARING:
Accounting Review

COUNSEL:

JUDITH A SHUFORD	(PET)...KEITH S WALKER
RUTH ELLA JEFFERY	(DEC)...
ELLA JACOBS	(PET)...PRO/PER
GUY JACOBS	(OBJ)...GILBERT M GUTIERREZ
ELLA JACOBS	(GILBERT M GUTIERREZ)

Waiver of Court Fees and Costs filed by ELLA JACOBS is GRANTED

GENERAL INFORMATION

Continued from **12/03/15**. Counsel reports property has sold. Notice to be given by Mr. Walker.

Continued from **02/16/16** at request of counsel to file status report. Nothing new filed.

Continued from **04/12/16** at request of counsel to clear notes. Counsel to file motion to enforce settlement agreement.

Continued from **06/06/16**. No appearances. Judith Shuford needs to file an accounting for the special administrator. Court orders Attorney Keith Walker and Judith Shuford to personally be present at the next hearing. Notice by Judicial Assistant.

Continued from **08/15/16 and 10/17/16** at request of counsel. Oral report given by Keith Walker.

Continued from 01/30/17 at request of counsel.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Letters of Special Administration issued to Judith Shuford on 06/25/13.
2. It appears court is seeking an accounting from special administrator.

RECOMMENDATION

Inquire status.

(lc//nb/dl/nb)

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500110

CASE NAME: ALAN R. ARMSTRONG LIVING TRUST DATED 8/28/06

SEE ALSO 4

HEARING:

Hearing Re: TRIAL STATUS

COUNSEL:

MARISSA ARMSTRONG	(PET)...MARY M BADER
ALAN R. ARMSTRONG LIVING TRUS T (TRU)...	
ALYSSA MAY ARMSTRONG	(MIN)...
ALANA MARCY ARMSTRONG	(MIN)...
ALAN R ARMSTRONG JR	(RES)...MITCHELL I ROTH

No notes – Status.

FUTURE HEARINGS:

8/17/17 READINESS CALENDAR

8/28/17-9/01/17: COURT TRIAL

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500110

CASE NAME: ALAN R. ARMSTRONG LIVING TRUST DATED 8/28/06

SEE ALSO 3

HEARING:

Petition for Relief from breach of trust

COUNSEL:

MARISSA ARMSTRONG	(PET)...	MARY M BADER
ALAN R. ARMSTRONG LIVING TRUS T	(TRU)...	
ALYSSA MAY ARMSTRONG	(MIN)...	
ALANA MARCY ARMSTRONG	(MIN)...	
ALAN R ARMSTRONG JR	(RES)...	MITCHELL I ROTH

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

FUTURE HEARINGS:

8/17/17 READINESS CALENDAR

8/28/17-9/01/17: COURT TRIAL

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500351

CASE NAME: ALICE K CAMP

HEARING:

FIRST AND FINAL ON WAIVER OF Account and Report of SHERRILL LYNN
RANDAZZO, VICKI G GRILLOT and Petition for allowance of fees

COUNSEL:

SHERRILL LYNN RANDAZZO	(PET)...SCOTT COLE
ALICE K CAMP	(DEC)...
VICKI G GRILLOT	(CPE)...SCOTT COLE
ALICE K CAMP	(CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Daughters/Co-Executrixes, Sherrill L. Randazzo and Vicki G. Grillot.

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

1. All beneficiaries waive accounting.
2. Accounting period 05/03/11 to 12/31/16
3. Assets on Hand \$299,791.34 consisting of cash.
4. Petitioners waive statutory compensation.
5. Attorney requests statutory fees of \$9,500.00. Fees to be divided between Scott Cole and The Grossman Law Firm, APC. Calculated.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/18**.

(nb)

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500710

CASE NAME: THE AGNES M DIRE TRUST

HEARING:

Petition for Under Probate Code 17200 to Determine the Validity
of the Second Amendment, etc

COUNSEL:

BRUCE DIRE	(PET)...JOSEPH A WALKER
THE AGNES M DIRE TRUST	(TRU)...
ROBERT DIRE	(OBJ)...THOMAS W DOMINICK

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

FUTURE HEARING:
6/19/17: COURT TRIAL

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600103

CASE NAME: ROBERT SHOWER

HEARING:

Accounting Review

COUNSEL:

DAVID P LENHARDT

(PET)...KRISTA DAWKINS

ROBERT SHOWER

(DEC)...

DAVID P LENHARDT

(PET)...PYKA LENHARDT SCHNAIDER ZELL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing Executor entered 03/21/16, full authority, no bond. Need Letters.
2. As letters have not issued, account is not due.

RECOMMENDATION:

Need letters. Set control hearing re Issuance of Letters then set Accounting Review 60 days later.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600202

CASE NAME: TERESA D SACCONO

HEARING:

Accounting Review

COUNSEL:

KATHLEEN G SACCONO (PET)...JAMES BANKS JR

TERESA D SACCONO (DEC)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

Continued from 05/01/17. No appearances. Court orders petitioner to be present at hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters issued 04/25/16 with full authority, no bond.
2. Need final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh/nb)

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

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700291

CASE NAME: SAMUEL CALHOUN DOMINEY

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
IAEA

COUNSEL:

BARBARA A DOMINEY (PET)...CHRISTOPHER L CARPENTER
SAMUEL CALHOUN DOMINEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA, for Ancillary Administration, by surviving spouse and named executrix, Barbara Dominey ["Petitioner"].

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

1. Petitioner seeks to probate unimproved real property in Dell, County of San Bernardino, CA. However, it does not appear subject property is in San Bernardino County. Humboldt County has a city known as Rio Dell. Venue appears to be improper.
2. Exemplified copies of will and Texas Probate Order/Letters affixed to declaration filed 03/29/17.
3. Caption also requests Letters of Administration. Need further clarification via verified supplement.
4. Will waives bond. However, Petition is a non-resident and court has discretion to require bond per Pr. C. § 8571. Estimated value of the property of the estate reflected at \$210,000. Does Court wish to require minimum bond of \$20,000 or full bond of \$210,000? JTD.
5. Question if Paula Ann Bourne is the same as Paula Ann Schollenberger Falldorf named in the Will? Need verified supplement.
6. Proof of publication filed.
7. ~Proposed Form Order/Letters 03/29/17.

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RECOMMENDATION:

Need to clear notes 1, 3 & 5. If approved, set future hearing for Accounting/Status Review on **08/13/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: RPR RS02181

CASE NAME: ***MF** BRUNO CEJA JR.

