



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 06/06/18**

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

### **Destruction of Filed Documents:**

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

### **Contacting the Probate Examiners:**

Probate Examiners' email address: [ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org)

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

05/21/18 lh; 06/01/18lh

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

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: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1000472

CASE NAME: HOWARD WAYNE LIVINGSTON

**SEE ALSO 2**

HEARING:

Hearing re Final Discharge

COUNSEL:

MICHAEL WAYNE LIVINGSTON (PET)...SLOVAK BARON EMPEY MURPHY

HOWARD WAYNE LIVINGSTON (DEC)...

MICHAEL WAYNE LIVINGSTON (PET)...DAVID M LIVINGSTON

GENERAL INFORMATION

Continued from 12/15/16 at request of counsel to clear notes and file a further accounting.

Continued from 12/14/17 and 02/15/18. Attorney Valerie Powers stated she filed a verified supplement and substitution of attorney. Status report to be filed.

**Continued from 03/29/18.** Further accounting hearing vacated as status filed.

**Continued from 04/25/18 to clear probate notes.**

THIS CASE SET FOR HEARING ON Status/Final Discharge.

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

1. Final account/distribution of Michael Livingston, son, approved on 01/15/15.  
**~Proposed Order submitted 05/09/18 reviewed/approved by examiner. Need signed order.**
2. Status report filed 03/07/18 states administrator appears to seek any after discovered assets in the Asbestos litigation to be distributed directly to the heirs, rather than to the estate.
3. Receipts filed, petitioner alleges distribution is unequal due to alleged medical emergency for Laurel. No objections by sibling/administrator.
4. Ex Parte Petition for Final Discharge and Order attached returned for corrections as note 1 has not yet cleared. **Need** discharge order.

RECOMMENDATION

Need to clear notes #1 & 4.

(lc/lh)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/06/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO DS1000472

CASE NAME: HOWARD WAYNE LIVINGSTON

**SEE ALSO 1**

HEARING:

Probate status report

COUNSEL:

MICHAEL WAYNE LIVINGSTON      (PET)...SLOVAK BARON EMPEY MURPHY

HOWARD WAYNE LIVINGSTON      (DEC)...

MICHAEL WAYNE LIVINGSTON      (PET)...DAVID M LIVINGSTON

See notes on prior matter #1.

(lh)

HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0700812

CASE NAME: TESSIE M RATLEY

**SEE ALSO 4, 5**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 FOR FAILURE TO APPEAR

COUNSEL:

RALPH L RATLEY	(PET)...ROBBINS & HOLDAWAY
TESSIE M RATLEY	(DEC)...
CATRINA RATLEY	(TP )...MILES & HATCHER

#### GENERAL INFORMATION

Continued from 04/25/18. No appearance. Court continues hearing and sets OSC re sanctions of \$500 on administrator for failure to appears, and set OSC re sanction of \$500 on administrator for failure to file accounting. Court orders administrator and their attorney to appear on 06/06/18.

**THIS CASE IS SET FOR HEARING ON OSC Re \$500 Sanctions for Failure to Appear/Failure to File/Accounting Review re Ralph Ratley, Administrator**

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

1. Court approved Status Report on 5/11/17.
2. Accounting or status report now due.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0700812

CASE NAME: TESSIE M RATLEY

**SEE ALSO 3, 5**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 FOR FAILURE TO FILE

COUNSEL:

RALPH L RATLEY	(PET)...ROBBINS & HOLDAWAY
TESSIE M RATLEY	(DEC)...
CATRINA RATLEY	(TP )...MILES & HATCHER

See notes on prior matter #3.

(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: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0700812

CASE NAME: TESSIE M RATLEY

**SEE ALSO 3, 4**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

RALPH L RATLEY	(PET)...ROBBINS & HOLDAWAY
TESSIE M RATLEY	(DEC)...
CATRINA RATLEY	(TP )...MILES & HATCHER

See notes on prior matter #3.

(lh)

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400693

CASE NAME: ELAINE LEVITT

HEARING:

Hearing re Final Discharge

COUNSEL:

JOHN BABROWSKI (PET)...COSGROVE, COSGROVE & HUMPHRE  
ELAINE LEVITT (DEC)...  
STATE OF CA FRANCHISE TAX BOARD (TP )...PRO/PER

#### GENERAL INFORMATION

**Continued from 04/26/17;** petitioner is finishing up taxes.

**Continued from 06/07/17** at request of counsel re taxes.

**Continued from 12/06/17 at request of counsel.**

THIS CASE SET FOR HEARING ON Final Discharge re John Babrowski

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

1. Final account/distribution of John Babrowski, son, approved on 04/20/16.
2. Receipt filed.
3. Creditor's Claim by Franchise Tax Board for \$7,420.65 filed 08/15/17.
4. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status of creditor's claim.

(lc/lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1401093

CASE NAME: Virgil Buster Blackmon

HEARING:  
Probate status report

COUNSEL:

VIRGIE RENTIE (PET)...HALLI B. HESTON  
VIRGIL BUSTER BLACKMON (DEC)...  
CHRISTINA BLACKMON (PET)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON [Second] Status Report by Virgie Rentie,  
administrator

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

1. Virgie Rentie was appointed administrator on 06/03/15 with full authority;  
\$1,074,000 bond.
2. Order on [first] status report entered 04/25/17.
3. Estate includes real property that subject to a quiet title action which has now  
settled. Administrator is in the process of evicting one of decedent's children,  
Christina Blackmon, in order to prepare property for sale.
4. Petitioner did not specify additional time needed to file accounting. Suggest 12  
months. **JTD**
5. Notice is complete.
6. Proposed Order submitted 05/30/18 not in LF at time of review.

