



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/06/17

All corrections/supplements addressing these notes should be filed by 5/30/17. Later-filed documents might not be reviewed prior to the hearing and could result in a continuance of your case. Updates to these notes *typically* will be posted three court days prior to the hearing.

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb0517

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 **PROBATE**

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

CASE#: PRO PS1100632

CASE NAME: ESTATE OF HENRY MARTIN YANCEY

HEARING:
Accounting Review

COUNSEL:

BRYAN C HARTNELL	(HARTNELL LAW GROUP
CATHERINA GUTIERREZ	(PET)...PRO/PER
ESTHER YANCEY	(OBJ)...PRO/PER
HENRY MARTIN YANCEY	(DEC)...
YOLANDA SANDOVAL	(PRO/PER

Request for Waiver of Court Fees and Costs filed by ESTHER YANCEY is GRANTED

Request for Waiver of Court Fees and Costs filed by CATHERINA GUTIERREZ is GRANTED

GENERAL INFORMATION

Continued from 01/27/16, 03/24/16, 05/31/15, 08/16/16 and 11/01/16 at request of administrator.

Continued from **02/7/17**. Court is informed all creditor claims have been withdrawn.
Hearing continued to prepare final accounting.

Continued from 05/02/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration issued to Catherina Gutierrez on 5/16/13, no bond.
2. Last status report approved 4/15/15. ~**Order approving status report 05/03/17.**
3. Need an accounting or status report.

RECOMMENDATION:
Inquire status.

(sa/lc/nb/lh/nb)

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

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

CASE#: PRO PS1400928

CASE NAME: Herbert Carl Ford

HEARING:

WAIVER OF Account and Report of HAROLD EDGAR BELL and Petition
for allowance of fees filed.

COUNSEL:

HAROLD EDGAR BELL (PET)...PRO/PER
HERBERT CARL FORD (DEC)...

Request for Waiver of Court Fees and Costs filed by HAROLD EDGAR BELL is GRANTED
Fee waiver amount due \$930.00
\$465.00 for petition filing fees on 10/29/14
\$465.00 for waiver of account on 03/27/17

GENERAL INFORMATION:

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

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

1. Sole heir waives accounting.
2. Petitioner waives statutory compensation.
3. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614).
4. Need vehicle license number(s) and description
5. Need findings re: sole and separate property
6. Need legal description of the real property and assessor's parcel number
7. Need address of heirs/beneficiary receiving real property.
8. Petitioner transferred the Decedent's 50% interest in and to the real property located at 13351 Foothill Blvd., Fontana, CA 92335, from himself as Administrator to himself, by Grant Deed [LF, p. 8], without court authority. Creditors or estate does not appear to be damaged.
9. Proposed Order 03/27/17 does not include legal description or APN for real property; information on the foothill property or stolen property; or address of

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heir receiving real property. All orders must be complete in and of themselves.
Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 3-6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/12/18**.

(nb)

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

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

CASE#: PRO PS1600782

CASE NAME: MTR OF RODOLFO SANZON

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORITY UNDER
IAEA

COUNSEL:

JUAN M SANZON (PET)...PRO/PER
RODOLFO SANZON (DEC)...

Request for Waiver of Court Fees and Costs filed by JUAN M SANZON is GRANTED

GENERAL INFORMATION

Continued from **09/26/16** at request of petitioner. Court clears note 1 re bond waiver. Court will not order bond to be filed.

Continued from 11/22/16 at request of petitioner.

Continued from 02/14/17. Court clears probate note 2 on the records; matter continued to clear probate note 1.

Continued from **03/28/17**. Continued to file supplement regarding other heirs to be filed no later than 04/18/17.

Continued from 05/02/17 for proper notice to be given.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

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

1. Supplement filed 11/22/16 indicates decedent had predeceased issue. Question whether Eduardo Sanzon was survived by wife and/or issue. If so, need verified supplement to include wife, issue, addresses; and notice to same. **Supp. (04/14/17) indicates Eduardo Sanzon was survived by spouse and issue. Notice filed 04/19/17 is the wrong type of notice. Need Notice of Petition to Administer Estate with proof of service.**
2. ~Proposed form order: 8/9/16 (no Letters)

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RECOMMENDATION:

Need to clear note 1. If approved, set hearing for Accounting/Status Review on **07/10/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(sa/nb/lh/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1601253

CASE NAME: IN THE MTR OF SKODA TRUST

HEARING:

Petition for ORDER TO CONVEY REAL PROPERTY TO DECEDENT'S TRUST

COUNSEL:

JUDITH GRZESEK

SKODA TRUST DATED APRIL 18, 19

(PET)...DELILAH KNOX RIOS

(TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice filed 04/10/17 does not include Beverly Skoda. Need proper service.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1700216

CASE NAME: The Libert Family Trust

HEARING:

Hearing Re: PROOF OF BOND

COUNSEL:

FRANCINE MORRIS (STE)...CRAIG M PARKER
THE LIBERT FAMILY TRUST (TRU)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge STANFORD E. REICHERT for all purposes.

Bond filed 05/10/17 does not indicate Francine F. Morris is **Successor** Trustee. Need corrected bond.

(nb)

Future Hearing:

06/19/17 Accounting Review.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIP

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

CASE#: CON PS1400141

CASE NAME: Febe Gonzalez

HEARING:

FIRST AND FINAL Account and Report of SILVIA GONZALEZ and
Petition for allowance of fees filed.

COUNSEL:

FEBE GONZALEZ (CEP)...

SILVIA GONZALEZ (CPE)...GARY H BLAYLOCK

Request for Waiver of Court Fees and Costs filed by FEBE GONZALEZ is GRANTED
Fee waiver amount due \$930.00
\$465.00 for petition for atty fees by court appointed counsel on 07/19/16
\$465.00 for accounting on 10/05/16

GENERAL INFORMATION:

Conservatee passed away on 01/09/17.

Continued from **11/22/16** at request of counsel to clear notes. Referred to Court
Investigator for investigation and report.

Continued from 03/07/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees.

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

1. Petition is not verified. Need same.
2. Accounting period 02/24/15 to 02/28/16.
3. Assets on Hand \$220,053.30 consisting of \$18,053.30 in cash and remaining in real property.
4. Current bond of \$20,000. Insufficient. Suggest bond increase by \$5,000 for a total bond of \$25,000 (includes recovery).
5. Petitioner waives compensation for this account period.
6. Attorney requests reduced fees of \$2,754.90. Billed at \$250/hour for 15.3 hours; attorney time. Itemized [LF, pgs. 12-13]. JTD.
7. Need cash and non-cash assets on hand at end of accounting period schedules via verified supplement.

