



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/05/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb0517/0530

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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500491

CASE NAME: SOPHIA M SANCHEZ

HEARING:

Hearing re Final Discharge

COUNSEL:

REBECCA BURNS (PET)...PRO/PER
SOPHIA M SANCHEZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of Administrator, Rebecca Burns.

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

1. Order Settling First and Final Account entered 04/04/17.
2. Need receipts by heirs, James Ybarra; Anna Ybarra; Joseph Sanchez; Rebecca Burns; Leticia Ybarra; and Joshua Ybarra.
3. Need informal account for \$10,000 reserve per Local Rule 20-911.
4. Need Ex-Parte Petition/Order for Final Discharge.

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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501020

CASE NAME: RYAN WALLIS

HEARING:

Probate status report filed.

COUNSEL:

MICHAEL SCHAEFER (PET)...DIANE E ROBBINS
RYAN WALLIS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Michael Schaefer ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as Petitioner recently learned that Petitioner's estate is the beneficiary of decedent's separate property interest in his retirement and/or pension benefits totaling about \$30,000. Upon receipt of that information, Petitioner will file a Petition for Determination of Estate Interest in Decedent's benefits and request an Order Directing the Plan Administrator to pay those funds to Decedent's estate.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 04/11/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600153

CASE NAME: DALE DUNN

HEARING:

Hearing re Final Discharge

COUNSEL:

DALE WARREN DUNN (DEC)...

DAVID DUNN (PET)...JOHN F WEBER

VACATE – Ex-Parte Petition for Final Discharge and Order forwarded to Dept. for signature.

(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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600873

CASE NAME: MTR OF WILLIAM LESTER COX

SEE ALSO 5

HEARING:

Order to Show Cause RE: Possible Sanctions

COUNSEL:

MELODY AMBER COVERDELL (PET)...GAUDY LAW, INC
WILLIAM LESTER COX (DEC)...

GENERAL INFORMATION:

Continued from **12/19/17** at request of counsel.

Continued from 05/01/18 for failure to appear/failure to file accounting. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Possible \$500 Sanctions on Petitioner's Counsel for FTA and \$500 Sanctions on Melody A. Coverdell for Failure to File Accounting** at Accounting Review.

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

1. Letters of Testamentary issued to Melody Coverdell, daughter, on 10/25/16, full authority, no bond.
2. Final Inventory and Appraisal filed 04/28/17.
3. **Need** accounting or status report.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.
(nb/ww/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600873

CASE NAME: MTR OF WILLIAM LESTER COX

SEE ALSO 4

HEARING:

Accounting Review by ***

COUNSEL:

MELODY AMBER COVERDELL

(PET)...GAUDY LAW, INC

WILLIAM LESTER COX

(DEC)...

See prior matter #4.

(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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

SEE ALSO 6A, 6B

HEARING:

Hearing re Final Discharge

COUNSEL:

RICHARD HUNTINGTON

(PET)...MUSCARELLA &

THE JORDAAN CLARKE SPECIAL NE

(TRU)...

WELLS FARGO BANK

(PET)...MUSCARELLA &

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of former Trustee of SNT,
Wells Fargo Bank.

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

1. Order Settling First and Final Account entered 05/30/17.
2. Need receipt by Successor Trustee, Richard Huntington.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Future hearing:

08/16/18 OSC re: Removal of: Ms. Katzen

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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST
SEE ALSO 6, 6B

HEARING:

Hearing Re: STATUS CONFERENCE RE SELL OF TRUST PROPERTY

COUNSEL:

RICHARD HUNTINGTON	(PET)...MUSCARELLA &
THE JORDAAN CLARKE SPECIAL NE	(TRU)...
WELLS FARGO BANK	(PET)...MUSCARELLA &

No notes – Status Conference.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 6B ADD ON

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

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601031

CASE NAME: THE JORDAAN CLARKE SPECIAL NEEDS TRUST

SEE ALSO 6, 6B

HEARING:

Trustee's Second & Final Account & Report Account and Report of
WELLS FARGO BANK and Petition for allowance of fees filed.

COUNSEL:

RICHARD HUNTINGTON	(PET)...MUSCARELLA &
THE JORDAAN CLARKE SPECIAL NE	(TRU)...
WELLS FARGO BANK	(PET)...MUSCARELLA &

X-REF: CONPS 1600162

GENERAL INFORMATION:

Continued from 05/22/18 at request of counsel. Court orders that the hearing set for May 31, 2018 is reset to June 5, 2018.

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

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

1. Order Approving Trustee's First and Final Account entered 05/30/17 for period through 02/28/17. On 05/30/17, Court accepted Petitioners resignation [LF, pgs. 38-40] as Trustee and appointed PPF, Richard Huntington as Successor Trustee of the Trust. Richard Huntington is the current Trustee of the Trust.
2. Accounting period 03/01/17 to 02/15/18.
3. Assets on Hand \$0.00. All trust assets are in the possession, custody and/or control of Successor Trustee, PPF, Richard Huntington.
4. Petitioner requests ratification of fees paid on account during this accounting period of \$12,758.14. Billed at 1.50% of the first \$2,000,000.00 per Wells Fargo Special Needs Trust Fee Schedule [LF, pgs. 96-100]. **JTD.**
5. Petitioner seeks no additional compensation for its services during this account period.
6. Attorney requests fees of \$8,475.00. Billed at \$300/hour for 29.25 hours' attorney time. Itemized [LF, pgs. 106-108]. **JTD.**

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7. Attorney requests reimbursement of costs advanced of \$701.74. Itemized [LF, p. 109]. However, costs include copy and postage charges that are normally not allowed and considered overhead. Does Court wish to reduce costs by \$311.49? **JTD.**
8. Question whether disbursements for Living Expenses [LF, p. 74], pool maintenance [LF, p. 79] and air conditioning [LF, p. 81] are apportioned? **Need** verified supplement.
9. Question payments of \$4,900 & \$2,725x2 to Miken Construction Company, Inc. [LF, pgs. 79 & 81]. **Need** verified supplement.
10. Court to review report by court-appointed counsel, Mitchell I. Roth, filed on 04/18/18.
11. Beneficiary now resides at Yorba Linda in Orange County and trust is administered at Laguna Hills in Orange County. Suggest transfer to Orange County. If approved, Court to set control date. **JTD.**
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 8-9 then Court's discretion re: fees, transfer and report by court-appointed counsel. Matter already calendared for final discharge on 06/05/18.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601193

CASE NAME: MTR OF HORACE BENTON

HEARING:

Accounting Review by ***

COUNSEL:

HORACE BENTON

(DEC)...

MICHAEL BENTON

(PET)...RICHARD F NEVINS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Administrator w/Limited Authority, Michael Benton.

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

1. Letters of Administration issued 03/28/17, limited authority, no bond.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700081

CASE NAME: MTR OF DANIEL LEON NAASZ

HEARING:

Accounting Review by ***

COUNSEL:

DANIEL LEON NAASZ (DEC)...

KIEL NAASZ (PET)...FULLERTON LEMANN SCHAEFER & DO

VACATE – Order Approving First and Final Account entered on 11/13/17.

(nb)

Future hearing:

11/19/18 Final Discharge

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700311

CASE NAME: RONALD GENE SMEDLEY

HEARING:

First and Final Account and Report of BENJAMIN CHARLES SMEDLEY
and Petition for allowance of fees filed.

COUNSEL:

BENJAMIN CHARLES SMEDLEY (PET)...ALBREKTSON & SHUMATE, LLP

RONALD GENE SMEDLEY (DEC)...

Image not available in Laser Fiche – Clerks' Office notified.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700462

CASE NAME: THE STENERSON TRUST

HEARING:

Petition for Public Guardian to be Appointed Trustee

COUNSEL:

JAMES STENERSON	(PET)...JAMES L HEYWOOD AND
NORMAN C RUSS	(PET)...STANLEY W HODGE
RHONDA MOORE	(PET)...STANLEY W HODGE
THE STENERSON TRUST	(TRU)...PRO/PER

Currently under review by Legal Research.
(LR)

Future hearing:

07/12/18 Hearing re: Status of Mediation/Trial setting conference

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701102

CASE NAME: ESTATE OF STEPHEN LEE GUGGISBERG

HEARING:

Petition for transfer of property belonging to decedent etc

COUNSEL:

BRIAN R GUGGISBERG

(BRUNICK, MCELHANEY & KENNEDY

SCOTT SHOWLER

(PET)...FULLERTON LEMANN SCHAEFER

STEPHEN LEE GUGGISBERG

(DEC)...

TED A GUGGISBERG

(OBJ)...BRUNICK, MCELHANEY &

Currently under review by Legal Research.
(LR)

Notice:

Notice is not proper.

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

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

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

(nb)

Future hearing:

05/02/19 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.**

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800263

CASE NAME: Mtr of Sheila A Gipson

SEE ALSO 13

HEARING:

Order to Show Cause RE: Dismissal for Petitioner's counsel FTA

COUNSEL:

SHARON GRIFFIN (PET)...RICHARD F NEVINS
SHEILA A GIPSON (DEC)...

GENERAL INFORMATION:

Matter set at 05/01/18 hearing due to failure to appear by counsel. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal for Petitioner's Counsel FTA** on Petition for Letters of Administration with full authority under IAEA by sister, Sharon Griffin ["Petitioner"].

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

1. Decedent was survived by Nathan La Mar Gipson, son who has higher priority than petitioner and holds a Durable Power of Attorney re Health Care [per death certificate affixed to petition, LF, p. 6]. **JTD**
2. Petitioner alleges all heirs waive bond, however, **need** bond waivers on mandatory judicial council form DE-142/DE-111 (A-3d) from Nathan Gipson and Lynette Gipson, children. Estimated estate valued at \$224,000. Suggest bond of \$224,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order 03/19/18.