HEARING:

Hearing re Final Discharge

COUNSEL:

MONICA M CEJA	(PET)...MARK J TUNDIS
BRUNO CEJA JR	(DEC)...
JOE SANCHEZ	(SPA)...L.DOMINIC CHACON
MELINDA A MILLER	(PET)...ALLARD, SHELTON & O'CONNOR
JESSIE C VELARDE	(OBJ)...ALLAR, SHELTON & O'CONNOR
ROBERT L KERN	(PRO/PER)
VICTIM COMPENSATION AND GOVERNMENT CLAIMS (PRO/PER)	

XREF: RPRRS02843

GENERAL INFORMATION

Continued from **03/02/11 - 06/26/12**. No appearance on 06/26. Keith Walker ordered to personally appear. Continued from 07/31/12, - 08/28/14.

Continued from 10/09/14 for final discharge to be filed. Related action RPRRS02843 to be advanced and continued to trail this matter.

Continued from **01/08/15 and 04/16/15** (No appearance). Citations issued for Melinda Miller and Monica Ceja.

Continued from **06/25/15**. Bench warrant ordered to issue with bail set at \$25,000 and held to 10/08/15. Melinda Miller ordered to be present.

Continued from **10/8/15** (coverage in S55). Counsel reported that Melinda Miller was present at prior hearing although the minutes do not reflect that and a bench warrant was issued and held at the prior hearing. Bench warrant remained held. Melina Miller ordered to be present at next hearing unless counsel supplies a transcript showing that she was present.

Continued from **12/10/15**. Bench warrant recalled.

Continued from **06/09/16** to file required documents.

Continued from 08/15/16, 10/17/16 and 01/30/17 at request of counsel.

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THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Order for final distribution approved on 02/24/10.
2. Need receipts. There appears to be 37 beneficiaries and a claim from Victim's Compensation Board.
3. Need to submit Ex Parte Petition for Final Discharge and Order.
- 4. Need return of citation for Melinda Miller.**
5. Citation returned served as to Monica Ceja.

RECOMMENDATION

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.
(cbr/vet/gls/vet/gls/cbr/gls/nb/lc/ds/lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 8:30 DEPT: S35P

CASE#: RPR RS02843

CASE NAME: FELIPA C CEJA

HEARING:

Hearing re Final Discharge

COUNSEL:

MELINDA A MILLER

(PET)...ALLAR, SHELTON & O'CONNOR

FELIPA C CEJA

(DEC)...

CCP170.6 filed as to CYNTHIA LUDVIGSEN

X REF RPR RS02181

GENERAL INFORMATION

Continued from **8/20/09 many times to 06/26/12**. No appearance on 06/26. Keith Walker ordered to personally appear. Notice given by judicial assistant.

Continued from **07/31/12 many times to 06/25/15, 10/08/15, 12/10/15, 03/10/16, 06/09/16, 08/15/16, 10/17/16 and 01/30/17**.

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

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

1. Order for Final Distribution granted 8/20/08.
2. Need to file receipt and submit final discharge declaration/order.
3. Citation returned SERVED as to Melinda Miller on 06/24/15.
4. Court to review declaration filed 07/03/14 by Attorney Walker.

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(gls/vet/smj//vet/gls/vet/gls/vet/gls/lc/gls/vet/gls/nb/lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601221

CASE NAME: THE DEMMITT TRUST

HEARING:

Petition for (CROSS PETITION) to REMOVE CO-TRUSTEE KAREN WHITNEY
FOR BREACH OF TRUST

COUNSEL:

KAREN WHITNEY	(PET)...DANIEL G. MCMEEKIN
THE DEMMITT TRUST	(TRU)...
RONALD DEMMITT	(PET)...GREGORY T ANNIGIAN

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to beneficiaries, Karen Whitney and Ronald Demmitt, in their capacity as Co-Trustees.

FUTURE HEARINGS:

9/14/17: STATUS RE: PETITION TO REMOVE CO-TRUSTEE

10/10/17-10/11/17: COURT TRIAL

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500223

CASE NAME: HUEY JACKSON SR

SEE ALSO 15 16

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of OLIVIA JACKSON

COUNSEL:

OLIVIA JACKSON (CPE)...

HUEY JACKSON SR (CTE)...BRYAN C. HARTNELL

Waiver of Court Fees and Costs filed by HUEY JACKSON SR is GRANTED

See next matter.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500223

CASE NAME: HUEY JACKSON SR

SEE ALSO 14 16

HEARING:

Hearing Re: OSC RE IMPOSING SANCTIONS ON OLIVIA JACKSON

COUNSEL:

OLIVIA JACKSON (CPE)...

HUEY JACKSON SR (CTE)...BRYAN C. HARTNELL

GENERAL INFORMATION

Continued from 06/20/16, 11/21/16, 02/06/17 and 04/24/17. Non-appearance by Olivia Jackson. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON OSC re Imposing Sanctions on Olivia Jackson on Conservatorship Compliance Review

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

1. Wife appointed conservator person/estate on 09/21/15. No bond.
2. Conservatee's rights filed 10/15/15.
3. Care Plan filed 01/14/16.
4. Determination of Conservatee's Appropriate Level of Care filed 04/21/16.
5. Final Inventory & Appraisal filed 06/27/16 reflects \$0.00 assets as all property is purportedly community property.
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:

Need to clear notes 6 - 7.

(dl/nb)

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500223

CASE NAME: HUEY JACKSON SR

SEE ALSO 14 15

HEARING:

Accounting Review

COUNSEL:

OLIVIA JACKSON (CPE)...

HUEY JACKSON SR (CTE)...BRYAN C. HARTNELL

Waiver of Court Fees and Costs filed by HUEY JACKSON SR is GRANTED
GENERAL INFORMATION

Continued from **11/21/16** at request of counsel. Notice by Judicial Assistant.

Continued from 02/06/17. Court cites Olivia Jackson into court for failure to appear/failure to file. Citation issued to: Olivia Jackson who is required to appear.

THIS CASE IS SET FOR HEARING ON accounting review

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

- 1 Olivia Jackson appointed conservator of the person and estate on 09/21/15; accounting now due.
- 2 Final Inventory & Appraisal filed 06/27/16 reflects \$0.00 assets as all property is purportedly community property. **Question need for estate powers? Court to inquire.**
- 3 **Need return of citation.**

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT PUBLIC GUARDIAN

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200052

CASE NAME: PEGGY MCCONNELL

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUADIAN

(CPE)...COUNTY COUNSEL

PEGGY MCCONNELL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 03/28/17.