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8. Need copy of bank statement to support beginning and ending balances per Local Rule 20-908.
9. Account does not state conservatee's residences during the account period per Local Rule 20-1406(a). Need verified supplement.
10. Last CI report filed 03/03/16. **CI Special report filed 01/12/17.**
11. Notice given.
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes \$25,000 bond. If approved, set next hearing for Accounting Review **in 60 days** for pre and post death, final accounting. Account to be filed 30 days before hearing. Note requirements of Local Rules.
(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1500363

CASE NAME: CHARLENE MAYER AKA CHARLENE D. MAYER ETC

HEARING:

Accounting Review

COUNSEL:

CHARLENE MAYER

(CEP)...WALTER T. MOORE

MELODY BRAVO

(CPE)...ELISABETH KEMPE-OLINGER

TIMOTHY MAYER

(CPE)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION

Continued from 04/25/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order appointing Melody Bravo and Timothy Mayer co-conservators of the person and estate entered 02/16/16, \$118,000 bond; amended order entered 06/20/16.
- 2 No accounting; first account now due.

RECOMMENDATION:

Inquire status.

(nb)

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

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

CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

CLIFFORD MOORE	(PET)...CHRISTINA FERRANTE
GLORIA MOORE	(CEE)...SANDY L. TURNER
JOHN MARANAN	(PET)...CHRISTINA FERRANTE
SURETEC INSURANCE COMPANY	()...

Address: 12852 Dillon Ln., Victorville, CA 92392

Appraised Value: \$215,000

Sale price: \$224,700

First overbid: \$236,435.00

Deposit: \$2,000 – Insufficient. However, the sale appears to be FHA financed.

Commission: 6% = \$13,482.00

Additional bond: **Current bond of \$59,000. Need additional bond in the amount of \$165,700 for a total bond of \$224,700.**

Reason for Sale: Necessary to pay debts.

Exposure to Market: Listed on MLS; advertised in local publications and open houses held.

Notice: **Need Notice of Hearing with proof of service to include buyer and real estate agents; need proof of publication; and proof of posting by clerk's office.**

~Proposed Form Order 04/19/17

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Future Hearing:
09/12/17 Compliance review hearing
04/17/18 Accounting Review.

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

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

CASE#: CON PS1700031

CASE NAME: MTR OF EVELYN TERESA NUNO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

EVELYN TERESA NUNO (CTP)...WALTER T. MOORE
ROQUE NUNO (CP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by EVELYN TERESA NUNO is GRANTED

GENERAL INFORMATION:

Continued from 03/07/17. Probate notes 3, 6, 7, 8, 9, 10 cleared on the record. Court appoints Walter T. Moore today for proposed conservatee. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by brother, Roque Nuno.

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need report by court-appointed counsel, Walter Moore.**
3. Petitioners request Pr. C. § 2351.5 powers [at LF, p. 10, however, request is not reflected on page one to petition LF, p. 2] 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.
4. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
5. Court Investigator Report filed.
6. Inland Regional Center Report filed..
7. Certificate of Completion re Conservatorship Class filed.

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8. Need Notice of Hearing with proof of service to include Inland Regional Center. **However, IRC has filed their report. Does Court wish to deem notice waived? JTD.**
9. ~Proposed Form Order/Letters 01/27/17.

RECOMMENDATION:

Need to clear notes 2 & 8. If approved, set hearing for Compliance Review for **01/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1700151

CASE NAME: MTR OF DORRIS JONES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DORRIS JONES

(CTP)...

TABITHA WEST

(CP)...PRO/PER

GENERAL INFORMATION

Ex parte orders granted on 05/2/17. Tabitha West appointed temporary conservator of the person, no bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Tabitha West (daughter)

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

1. Petitioner does not request medical powers; however, petition indicates proposed conservatee lacks capacity to consent to medical treatment in section 9 [LF, pg7]. Need verified supplement as to whether medical powers are sought. If so, need Capacity Declaration.
2. Petition indicates proposed conservatee has no second degree relatives. Need verified supplement clarifying whether there are any living relatives within the second degree. If so, need notice of hearing and proof of service.
3. Need return of Citation.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need Court Investigator report.
6. ~Proposed Form Order: 04/25/17

RECOMMENDATION

Need to clear notes 1-5. If approved, set hearing for Compliance Review for **01/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh)

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

CASE#: CON PS1700152

CASE NAME: JOSHUA ALEXANDER ORTEGA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JOSHUA ALEXANDER ORTEGA (CTP)...

LAURA MARIE REKTE (PET)... KEITH A. KELLY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Laura Rekte (mother)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 04/26/17; however, physician's initials are missing at item 7b and page 3 of form is not dated at signature. Need completed form.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
4. Petitioner requests estate orders/powers under Pr. C. §2590; however, this petition is for conservatorship of the person only, and missing attachment 1d as to specified orders/powers and reasons. Need verified supplement as to whether petitioner is seeking estate powers and include attachment 1d.
5. Petitioner requests orders relating to capacity of proposed conservatee under Pr. C. §1873 or §1901; however, need verified supplement with attachment 1e as to specified orders, facts, and reasons.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need Court Investigator report.
8. Need Notice of Hearing and proof of service to include 30 days' notice to Inland Regional Center.
9. Need return of Citation.

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10. ~Proposed Form Order: 04/26/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **01/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5
(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA/PG

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

CASE#: PRO PS0900497

CASE NAME: MANUEL RAMIREZ

HEARING:

Accounting Review

COUNSEL:

CATALINA MONTEZ

(PET)...JOSEPHINE A. RICH

MANUEL RAMIREZ

(DEC)...

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

GENERAL INFORMATION:

Continued from 02/28/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Report of Status entered 02/23/16.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1100243

CASE NAME: Eliza C. Brown

HEARING:

Accounting Review

COUNSEL:

EALEN O'BRIEN (PET)...PRO/PER

ELIZA C BROWN (DEC)...

Waiver of Court Fees and Costs filed by EALEN O'BRIEN is GRANTED **\$911.00**

GENERAL INFORMATION

Continued from **01/04/16**. Ealen O'Brien called clerk's office that she was ill.

Continued from **02/25/16**. No appearance. Citation issued to Ealen O'Brien.