RECOMMENDATION:

Need to clear notes 3-4, \$224,000 bond. If approved, set future hearing for Accounting/Status Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800263

CASE NAME: Mtr of Sheila A Gipson

SEE ALSO 12

HEARING:

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

COUNSEL:

SHARON GRIFFIN
SHEILA A GIPSON

(PET)...RICHARD F NEVINS
(DEC)...

See matter #12.
(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: 06/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700972

CASE NAME: MTR OF GAYLE ELAINE CRAMPTON

HEARING:

Hearing Re: Petition for ORDER OF PRELIMINARY DISTRIBUTION

COUNSEL:

BRYAN CRAMPTON (PET)...VOORHEES & RATZLAFF
GAYLE ELAINE CRAMPTON (DEC)...
DEPT OF CHILD SUPP SRVCES (TP)...ELIZABETH LAWRENCE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Order of Preliminary Distribution by Administrator, Bryan Crampton ["Petitioner"]. Pr. C. §11620.

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

1. Assets on Hand \$239,668.91, consisting of the net sum of the proceeds from the sale of real property.
2. Petitioner is requesting that \$55,000 be distributed to his sibling, Christopher Crampton (one of two heirs), only, which is approximately 50% of the value of the estate to be distributed to Christopher Crampton, or approximately 25% of the estate to be distributed in total.
3. Petitioner claims this preliminary distribution will give Christopher Crampton the ability to pay Southern California Edison to install electricity on vacant land that Christopher owns. Christopher currently resides on that land in a motorhome that does not have running water or electricity. This distribution will provide Christopher funds to immediately build a house with electricity.
4. Petitioner requests the court order distribution under Pr.C. §11620 et seq. as it appears there are sufficient funds to make the requested preliminary distribution without harm to creditors or estate.
5. **Need** Notice of Hearing with proof of service.
6. ~Proposed Order 05/21/18

RECOMMENDATION:

Require notice then Court's discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 06/05/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800091

CASE NAME: Jose Rossab Individual Beneficiary Account Created

HEARING:

Petition for order establishing an individual beneficiary account for the sole benefit of Jose Rossab

COUNSEL:

JOSE ROSSAB INDIVIDUAL BENEFIC
RUBEN ROSSAB

(TRU)...

(PET)...RODNUSKY & ASSOCIATES

X-REF: CIVDS 1313726

Currently under review by Legal Research.
(LR)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800031

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

HEARING:

Eighth Account and Report of GREG OVEROSS and Petition for allowance of fees filed.

COUNSEL:

EVELYN JENNIFER PADRON	(CP)...J. DAVID HORSPPOOL
EVELYN JENNIFER PADRON	(CPE)...J. DAVID HORSPPOOL
EVELYN PADRON	(CP)...HORSPPOOL & HORSPPOOL
GREG OVEROSS	(SC)...PATRICK L. HANRAHAN
JOSE JUAN PADRON RODRIGUEZ	(CPE)...MITCHELL I ROTH
JOSE JUAN PADRON RODRIGUEZ	(PET)...CHO, SHEASBY, CHUNG &
LOURDES BARRAGAN	(RES)...LENITA A SKORETZ
MATTHEW E SHEASBY	(PET)...CHO, SHEASBY, CHUNG &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
S.N. TRUST OF JOSE JUAN PADRON	(TRU)...

XREF: CIVDS1504049 (24-Seven Home Health-v-Rodriguez)

SBFSS 67433

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Eighth and Final Account and Petition for Fees by Former Trustee/Conservator of the Estate, PPF, Greg Oveross ["Petitioner"].

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

1. Accounting period 05/01/17 to 01/31/18.
2. Assets on hand \$54,759.75 in personal property.
3. Current bond of \$465,000. Appears sufficient.
4. Petitioner requests compensation of \$12,730.50. Billed at \$150/hour for 114.10 hours' time. Itemized [LF. pgs. 91-101]. **JTD.**
 - a. Fees include billing at \$95-\$125/hour by Sarah P. Medina; Lara M. Clements; and Nita Corvalan. **Need** verified supplement indicating job positions and whether parties meet the requirements of CRC 7.703(e) (1)

(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d)?

5. Attorney requests fees of \$16,708.50. Billed at the reduced rate of \$395/hour for 42.30 hours' attorney time. Itemized [LF, pgs. 107-109]. **JTD.**
6. Attorney requests reimbursement of costs advanced of \$1,686.39. Itemized.
7. The Summary of Account is not on the mandatory Judicial Council form (GC-400/405). **JTD.**
8. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c) (4) by THR California LLC and Invitation Homes.
9. **Need** Notice of Hearing with proof of service.
10. Court to require separate accountings and hearings for conservatorship estate and SNT Estate.
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4a and 8-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

HEARING:

Accounting Review by ***

COUNSEL:

JAMES KUNST (PET)...VALERIE ROSS
SARA M KUNST (CEE)...

GENERAL INFORMATION

Conservatee died on 12/05/16.

Continued from **05/23/17 and 09/12/17**. Counsel states no assets were marshalled; court requires a verified statement that no assets were marshalled with a request that no accounting is required. Counsel to prepare verified statement with proposed order. Continued from **11/28/17** at request of counsel to file accounting. Court sets deadline for the filing of the accounting for 01/30/18.

Continued from 03/06/18 and 04/10/18 at request of counsel. Court orders remaining money in US Bank account to be released to Donald Kunst, the surviving spouse of Sara M. Kunst.

THIS CASE IS SET FOR HEARING ON Accounting Review by James Kunst [Conservator of the person and estate – son].

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

1. James Kunst, son, appointed temporary conservator of the person and estate on 03/30/16, no bond. General appointment on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. Final Inventory and Appraisals filed 12/13/16 includes a checking account vested in Petitioner's name for the benefit of the conservatee.
3. **Supplement filed 03/06/18** alleges no assets were marshaled, however, also acknowledges a bank account with US Bank with a balance of \$2,343.82. Petitioner requests the remaining money in the US Bank Acct. No, XXX7831 be ordered payable to Conservatee's surviving spouse Donald Kunst ; closed; and once completed, terminate the Temporary Conservatorship of the person and estate.
4. Receipt by surviving spouse, Donald Kunst filed.

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RECOMMENDATION

Need pre and post-death accounting per Pr. C. §2620 and Pr. C. §13100 petition.
(lh/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: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER
SEE ALSO 17B

HEARING:
Hearing Re: ISSUE OF ESTATE POWERS

COUNSEL:
BEULAH MAE TOLLIVER (CTP)...MITCHELL I ROTH
CARLA RAE TOLLIVER (CP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Issue of Estate Powers.

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

1. Carla R. Tolliver appointed Conservator of the person on 08/01/17, no bond.
2. Matter set at 05/08/18 Compliance Review hearing wherein, Craig Tolliver left prior to matter being called and requested "the court to have bank statement reviewed from his sister, Allison Tolliver, reviewed for two years."

RECOMMENDATION:
Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER

SEE ALSO 17A

HEARING:

Hearing Re: STATUS- RECEIPT OF REPORT FROM MITCHELL ROTH

COUNSEL:

BEULAH MAE TOLLIVER (CTP)...MITCHELL I ROTH

CARLA RAE TOLLIVER (CP)...

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700242

CASE NAME: MIGUEL MENDEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA MENDEZ

COUNSEL:

MARIA MENDEZ

(CPE)...PRO/PER

MIGUEL MENDEZ

(CTP)...CRAIG M PARKER

GENERAL INFORMATION

Mother, Maria Mendez, appointed Limited Conservator of the person on 10/31/17.

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 per Pr.C. §1830(c); Care Plan; and a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(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: 06/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800120

CASE NAME: BRANDYN BURCHELL HARMON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BRANDYN BURCHELL HARMON (CEE)...

DONNA K WASHINGTON HARMON (PET)...PRO/PER

X-REF: PROPS 14000685 *BETTEANNE BURCHELL*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship of the person and estate, by adoptive mother, Donna K. Washington Harmon ["Petitioner"].

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

1. Petitioner requests bond not be required as the estate consists of inheritance in the related case. **JTD.**
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Medical Capacity Declaration filed.
4. Section 1 to petition does not request medical powers. Court to inquire whether medical powers are being sought? **JTD.**
5. Petitioner seeks Pr. C. § 2590 powers but does not specify reason; and for proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **JTD**
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.
9. **Need** Certificate of Completion re Conservatorship Class.
10. ~Proposed Form Order/Letters 04/23/18.

RECOMMENDATION:

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **01/08/19** for the filing of the following: proof of service of Order

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.**

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.

Set hearing re Accounting Review for **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 06/05/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100292

CASE NAME: FAITH E BATER

HEARING:

Accounting Review by ***

COUNSEL:

TIFFANY L COONEY

(PET)...PRO/PER

FAITH E BATER

(DEC)...

SAN BERNARDINO COUNTY PUBLIC A (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Public Administrator.

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

1. Status Report approved on 06/06/17; need order after hearing.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 06/05/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500648

CASE NAME: MTR OF PATRICIA MAE SWAIN

HEARING:

Probate status report filed.