Continued from 12/05/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Third Account entered 12/16/15; account or waiver of account now due.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200169

CASE NAME: BETH E PATTERSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

BETH E. PATTERSON

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 07/17/16.

Continued from 12/19/16 and 04/27/17. No appearances. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 3rd account for Public Guardian approved on 02/18/16.
2. Need 4th accounting beginning with 11/01/15.

RECOMMENDATION:

Inquire status. .

(/lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300287

CASE NAME: Joshua I. Rubio

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

JOSHUA I RUBIO

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 02/18/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered 11/28/16; account or waiver of account now due beginning 09/01/15.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300300

CASE NAME: Corey A Crow

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
COREY A CROW (CEP)...

GENERAL INFORMATION:

Letters expire 12/28/17

Continued from 02/27/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON **Amended** (03/15/17) First Account Current and Petition for Fees.

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

1. Accounting period 11/22/13 to 08/31/15
2. Assets on Hand \$262.80 consisting of cash.
3. **Charges and Credit to Summary of Account [LF, p. 3] do not match by \$200. Does Court wish to deem amount de minimus? JTD.**
4. Public Guardian requests fees totaling \$2,835.00. For the period of 11/22/13 to 08/31/15, in the sum of \$2,835.00 assessed and deferred until such time as the conservatorship estate has sufficient funds for such purpose. Generally itemized. JTD.
5. County Counsel request fees totaling \$1,435.00. For the period of 11/22/13 to 08/31/15, in the sum of \$1,435.00 deferred until such time as the conservatorship estate has sufficient funds for such purpose. Generally itemized. JTD.
6. Notice given.
7. Proposed Order 03/15/17 charges and credits do not match on Summary of Account.

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

RECOMMENDATION:

Court's discretion. If approved, Court to set the next hearing re Accounting Review on **10/30/17**.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400013

CASE NAME: JAMES R BRENNAN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JAMES R. BRENNAN

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/24/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered on 11/28/16; second account or waiver of account now due beginning 05/01/15.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400055

CASE NAME: Jordan Brooks

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JORDAN BROOKS

(CEP)...HARTNELL LAW GROUP

JORDAN E BROOKS

(CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters terminated on 04/18/16.

Continued from 09/12/16 and 12/19/16 at request of counsel. No further continuances will be granted.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 5/9/16 Court approved the 1st Account Current for the period ending 2/26/15.
2. **On 9/2/16 PG withdrew the Petition to re-establish LPS conservatorship and Court set hearing re final accounting.**
3. Need second and final account beginning 02/27/15.

RECOMMENDATION:

Inquire status.

(sa/nb)

FUTURE HEARING:

6/12/17: Final Accounting

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400175

CASE NAME: MTR OF LORETTA COPE

HEARING:

FIRST AND FINAL ACCOUNT AND REPORT Account and Report of PUBLIC
GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
LORETTA COPE	(CEP)...WALTER T. MOORE
LORETTA COPE	(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Conservatee passed away on 01/07/16.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Conservator of the person and estate, Public Guardian ["Petitioner"].

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

1. Accounting period 06/23/14 to 08/11/16.
2. Assets on Hand \$0.00 after payment of fees.
3. Petitioner requests compensation in the amount of \$4,200.00. Billed in the
monthly fee of \$200 for ordinary services pursuant to a new Court-approved fee
schedule effective 07/01/14. JTD.
4. County Counsel requests fee in the amount of \$2,100.00. Billed in the monthly
fee of \$100 for ordinary services pursuant to a new Court-approved fee
schedule effective 07/01/14. JTD.
5. Proposed Order 11/28/16 discharges upon the filing of an ex parte petition for
final discharge instead of upon entry of final discharge order.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
06/11/18.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500045

CASE NAME: Donald Mundy

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DONALD MUNDY

(CPE)...COUNTY COUNSEL

(CEP)...KARIN E HORSPOOL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed Temporary Conservator of the estate on 09/21/15; appointed Temporary Conservator of the person on 03/16/16; and general appointment, person and estate on 09/12/16, no bond.
2. Need accounting or waiver of account.

RECOMMENDATION:

Inquire status.

(nb)

FUTURE HEARING DATES:

03/26/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500206

CASE NAME: MTR OF DARLA R FULTON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
DARLA R FULTON	(CEP)...HARTNELL LAW GROUP
CARLA FULTON-BAXTER	(CEE)...

GENERAL INFORMATION

Letters expire 08/28/17.

Continued from 12/19/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order establishing Temporary LPS entered 07/31/15; Order establishing LPS entered 09/10/15
2. Account or waiver of account now due

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
SHELBY JEAN MORGAN-PETRIZZI (CEP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

- 1 Need final Inventory & Appraisal per Pr.C.§2610.
- 2 Need proof of service of Final Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 3 Notification of Conservatee's Rights; Care Plan; including a Determination of Conservatee's Appropriate Level of Care filed.
- 4 Proof of recordation of letters filed.

RECOMMENDATION:

Need to clear notes 1-2.

(nb)

FUTURE HEARING:

3/26/18: Accounting Review

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

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600264

CASE NAME: CARMEN GREEN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
CARMEN GREEN (CPE)...JACK B OSBORN

GENERAL INFORMATION

Order Appointing Public Guardian, Conservator of the person and estate entered
10/31/16, no bond..

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Conservatee passed away on 05/03/17.
2. Notification of Conservatee's Rights filed. However, section 5 to proof of service is not dated. Question whether copy of order appointing conservator was also served? JTD.
3. Care Plan including a Determination of Conservatee's Appropriate Level of Care filed.
4. Question whether any assets were marshaled as to require an accounting? If no assets were marshaled, suggest Court require a verified statement that no assets were marshaled, in which case an accounting will not be necessary. JTD.
5. If assets were marshaled, need final Inventory & Appraisal per Pr.C.§2610 and 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.

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

RECOMMENDATION:

Matter appears moot. However, if assets were marshaled, need first and final account to include pre and post death account periods to be placed on first check calendar no sooner than **07/17/17**.

(nb)

FUTURE HEARING:

3/26/18: Accounting Review (Court to take matter off calendar).

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

SEE ALSO 31

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

PUBLIC GUARDIAN

(PET)...COUNTY COUNSEL

KATHLEEN SCHAEFFER

(CEP)...MITCHELL I ROTH

No notes – Judge to decide.

(nb)

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

SEE ALSO 30

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
KATHLEEN SCHAEFFER (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

Ex Parte held 04/18/17 and trailed to this date. Court appoints Sherri Kastilahn as Guardian ad litem for proposed conservatee.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Public Guardian ["Petitioner"].