Continued from **04/21/16**. No appearance. Court suspends the powers of Ealen O'Brien. Referred to Court Investigator for investigation and report.

Continued from **06/07/16** at request of public administrator.

Continued from 09/13/16 and 03/14/17. Court suspends the powers of Ealen O'brien and appoints the public administrator as successor administrator of the estate of eliza c. Brown. Public Administrator to prepare order/letters of successor administrator.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Letters of Administration issued on 05/3/11; Ealen O'Brien later suspended. Court reinstated powers of Administrator Ealen O'Brien on 10/20/14. **Letters never reissued. Court vacated previous letters; however, note that petitioner still has original letters in hand.**
2. Citation unable to be served. Declaration of Non-Service filed 01/24/17.
3. Need CI report as directed by Court on 04/21/16.

RECOMMENDATION

Need CI report then Court's discretion.

(lc/nb)

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

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

CASE#: PRO PS1100292

CASE NAME: FAITH E BATER

HEARING:

Probate status report filed.

COUNSEL:

FAITH E BATER	(DEC)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER
TIFFANY L COONEY	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Successor Administrator of the estate, Public Administrator ["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 the 2004 Nissan Xterra remains to be sold and additional time to find a buyer for said vehicle is needed.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/20/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **06/12/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1200767

CASE NAME: JOSE SANCHEZ

HEARING:

Accounting Review

COUNSEL:

JOSE SANCHEZ	(DEC)...
MAGDA YUDI GALAZ-PARRA	(OBJ)...PRO/PER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
SILVIA ORDAZ	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 03/21/17 at request of Counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Status Report entered 09/20/16; accounting now due.
2. No accounting and/or updated status report. Need same.

RECOMMENDATION

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

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300031

CASE NAME: GILBERT F. BROOKS JR.

HEARING:

Accounting Review

COUNSEL:

AIDA RUIZ	(BRIAN P TRELA
ANTHONY GALLEGOS	(BRIAN P TRELA
DIANE GALLEGOS	(BRIAN P TRELA
GILBERT F BROOKS JR	(DEC)...
MARIA GALLEGOS	(TP)...BRIAN P TRELA
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **03/25/14**. Counsel requested that matter be placed on the Public Administrator calendar at 10:00 a.m.

Continued from 05/27/14 and 06/02/15. Oral report given by Attorney Parker. Property is listed for sale.

Continued from 06/14/16. Oral report is given on the record by Attorney Parker. Property is currently in escrow. Matter continued 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. Public Administrator was appointed on 01/22/13 to collect and sell property.
2. No status report or accounting has been filed.
3. There are Creditor's Claims filed in excess of \$1M without further action. Court to inquire if a formal probate is necessary.

RECOMMENDATION

Inquire status.

(cbr//vet/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1300032

CASE NAME: GRACE EVANS

HEARING:

Accounting Review

COUNSEL:

GRACE EVANS

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **03/25/14**. Counsel requested that matter be placed on the Public Administrator calendar at 10:00 a.m.

Continued from 05/27/14 and 06/02/15. Oral report given by Attorney Craig Parker. Property listed but not yet sold.

Continued from 06/14/16. Oral report given by Attorney Craig Parker. Potential buyer has been found, but property has not been sold.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Public Administrator was appointed on 01/22/13 to collect and sell real property.
2. No status report or accounting has been filed.

RECOMMENDATION

Inquire status.

(cbr//vet/lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300196

CASE NAME: EDDIE GLASTER JR.

HEARING:

Accounting Review

COUNSEL:

EDDIE GLASTER JR	(DEC)...
LATERICIEA MCCLENNON	(PET)...JAMES O DOUGLASS
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
YELE GLASTER	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 03/21/17 at request of Counsel. Attorney Craig Parker present

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Status Report entered 03/15/16; accounting now due.
2. No accounting and/or updated status report. Need same.

RECOMMENDATION

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

(lh/)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1300748

CASE NAME: Leatha Laverne Wilson

SEE ALSO 20

HEARING:

Petition for AMENDMENT TO PETITION FOR PROBATE FILED 09/12/2013

COUNSEL:

LEATHA LAVERNE WILSON (DEC)...
SAN BERNARDINO COUNTY PUBLIC A (PET)...CRAIG M PARKER

XREF: SCSS02630

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Amendment to Petition for Probate filed on 09/12/13

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

1. On 01/14/14, Court granted Petition for Letters of Administration filed on 09/12/13, appointing Public Administrator as administrator with full authority; Letters issued 01/17/14.
2. Prior to appointment of administrator, decedent's Will was lodged with the Court on 10/24/13. However, petitioner failed to file an amended Petition for Letters of Administration with Will Annexed, thus neither an amended Order nor amended Letters have been issued to date.
3. Public Administrator now seeks an amended Order for probate admitting decedent's Will, and for issuance of amended Letters of Administration with Will annexed.
4. Petition appears improper per Pr. C. §8226 as over 120 days have lapsed since Order was entered, and petitioner has had knowledge of Will for over 60 days. JTD.

RECOMMENDATION

Court's discretion.

(lh)

Revised second check notes post two court days prior to the hearing. Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at ProbateNotes@sb-court.org 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: 06/06/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300748

CASE NAME: Leatha Laverne Wilson

SEE ALSO 19

HEARING:

Accounting Review

COUNSEL:

LEATHA LAVERNE WILSON

(DEC)...

SAN BERNARDINO COUNTY PUBLIC A

(PET)...CRAIG M PARKER

XREF: SCSS02630

GENERAL INFORMATION:

Continued from 08/30/16, 11/22/16, 02/14/17 and 05/02/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Report of Status entered 08/25/15.
2. No accounting or updated status report. Need same.

RECOMMENDATION: Trail matter to 06/06/17.

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/lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300765

CASE NAME: Suzanne Hill

HEARING:

FIRST AND FINAL Account and Report of SAN BERNARDINO COUNTY
PUBLIC ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

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

GENERAL INFORMATION:

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

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

1. Accounting period 07/27/12 to 03/06/17.
2. Assets on Hand \$588,978.67 in cash.
3. Statutory Fees in the amount of \$16,362.00 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.
5. Petitioner requests authority to withhold the amount of \$2,500 as a reserve.
6. ~Proposed Order 03/21/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for discharge on **06/12/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1400175

CASE NAME: JAMES LEONARD HILL

HEARING:

Hearing Re: STATUS OF ACCOUNTING OF MARILYN HILL

COUNSEL:

JAMES LEONARD HILL

(DEC)...