COUNSEL:

ALLISON TRACEY HUTTON	(PET)...SCOTT A HANCOCK
BARBARA JEAN MOSLEY	(PET)...SCOTT A HANCOCK
BARTON K PEVEY	(PET)...SCOTT A HANCOCK
BERRY MOSLEY STILL	(PET)...SCOTT A HANCOCK
BOYD R MOSLEY	(PET)...SCOTT A HANCOCK
CARL L PEVEY	(PET)...SCOTT A HANCOCK
CAROL A SEYMOUR	(PET)...SCOTT A HANCOCK
CAROL SUE NOLTE	(PET)...SCOTT A HANCOCK
CATHY L HARTE	(PET)...SCOTT A HANCOCK
CHRISTOPHER DEAN MOSLEY	(PET)...SCOTT A HANCOCK
CONNIE L MORRIS	(PET)...SCOTT A HANCOCK
DANA ALAN PEVEY	(PET)...SCOTT A HANCOCK
DANA L SOLTE	(PET)...SCOTT A HANCOCK
DANIEL CLOUSER	(PET)...SCOTT A HANCOCK
DAVID H MOSLEY	(PET)...SCOTT A HANCOCK
DEBORAH JEAN ZULAUF	(PET)...SCOTT A HANCOCK
DEE W MURPHY	(PET)...SCOTT A HANCOCK
DIANA L HOOTS	(PET)...SCOTT A HANCOCK
DIANNE KATHLEEN LORENZ	(PET)...SCOTT A HANCOCK
DONNA F WESTERFIELD	(PET)...SCOTT A HANCOCK
DOROTHY M KNOX	(PET)...SCOTT A HANCOCK
ERIC F FULLER	(PET)...SCOTT A HANCOCK
GARY L MOSLEY	(PET)...SCOTT A HANCOCK
JAMES A DEHNER	(PET)...SCOTT A HANCOCK
JANET TRONE	(PET)...SCOTT A HANCOCK
JANET WALKER	(PET)...SCOTT A HANCOCK
JANIS CLINE MCCURLEY	(PET)...SCOTT A HANCOCK
JEANETTE L NEIDERHISER	(PET)...SCOTT A HANCOCK
JOHN STEVEN MOSLEY JR	(PET)...SCOTT A HANCOCK
JONELLE REXENES	(PET)...SCOTT A HANCOCK

JOYCE KAY HUGHES	(PET)...SCOTT A HANCOCK
JUDITH K OGLE	(PET)...SCOTT A HANCOCK
JUDY MCCLEARY	(PET)...SCOTT A HANCOCK
LADONNA ANN WILCOX	(PET)...SCOTT A HANCOCK
LEONARD J EBREY	(PET)...SCOTT A HANCOCK
LESLIE ANN LINDSLEY	(PET)...SCOTT A HANCOCK
LESLIE DAWN PEVEY	(SCOTT A HANCOCK
LYNN D PEVEY	(SCOTT A HANCOCK
LINDSAY BOSTON	(PET)...SCOTT A HANCOCK
LLOYD J MOSLEY	(PET)...SCOTT A HANCOCK
LORI P DEVAUGHN	(SCOTT A HANCOCK
LORRI L GLOSSOP	(PET)...SCOTT A HANCOCK
MARILYN J TRUITT	(PET)...SCOTT A HANCOCK
MARY LAUGHARY	(PET)...SCOTT A HANCOCK
MELISSA K FARLEY	(TP)...SCOTT A HANCOCK
MELISSA RAMSAY	(PET)...SCOTT A HANCOCK
MISTY APRIL CRONAN	(PET)...SCOTT A HANCOCK
NORMA JEAN DEORNELLAS	(SCOTT A HANCOCK
NORMAN T WALKER	(PET)...SCOTT A HANCOCK
PAMELA SUE KILMER	(PET)...SCOTT A HANCOCK
PATRICIA MAE SWAIN	(DEC)...
PEGGY A LANE	(PET)...SCOTT A HANCOCK
PEGGY L LARSON	(PET)...SCOTT A HANCOCK
POLLY SAMPSON	(PET)...SCOTT A HANCOCK
RICHARD W SMITH	(PET)...SCOTT A HANCOCK
RACHEL A MOSLEY	(PET)...SCOTT A HANCOCK
RAHN HEART	(PET)...SCOTT A HANCOCK
REBECCA L HOWELL	(PET)...SCOTT A HANCOCK
RHONDA ROYER	(SCOTT A HANCOCK
RICHARD L EBREY	(PET)...SCOTT A HANCOCK
RICHARD L PEVEY	(PET)...SCOTT A HANCOCK
RUBEN J ROYER	(PET)...SCOTT A HANCOCK
SAMANTHA MCBRIDE	(PET)...SCOTT A HANCOCK
SANDRA K FORD	(PET)...SCOTT A HANCOCK
SANDRA S DAVID	(PET)...SCOTT A HANCOCK
SCOTT LEE MOSLEY	(PET)...SCOTT A HANCOCK
SCOTT ROYER	(SCOTT A HANCOCK
SHARON M MIDDENDORF	(PET)...SCOTT A HANCOCK
SONYA L ROWE	(PET)...SCOTT A HANCOCK
TERESA L ADMIRE	(PET)...SCOTT A HANCOCK
THE SAN BERNARDINO COUNTY PUBL	(PET)...CRAIG M PARKER
THOMAS L WALKER	(PET)...SCOTT A HANCOCK
TONYA L CROSIER	(PET)...SCOTT A HANCOCK
TWYLA LOUISE PITTMAN	(SCOTT A HANCOCK
VELMA M MOSLEY	(PET)...SCOTT A HANCOCK
WILLIAM E CLINE jr	(PET)...SCOTT A HANCOCK

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.

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Public Administrator ["Petitioner"].

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

1. Accounting period 11/16/16 to 04/06/18.
2. Assets on Hand \$143,921.19 in cash.
3. Petitioner alleges the estate is not in a condition to be closed as an additional at Wells Fargo Bank has been possibly located and a claim with the State of California, Unclaimed Property Division has been filed to collect property held by the State of California.
4. Petitioner requests an additional 12 months to close the estate.
5. ~Proposed Order 04/16/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **06/11/19**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500816

CASE NAME: MARTHA MARY BARBEE

HEARING:

First and Final Account and Report of PUBLIC ADMINISTRATOR and
Petition for allowance of fees filed.

COUNSEL:

LYDIA WINZ-BYONE	(OBJ)...PRO/PER
MARTHA JO WILKINS-PADILLA	(PET)...PRO/PER
MARTHA MARY BARBEE	(DEC)...
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by MARTHA JO WILKINS-PADILLA is GRANTED
Fee waiver amount due \$465.00 for petition for letters of administration on 08/31/15

Request for Waiver of Court Fees and Costs filed by LYDIA WINZ-BYONE is GRANTED
Fee waiver amount due \$435.00 for objection to petition for probate on 12/01/15

PA fees waived for the amount of \$1169.50
\$25.50 for cert copy of the letters on 02/05/16
\$525.00 for ex-parte ptn for temp. restraining order on 04/18/16
\$52.00 for 2 cert copies of the order on 04/19/16
\$102.00 for certified copies on 05/31/16
\$465.00 for first and final on 11/14/17

GENERAL INFORMATION:

Continued from 03/06/18.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator w/WA, Public Administrator ["Petitioner"].

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

1. Accounting period 06/02/15 to 10/27/17.
2. Assets on Hand \$32,222.25 consisting of cash.
3. Statutory fees of \$3,828.30 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in
connection with the sale of real property. Billed at \$60/hour for a total of 8
hours' time. Generally described [LF, p. 27]. **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.**

5. Attorney requests extraordinary fees of \$2,922.50 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 8.35 hours' attorney time. Itemized [LF, p. 29]. **JTD.**
6. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. **JTD.**
7. Fees previously waived. Does Court wish to reconsider waiver of fees? **JTD.**
8. ~Proposed Order 02/22/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700118

CASE NAME: DANIEL NAGY

HEARING:

first and final Account and Report of PUBLIC ADMINISTRATOR and
Petition for allowance of fees filed.

COUNSEL:

DANIEL NAGY (DEC)...
PUBLIC ADMINISTRATOR (PET)...CRAIG PARKER

X-REF: CONPS 1200205

GENERAL INFORMATION:

Continued from 03/06/18.

THIS CASE IS SET FOR HEARING ON Amended (11/14/17) First and Final Account and Petition for Fees by Administrator, Public Administrator ["Petitioner"].

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

1. Accounting period 03/04/15 to 09/20/17.
2. Assets on Hand \$264,431.52 consisting of \$264,001.79 in cash and remaining in personal property.
3. Statutory fees of \$8,299.99 requested. Calculated.
4. Petitioner requests authority to withhold the sum of \$6,000 as a reserve. **JTD.**
5. Fees previously waived. Does Court wish to reconsider waiver of fees? **JTD.**
6. ~Proposed Order 11/14/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1800412

CASE NAME: PHILLIP L MC NORTON

HEARING:

Petition for letters of administration w/full

COUNSEL:

PUBLIC (PET)...CRAIG M PARKER
PHILLIP L MCNORTON (DEC)...

GENERAL INFORMATION:

Letters of Special Administration issued to PA on 05/08/18, with special powers, no bond.

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

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

1. No bond – exempt government agency. Estimated estate valued at \$226,000.
2. Duties form is not dated at signature line. **Need** same.
3. Proof of publication filed.
4. Attachment 8 to petition [LF, p. 8] refers to “decedent’s son.” However, there is no son listed at Section 8 of petition. **Need** verified supplement.
5. Proof of service affixed to notice filed on 05/02/18 is not dated at Section 4a and at signature line; and does not include Attorney Hartnell or Melissa Walker. **Need** proper service.
6. ~Proposed Form Order/Letters 04/30/18.

RECOMMENDATION:

Need to clear notes 2, 4-5, no bond. If approved, set future hearing for Accounting Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600995

CASE NAME: MTR OF TAMARA KAY HANSON

HEARING:

Accounting Review by ***

COUNSEL:

CRAIG A HANSON

(PET)...BUXBAUM & CHAKMAK

TAMARA KAY HANSON

(DEC)...