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

- 1 No bond - PG.
- 2 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.
- 3 Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300 or less as the cost to the estate to arrange and consummate a sale of such personal property would exceed the value of said property.
- 4 Petitioner seeks medical powers. Medical Capacity declaration filed.
- 5 Petitioner requests dementia powers; Need report of court-appointed counsel, Mitchell I Roth.
- 6 Need Court Investigator's Report.
- 7 Citation returned served.
- 8 APS involvement noted [see Confidential Supplemental Information filed 04/03/17, LF, p. 4]
- 9 Declaration [filed 04/03/17, LF, p. 4] indicates conservatee opposes the appointment of PG.
- 10 Notice filed 04/26/17 does not include GAL, Sheri Kastilahn. Need proper service.
- 11 ~Proposed Form Order/Letters 04/03/17.

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

RECOMMENDATION:

Need to clear notes 5-6. If approved, set hearing for Compliance Review for **01/08/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **08/13/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SG SS5942

CASE NAME: IN THE MATTER OF JAMES PERRENOUD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JAMES PERRENOUD

(CEP)...

GENERAL INFORMATION

Continued from 10/03/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting review.

1. On 09/29/14 Court approved the 39th account; accounting now due
2. Conservatee died on 07/28/16.
3. Need 40th and final accounting.

RECOMMENDATION:

Inquire status.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS00629

CASE NAME: IN THE MATTER OF TAMMY KUEBLER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

TAMMY L KUEBLER

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/17/18.

Continued from 12/19/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Tenth Account entered 12/23/15; account or waiver of account now due.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01574

CASE NAME: MATTER OF JOHN FINLEY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

JOHN C FINLEY

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/23/17.

Continued from **05/02/16** at request of counsel. The accounting is to be brought current and filed.

Continued from 11/14/16 and 03/13/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 4/27/15 Court approved a Waiver of account for the period ending 8/27/14.
2. Need account or waiver of account.
3. Conservatee appears to reside in Norwalk, CA. Does Court wish to transfer matter to LA County? JTD.

RECOMMENDATION:

Inquire status.

(sa/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01965

CASE NAME: MTR OF CHRIS GRANDE

HEARING:

Accounting Review

COUNSEL:

ROBETTE GRANDE (CPE)...PRO/PER
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CHRISTOPHER GRANDE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 10/16/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fifth Account entered 03/15/15; account or waiver of account now due beginning 12/01/15.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4557

CASE NAME: IN THE MATTER OF ROGER OELHAFEN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

ROGER OELHAFEN

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expired: 4/5/16

Continued from 06/08/15, 11/09/15, 03/07/16 and 12/19/16 at request of counsel.

No further continuances will be granted.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order settling 29th Waiver of Account granted 9/12/14 for period ending 02/26/14.
2. 30th Account/Waiver of account now due for the period 03/27/14 – current date.

RECOMMENDATION

Court's discretion.

(gls/vet/dl/nb)

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

DATE: 06/05/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5916

CASE NAME: IN THE MATTER OF KATHERINE EVANS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
KATHERINE EVANS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 04/15/18.

Continued from 12/19/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 15th Account entered 02/23/16; account or waiver of account now due starting 11/01/15.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 06/05/17 TIME: 1:30 DEPT: S35P

CASE#: CON PS1600257

CASE NAME: ANNIE ODEN

HEARING:

Hearing Re: COURT TRIAL (FIRST DAY)

COUNSEL:

PUBLIC GUARDIAN
ANNIE ODEN

(CPE)...COUNTY COUNSEL
(CEP)...LENITA A SKORETZ

No notes – Court Trial
(nb)

FUTURE HEARING:

6/06/17-6/09/17: COURT TRIAL

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

DATE: 06/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000614

CASE NAME: MTR OF JOSEPH JOHN ALLEGRA

HEARING:
Probate status report filed.

COUNSEL:
GAYLE ALLEGRA (PET)...GREGORY T ANNIGIAN
JOSEPH JOHN ALLEGRA (DEC)...

GENERAL INFORMATION:

Continued from **01/23/17** at request of counsel.

**Continued from 03/27/17. Need proper notice of hearing and proof of service.
Counsel states he is still trying to collect the settlement monies.**

THIS CASE IS SET FOR HEARING ON "Report of Status of Administration."

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 some, but not all, of the proceeds from the wrongful death lawsuit have been received. Wrongful death action is Harris County, Texas case #ED101J016077378. Petitioner alleges that the Lanier Law Firm is attempting to collect settlement monies from various defendants.
2. Notice of Hearing filed 04/10/17 does not contain notice to Stephen Allegra or James Allegra, and states "whereabouts unknown" but there addresses are listed in the status report. - JTD
3. Petitioner requests an additional one year to close the estate.
4. ~Proposed Order 11/15/16.

RECOMMENDATION:

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

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 06/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300190

CASE NAME: NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST

SEE ALSO 3

HEARING:

Petition for REMOVAL OF TRUSTEE AND OBJECTION TO ACCOUNTING

COUNSEL:

LYLE STREY	(PET)...	GREGORY T ANNIGIAN
THE NORMAN FRED AND RAMONA ROSE STREY TRUST (TRU)...		
DUAYNE DALE BLISS	(PET)...	GRESHAM SAVAGE NOLAN & TILDEN
DUAYNE DALE BLISS	(PET)...	RICHARD G ANDERSON
THE NORMAN FRED AND RAMONA ROS(TRU)...		
TERRY STREY	(BEN)...	ZUMBRUNN LAW CORPORATION
PAULA ANN KENT	(PET)...	PRO/PER
LINDA M. ROGERS	(TEE)...	PRO/PER

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300190

CASE NAME: NORMAN FRED AND RAMONA ROSE STREY FAMILY TRUST

SEE ALSO 2

HEARING:

FIRST FORMAL Account and Report of LYLE STREY and Petition for allowance of fees filed.

COUNSEL:

LYLE STREY (PET)...GREGORY T ANNIGIAN
THE NORMAN FRED AND RAMONA ROSE STREY TRUST (TRU)...
DUAYNE DALE BLISS (PET)...GRESHAM SAVAGE NOLAN & TILDEN
DUAYNE DALE BLISS (PET)...RICHARD G ANDERSON
THE NORMAN FRED AND RAMONA ROS(TRU)...
TERRY STREY (BEN)...ZUMBRUNN LAW CORPORATION
PAULA ANN KENT (PET)...PRO/PER
LINDA M. ROGERS (TEE)...PRO/PER

GENERAL INFORMATION:

Continued from 03/27/17. Parties agree to vacate the 04/26/17 hearing and set it for 06/05/17.