JENNIFER L FIELD

(TP)...PRO/PER

MARILYN HILL

(PET)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Status of Accounting of Marilyn Hill.

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

1. Matter set at 03/14/17 hearing, wherein, the Court appointed Public Administer as general administrator.
2. Citation issued as to Marilyn Hill. Need return of citation.

RECOMMENDATION:

Need return of citation then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1500010

CASE NAME: Dorothy G Chambers

SEE ALSO 24

HEARING:

Hearing Re: OSC RE SURCHARGE/SANCTIONS OF \$1,000.00

COUNSEL:

DOROTHY G CHAMBERS

(DEC)...

STATE OF CALIFORNIA FRANCHISE

(TP)...PRO/PER

TRENT S WILLIS

(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Surcharge/Sanctions of \$1,000 on Trent S. Williams.

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

1. Matter set at 05/02/17 hearing, wherein, Court indicated if Trent S. Williams fails to appear, the Court will impose a surcharge on him in the amount of \$1,000.
2. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

01/31/18 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.**

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1500010

CASE NAME: Dorothy G Chambers

SEE ALSO 23

HEARING:
Accounting Review

COUNSEL:

DOROTHY G CHAMBERS	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER
TRENT S WILLIS	(PET)...PRO/PER

GENERAL INFORMATION

Continued from **04/12/16**. The Court finds a Notice of Sale of Real Property was filed 2/16/16. Administrator has limited powers with no authority to sell the property. Court suspends powers to Administrator. Court appoints Public Administrator as Special Administrator. Administrator, Trent S. Willis is ordered to return. Notice given by Judicial Assistant.

Continued from 06/28/16 and 09/13/16. Citation issued to: Trent Williams.
Continued from **11/22/16**. Oral report given by Craig Parker. Court removes Trent Willis as administrator and court appoints Public Administrator as successor administrator.

Continued from **02/07/17**. Citation reissued as to Trent S. Willis who is required to appear.

Continued from 05/02/17. Court sets OSC re Surcharge/Sanctions (see prior matter). Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review (re Trent Willis)

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

- 1 Letters of Administration issued 02/10/15, LIMITED authority, no bond.
- 2 Need accounting or status report of administration.
- 3 Review of laser fiche indicates a Notice of Sale of Real Property filed on 02/16/16 by pro per administrator. However, this type of notice is incorrect as administrator has LIMITED powers that would require a noticed hearing and court authorization. Court may wish to set a control hearing and suggest administrator obtain legal advice. 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.**

4 Affidavit of Unsuccessful Service filed 10/13/16. **Need return of re-issued Citation.**

RECOMMENDATION:

Need to clear note 4. 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)

Future Hearing:

01/31/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1501008

CASE NAME: MARILYN RICHMOND

SEE ALSO 26

HEARING:

Petition for AMENDED PETITION TO DETERMINE TITLE AND TO REQUIRE
TRANSFER OF REAL PROPERTY

COUNSEL:

MARILYN KAY RICHMOND	(DEC)...
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Amended Petition to Determine Title and to Require Transfer of Real Property to Estate by Public Administrator ["Petitioner"]. Pr. C. §§17200(b)(6), 17200.1, 850(a)3; *Estate of Heggstad* (1993)

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

1. Petitioner discovered that the decedent owned two vacant lots in Inyo County, CA, [LF, pgs. 6-7] that are titled in the name of the decedent, as Trustee of The Marilyn Richmond Living Trust. The decedent left no Will and Testament; no original of The Marilyn Richmond Living Trust has ever been located; and no family member has a copy of said trust.
2. Petitioner, as Administrator of the Estate, alleges he is unable to exercise his rights, duties and obligations without a court order of this Court determining that the above-identified assets are property of the decedent.
3. Petitioner alleges it is in the best interests of the Estate and those interested in said Estate that this Petition be granted in order that Decedent's real property located in Inyo County be ordered titled in the name of the San Bernardino County Public Administrator, as Administrator, so that assets can either be sold or transferred to the rightful heirs of Decedents estate.
4. While caption references the *Estate of Heggstad* (1993), petition does not proffer authority for this Court to deem assets titled in the name of a trust, to be deemed estate assets. Need p's and a's that would allow this Court to deem

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.**

assets held in trust, removed and deemed estate assets. (Referred to Legal Research)

5. Petitioner requests title to the above –identified assets be deemed assets of the Decedent and should be held in the name of the San Bernardino County Public Administrator, as Administrator of the Estate of Marilyn Richmond.
6. ~Proposed Order 02/28/17

RECOMMENDATION:

Need to clear note 4, then Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1501008

CASE NAME: MARILYN RICHMOND

SEE ALSO 25

HEARING:

Petition for ORDER TO CONFIRM TRANSFER OF REAL PROPERTY TO TRUST

COUNSEL:

MARILYN KAY RICHMOND

(DEC)...

S.B. COUNTY PUBLIC ADMINISTRAT

(PET)...CRAIG M PARKER

STATE OF CALIFORNIA FRANCHISE

(TP)...

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

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

CASE#: CON PS1600257

CASE NAME: ANNIE ODEN

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

ANNIE ODEN

(CEP)...LENITA A SKORETZ

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

No notes – Court Trial.

Future Hearing:

06/07/17 Court Trial

06/08/17 Court Trial

06/09/17 Court Trial

06/12/17 Court Trial

06/13/17 Court Trial

06/14/17 Court Trial

06/15/17 Court Trial

06/16/17 Court Trial

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: CYNTHIA LUDVIGSEN **PROBATE**

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

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

SEE ALSO 2

HEARING:

Petition for TO COMPEL ACCOUNTING FOR SUSPENSION OF TRUSTEE
POWERS

COUNSEL:

CHRISTINE LARSON	(PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON	(RES)...
CHRISTINE LARSON,TRUSTEE	()...
JASON LARSON	(PET)...MICHAEL B HICKEN
JOSHUA LARSON	(MIN)...
MATTHEW LARSON	(MIN)...
THE GEORGE NEWMAN LIVING TRUST	(TRU)...

GENERAL INFORMATION

Jason Larson appointed GAL for minors Matthew and Joshua.

Continued from **2/11/16** for Attorney Bartholomew to file an accounting.