GENERAL INFORMATION:

Continued from 04/17/18 on courts motion. No appearances nor has the accounting been filed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Craig A. Hanson appointed on 02/07/17, full authority, \$100,000 bond. Letters of Administration issued 02/08/17.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601105

CASE NAME: MTR OF DAVID IRVINE HAMILTON

HEARING:

Accounting Review by ***

COUNSEL:

BIRDIE MERDENA HAMILTON (PET)...FARHAT & ASSOCIATES
DAVID IRVINE HAMILTON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Birdie Merdena Hamilton

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

1. Letters of Administration issued on 03/28/17, full authority, no bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601114

CASE NAME: MTR OF FRED ABILA

HEARING:

Probate status report filed.

COUNSEL:

FRED ABILA

(DEC)...

MICHAEL ABILA

(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Michael Abila ["Petitioner"].

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

1. Letters of Administration, full authority, \$170,000 bond, issued 01/26/17.
2. Purported status report does not comply with Pr. C. §12201. **Need** same.
3. Petitioner does not specify a time he wishes estate to remain open. **Need** same.
4. **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.**
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require proper status report and notice.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601246

CASE NAME: Joyce Ann Shaw

HEARING:

Ptn for First and Final Account and Report of RONNIE FEEMSTER
and Petition for allowance of fees filed.

COUNSEL:

JOYCE ANN SHAW (DEC)...
RONNIE FEEMSTER (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Ronnie Feemster ["Petitioner"-son].

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

1. Heirs waive accounting.
2. Accounting period 05/06/15 to 04/20/18.
3. Assets on Hand \$8,363.43 in cash.
4. Petitioner waives statutory compensation.
5. Petitioner requests reimbursement of costs advanced of \$1,837.23. Itemized [LF, p. 13]. Includes Misc. adjustment of -2.77.
6. Prayer includes statutory compensation that was waived and a different amount for reimbursement. **Need** corrected prayer.
7. Disbursements – Schedule D includes payment for a claim made by Petitioner in the amount of \$6,636.85 that was denied by Court on 04/17/18. Does Court wish to surcharge Petitioner? **JTD**.
8. **Need** Notice of Hearing with proof of service to include outstanding creditors.
9. Proposed Form Order 04/25/18 refers to an escrow closing statement and property being sold; indicates petitioner is the sole heir; does not include reimbursement of \$1,837.23; or omnibus clause.

RECOMMENDATION

Need to clear notes 6 & 8 then Court's discretion re: note 7. If approved, set next hearing for receipts and final discharge for **06/11/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800086

CASE NAME: Helen Goritz

HEARING:

Hearing Re: DISMISSAL OF PTN FOR PROBATE

COUNSEL:

HELEN GORITZ (DEC)...
SPIRO GORITZ (PET)...PRO/PER

GENERAL INFORMATION:

Continued from **03/06/18** to clear notes. Court suggests that petitioner seek legal assistance, as the petition has significant amounts of omissions.

Set at 04/17/18 hearing due to non-appearance by petitioner. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **Dismissal** on Petition for Letters Testamentary with full authority under IAEA by son, Spiro Goritz ["Petitioner"].

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

1. Court address at caption is incorrect.
2. Section 3d to petition re character and estimated value of the property lists home at section 1-personal property and does not include total at section 3d(7).
3. Section 3e(1) to petition indicates will waives bond. However, will does not address bond.
4. Section 3f(3) to petition indicates the original will is lost. However, a receipt for lodging of the original will is filed.
5. Section 5b to petition is blank.
6. Section 7 to petition is marked and should be blank as issue survived decedent.
7. Will is not self-proving. **Need** Proof of Subscribing Witness.
8. Beneficiaries waive bond on estimated estate valued at \$200,000. However, **Need** Mandatory Waivers of Bond by Heir, form DE-142/DE-111, Spiro Goritz.
9. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
10. **Need** proof of publication.
11. **Need** Notice of Petition to Administer Estate with proof of service.
12. ~Proposed Form Order/Letters 01/29/18

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 amended petition to be set on first check calendar no sooner than **07/24/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800226

CASE NAME: MTR OF MARIANO VASQUEZ RIOS
HEARING:
Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

GARTH RIOS (PET)...PRO/PER
MARIANO VASQUEZ RIOS (DEC)...

GENERAL INFORMATION:

Continued from 04/10/18 on courts motion to clear notes.

THIS CASE IS SET FOR HEARING ON Petition of Lost Will and for Letters of Administration W/WA and full authority under IAEA by son, Garth Rios ["Petitioner"].

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

1. Decedent was survived by spouse, Josie Rios.
2. **Need** a copy of the purported Will and state reasons why the presumption in Pr. C. §6124 does not apply via verified supplement.
3. Sections 2d and 3e to petition re: bond is incomplete. **Need** verified supplement.
4. Character and estimated value of the property of the estate reflected as "TBD." Does Court wish to require minimum bond of \$20,000 until such time as an estimated value can be determined? The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
5. Section 9d is incomplete as to why other named executors will not act. **Need** verified supplement.
6. **Need** proof of publication.
7. **Need** Notice of Petition to Administer Estate with proof of service.
8. ~Proposed Form Order/Letters 03/08/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set next hearing for Accounting Review on **08/13/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800276

CASE NAME: MTR OF CARMEN RODRIGUEZ VERGARA

HEARING:

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

COUNSEL:

CARMEN RODRIGUEZ VERGARA

(DEC)...

MARIA VERGARA SALE

(PET)...NORIEL L FLORES

GENERAL INFORMATION:

Continued from 05/01/18 to clear notes.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Maria Vergara Sale, sister.

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

1. Section 3 appears incomplete as to asset calculation, however, appears to be \$180,719.
2. All heirs waive bond. Estimated estate valued at \$181,000.
3. Court to clarify and whether petitioner is permanent US resident.
4. Proofs of publication filed on 04/25/18 and 05/07/18 do not include case number. **Need** proper publication.
5. ~Proposed Form Order 03/23/18.

RECOMMENDATION:

Need to clear note 4, Court's discretion re bond. If approved, set future hearing for Accounting Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800394

CASE NAME: Fred Edward Baumgartner

HEARING:

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

COUNSEL:

FRED EDWARD BAUMGARTNER (DEC)...
KARL BAUMGATNER (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petition alleges all heirs waive bond. However, **need** Mandatory Waivers of Bond by Heir, Kurt E. Naumgrtner, form DE-142/DE-111. Estimated estate valued at \$10,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
2. **Need** proof of publication.
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. ~Proposed Form Order/Letters 04/25/18.

RECOMMENDATION:

Need to clear notes 1-3 then Court's discretion. If approved, set future hearing for Accounting Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800405

CASE NAME: MTR OF JUANITA BELTRAN

HEARING:

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

COUNSEL:

DIANA ELICERIO (PET)...JOHN R RAMOS
JUANITA BELTRAN (DEC)...

GENERAL INFORMATION:

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

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

1. Petitioner seeks limited powers, thus reducing requirement for bond. Petitioner requests bond of \$10,000 based on estimated estate value of \$120,000 consisting of real property. Does court wish to require maximum bond of \$120,000 or minimum bond of \$20,000? **JTD**.
2. **Need** proof of publication.
3. ~Proposed Form Order 04/26/18

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800406

CASE NAME: MTR OF BOYCE JEQRL NEWTON SR

HEARING:

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

COUNSEL:

BOYCE JEARL NEWTON SR (DEC)...
EDITH INGE HARRIS (PET)...AMY YORK GARRETT

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA by named executrix, Edith Inge Harris ["Petitioner"-daughter].

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

1. Will is not self-proving. Proof of Subscribing Witness filed.
2. Petition alleges all heirs waive bond. However, **need** Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111, by Ronald T. Newton. Estimated estate valued at \$383,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b). **JTD.**
3. Notice of Petition to Administer Estate filed 05/25/18 reflects incorrect hearing date. **Need** proper notice.
4. ~Proposed Form Orders/Letters 04/26/18.

RECOMMENDATION:

Need to clear note 3 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 12

HEARING:

Petition for LETTERS OF SUCCESSOR ADMINISTRATION

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION

Continued from 04/26/17, 07/25/17, 09/19/17, 12/19/17, 02/20/18 and 04/24/18.

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administration with full authority under IAEA by Sandra Thomas Stell, great niece.

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

1. Letters of Administration with Will Annexed issued to Verna Grasso, paternal grandniece on 8/23/02, with funds held in blocked account in lieu of bond. Verna passed away on **12/29/16**.
2. As the will has already been admitted to probate, it appears to be a petition for successor administrator.
3. Petitioner requests bond of \$20,000; however, cash and real property appear to be valued at \$42,020. Court to require bond of \$42,020.
4. Notice to Petition to Administer Estate and proof of service filed 04/05/17. However, need Due Diligence Declarations as to heirs with unknown whereabouts.
5. Notice of Death of Administrator filed 04/05/17; need proof of service.
6. Proof of Publication filed 04/17/17 is not verified. Need amended Proof of Publication.
7. ~Proposed Form Order: 03/07/17.

RECOMMENDATION

Need to clear notes 4-6 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/15/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 11

HEARING:

SIXTH Account and Report of VERNA GRASSO and Petition for allowance of fees filed.

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION:

Administrator Verna Grasso died on 12/29/16.

Continued from 07/25/17, 09/19/17, 12/19/17, 02/20/18 and 04/24/18.

THIS CASE IS SET FOR HEARING ON Sixth and Final Account and Petition for Fees by Attorneys for Petitioner C.L. Farrell and as former Attorneys for the late Verna Grasso, Deceased Administrator.