THIS CASE IS SET FOR HEARING ON First and Current Account by Second Named Successor Trustee, Lyle Strey.

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

1. Accounting period 07/15/15 to 12/07/16.
2. Assets on Hand \$130,843.00 consisting of cash.
3. Petitioner does not request compensation.
4. Petition indicates Attorney Anigian has been paid \$14,170.00 [LF, p. 8 & 17].
Need itemization via verified supplement.
5. Need proper Summary of Account.
6. Account does not include a loss/profit schedule. Need same.
7. Check numbers are not consecutive or missing. Need further clarification via verified supplement.
8. Real property was sold during this account period. Need copy of closing statement per Local Rule 20-910.

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

9. Disbursements – Schedule B [LF, p.14] reflects partial distributions totaling \$200,000 which exceeds more than 50% of the net value of the estate. Pr. C. § 11623(a)(2).
10. Disbursements include items usually considered overhead or not normally allowed. However, petitioner is not seeking fees.
11. Disbursements include clerical expenses to Aero Sierra. Need further clarification via verified supplement.
12. Notice given.
13. **Objections filed 02/23/17 by Duayne Dale Bliss.**
14. ~Proposed Order 03/30/17 as to appointment of PPF.

RECOMMENDATION: Matter is contested.

This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

Set on first check calendar no sooner than **07/17/17**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

DATE: 06/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500216

CASE NAME: MILDRED SCHUYLER

HEARING:

SECOND Account and Report of VERONICA LANUZA and Petition for allowance of fees filed.

COUNSEL:

LISA SCHUYLER	(CPE)...PRO/PER
MILDRED SCHUYLER	(CEP)...SHERRI L KASTILAHN
BRANDON EDWARDS	(CPE)...PRO/PER
VERONICA LANUZA	(PET)...M. DANIEL SAYLOR
MILDRED SCHUYLER	(CEE)...
DEBBIE EDWARDS	(SCHLECHT, SHEVLIN & SHOENBERGE)

Waiver of Court Fees and Costs filed by MILDRED SCHUYLER is GRANTED
TOTAL FEES WAIVED TO DATE: \$1886.50

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Second Account Current and Petition for Allowance of Fees by Conservator of the Person and Estate, by PPF, Veronica Lanuza.

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

1. Accounting period 01/01/16 to 02/28/17.
2. Assets on hand \$745,605.41 consisting of \$27,471.86 in cash and remaining in real and personal property.
3. Accounting is not on mandatory judicial council forms. Court to inform counsel to use correct forms in the future.
4. Petitioner requests fees of \$19,875.50, of which, \$2,750.00 has been paid, leaving a balance owing of \$17,125.50. Billed at \$40-\$115/hour for 217.50 hours at \$40 to 115/hour. Itemized [LF, pgs. 23-50]. JTD.
5. Petitioner requests authorization to pay herself \$250 per month for future services as Conservator, commencing 07/01/17, not to exceed 26 months. JTD.

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

6. Attorney requests fees of \$9,721.50. Billed at \$350/hour for 20.2 hours' attorney time and \$125/hour for 21.0 hours' paralegal time. Itemized [LF, pgs. 52-55]. JTD.
7. Current bond of \$57,000. Petitioner requests bond be increased by \$20,000 for a total bond of \$77,000. Appears sufficient. JTD.
8. During the accounting period, petitioner paid The Shamrock Place and Flor Darwish for caregiver expenses totaling \$611.50. Need verified declarations for acknowledgment of receipt of fees per Local Rule 20-1406(c).
9. Conservatee resides in Northridge, CA. Suggest transfer to LA County. If approved, Court to waive transfer fees and set control hearing date. JTD.
10. ~Proposed Order: 04/19/17.

RECOMMENDATION

Need to clear note 8 the Court's discretion. If approved, set hearing on the next accounting review for **04/12/18** (if one year) or **04/11/19** (if two years). Account to be filed 30 days in advance of hearing.

(nb)

FUTURE HEARING DATES:

06/22/17 Petition for Attorney Fees

06/22/17 Accounting Review (if approved, Court to take matter off calendar).

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700045

CASE NAME: CHINA NIKEL ARKADIE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

NICOLE L ARKADIE (PET)...PRO/PER
ORLANDO ARKADIE (PET)...PRO/PER
CHINA NIKEL ARKADIE (CTP)...E JOAN NELMS

Waiver of Court Fees and Costs filed by CHINA NIKEL ARKADIE is GRANTED

GENERAL INFORMATION:

Continued from 03/20/17. The return of the citation is not required as China Arkadie was present in court today. Attorney E Joan Nelms appointed.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Nicole and Orlando Arkadie.

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need report by court-appointed counsel, E Joan Nelms.**
3. Need Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to consent or withhold consent to marriage or entrance into registered domestic partnership; make or withhold all medical decisions for the proposed limited conservatee.
5. List of Required Contacts filed on 02/08/17 does not include petitioners. Need complete form.

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.

6. **Court Investigator Report filed 03/14/17**
7. Need Inland Regional Center Report.
8. Need Certificates of Completion re Conservatorship Class.
9. ~Proposed Form Order/Letters 02/08/17.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **01/08/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500710

CASE NAME: THE AGNES M DIRE TRUST

HEARING:

Hearing Re: TSC/STATUS CONFERENCE

COUNSEL:

BRUCE DIRE

(PET)...JOSEPH A WALKER

THE AGNES M DIRE TRUST

(TRU)...

ROBERT DIRE

(OBJ)...THOMAS W DOMINICK

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

No notes – TSC/Status Conference.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600249

CASE NAME: JOSE R CASTILLO

HEARING:

Hearing Re: Pet for order to determine title

COUNSEL:

MARTHA CHAVEZ ACEVEDO	(PET)...MADRID LAW FIRM
JOSE R CASTILLO	(DEC)...
AIDA E RODRIGUEZ	(OBJ)...LAW OFFICES OF JAMES A HAGAN
JOSE CASTILLO JR	(LAW OFFICES OF JAMES A HAGAN)
CASSANDRA CASTILLO	(LAW OFFICES OF JAMES A HAGAN)

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600416

CASE NAME: FOSTER LEE BRAY

SEE ALSO 4

HEARING:

Hearing Re: ENFORCEMENT OF SETTLEMENT AGREEMENT

COUNSEL:

WILLIAM HENRY BRAY	(PET)...	C.L. FARRELL
FOSTER LEE BRAY	(DEC)...	
HEATHER BRAY SCHAFFER	(PET)...	MARK J ANDREW FLORY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Enforcement of Settlement Agreement.