Continued from **05/25/16**. Court suspends the powers of Christina Larson as trustee- no trust funds are to be used in any way pending further order of the court. As to this matter, court removes Jason Larson as guardian ad litem for the two minor children. Court appoints Craig Parker as guardian ad litem for the two minor children. Michael Hicken to prepare order.

Continued from 07/26/16 at request of counsel.

Continued from 10/11/16, 01/17/17 and 04/04/17.

THIS CASE SET FOR HEARING ON Petition to Compel Accounting, Suspend and Remove Trustee and for Breach of Trust. Pr.C. §§ 859, 16004 et seq and § 17200.

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

1. Petitioner, Jason Larson, is GAL for minors. George Newman Trust was created on 10/15/09. Settlor George died on 06/30/11. Christine Larson,

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.**

daughter, is current Successor Trustee. Petitioner is father of the minors and was previously married to Christine.

2. Petitioner is seeking an order compelling an accounting from Christine. At the time of George's death, the trust was to be divided into two trusts, one for the benefit of each minor; Matthew and Joshua. Petitioner alleges that he has seen bank records indicating substantial withdrawals made by Christine in the amount over \$200,000 from each trust [LFpgs28-32]. Christine has allegedly not provided an accounting after request was made on 09/23/15. The court has the power to compel the trustee to report information about the trust or to account if the trustee fails to submit the report within 60 days after written demand and no report or account has been made within six months preceding the request. (Pr.C. § 17200(b)(7)).
3. Petitioner is seeking an order suspending/removing Christine and appointing petitioner as interim and Successor Trustee.
4. Petitioner is seeking an order that Christine be liable for redress/damages for breach of trust, according to proof, including prejudgment interest. Petitioner alleges that Christine may have used trust money to pay off mortgage encumbrances.
5. Petitioner is seeking punitive damages, attorney fees and costs.
6. Response and Objections filed 05/20/16 by Christine Larson alleges the plan by which Respondent would utilize trust funds to pay off Petitioner was discussed between Respondent and Petitioner and their respective attorneys and mediation coaches during the dissolution of marriage proceedings.
7. ~Proposed Order 06/16/16.

RECOMMENDATION

Set for contested hearing.

(lc/sa/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

SEE ALSO 1

HEARING:

FIRST Account and Report of CHRISTINE LARSON and Petition for allowance of fees filed.

COUNSEL:

CHRISTINE LARSON	(PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON	(RES)...
CHRISTINE LARSON, TRUSTEE	()...
JASON LARSON	(PET)...MICHAEL B HICKEN
JOSHUA LARSON	(MIN)...
MATTHEW LARSON	(MIN)...
THE GEORGE NEWMAN LIVING TRUST	(TRU)...

GENERAL INFORMATION:

Continued from 07/26/16, 10/11/16, 01/17/17 and 04/04/17 at request of counsel. Guardian ad litem represents parts of the funds are being recovered.

THIS CASE IS SET FOR HEARING ON First Account Current by Successor Trustee, Christine Larson; Response and Objection to Petition for Removal of Trustee and Appointment of Successor Trustee for Redress of Breach of Trust including Punitive Damages.

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

1. Accounting period 06/30/11 to 02/29/16 (5.8 years).
2. Assets on Hand \$685,692.39 consisting of \$495,181.67 in cash and \$190,510.72 in equities, securities and bonds
3. Disbursements – Schedule C11 reflects multiple loans to Petitioner and payments from the trust in order to purportedly make ends meet during the dissolution of marriage proceedings and to enable Petitioner to settle demands for cash offsets by Jason Larson in the dissolution of marriage settlement [LF, p. 110]. Petitioner alleges she was advised that the sections titled “Trustee Self-Dealing – Loan, Buy, Sell” and Trustee and Executor Transactions – Self Dealing Permitted” and the section titled “Loan” of the trust allowed her to loan

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.

- money to herself from the trust for any purpose and that she did not have to provide any security for the loans. Copy of trust affixed to petition filed 12/09/15.
4. Schedule I1 [LF, p. 99-101] reflects funds to be reimbursed to Trust by Trustee totaling \$729,280.90 less offset of \$27,000 for trustee fees pursuant to trust provisions for a total sum of \$695,546.43 to be reimbursed .
 5. Notice given.
 6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb/lh/nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIP**

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

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

HEARING:

Hearing re Final Discharge

COUNSEL:

DIANE D HARKISON	(CE)...MARIELLEN ROSS
DIANE D HARKISON	(PET)...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
GEORGE DEKTEROV	(CP)...ELIZABETH MCDONOUGH
GEORGE DEKTEROV	(CPE)...ROY A BARRY
LIDIA DEKTEROV	(CEP)...PRO/PER
LIDIA DEKTEROV	(PET)...PRO/PER
LIDIA KEKTEROV	(PCE)...THE ALVAREZ FIRM
SURETEC INSURANCE COMPANY	(PRO/PER
VICTOR DEKTEROV	(APP)...AMY M COHEN
VICTOR DEKTEROV	(APP)...JOHN
VICTOR DEKTEROV	(OBJ)...

GENERAL INFORMATION

Continued from **03/03/16 and 10/06/16**. Mitchell I Roth is relieved as counsel of record for Lidia Dekterov.

Continued from **12/20/16** – awaiting refund on amended tax return.

Continued from 03/21/17.

THIS CASE SET FOR HEARING ON Final Discharge re Temporary Conservator Dian Harkison

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

1. Final Accounting approved on 02/26/15.
2. Need receipt from George Dekterov, successor Conservator.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(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: CYNTHIA LUDVIGSEN

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

CASE#: CON PS1400064

CASE NAME: JAMES C MANIACI

HEARING:
Hearing Re: FIRST AND SECOND ACCOUNT

COUNSEL:
JAMES C MANIACI (CEP)...PRO/PER
MYRA MANIACI (CPE)...PRO/PER

***PER JUDGE LUDVIGSEN THE INVESTIGATION FEE IS HEREBY WAIVED FOR
THE ACCOUNTING PERIOD 2013/2014***

***06/03/14 Court Investigator fees waived in the amount of \$450.00 on 06/03/14

GENERAL INFORMATION:

Conservatorship terminated on 12/08/14.

Continued from **1/19/16** to clear notes. JA to notify bond company and bond company to be present at next hearing date.

Continued from **3/21/16 and 05/25/16** at request of counsel. Notice by Judicial Assistant.

Continued from **08/08/16 and 10/25/16** at request of counsel to file amended or supplemental accounting.

Continued from **01/10/17** for notes to be cleared. .