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

1. Accounting period 10/12/15 to 02/28/17.
2. Assets on Hand \$45,260.36 consisting of \$40,255.40 in cash and remaining in a ½ interest in unimproved real property.
3. Compensation is not requested.
4. Reimbursement for costs is not requested.
5. Petitioner requests an Order Authorizing the Estate to Abandon its Undivided one-half tenancy in common interest in the unimproved, vacant lot located in Newberry Springs, CA, having a 01/26/16 reappraised value of \$2,000 due to its demonstrated unmarketability, to conserve the Estate cash assets and enable the Estate assets to be distributed to its heirs at law and for the Estate to be brought to a close. Consents are not affixed as alleged. **Need same by all Nolen Estate Heirs.**
6. **Need** Notice of Hearing with proof of service.

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

7. Petitioner requests Attorney Farrell be authorized and directed to issue Final Distribution checks to the Nolen Heirs from the unblocked Community Bank Nolen Heirs Checking Account.
8. Petitioner requests an order authorizing and directing her to retain the sum of \$5,000 in the Community Bank Nolen Heirs Checking Account for closing costs.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 5-6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200235

CASE NAME: CARMEN REVECA NIETO

HEARING:

FIRST AND FINAL Account and Report of ARTURO NIETO, CARMEN NIETO
and Petition for allowance of fees filed.

COUNSEL:

CARMEN NIETO	(CPE)...WILLIAM J BRUNICK
CARMEN REVECA NIETO	(CEP)...JACK B OSBORN
CARMEN REVECA NIETO	(CEP)...PRO/PER
JACK B OSBORNE	(PET)...BROWN WHITE & OSBORN

PROPS 1800124 Carmen Reveca Nieto

XREF: SGSS01626 (Carmen Reveca Nieto)

GENERAL INFORMATION:

Conservatee died on 11/23/17.

THIS CASE IS SET FOR HEARING ON Fifth and Final Account and Petition for Fees
by Co-Conservators of the Person and Estate, Arturo Nieto and Carmen Nieto
[“Petitioners”].

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

1. Accounting period 06/13/17 to 12/12/17 (pre & post death). Does Court wish to bring account current? JTD.
2. Assets on Hand \$4,180,896.42 consisting of \$2,167,152.03 in cash and \$2,013,744.39 in real and personal property.
3. Current bond of \$600,000. Appears sufficient.
4. Per Court Order dated 11/03/15, petitioners were authorized to continue payments of \$5,000/month. This amount was paid during the current account.
5. Attorney requests fees of \$2,041.25. Billed at \$295/hour for 3 hours’ attorney time and \$125/hour for 9.25 hours’ paralegal time. Itemized [LF, p. 9]. JTD.
6. Attorney requests reimbursement of costs advanced of \$465.00. Itemized.
7. Disbursements – Schedule C includes DMV license renewal. **Need** further clarification 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. Bond does not get exonerated and discharge does not occur until entry of a final discharge order.
9. Proposed Order 04/26/18 exonerates bond and discharges upon filing of receipts and final discharge order instead of upon entry of a final discharge order.

RECOMMENDATION:

Need to clear note 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 15

HEARING:

Petition for ATTORNEY FEES BY COURT APPOINTED COUNSEL

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO	(CEE)...JAMES B CHURCH
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION:

Continued from **10/31/17**. Notice waived.

Continued from 03/20/18 to be heard with accounting. Notice given by Attorney David Colella.

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-appointed counsel, James B. Church ["Petitioner"].

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

1. Petitioner was appointed on 03/06/15. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$43,113.75. Billed at \$375/hour for 105.9 hours' attorney time and \$75-150/hour for 24.75 hours' paralegal time. Itemized [LF, pgs. 9-18]. JTD.
3. Attorney requests reimbursement of costs advanced of \$24.00. Itemized.
4. Petitioner requests and order authorizing and directing Conservator of the Estate, Lucio Coronado III, to pay for services rendered.
5. Petitioner requests to be relieved as counsel for the conservatee, herein.
6. ~Proposed Order 09/18/17.

RECOMMENDATION:

Court's discretion.

(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: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 14

HEARING:

Accounting Review by ***

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO	(CEE)...JAMES B CHURCH
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION:

Continued from 03/20/18 for an accounting to be filed.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Lucio Coronado, III.

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

1. Order Settling First Account entered 09/06/17; second account now due.
2. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600166

CASE NAME: RODRIGO R ROMERO

HEARING:

FIRST AND FINAL Account and Report of ALEJANDRO QUIROGA and
Petition for allowance of fees filed.

COUNSEL:

ALEJANDRO QUIROGA (CP)...FELIX M MARTIN
RODRIGO R ROMERO (CEE)...SANDY L. TURNER

Request for Waiver of Court Fees and Costs filed by RODRIGO R ROMERO is GRANTED
Fee waiver amount due \$465.00 for petition for conservatorship on 06/20/16

Request for Waiver of Court Fees and Costs filed by ALEJANDRO QUIROGA is GRANTED
Fee waiver amount due \$465.00 for petition for first and final on 06/06/17

GENERAL INFORMATION:

Conservatee passed away on 04/01/17.

Continued from **07/25/17 and 10/03/17** (no appearances). The Court orders the
petitioner or his counsel of record to appear. Notice to be given by Ms. Turner. Notice
by Judicial Assistant.

Continued from **11/21/17** to be heard with other pending hearing.

**Continued from 11/28/17, 02/06/18 and 04/10/18 at request of counsel to file
amended accounting. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Temporary Conservator of the Person, Alejandro Quiroga ["Petitioner"].

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

1. General order/letters to include estate powers granted on 03/01/17 have not
issued.
2. Court to review report by court-appointed counsel, Sandy Turner, filed on
06/19/17.
3. Court to review sticky note at LF, p. 6.
4. Final Inventory and Appraisal does not include real property or personal
property referred to in petition. Need amended inventory.
5. Accounting period 12/21/16 to 05/31/17 (pre & post death periods).

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. Assets on hand \$0.00. Question the status of conservatee's home/real property? Need verified supplement.
7. No fees or reimbursement for costs are requested.
8. Petitioner requests bond of \$73,700 be exonerated. However, bond is not exonerated until entry of final discharge order.
9. Proposed Order 06/06/17 refers to Temporary Conservator and exonerates bond.

RECOMMENDATION:

Need to clear notes. Need amended accounting to be set on first check calendar no sooner than **07/31/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

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

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600266

CASE NAME: BETTY JANE WOODSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALICE L WINCHESTER

COUNSEL:

ALICE L WINCHESTER (PET)...HARTNELL LAW GROUP
BETTY JANE WOODSON (DEC)...MARK J. FLORY

GENERAL INFORMATION

Order appointing Alice L. Winchester Temporary Conservator of the Estate entered 09/15/16, \$33,000 bond. Order appointing Alice L. Winchester Conservator of the Estate entered 05/23/17, \$40,150 bond.

Continued from **12/26/17**. Counsel represents the conservatee passed away in July and a Notice of Death will be filed. Court orders Mark J. Flory relieved as court-appointed counsel. The Court orders the Accounting Hearing will be on 02/06/18 if counsel files the accounting by noon on 12/29/17. If the accounting is not filed by the deadline, the Clerk's office is to provide a different accounting date for counsel. No accounting filed.

Continued from 02/06/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 **Need** general letters.
- 2 **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
- 3 **Need** final Inventory & Appraisal per Pr.C.§2610.
- 4 **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 5 **Need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

07/31/18 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.**

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

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800125

CASE NAME: Joseph Anthony Cabrera

HEARING:
Petition for Appointment of Conservator

COUNSEL:

ANNA M CABRERA (CP)...ELIZABETH C MCCOY
JAMES H.R. CABRERA (CP)...ELIZABETH C MCCOY
JOSEPH ANTHONY CABRERA (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Anna M. Cabrera and brother, James H.R. Cabrera ["Petitioners"].

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

1. No bond – person only.
2. Section 1 to petition does not specify the type of orders sought. **Need** verified supplement.
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
4. **Need** Medical Capacity Declaration.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
6. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
7. **Need** Notification or Court Address form.
8. **Need** Order Appointing Court Investigator form.
9. Citation returned served.
10. Court Investigator Report filed.

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

11. **Need** Inland Regional Center Report.
12. **Need** Certificates of Completion re Conservatorship Class.
13. No Proposed Form Order/Letters

RECOMMENDATION:

Court to appoint counsel then need to clear notes 2-4 & 7-8, 11-12. If approved, set hearing for Compliance Review for **01/08/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); 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: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS01984

CASE NAME: MTR OF ROBERTA L. GLASS

SEE ALSO 20, 21

HEARING:

Hearing Re: Possible Appointment of the PG (person only)

COUNSEL:

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

GENERAL INFORMATION

Mary Glass, sister, was appointed temporary Conservator of the estate on 04/18/18, no bond.

Mary Nieves, non-relative was appointed successor conservator of the person only on 01/09/14.

It appears that the Court previously terminated conservatorship of estate Nunc Pro Tunc to 10/24/13 and discharged conservator Lawrence Dean, II.

Continued from **04/23/18**. Matter is continued for the Public Guardian to complete their investigation and report.

Continued from 05/21/18.

THIS CASE SET FOR HEARING ON Possible Appointment of the PG (person only)

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

1. Matter set on 04/17/18 for possible appointment of Public Guardian as successor conservator of the person.
2. Court orders Public Guardian to be present, Roberta Glass and Mary Nieves.

RECOMMENDATION:

Court's discretion.