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

1. Matter set at 03/23/17 hearing, wherein, a stipulation and order were signed in Court as modified.
2. No distributions to be made pending this hearing.
3. William Bray has not filed objections to stipulation at this time.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600416

CASE NAME: FOSTER LEE BRAY

SEE ALSO 3

HEARING:

Petition for /of SUCCESSOR TRUSTEE WILLIAM HENRY BRAY FOR
INSTRUCTION ON HOW TO PROCEED

COUNSEL:

WILLIAM HENRY BRAY (PET)...C.L. FARRELL
FOSTER LEE BRAY (DEC)...
HEATHER BRAY SCHAFFER (PET)...MARK J ANDREW FLORY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to parties listed on mailing list affixed to
petition filed 03/23/17 [LF, p. 85].

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700268

CASE NAME: SALLY ANN LOHR

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
IAEA

COUNSEL:

DAVID CLINTON LOHR (PET)...VARNER & BRANDT
SALLY ANN LOHR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA, by son and named executor, David Clinton Lohr ["Petitioner"].

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

1. Will waives bond. Estimated value of estate is \$92,000.
2. Proof of publication filed.
3. ~Proposed Form Order 03/23/17.

RECOMMENDATION:

RFA, no bond. If approved, set future hearing for Accounting/Status Review on
08/13/18. Any account to be filed 30 days in advance. Note requirements of Local
Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS04008

CASE NAME: ESTATE OF BOBBY P. MAC LACHLAN

SEE ALSO 7

HEARING:

Accounting Review

COUNSEL:

DONNELL FRANK MACLACHLAN (DEC)...

DOROTHY N. KINSEY (PET)...HORSPOOL & HORSPOOL

BOBBY P. MAC LACHLAN (DEC)...

DOROTHY N KINSEY (TEE)...HORSPOOL & HORSPOOL

XREF: SPRSS57143

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling 15th Account entered 11/14/16; 16th account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS57143

CASE NAME: MTTR OF DONNELL FRANK MACLACHLAN TRUST

SEE ALSO 6

HEARING:

Accounting Review

COUNSEL:

DONNELL FRANK MACLACHLAN (DEC)...

DOROTHY N. KINSEY (PET)...HORSPOOL & HORSPOOL

BOBBY P. MAC LACHLAN (DEC)...

DOROTHY N KINSEY (TEE)...HORSPOOL

XREF: SPRSS04008

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling 26th Account entered 11/14/16; 27th account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700270

CASE NAME: THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG

HEARING:

Petition for ORDER CONFIRMING REVOCABLE LIVING TRUST,
SUCCESSOR TRUSTEE THEREUNDER OF CERTAIN ETC

COUNSEL:

BRANDY MOODY (PET)...DINA I FARHAT
REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG (TRU)

VACATED per register of actions. Ex parte orders advancing hearing granted on
05/15/17.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000180

CASE NAME: LUISA PEPILASCOV

HEARING:

Hearing Re: FIRST ACCOUNTING

COUNSEL:

LUISA PEPILASCOV	(CEP)...
RAQUEL PEPILASCOV	(CPE)...EDWARD B FISCHEL & ASSOCIATES
MARCOS PEPILASCOV	(CPE)...EDWARD B FISCHEL & ASSOCIATES
LINDA MAXWELL	(CE)...MAUREEN MURATORE
LEIA CHASE	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
CHARLES CORNETT	(PET)...EDWARD G. OPERINI
LINDA MAXWELL	(CPE)...MAUREEN MURATORE
MITCHELL I ROTH	(PET)...
EDWARD B FISCHEL	(PET)...EDWARD B FISCHEL & ASSOCIATES
US SPECIALTY INSURANCE COMPANY (TP)	...PRO/PER
LISA LEHAR	(PRO/PER)

XREF: PRODS1000524

GENERAL INFORMATION:

Per stipulation entered on 03/16/15, Leia Chase was appointed to replace Linda Maxwell as Successor Trustee. Leia Chase appointed as Successor Trustee on 09/25/15.

Continued from 12/12/16 and 03/13/17 to clear notes.

THIS CASE IS SET FOR HEARING ON **Amended (02/21/17)** First and Current Account by Successor Trustee, Leia Chase.

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

1. Need Notice of Hearing with proof of service. **Proof of Service to amendment filed 02/21/17 [LF, p. 9] does not include name or address of party being served. Need proper Notice of Hearing with proof of service.**
2. Accounting period 09/25/15 to 10/28/16.

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

3. Assets on hand **\$384,319.00 consisting of \$76,519 in cash and \$308,300** in improved real property in Hesperia, CA and unimproved real property in Apple Valley, CA.
4. Summary of Account [LF, p. 4] does not indicate there any assets in the trust estate. Need amended Summary of Account with supporting schedules in compliance with Pr. C. § 1064 et seq. **Supp. (02/21/17) includes Summary of Account [LF, p. 5-6] that includes cash and non-cash assets. However, Total Charges and Total Credits are blank; does not include cash assets on hand at the beginning or end of account period; or disbursement schedules. Need complete summary of account and affected schedules via verified supplement.**
5. **Trustee requests reimbursement of \$300 for filing costs.**
6. Question if income or distributions related to upkeep/overhead of real property have occurred during this account period? If so, need supporting schedules.
7. Special Report by CI filed 11/01/16 **and 03/07/17**
8. No proposed order. Submit Order after Hearing.
9. **Amended Account filed and set for 06/14/17.**

RECOMMENDATION: Continue to 06/14/17.

Need to clear notes. If approved, set next hearing for Accounting Review on **01/15/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.
(nb)

FUTURE HEARING:

08/29/18 Accounting Review (conservatorship)

08/29/18 Petition to Terminate Guardianship

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

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000249

CASE NAME: IRMA SUSANA MELENDEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIO MELENDEZ

COUNSEL:

MARIO MELENDEZ	(CP)...PRO/PER
IRMA MELENDEZ	(CP)...PRO/PER
IRMA SUSANA MELENDEZ	(CTP)...CANDICE A GARCIA-RODRIGO
ENRIQUE MELENDEZ	(SC)...PRO/PER

Waiver of Court Fees and Costs filed by MARIO MELENDEZ is GRANTED

GENERAL INFORMATION

Enrique Melendez appointed Successor Limited Conservator of the person on
03/29/16.