Continued from 03/28/17 to clear notes.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by prior Conservator, Myra Maniaci

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

1. Need Notice of Hearing with proof of service
2. Accounting period 04/04/13 to 05/11/15.
3. Assets on hand of \$45,000 consisting of a mobile home.
4. Final, Corrected Inventory filed 04/07/15 does not include settlement sum from prior Conservatee's personal injury or personal property that is held by Leonor Gomez. Need amended Inventory.
5. Summary of Accounts do not reflect amounts reflected on final, corrected inventory and appraisal filed 04/07/15. Need amended Summary of Account.

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

6. Need bank/financial statements reflecting date of appointment and closing balances per Local Rule 20-908.
7. Petitioner does not request compensation.
8. Disbursements – Schedule C requires further clarification via verified supplement as to the following:
 - a. ATM withdrawals in increments of \$350 - \$600 each;
 - b. Cobra; Obamacare; Blue Shield;
 - c. Time Life;
 - d. CCS Inc. Time Collections;
 - e. B of A Collections;
 - f. Chase Bank Collection;
 - g. Checkcard Collection Agency;
 - h. Court Traffic Collection;
 - i. DMV when there is no vehicle listed on inventory.
9. Account does not include Cash Assets or Non-Cash Assets at End of Account Period.
10. Petition does not include proposed distribution.
11. Notice of Non-Payment of Bond Premium filed **03/14/17**.
12. **Joinders and Waivers of Account and deficiencies filed 05/25/16 by James C. Maniaci and Myra Maniaci. However, notwithstanding said waivers, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1).**

RECOMMENDATION: Trail to 06/12/17.

Need amended petition to comply with Pr. C. § 1060 et seq.
(nb/dl/sa/nb)

Future Hearing:

06/12/17 Amended petition for settlement of first and final

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

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

CASE#: PRO PS1200267

CASE NAME: ESTATE OF CARMEN G ALCARAZ

HEARING:
Hearing re Final Discharge

COUNSEL:
CARMEN G ALCARAZ (DEC)...
DEPT OF HEALTH CARE SERVICES (TP)...
JUAN ALCARAZ (PET)... WALTER R HUFF &
MARIA C VASQUEZ (PET)...CRAIG M PARKER
VICTIM COMPENSATION AND GOVERN (PRO/PER

VACATED – final discharge order entered 05/05/17.
(nb)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust**MASTER FILE**

SEE ALSO 3, 4, 5, 6

HEARING:

Hearing Re: RULING ON UNEXPENDED SUMS

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID MARTINEZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(JAMES B CHURCH
FRANK MARTINEZ	(PLA)...H.G. LONG
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
HOSSEIN YAZDANI	(JOHN L BAILEY
MARTINEZ FAMILY TRUST	(TRU)...PRO/PER
PAUL MARTINEZ	(PET)...ROBERT J SPITZ
PAUL MARTINEZ SR	(PRO/PER
THE MARTINEZ FAMILY TRUST	(TRU)...
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY

Request for Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED

GENERAL INFORMATION

Continued from 05/03/17. Trailing other hearings set.

THIS CASE SET FOR HEARING ON Ruling on Unexpected Sums.

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

1. Matter set on 02/16/17 to rule on the 4/27/17 statements issue.

RECOMMENDATION

Court's discretion.

(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: TARA REILLY

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

CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust**MASTER FILE**

SEE ALSO 2, 4, 5, 6

HEARING:

Hearing Re: STATUS OF ACCOUNTING

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID MARTINEZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(JAMES B CHURCH
FRANK MARTINEZ	(PLA)...H.G. LONG
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
HOSSEIN YAZDANI	(JOHN L BAILEY
MARTINEZ FAMILY TRUST	(TRU)...PRO/PER
PAUL MARTINEZ	(PET)...ROBERT J SPITZ
PAUL MARTINEZ SR	(PRO/PER
THE MARTINEZ FAMILY TRUST	(TRU)...
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY

Request for Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED

See notes on matter 5.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust**MASTER FILE**

SEE ALSO 2, 3, 5, 6

HEARING:

Motion Re: ENFORCEMENT OF STTLMT AGREEMENT

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID MARTINEZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(JAMES B CHURCH
FRANK MARTINEZ	(PLA)...H.G. LONG
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
HOSSEIN YAZDANI	(JOHN L BAILEY
MARTINEZ FAMILY TRUST	(TRU)...PRO/PER
PAUL MARTINEZ	(PET)...ROBERT J SPITZ
PAUL MARTINEZ SR	(PRO/PER
THE MARTINEZ FAMILY TRUST	(TRU)...
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY

Request for Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED

No notes – JTD

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust**MASTER FILE**

SEE ALSO 2, 3, 4, 6

HEARING:

Accounting Review

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID MARTINEZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(JAMES B CHURCH
FRANK MARTINEZ	(PLA)...H.G. LONG
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
HOSSEIN YAZDANI	(JOHN L BAILEY
MARTINEZ FAMILY TRUST	(TRU)...PRO/PER
PAUL MARTINEZ	(PET)...ROBERT J SPITZ
PAUL MARTINEZ SR	(PRO/PER
THE MARTINEZ FAMILY TRUST	(TRU)...
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY

Request for Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED

GENERAL INFORMATION

Continued from 03/02/17 and 05/03/17. Mr. Spitz reports he has received the documents ordered released in the in-camera review last Thursday. The Court clarifies there has been no double billing. Matter continued for counsel to review documents. Trailing other hearings set.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 11/10/14, Frank Martinez resigned as Trustee and Christina Erickson Taube was appointed successor with \$350,000 bond.
2. Need accounting by Christina Erickson Taube.

RECOMMENDATION

Inquire status.

(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: TARA REILLY

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

CASE#: PRO PS1300719

CASE NAME: The Martinez Family Trust**MASTER FILE**

SEE ALSO 2, 3, 4, 5

HEARING:
Trial Setting Conference

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DAVID MARTINEZ	(PET)...ROBERT J SPITZ
FRANK MARTINEZ	(JAMES B CHURCH
FRANK MARTINEZ	(PLA)...H.G. LONG
FRANK MARTINEZ	(STE)...BROWN WHITE & OSBORN
HOSSEIN YAZDANI	(JOHN L BAILEY
MARTINEZ FAMILY TRUST	(TRU)...PRO/PER
PAUL MARTINEZ	(PET)...ROBERT J SPITZ
PAUL MARTINEZ SR	(PRO/PER
THE MARTINEZ FAMILY TRUST	(TRU)...
YAZDANI PROPERTIES, LLC	(JOHN L BAILEY

Request for Waiver of Court Fees and Costs filed by PAUL MARTINEZ SR is GRANTED

TSC – No notes – JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1400548

CASE NAME: MTR OF EULA MARIE HILL

HEARING:

Probate status report filed.