(cs/ww/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: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS01984

CASE NAME: MTR OF ROBERTA L. GLASS

SEE ALSO 19, 21

HEARING:

Petition for appointment of successor conservator of the estate

COUNSEL:

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

GENERAL INFORMATION

Mary Glass, sister, was appointed temporary Conservator of the estate on 04/18/18, no bond.

Mary Nieves, non-relative was appointed successor conservator of the person only on 01/09/14.

It appears that the Court previously terminated conservatorship of estate Nunc Pro Tunc to 10/24/13 and discharges conservator Lawrence Dean, II.

Continued from 05/21/18. Court appoints Attorney Melvin Friedland as Guardian ad Litem. Public Guardian to be present at next hearing.

THIS CASE SET FOR HEARING ON

Petition #1 Petition for Appointment of **Successor** Conservator, of the estate only, by **sister, Mary Glass**, [Petitioner]

Petitioner #2 Petition for Appointment of **Successor** Conservator, of the person & estate , by **sister, Roberta Glass** for Christopher Nieves, friend

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

Petitioner #1, Mary Glass, sister

1. Conservatorship of the estate was terminated on 04/04/16.
2. Petitioner requests bond be determined. Conservatee owns partial interest in real property located in Redlands; however, the property is in disrepair and value is unknown. **JTD**
3. Petitioner seeks estate powers under Pr.C. §2590 to sell the real property conservatee owns partial interest in.
4. Petitioner is not dated by Attorney Daniel. **JTD**
5. Section 5(c)(2) re reason the proposed conservatee requires conservator is incomplete. **Need** verified supplement.
6. **Need** Confidential Supplemental Information.
7. **Need** return of Citation.
8. **Need** Certificate of Completion of the Conservatorship Training Class.
9. **Need** Notice of Hearing and proof of service.
10. **Need** Court Investigator report.
11. ~Proposed Form Order: 04/09/18.

Petitioner #2 Roberta Glass, proposed conservatee, for Christopher Nieves, friend

12. Petitioner requests that no bond be required as the only asset is an interest in real property that is currently in litigation. [LF pg. 10] **JTD**
13. Petitioner seeks medical powers under Pr.C. § 2355.
 - a. **Need** Capacity Declaration.
 - b. **Need** report by court-appointed counsel, Melvin Friedland..
14. Petition is marked as to estate also; however, 2590 powers are not being requested. Court to inquire. **JTD**
15. Petition indicates that Mary Glass will resign upon appointment of successor. [LF pg. 5]
 - a. Resignation by Mary Nieves is attached. [LF pg. 13]
 - b. Consent to serve by Christopher Nieves is attached. [LF pg. 15]
16. Petitioner indicates in section 5d that she voluntarily requests the appointment. Attachment 5d is not attached, however, Nomination of Christopher Nieves appears to explain her request. [LF pgs. 11-12] **JTD**
17. **Need** Certificate of Completion of the Conservatorship Training Class.
18. Confidential Conservator Screening form by Christopher filed 04/23/18; however, attachment 8 is missing. **Need** completed form.
19. Notice given.
20. **Need** Court Investigator report.
21. ~Proposed order: 04/23/18

RECOMMENDATION

Need CI reports for both petitioners and to clear notes 5-9, 13, 17 – 18 & 20. Court's discretion re bond. If approved, set hearing for Compliance Review for **01/07/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory

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.**

and Appraisal; Proof of service of Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **08/12/19**. Any accounting to be filed 30 days in advance.

(cs/ww/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
Page: 21 ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 06/05/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS01984

CASE NAME: MTR OF ROBERTA L. GLASS

SEE ALSO 19, 20

HEARING:

Petition for appointment of successor conservator of the person and estate

COUNSEL:

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

See matter #20.

(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: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0801097

CASE NAME: MINERVA DE GUZMAN GESTUVO

HEARING:

THIRD, FINAL Account and Report of MARGARET S. MAR and Petition for allowance of fees filed.

COUNSEL:

FRED D SOLDWEDEL	(TP)...
IKE MIGUEL GESTUVO	(DEXTER ROSARIO
MARGARET S MAR	(PET)...FRED D SOLDWEDEL
MARIA KRISTINA P. GESTUVO	(PET)...CHRISTOPHER A BURY
MINERVA DE GUZMAN GESTUVO	(DEC)...
NORIEL L FLORES	(PET)...NORIEL L FLORES

GENERAL INFORMATION

Continued from **01/03/18**. Ms. Nejal present in court to waive her creditor's claim and consents to fees as requested. Mr. Soldwedel gives an oral report regarding extraordinary fees. The Court requests verified supplement justifying extraordinary fee requests.

Continued from 03/20/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Third and Final Account and Report of Successor Administrator, Margaret S. Mar, Administrator.

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

1. Accounting period 01/07/15 to 08/17/17
2. Assets on hand **\$70,970.06, cash**
3. Current bond of \$92,400
4. Petitioner Margaret Mar requests **\$9,019.71** for statutory compensation. Calculated.
5. Petitioner Margaret Mar requests **\$9,019.71** for statutory attorney compensation, and proposes \$3,000 be paid to Noriel L. Flores (former attorney for former administrator Maria Gestuvo), and remaining \$6,019.71 to be paid to attorney Fred D. Soldwedel (attorney for administrator Margaret Mar). **Consent by Ms. Flores filed 03/20/18. 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. Margaret Mar, petitioner/administrator, requests extraordinary fees totaling **\$8,000** for sale of real property and settlement of tax debts. **Billed at \$60.84/hour for 131.5 hours of service. Itemized [see. supp filed 03/20/18, LF, pgs. 5-24]. Consent by Corazon Nejal filed 12/27/17. JTD.**
7. Attorney Fred D. Soldwedel seeks extraordinary fees totaling **\$44,930. Billed at \$87.11/hour for 515.8 attorney hours.** On 04/20/09, Corazon S. Nejal, purchaser of real property, paid Fred Soldwedel a retained fee of \$25,000 as a retainer for removing prior administrator Maria Gestuvo. Attorney Soldwedel assisted petitioner Margaret Mar from becoming personally liable for decedent's tax debts; prepared tax returns for 2001 to 2006, and assisted petitioner in paying resulting assessments. He prepared a Request for Discharge from Personal Liability with the Internal Revenue Service. He assisted petitioner in competitively selling decedent's one-half interest in real property, and prepared a creditor's claim for Corazon Nejal. **Itemized [see supp. filed 03/20/18, LF, pgs. 25-75]. Consent by Corazon Nejal filed 12/27/17. JTD.**
8. Proposed Order 04/27/18; caption reflects "Fourth Account Final."

RECOMMENDATION:

Court's discretion. Court to set hearing re receipts/final discharge for **06/12/19.**

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500028

CASE NAME: ANGELA GAIL MATTHEWS

HEARING:

Report of admin & pet for settlement & waiver of Account and
Report of CHRISTOPHER K MATTHEWS and Petition for allowance of
fees filed.

COUNSEL:

ANGELA GAIL MATTHEWS (DEC)...
CHRISTOPHER K MATTHEWS (PET)...JOHN M WOODBURN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator Christopher K. Matthews ["Petitioner"].

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

1. Heirs waive accounting.
2. Final Inventory filed 10/29/15 reflects \$1.00. Does Court wish to require supplemental/corrected final inventory & appraisal? **JTD**.
3. Assets on Hand \$136,788.75 consisting of cash.
4. Petitioner waives statutory compensation.
5. Attorney Woodburn requests statutory fees of \$5,103.66. Calculated.
6. Petitioner's Attorney, William M. Paparian has agreed to pay Attorney John M. Woodburn the statutory fees out his 25% contingency fee as set forth in Attachment 14a of the Petition to Approve Compromise of Disputed Claim on lines 25-26, thereof.
7. **Need** Notice of Hearing with proof of service to include GAL, Walter Moore.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear note 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for 06/11/19.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500757

CASE NAME: ROBERT CHARLES LAMAR

HEARING:

Accounting Review by ***

COUNSEL:

MARJORIE LAMAR (PET)... SCOTT S STREED
ROBERT CHARLES LAMAR (DEC)...

GENERAL INFORMATION

Continued from **11/30/16** and **03/29/17**. Waiting for Inventory and Appraisal to come back from referee.

Continued from **06/07/17**, **09/20/17**, **11/29/17**, **01/03/18** and **03/20/18** at request of **Counsel**.

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 Marjorie Lamar, daughter, on 12/09/15; full authority \$95,000 bond.
2. Final Inventory and Appraisal filed 11/27/17.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear note 3. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. *Clerk may notice bond company*

(lc/ww/lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500909

CASE NAME: MTR OF JAMES CHEATHAM

SEE ALSO 5

HEARING:

Hearing Re: ACCOUNTING REVIEW (PUBLIC ADMINISTRATOR)

COUNSEL:

JAMES CHEATHAM

(DEC)...

MICHAEL BRAGG

(PET)...PRO/PER

X-REF: GARSS 1500408 (Antonio Denai Crump)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Public Administrator.

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

1. Letters appointing Public Administrator as Successor Administrator, full authority, no bond, issued 11/28/16. Amended Letters issued 04/20/17.
2. No account or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500909

CASE NAME: MTR OF JAMES CHEATHAM

SEE ALSO 4

HEARING:

First & Final Account and Report of MICHAEL BRAGG and Petition
for allowance of fees filed.

COUNSEL:

JAMES CHEATHAM (DEC)...
MICHAEL BRAGG (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MICHAEL BRAGG is GRANTED
Fee waiver amount due \$1020.00
\$465.00 for petition for letters of administration on 09/28/15
\$90.00 for ex parte petition on 12/20/16
\$465.00 for first and final on 01/22/17

XREF: GARSS1500408 (Antonio Denai Crump)

GENERAL INFORMATION:

Letters appointing Public Administrator as Successor Administrator, full authority, no
bond, issued 11/28/16.