Continued from **10/03/16**. The Court takes judicial notice of the fact that ENRIQUE
MELENDEZ was appointed successor conservator for IRMA SUSANA MELENDEZ
and letters issued 4/4/16 without the filing of a petition for successor conservatorship.
Continued from **12/12/16**. The Court orders IRC to prepare report for the
court. The Court further orders conservator to complete conservator class and file
proof with the court.

**Continued from 03/13/17 to clear notes. Court finds the proof of completion of
conservatorship class has been filed.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights; Statement of Care Plan; and
Determination of Conservatee's Appropriate Level of Care filed 11/18/16.
2. Need IRC Report.

RECOMMENDATION:

Need to clear note 2.

(nb)

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

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

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800137

CASE NAME: JOE M. TOLLEY SR.

HEARING:

Accounting Review

COUNSEL:

THOMAS V. TOLLEY	(PCR)...
JOE M. TOLLEY SR	(PCE)...DONNASUE ORTIZ
MICHAEL D TOLLEY	(PET)...PRO/PER
JOE M TOLLEY SR	(CEP)...DONNASUE ORTIZ
DONNA TOLEY	(CPE)...BRIAN C MILES
RUTH M. TOLLEY	(PET)...STEVENSON LAW OFFICE
JOHN L GORDON esq	(PET)...DRISKELL & GORDON
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
DONNA TOLLEY	(PET)...MARIELLEN ROSS
MARIELLEN ROSS	(PET)...MARIELLEN ROSS
RUTH M TOLLEY	(OBJ)...
CHRISTOPHER SUTTON	(PRO/PER)
ROBERT L KERN	(ROBERT L KERN)
PATRICK B WRIGHT	(PRO/PER)

XREF: CONPS0900199 PROPS000741

GENERAL INFORMATION

Continued from **09/14/16** by stipulation. Notice given by Mr. Hatcher.
Continued from 12/12/16 and 03/13/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 3/28/16 Court approved the 1st Account Current for the period ending 4/30/14.
 - a. Need Order Settling First Account Current.
2. Need an accounting.

RECOMMENDATION:
Inquire status.
(sa/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900119

CASE NAME: KEVIN CHARLES CARTER MORALES

HEARING:

Hearing Re: OSC RE TRANSFER CASE TO RIVERSIDE COUNTY

COUNSEL:

DENNIS MARIE MORALES (CPE)...CHRISTOPHER A POULOS
ROLAND MORALES (CPE)...CHRISTOPHER A POULOS
KEVIN CHARLES CARTER MORALES (CEP)...
DENNIS MARIE MORALES (PET)...HARTNELL LAW GROUP
ROLAND MORALES (PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from **09/27/16**. No appearances. Order for transfer filed 07/15/16. Notice by Judicial Assistant.

Continued from 12/06/16. Dennis Morales and Roland Morales are ordered to be present at next hearing if transfer to Riverside is not complete. Notice by Judicial Assistant.

Continued from 02/21/17. Counsel to prepare order for transfer. If matter is transferred prior to hearing, matter will be taken off calendar.

THIS CASE IS SET FOR HEARING ON OSC re Transfer to Riverside County.

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

1. Matter set on Court's motion after receipt and review of CI report on that indicates conservatee now resides in Riverside, CA.
2. Need signed return receipt as proof of receipt.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400205

CASE NAME: TERRY LYNN HERBERT

HEARING:

Accounting Review

COUNSEL:

JACQUELINE LEE DADGARKIANI (CPE)...SHARISSE E MOLYNEUX

TERRY LYNN HERBERT (CEP)...

XREF: CIVDS1415915

GENERAL INFORMATION

Continued from 03/06/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving First Account entered 03/25/16; second account now due.
2. No accounting or waiver. Need same.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700127

CASE NAME: MTR OF ISAAC MEJIA

SEE ALSO #15

HEARING:

Petition for Appointment of Conservator

COUNSEL:

WENDY BARRETO (CP)...PRO/PER

ISAAC ARMANDO MEJIA (CTP)...CANDICE A GARCIA-RODRIGO

Waiver of Court Fees and Costs filed by ISAAC ARMANDO MEJIA is GRANTED

X-REF: CONPS 1700137

GENERAL INFORMATION

Ex Parte Orders granted 04/17/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person only, by mother Wendy Barreto ["Petitioner"].

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

1. *Proposed conservatee is a minor* who will not attain the age of majority until 11/24/17. Petition appears premature.
2. No bond – person only.
3. Court to review IRC letter filed 05/04/17 and sticky note on page 2
4. Section 11 to petition [LF, p8] does not include father, paternal grandmother or maternal grandparents. Need verified supplement.
5. Attachment 14 to petition [LF, p. 10] requests taking possession of monetary compensation for one-self. Question if petitioner is "representative payee" and if so, the need for estate powers? Court to inquire.
6. Conservator Screening form filed 04/10/17, sections 12, 18 & 19 are marked, but no explanation is given in an Attachments 12 or 19. Need verified supplement.
7. List of Required Contacts filed 04/10/17 lists a Federico Mejia but no relationship. Also, form does not include paternal grandmother or maternal grandparents. Need complete contacts form.

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

8. Petition purports proposed conservatee is developmentally disabled. If so, need appointment of counsel and report by same.
9. Petitioner seeks medical powers. Need Medical Capacity Declaration.
10. Need Court Investigator's Report.
11. Need return of Citation.
12. Need Notice of Hearing and proof of service or due diligence declarations.
13. ~Proposed Form Order/Letters 04/10/17.

RECOMMENDATION: Petition appears premature as proposed conservatee is still a minor.

Need to clear notes. If approved, set hearing for Compliance Review for **01/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

If estate powers are granted, set hearing re Accounting Review for **08/13/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700137

CASE NAME: MTR OF ABRAHAM MEJIA

SEE ALSO #14

HEARING:

Petition for Appointment of Conservator

COUNSEL:

WENDY BARRETO (CP)...PRO/PER
ABRAHAM MEJIA (CTP)...

Waiver of Court Fees and Costs filed by ABRAHAM MEJIA is GRANTED

X-REF: CONPS 1700127

GENERAL INFORMATION

Ex Parte Orders denied 04/24/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person only, by mother Wendy Barreto ["Petitioner"].