COUNSEL:

ARLINE H EDWARDS (PET)...HENRY T HEUER
EULA MARIE HILL (DEC)...

GENERAL INFORMATION:

Petitioner, Arline Edwards, suspended on 08/09/16. Court appoints the PA as Special Administrator.

Continued from 01/17/17 and 04/04/17 at request of counsel. Notice to be given by Mr. Heuer.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees.

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

1. Petitioner requests reinstatement as Executrix of the Estate of Eulah M. Hill.
2. It does not appear filing fees for accounting were paid. Court to inquire.
3. Final Inventory and Appraisal filed 10/31/16 is not signed by counsel. Need complete inventory.
4. Accounting period covers 07/16/10 to 09/26/16.
5. Assets on hand \$322.85 in cash.
6. Statutory fees of \$1,890.23 requested. Calculated. Question how parties intend on being paid as there are not enough assets on hand? Need verified supplement,
7. Attorney requests reimbursement of costs advanced of \$681.00.
8. No Summary of Account. Need same via verified supplement.
9. Disbursements – Exhibit A [LF, p. 10] requires further clarification via verified supplement as to the following:
 - a. Disbursements to A. Edward totaling \$14,000;
 - b. Cashier's Check to John D. Hill in the amount of \$15,000;
 - c. Foreclosure costs to A. Edwards totaling \$10,984.02.

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.**

10. Disbursements – Schedule A [LF, p. 10] reflects repairs to the home in the amount of \$5,000. Does Court wish to require further itemization of repairs? JTD.
11. Petition alleges real property was sold at foreclosure netting \$47,255.87 after the foreclosure sale. Need Trustee's Deed of Sale.
12. Need bank/financial statement to support date of death and closing balances per Local Rule 20-908.
13. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
14. No proposed order. Submit Order after Hearing.
15. Notice filed 11/07/16 and 01/09/17 does not include Public Administrator. Need proper service.

RECOMMENDATION:

Need to clear notes. If approved, set next hearing for receipts and final discharge for **06/12/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1500057

CASE NAME: John Journey Jackowski, Jr.

HEARING:

Accounting Review

COUNSEL:

JACKLINE JOURNEY SEGUERRA

(PET)... HOWARD S BORENST

JOHN JOURNEY JACKOWSKI jr

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved Status Report on 05/31/16.
2. Need Final Account and Report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1500809

CASE NAME: CARRIE RAY AND IZILLA LA VERNE CUMMINGS

HEARING:

Accounting Review

COUNSEL:

CARRIE RAY	(DEC)...
IZILLA LA VERNE CUMMINGS	(DEC)...
ROBERT L CUMMINGS	(PET)...DAVID CHASE

GENERAL INFORMATION:

Continued from 03/28/17. No appearance. Robert Cummings and/or Counsel ordered to appear at next hearing.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 02/04/16, full authority, no bond.
2. No accounting or status report of administration filed.
3. No accounting and/or updated status report is filed

RECOMMENDATION:

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

(nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1601199

CASE NAME: SUSAN KATHRYN HIRSCH

HEARING:

Petition for INJUNCTION AGAINST TRUSTEE FROM SELLING REAL
PROPERTY AT TRUSTEES SALE

COUNSEL:

MICHAEL D AYALA (PET)...HORSPPOOL & HORSPPOOL
SUSAN KATHRYN HIRSCH (DEC)...

Currently under review by Legal Research.
(LR)

Future Hearing:
05/02/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700068

CASE NAME: DOROTHY R. MAJINSKI

HEARING:

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

COUNSEL:

CHICE DAVISON (PET)...JOSEPHINE A. RICH
DOROTHY R MAJINSKI (DEC)...

XREF: CONPS1500175

GENERAL INFORMATION:

Ex parte orders granted on 01/30/17. Chice Davison appointed Special Administrator with special powers, no bond.

Continued from 04/04/17 at request of Counsel to clear probate notes. Court recommends Counsel use the prison locator to find missing executor and heir. The Court urges petitioner to file a missing person's report. Bond required \$209,211.

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Chice Davidson (alternate executor)

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

1. Court requires bond of \$209,211.
2. Need Declination to Act from Gary Martin Majinski. However, see note 4.
3. Due Diligence Declaration as to Gary Martin Majinski filed 01/26/17 **and 05/05/17.** JTD
4. ~Proposed form Order: 01/26/17

RECOMMENDATION:

RFA subject to notes 2-3, Court's discretion. If approved, set future hearing for Accounting/Status Review on **08/14/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Revised second check notes post two court days prior to the hearing. Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at ProbateNotes@sb-court.org 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: 06/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700267

CASE NAME: MTR OF WALT GLEN PITTER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DEBRA LYN PITTER (PET)...HORSPPOOL & HORSPPOOL
WALT GLEN PITTER (DEC)...

GENERAL INFORMATION:

Ex parte orders entered on 03/30/17 appointing Debra Lyn Pitter as Special Administrator. Court limits powers to get through emergency and work with insurance company to receive proceeds from fire. Special Administrator is able to use insurance proceeds to pay for any and all construction bills for repairs of home. No bond is required.

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

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

1. Bond appears to be waived by all heirs; however, bond waivers are not dated at signatures as to issue, Leland Pitter, Cindy Laughery, and Eva Pitter. Need same. Estimated net value of estate is \$19,000, real property. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Need Notice of Petition to Administer Estate.
3. Need Proof of Publication.
4. ~Proposed form Order/Letters: 03/23/17

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **08/14/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Revised second check notes post two court days prior to the hearing. Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at ProbateNotes@sb-court.org 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: 06/06/17 TIME: 8:30 DEPT: S37P

CASE#: VPR VS02118

VACATED

CASE NAME: ESTATE OF MARY AUDREY JOHNSON

HEARING:

Hearing re Final Discharge

COUNSEL:

BETH OLSON

(PET)...CRAIG M PARKER

MARY AUDREY JOHNSON

(DEC)...