**Continued from 02/27/18 on Courts motion. The Court advises petitioner
accounting needs to be from the date of death to when the Public Administrator
was appointed. Petitioner reports his father was administrator until his death
and he has no information prior to his father's death. Declaration regarding the
passage of Administrator and the lack of information prior to fathers passing to
be filed.**

THIS CASE IS SET FOR HEARING ON First and Final Account by former
Administrator, Michael Bragg ["Petitioner"].

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

1. Letters of Administration issued on 11/16/15, full authority, no bond.
2. No final inventory and account. **Need** same.
3. Accounting period 08/01/15 to 07/01/17. **Incorrect.**
4. Assets on Hand \$212,000.

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

5. No compensation or reimbursements requested.
6. Receipts consisting of rental income end on 08/2016 and mortgage payments end 06/2016. **Need** further clarification via verified supplement.
7. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
8. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
9. **Need** Notice of Hearing with proof of service.
10. **Need** declaration as directed by Court on 02/27/18.
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060 et seq. Need amended accounting to be set on first check calendar no sooner than **07/31/18**.

(nb)

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500953

CASE NAME: ROBERT T CHAMP JR

HEARING:

First & Final Account and Report of ROBERT T CHAMP III and
Petition for allowance of fees filed.

COUNSEL:

BRADEN WILLIAM JOHNSON	(MIN)...
JORDYN LEE CHAMP	(MIN)...
KAYLEE ANN CHAMP	(MIN)...
ROBERT T CHAMP III	(PET)...J. BENJAMIN SELTERS III
ROBERT T CHAMP JR	(TRU)...

XREF: PROPS1601163 (Robert T Champ, Jr.)

GENERAL INFORMATION:

Continued from 03/20/18 on Courts motion to clear notes.

THIS CASE IS SET FOR HEARING ON First and Final Account; Surcharge of Beneficiary; and Petition for Fees by Successor Trustee, Robert T. Champ III ["Petitioner"-son]. Pr. C. §17200 (b).

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

1. Accounting period 07/28/15 to 09/15/17.
2. Assets on Hand \$728,461.36 consisting of \$557,126.43 in cash and remaining in real and personal property.
3. Petitioner requests compensation of \$1,302.00. Billed at \$35/hour for 37.2 hours' time. Itemized [LF, p. 80-82]. **JTD.**
4. Attorney requests fees of \$12,062.50. Billed at \$250/hour for 48.25 hours' attorney time. Itemized [LF, pgs. 83-86]. **JTD.**
5. Attorney Selters requests reimbursement of costs advanced of \$2,005.08. Itemized.
6. Starting Assets – Schedule A [LF, p.15] does not include Chase Checking Acct. XXX3798. **Need** further clarification via verified supplement.
7. Question if Chase Bank Acct. # XXX8960 has been determined to be a trust asset? **Need** verified supplement.
8. **Need** copy of bank statement to support closing balance.

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. **Need** vehicle license number(s) and description.
10. **Need** findings re: sole and separate property.
11. **Need** findings re: known creditors.
12. **Need** findings re: all taxes have been paid, or reserve made for taxes.
13. **Need** address of beneficiary receiving real property.
14. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
15. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§ 1064(a)(5).
16. **Need** statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
17. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
18. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
19. Petitioner alleges without better evidence of possible other assets, Trustee felt that collection efforts should not be pursued.
20. Petitioner alleges the responsibility for any fines for code violations should rest with Todd Champ because it is trustee's position that all the cleanup, delay and junk on the real property was caused or substantially worsened by Todd Champ.
21. Petitioner requests the distribution proposed in Order entered 06/09/16, Attachment E [LF, pgs. 65-74] be approved. **JTD**.
22. Petitioner reserves the right to assert a more involved position in response to challenges.
23. Petitioner requests the Court appoint Brenda Johnson as Trustee in this trust under the terms therein for the two trust shares of her children, Jordyn Champ and Braden Johnson, subject to her consent and bond if ordered by this court, or as their GAL, as petitioner does not consent to be trustee for his sister's children,. **JTD**.
24. Petitioner requests authority to withhold the sum of \$15,000 as a reserve. **JTD**.
25. Proposed Order 12/13/17 is not complete in itself without reference to the petition which it is based. Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 6-18 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/11/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600078

CASE NAME: JOHN HANF

HEARING:

Petition for TO DETERMINE HEIRSHIP

COUNSEL:

JOHN HANF

(DEC)...

LAWRENCE P HANF

(PET)...SNYDER & HANCOCK

PAT PERLEY

(PET)...MITCHELL I ROTH

SCOTT A HANCOCK

(SNYDER & HANCOCK

STATE OF CALIFORNIA FRANCHISE

(TP)...

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino
Page: 7A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600187

CASE NAME: MTR OF TIODOLA WILSON MADRID

HEARING:
Hearing re Final Discharge

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of Successor Executor, Cipriano M. Loera ["Petitioner"].

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

1. Order Settling First and Final Account entered 05/29/17 per ROA. Image unavailable. Clerks' Office notified.
2. Need receipts.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear note(s).

(nb)

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600739

CASE NAME: MTR OF GALILEE L GLANVILLE

HEARING:

FINAL Account and Report of CONSTANCE L KNOX and Petition for allowance of fees filed.

COUNSEL:

CONSTANCE L KNOX (PET)...PRO/PER
GALILEE L GLANVILLE (DEC)...

GENERAL INFORMATION

Continued from **01/03/18** on Court's motion. Petitioner to file a verified supplement bringing all issues filed with the court together. Petitioner is urged to speak with counsel.

Continued from 03/20/18 on Courts motion solely for notice to FTB. The Court ratifies the distributions made without Court approval in notes 5 and 6 on the probate notes from 3/20/18. The Court finds notice filed 12/27/17 is adequate and deems beneficiaries served by their appearances today.

THIS CASE IS SET FOR HEARING ON **AMENDED [02/26/18]** Petition for Final Distribution upon **Waiver of Account** and for Fees by Constance L Knox.

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

1. All beneficiaries waive accounting.
2. Petitioner waives compensation.
3. Petitioner does not request reimbursements for costs.
4. Petitioner mistakenly took the following actions without prior court approval;
 - a. Petitioner and other beneficiaries assigned their interest in the real property to sibling Gregory Glanville to allow him to secure a new mortgage in his name to pay-off the existing reverse mortgage directly. Petitioner alleges she was unaware she did not have authority for the pay-off and sale of the home to one of the beneficiaries.
 - b. Petitioner in error released the vehicle, through DMV title release, to Gregory Glanville so he could pay for insurance on the vehicle. Petitioner alleges she did not have authority to release the asset and transfer the vehicle to Gregory.

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.**

- c. Petitioner distributed the 60 shares of Disney stock evenly, amongst the 5 beneficiaries. Petitioner alleges she was unaware she did not have authority to make such transfer.

There does not appear to be harm to creditors or estate. **Ratified.**

5. Petitioner requests ratification for prior actions taken by Petitioner, to include having the Champion Reverse Mortgage paid off and title transferred to Gregory J. Glanville; transfer of vehicle to Gregory J. Glanville; and transfer of 12 shares to each of the 5 beneficiaries. **Granted.**
6. Petitioner has already distributed remaining assets to heirs without prior Court authority. Receipts filed.
7. ~Proposed Order 05/03/18

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge for **06/11/19**.

(lh/cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700188

CASE NAME: MTR OF JAMES E CURTIS

HEARING:

Waiver of Accounting Account and Report of ISREAL ADAMS KING and
Petition for allowance of fees filed.

COUNSEL:

ISREAL ADAMS KING	(PET)...WILLIAM J BRUNICK
JAMES E CURTIS	(DEC)...
SURETEC INSURANCE COMPANY	(TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Executor, Isreal Adams King ["Petitioner"].

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

1. Sole beneficiary waives accounting.
2. Accounting period 02/01/17 to 05/31/18.
3. Assets on Hand \$210,222.44 in cash.
4. Statutory fees of \$7,005.28 requested based on the on the lessor amount of
\$200,163.94 as account was waived.
5. Attorney requests reimbursement of costs of \$1,506.50. Itemized.
6. ~Proposed Order 04/20/18

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge on **06/11/19**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700879

CASE NAME: CAROL SNYDER

HEARING:

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

COUNSEL:

CAROL SNYDER (DEC)...
ELENA SNYDER (PET)...MATTHEW E SHEASBY

XREF: CONPS1500058(Carol Lane Snyder)

GENERAL INFORMATION:

Ex Parte orders granted 09/13/17.

Continued from 12/19/17 and 03/13/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by daughter, Elena Snyder ["Petitioner"].

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

1. Will does not waive bond as to this petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). Suggest bond of \$370,000. JTD.
2. Waiver of Bond filed by petitioner/primary beneficiary.
3. Declaration of Diligent Search as to Diane Emery affixed to supplement filed 05/25/18. **JTD.**
4. Proof of publication filed.
5. Proposed Form Order/Letters 09/06 & 09/13/17

RECOMMENDATION:

Court's discretion re bond and note 3. If approved, set future hearing for Accounting Review on **08/13/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701177

CASE NAME: MARIA FELIX PERRONE

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

GLORIA VALDIVIA

(PET)...MARIVEL M ZIALCITA

MARIA FELIX PERRONE

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond.

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

1. Daughter, Gloria Valdivia, appointed Administrator on 03/20/18, full authority, \$320,000 bond.
2. **Need** bond.

RECOMMENDATION:

Inquire status.