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

1. *Proposed conservatee appears to be a minor, age 17*, but documents do not indicate when he will attain the age of majority. Court to confirm age and date of majority of proposed conservatee.
2. No bond – person only.
3. Page 8 to petition filed 04/14/17, is not signed at verification section by petitioner. Need same via verified supplement.
4. Conservator Screening form, section 11 is blank and sections 18 and 19 are marked. Need verified supplement.
5. Confidential Supplemental Information filed 04/14/17, section 1 reflects proposed conservator's information instead of proposed conservatee's information. Need corrected form with attachments 3, 4c, and 4c(3).
6. List of Required Contacts filed 04/14/17 lists 2 mothers; does not include father, paternal grandparents or maternal grandparents. Need complete form.
7. Petitioner requests Pr. C. § 2590 powers. Need Attachment 1d specifying orders, facts and reasons for same via verified supplement.

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

8. Petitioner requests Pr. C. § 2351-2358 powers. Need Attachment 1f specifying orders, facts and reasons for same via verified supplement.
9. Petitioner requests Pr. C. § 2351.5 powers. Need Attachment 1j specifying orders, facts and reasons for same via verified supplement.
10. Due Diligence, Section 3f is marked on petition. Need Attachments 3f(1) and 3f(2) via verified supplement.
11. Section 4b indicates proposed conservatee is receiving or entitled to receive benefits from the U.S. Dept. of Veteran's Affairs but does not give an estimate of monthly benefit payable. Need verified supplement.
12. Section 7 to petition indicates petitioner is the domestic partner of the propose conservatee. Need Attachment 7b via verified supplement.
13. Section 11 to petition [LF, p8] does not include father, paternal grandmother or maternal grandparents. Need verified supplement.
14. Section 11 to petition [LF, p8] does not include father, paternal grandmother or maternal grandparents. Need verified supplement.
15. Need CI Report.
16. Conservator Screening form filed 05/08/17, sections 12, 18 & 19 are marked, but no explanation is given in an Attachments 12 or 19. Need verified supplement.
17. Completed By section to Notification to Court of Address of Conservatorship filed 05/08/17 is incomplete. Need complete form.
18. ~Proposed Form Order/Letters 04/14/17.

RECOMMENDATION: Petition appears premature as proposed conservatee is still a minor.

Need to clear notes. If approved, set hearing for Compliance Review for **01/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

(nb)

FUTURE HEARING DATES:

06/21/17 Amended Petition for Appointment of Conservator

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS659

CASE NAME: IN THE MTTR OF DAVID J OMLIN

HEARING:

THIRD CURRENT Account and Report of KATHERINE BRIGGS, KARIN LANGWASSER and Petition for allowance of fees filed.

COUNSEL:

ELSIE L OMLIN	(PET)...ALLAR, SHELTON & O'CONNOR
DAVID JOSEPH OMLIN	(PCE)...
WELLS FARGO BANK, N.A.	(CE)...MARK L SAMSON
DAVID JOSEPH OMLIN	(CEP)...
KATHERINE BRIGGS	(CPE)...BRIGGS LAW CORPORATION
KARIN LANGWASSER	(CPE)...BRIGGS LAW CORPORATION
DAVID JOSEPH OMLIN	(CEP)...
KATHERINE BRIGGS	(SC)...BRIGGS LAW CORPORATION
KARIN LANGWASSER	(SC)...BRIGGS LAW CORPORATION

XREF: OCRS659, PROPS1200657

Continued from **2/18/15** at request of counsel.

Continued from **4/15/15** for review of supplement filed this date.

Continued from 03/13/17 to clear notes.

THIS CASE IS SET FOR HEARING ON Second Account Current and Report of Successor Co-Conservators, Katherine Briggs and Karin Langwasser; Request for Conservators' Fees and for Attorney's Fees

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

1. Accounting covers 12/05/14 to 12/31/16.
2. Assets on hand: \$178,090.96 of which \$9,382.96 is cash and the balance in securities.
3. Petitioners request fees of \$18,525 for services rendered during this account period through 01/10/17. Invoice marked as Exhibit "CF" is not affixed as alleged. Additionally, it is unclear if petitioner is requesting fees or requesting to pay a CPA. Need verified supplement with itemization and subject invoice.
4. Petitioner requests attorney fees and costs of \$2,320.00. However, Attorney fees owing are reflected in the amount of \$745.00. Billed at \$225/hour for

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.**

- attorney time. Itemized [LF, p. 527-528]. Also, Exhibit "AF" is not affixed as alleged. Need verified supplement with itemization and subject exhibit.
5. Disbursements – Schedule C [LF, p. 15] reflects a double entry on 07/09/15 and 08/28/15 for preparation of court documents, court representation, and submittal of court fees. Need further clarification via verified supplement.
 6. Liabilities at End of Account Period – Schedule G [LF, p. 25] reflects a total of \$18,525 to petitioner's CPA. Invoices by petitioner's CPA affixed [pgs. 527-557]. Billed in varying rates of \$125-\$225 totaling \$18,525.00. These fees appear excessive based on the size of the estate. Question why the substantial fees on preparing an annual accounting and \$225/hour for preparing checks to pay bills; or the need for a CPA? Need verified supplement.
 7. Distributions to Conservatee or Ward – Schedule K [LF, pgs. 19-20] reflects a monthly allowance to Elsie Omlin in the amount of \$800/month for providing clothing, transportation, music, supplies and other expenses for David Omlin. Does Court wish to ratify monthly allowance? JTD.
 8. Bank Statement for Citizens Business Bank ending on 12/05/16 reflects a different amount than what is depicted on Schedule E- Cash Assets on Hand at End of Account Period [LF, p. 26]. Need reconciliation via verified supplement.
 9. Need facility statements or verified letter confirming payments and/or liabilities from Sycamore Home.
 10. Notice given.
 11. Proposed Order 01/17/17 does not include assets on hand at end of account period; reflects incorrect account period and hearing date; and purports to pay Conservator's fees directly to CPA.

RECOMMENDATION

Need to clear notes. If approved, set next Accounting Review for **02/27/18** (if one year) or **2/26/19** (if two year). Account to be filed 30 in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02728

CASE NAME: MTR OF JULIE A FISCHBACH

HEARING:
Accounting Review

COUNSEL:

DONNA C FISCHBACH	(CP)...PRO/PER
JULIE A FISCHBACH	(CTP)...
SPECIAL NEEDS TRUST OF JULIE A FUSCHBACH (TRU)...	
DONNA C FISCHBACH	(TEE)...PRO/PER

Waiver of Court Fees and Costs filed by DONNA C FISCHBACH is GRANTED
Waiver of Court Fees and Costs filed by JULIE A FISCHBACH is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Petition to Dispense with Accounting entered 05/06/16; account or waiver of account now due.

RECOMMENDATION:
Inquire status.

(nb)