RICHARD CHARLES JOHNSON JR

(PET)...PRO/PER

Final Discharge forwarded to department for signature on 05/16/17.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

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

CASE#: PRO PS1700257

CASE NAME: THE CHIANG TRUST

HEARING:

Petition for ORDER TO TERMINATE THE SUB-TRUST KNOW AS TRUST
B ETC

COUNSEL:

THE CHIANG TRUST

(TRU)...

WALDENE W.S. CHIANG

(PET)...BEZAIRE & LEATHERS

Currently under review by Legal Research.
(LR)

Notice given.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: PRO PS1700258

CASE NAME: THE KOLBE TRUST

HEARING:

Petition for ORDER MODIFYING THE TRUST BY TERMINATING THE
SUB-TRUST KNOWN ETC

COUNSEL:

GEORGE F KOLBE
THE KOLBE TRUST

(PET)...BEZAIRE & LEATHERS
(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

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

CASE#: CON PS1300339

CASE NAME: THOMAS W. MAHONEY

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

LAURA L. HARRIS

(CPE)...CRAIG M PARKER

PATSY MAHONEY

(OBJ)...PRO/PER

THOMAS M MAHONEY

(LAWRENCE R. BYNUM

THOMAS W. MAHONEY

(CEP)...MARK J. FLORY

Request for Waiver of Court Fees and Costs filed by THOMAS M MAHONEY is GRANTED

VACATE - Proof of additional \$47,000 bond filed.

(nb)

FUTURE HEARINGS:

05/08/18 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.**

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

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

CASE#: CON PS1600158

CASE NAME: MARIE LEMMONS

HEARING:
Petition for ATTORNEYS' FEES

COUNSEL:

MARIE LEMMONS	(CEE)...BRYAN C HARTNELL
SHAANA M BOEHM	(PRO/PER
WILLIAM R BOEHM	(CPE)...J DAVID HORSPOOL

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Bryan C. Hartnell ["Petitioner"].

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

1. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$15,120.00. Billed at \$250-\$425/hour for 45 hours' attorney time and \$75-\$125/hour for 4.1 hours' paralegal time. Itemized [LF, pgs. 8-12]. JTD.
 - a. Requested fees include those for Attorneys Theios and Gallant [LF, p. 6]. However, there does not appear to be an amendment of the appointment order to include Attorneys Theios and Gallant as required by Local Rule 20-1402(a).
3. Petitioner requests authorization and direction to the Conservator of the person and estate, William Boehm, to pay such sum to Petitioner.
4. ~Proposed Order 04/03/17

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: CON PS1600347

CASE NAME: AUTUMN B. SAENZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

AUTUMN B. SAENZ

(CEE)...ROBERTA L TAYLOR

ULRIKE E. SAENZ

(PET)...NEELAM KAHLON-PFISTER

GENERAL INFORMATION

Continued from 01/17/17. Court recommends current family law visitation orders remain. Father, Steven Saenz, requests to be kept informed of conservatee's life, and will not request to be co-conservator. Attorney Roberta L. Taylor appointed for Autumn B. Saenz. Court orders IRC report for the court. Clerk's office to notify IRC. Notice given by Judicial Assistant.

Continued from 04/04/17 for IRC report to be filed.

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

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

1. Petitioner seeks medical powers. Capacity Declaration filed 11/23/16.
2. Proposed Conservatee is developmentally disabled. **Report from counsel, Roberta L. Taylor filed 03/29/17.**
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship. **Letter from IRC requesting 30 day continuance filed 03/29/17. Need IRC report.**
4. Return of Citation filed 12/19/16.
5. Certificate of Completion of the Conservatorship Training Class filed 01/10/17.
6. CI Report filed 12/16/16.
7. ~Proposed Form Order: 11/23/16

RECOMMENDATION

Need IRC report, then Court's discretion. If approved, set hearing for Compliance Review for **01/09/18** for the filing of the following: proof of service of Order with

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.**

Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan
per Pr.C.§2352.5
(lh/nb/lh)

Revised second check notes post two court days prior to the hearing. Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at ProbateNotes@sb-court.org 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: 06/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700057

CASE NAME: LESSIE THOMAS PHILPOT

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALICE FAYE PHILPOT (PET)...PRO/PER
LESSIE THOMAS PHILPOT (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 04/04/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Alice Philpot (spouse)

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

1. Petitioner seeks no bond. Estate qualifies for bond waiver as income is less than \$2,000/month and no other assets. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 02/14/17.
3. Petitioner seeks dementia powers. **Need report of Counsel Walter Moore.**
4. Return of Citation filed 03/14/17; however, need corrected proof of service to include section 2-address where citee was served, and section 3 as to date and time of service.
5. Certificate of Completion of the Conservatorship Training Class filed 04/06/17.
6. Court Investigator report filed 03/15/17.
7. **Objection by Earnest Burnes, Sr, filed 03/20/17. Notice of objection sent to parties by Court on 05/08/17.**
8. ~Proposed Form Order: 02/14/17

RECOMMENDATION

Need to clear notes 3-4. Matter is contested. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the required documents and hearing re Accounting Review for **08/14/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.
(lh/nb/lh)

Revised second check notes post two court days prior to the hearing. Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at ProbateNotes@sb-court.org 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: 06/06/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS00089

CASE NAME: IN THE MATTER OF GREGORY L PENNINGTON

HEARING:

Accounting Review

COUNSEL:

GREGORY LYN PENNINGTON (CEP)...PRO/PER
GREGORY LYNN PENNINGTON (CEP)...ANNETTE DEBELLFEUILLE
RICHARD PENNINGTON (CPE)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 03/15/16, 05/24/16, 08/16/16 and 11/01/16 to file an accounting.

Continued from 01/17/17. No appearance. Richard Pennington and/or counsel are ordered to be present at next hearing if accounting not filed.

Continued from 04/04/17 at request of Counsel. Petitioner ordered to be present at next hearing.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Ninth Account entered 07/28/15.
2. Need 10th Accounting.

RECOMMENDATION:

Inquire status.

(nb/lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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

CASE#: VC VS00198

VACATED

CASE NAME: MTR OF LEONARD L MIANO JR

HEARING:

Accounting Review

COUNSEL:

BETTY A MIANO

(PET)...PRO/PER

DANIEL A MCCREA

(PET)...PRO/PER

LEONARD L MIANO

(CTP)...

Ex parte Order to Dispense with Accounting filed 05/05/17.

Future hearing date: 05/28/19 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.