(nb)

Future hearing:

03/0519 Compliance review hearing

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701277

CASE NAME: MTR OF ERIC JONES

HEARING:

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

COUNSEL:

CASEY GORDON JONES (PET)...PRO/PER

ERIC JONES (DEC)...

GENERAL INFORMATION:

Continued from 03/20/18 on Courts motion. The Court confirms petitioner resides in Texas. The Court will be requiring a bond in the amount of \$143,000.

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

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

1. Section 2c re: bond is incomplete. Estimated estate valued at \$143,000. Petitioner is an out-of-state resident. Suggest bond of \$143,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. Section 3h(3) or (4) re: residency is incomplete. **Need** verified supplement.
3. Section 4 indicates Decedent's will does not preclude administration of this estate under IAEA. However, caption and section 3f(1) indicate Decedent died intestate.
4. Section 9 re: number of pages attached is blank. However, there are no attachments.
5. **Need** proof of publication.
6. **Need** Notice of Petition to Administer Estate with proof of service.
7. No proposed order/letters. Submit after hearing.

RECOMMENDATION:

Need to clear notes, \$143,000 bond. If approved, set future hearing for Accounting Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800097

CASE NAME: JAMES WALTER BLACKBURN

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JAMES WALTER BLACKBURN	(DEC)...
LINDA TOMKO	(PET)...JOHN F WEBER
TYLER BRANSON	(MIN)...PRO/PER
WILLIAM KRATZER	(MIN)...PRO/PER

VACATE - \$75,000 bond posted.
(nb)

Future hearing:
05/28/19 Accounting review

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

DATE: 06/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800391

CASE NAME: JIM CHO
HEARING:
Spousal Property Petition hearing.

COUNSEL:
JIM CHO (DEC)...
PRANOM CHO (PET)...JOHN F WEBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Pranom Cho ["Petitioner"].

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

1. The petitioner is the trustee of a trust [LF, p. 18] that is a devisee under decedent's pour-over will [LF, p. 18]. Petitioner requests a determination and confirmation of property passing to the surviving spouse as community property. Specifically, 4 real properties at Barstow and 1 at Newberry Springs, in San Bernardino County.
 - a. Will and Trust disinherits daughter from a previous marriage, Cindy Cho Chow, her children or any of her other issue.
 - b. Son Jimmy Cho, assigns [filed 04/25/18] all his interests in favor of petitioner.
2. Other than indicating parties were married in 1979, petitioner does not set forth facts sufficient to establish a community property interest in the California real properties. When were petitioner and decedent married? How was the property interests acquired – with community funds, etc? **Supp. (05/30/18) with copy of vesting documents [LF, pgs. 5-13] reflect properties are held in decedent's name alone, but, indicates properties were purchased during the petitioner and decedent's marriage and were purchased with community property funds.**
3. ~Proposed Form Order 04/25/18.

RECOMMENDATION:

Court's discretion
(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

CONSRVATORSHIP

DATE: 06/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800199

CASE NAME: JAMES TIMOTHY CLAYTON

HEARING:

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

COUNSEL:

BRENDA L CLAYTON	(CPE)...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CPE)...SHERRI L KASTILAHN
JAMES TIMOTHY CLAYTON	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR &

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by Conservator of the Person and Estate, PPF, Christina Erickson-Taube ["Petitioner].

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

1. Accounting period 02/01/17 to 01/31/18.
2. Assets on Hand \$97,863.56 in cash.
3. Current bond of \$125,000. Insufficient. Suggest bond increase by \$27,000 for a new bond of \$152,000 (includes recovery). **JTD.**
4. Petitioner requests compensation of \$7,345.05. Billed at rates not exceeding \$115/hour. Itemized [LF, pgs. 23-29]. **JTD.**
 - a. Petitioner paid accountants for services in preparing 2nd Account [LF, p. 13]. Does Court wish to reduce compensation for the accountant's fees of \$875.00? **JTD.**
5. Attorney requests fees of \$2,712.50. Billed at \$350/hour for 7.75 hours' attorney time. Itemized [LF, pgs. 30-31]. **JTD.**
6. During this accounting period, petitioner paid Premier Financial Assistance Group for case management fees of \$5,082.75 and Visiting Angels for care services of \$1,205.10. **Need** verified declarations for acknowledgment of receipt of fees per Local Rule 20-1406(c).
7. Monthly Cellular Phone expenses [LF, p. 14] appear to be excessively high for one line. **Need** further clarification via verified supplement.

8. **Need** bank/financial statements for Millennium Trust Co., Acct No. #XXX7544.
9. Last CI Report filed 04/04/18.
10. Proposed Order reflects bond of \$125,000.

RECOMMENDATION:

Need to clear notes 6-8 then Court's discretion re: fees and bond. If approved, set next hearing for Accounting Review on **03/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200138

CASE NAME: MTR OF ASHLEY KERNS

HEARING:

Petition for TO TERMINATE CONSERVATORSHIP

COUNSEL:

ASHLEY KERNS

(CEP)...MARK J. FLORY

BOBBIE KERNS

(CPE)...PRO/PER

JOHN KERNS

(CPE)...PRO/PER

GENERAL INFORMATION:

Continued from **10/21/16**. No appearances. Notice by Judicial Assistant.

Continued from **01/10/17, 03/14/17 and 05/16/17**. Counsel reports a petition to terminate conservatorship will be filed today.

Continued **from 07/25/17**. The Court orders IRC to prepare a report on termination of conservatorship for the court. Donnasue Ortiz is appointed as Guardian ad Litem for conservatee. Notice by Judicial Assistant.

Continued from 10/17/17. Court reads and reviews the report filed by IRC and the report of the guardian ad litem. Court continues this matter for an update in the further progress of the conservatee. Court requests petitioners obtain and file a new medical capacity declaration along with report cards from the school the conservatee will be attending. Court requests an updated report from the Guardian ad Litem prior to the next court date. Court re-refers this case to IRC for an updated report.

THIS CASE IS SET FOR HEARING ON Request to Terminate Conservatorship.

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

1. Matter set for hearing upon receipt and review of CI report filed 08/22/16 on the issues of conservatee's request to terminate conservatorship.
2. **Need** updated IRC Report.
3. **Need** updated report by GAL, Donnasue Ortiz.
4. Medical Capacity Declaration filed

RECOMMENDATION:

Need updated reports then Court's discretion.

(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: 06/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700280

CASE NAME: MTR OF LOUIS EDWARD TAYLOR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THELMA LOUISE TAYLOR

COUNSEL:

LOUISE EDWARD TAYLOR (CTP)...JENNIFER M DANIEL
THELMA LOUISE TAYLOR (CP)...PRO/PER

GENERAL INFORMATION

Thelma L. Taylor appointed Temporary Conservator of the Person on 08/30/17.
General appointment made on 10/31/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800027

CASE NAME: Gilbert Flores

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GILBERT FLORES

(CEP)...SANDY L. TURNER

RAMONA GUTIERREZ

(CPE)...LAMB MORRIS & LOBELLO

GENERAL INFORMATION:

Continued from 03/13/18 on courts motion. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Limited Conservatorship of person and estate by sister, Ramona Gutierrez ["Petitioner"].

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

1. Petitioner requests and Order Dispensing with siblings, Michael Flores and Angie Ramirez as a private detective was hired to search for them and siblings could not be found. **JTD.**
2. Petitioner requests no bond be required as the estate will satisfy the conditions of Pr. C. § 2628(a). Estate appears to consist of SSI. Question the need for estate powers? Court to inquire. **JTD.**
3. Proposed conservatee is developmentally disabled. **Report by court-appointed counsel, Sandy Turner, filed.**
4. Medical Capacity Declaration filed.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
6. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
7. Citation returned SERVED.

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

8. Court Investigator Report filed.
9. **Inland Regional Center Report filed.**
10. Certificate of Completion re Conservatorship Class filed.
11. Petitioner requests an order waiving all Probate Investigator's assessments for as long as the requirements of Pr. C. §1851.5 are met. **JTD.**
12. Petitioner requests and order waiving all accounting as the estate will satisfy the conditions of Pr. C. §2628(a) for its duration. Suggest Court require yearly waivers of account. **JTD.**
13. ~Proposed Form Order 01/31/18.

RECOMMENDATION:

Court's discretion. If approved, set hearing for Compliance Review for **01/08/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

Set hearing re Accounting Review for **08/13/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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

DATE: 06/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800127

CASE NAME: Clairra Serrano

HEARING:
Petition for Appointment of Conservator

COUNSEL:

CLAIRA SERRANO (CTP)...PRO/PER
JESSICA LALA VASQUEZ (CP)...PRO/PER
MARK ANTHONY VASQUEZ (CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Jessica L. Vasquez and step-father, Mark A. Vasquez ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Medical Capacity Declaration filed.
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 make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Court Investigator Report filed.
7. **Need** return of Citation.
8. **Need** Inland Regional Center Report.

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9. Confidential Conservator Screening form for Mark does not include Attachment 7 and Section 18 re PPF is blank. **Need** complete screening form.
10. **Need** Notification to Court of Conservatorship Address form.
11. Certificates of Completion re Conservatorship Class filed.
12. Proposed Conservatee cannot complete an Affidavit of Voter Registration
13. ~Proposed Form Order/Letters 07/30/15.

RECOMMENDATION:

Court to appoint counsel then need to clear notes 7-10. If approved, set hearing for compliance review for **01/08/19** for the filing of the following: proof of service of order with notification of conservatee's rights per pr.c.§1830(c); including a determination of conservatee's appropriate level of care per pr.c.§2352.5 (form gc-355); and care plan per pr.c.§2352.5.

(nb)

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