RECOMMENDATION:

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

(lh)



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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500533

CASE NAME: MTR OF HELEN IRENE MARCUCCI

HEARING:

Hearing re Final Discharge

COUNSEL:

CINDY DIENER (PET)...MARIVEL M ZIALCITA  
HELEN IRENE MARCUCCI (DEC)...  
LIBERTY MUTUAL INSURANCE (TP )...

#### GENERAL INFORMATION

**Continued from 02/07/18.** No appearance. Court continued matter and set OSC re surcharge/\$500 sanctions for failure to appear/file. Court ordered both administrator and their counsel to be personally present at next hearing.

**Continued from 04/11/18 to clear probate notes. Court takes off calendar the OSC re sanctions and OSC re surcharge**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on First and Final Account approved 02/01/17 provides for **\$30,842.70**, each, to Alfred Marcucci, Jr; Jeff Marcucci, Cindy Diener, Linda Swanson, and Sherri Richmond.
2. Receipts filed 10/26/17. Cindy Diener, Sherri Richmond, and Linda Swanson received **\$17,708.05**, each. Alfred Marcucci, Jr, and Jeff Marcucci received **\$17,546.93**, each.
3. **Need** receipts for remaining distribution shares pursuant to Order entered 02/01/17. **Supp filed 4/11/18 distribution amounts are inaccurate within the Order Settling First Account entered 02/01/17. Petitioner did not take into account reimbursements, fees, and expenses when calculating distribution amounts.**
  - a. **Need amended Order on First and Final Account, and proof of service to heirs.**
4. Ex Parte Petition for Final Discharge and Order received 02/23/18 and returned by Court on 03/02/18. **Need corrected form.**

RECOMMENDATION  
Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600422

CASE NAME: MTR OF GLADYS FARRAR HUBBARD

HEARING:

Hearing re Final Discharge

COUNSEL:

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

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Dauna Goza, administrator

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

1. **Need** receipt from Melissa Suritt. Note: it appears a receipt may have been received Melissa Suritt on 07/12/17; however, not in LF. Clerk's office notified on 05/21/18.
2. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601233

CASE NAME: Armand Lamberto Lugo

**SEE ALSO 11, 12**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 FOR FAILURE TO APPEAR

COUNSEL:

LALINA A. STEINHART (PET)...DALE K BETHEL  
ARMAND LAMBERTO LUGO (DEC)...

GENERAL INFORMATION

**Continued from 04/25/18. No appearance. Court continues hearing and sets OSC re Sanctions of \$500 on Administrator and Counsel for failure to file, and OSC re sanctions of \$500 for failure to appear. Court orders Administrator and Counsel for Administrator to be present on 06/06/18.**

**THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$500 for Failure to File/OSC re Sanctions of \$500 for Failure to Appear/Accounting Review**

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

1. Lalina Steinhart was appointed administrator with full powers on 02/15/17, no bond; Letter issued same date.
2. **Need** accounting and status 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: STANFORD E. REICHERT

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DATE: 06/06/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1601233

CASE NAME: Armand Lamberto Lugo

**SEE ALSO 10, 12**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 FOR FAILURE TO FILE

COUNSEL:

LALINA A. STEINHART

(PET)...DALE K BETHEL

ARMAND LAMBERTO LUGO

(DEC)...

See notes on prior matter #10.

(lh)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601233

CASE NAME: Armand Lamberto Lugo

**SEE ALSO 10, 11**

HEARING:

Accounting Review

COUNSEL:

LALINA A. STEINHART (PET)...DALE K BETHEL  
ARMAND LAMBERTO LUGO (DEC)...

See notes on prior matter #10.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700092

CASE NAME: THE DAVID VARGAS 2014 REVOCABLE TRUST

HEARING:

Hearing re Final Discharge

COUNSEL:

DEBBIE GRIFFEN  
THE DAVID

(PET)...CALDWELL, KENNEDY & PORTER  
(TRU)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Debbie Griffen, trustee

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

1. Receipts filed.
2. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800108

CASE NAME: RONALD DAVE WEBER

**SEE ALSO 15, 16, 17**

HEARING:

Hearing Re: PTN for Letters of Admin. W/ Full Administration

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...ROSE C ROSADO
NANCY L MARTIN	(REC)...GREENBERG 7 BASS, LLP

GENERAL INFORMATION

Letters of Special Administration issued to Ken Blickenstaff on 02/02/18; \$1,600,000 bond.

**Continued from 03/15/18 (re petition by Ken Blickenstaff).** Court clears note re Mark Weber as he is present in Court this date; issue re proof of publication is cleared. Matter continued to 05/10/18 at request of objector. Court sets deadline to file objections, competing petitioner, etc, by 04/26/18, or they will be permanently waived. Court gave instructions re proper objections.

**Ex Parte Orders re Special Administration denied 04/03/18 without prejudice.**

**Ex Parte Orders re resignation as Special Administrator denied 04/03/18. Court orders hearing set for 05/10/18 to be reset to 06/06/18. Court approves request to appoint Nancy Martin as receiver. Estate to pay fees of Nancy Martin as received.**

THIS CASE SET FOR HEARING ON

- **Petition #1** [filed 02/01/18] for Letters of Administration with full authority under IAEA by **Ken Blickenstaff**, PPF.
- **Petition #2** [*Amended* filed 04/12/18] for Letters of Administration with full authority under IAEA by Bobbie Jo Weber to appoint Bobbie Jo Weber (daughter) and Joseph McCann (unknown relation)
- **Petition #3** [filed 04/30/18] for Letters of Administration with full authority under IAEA by Sherri Kastilahn, nominee



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

Petition #1 by Ken Blickenstaff

1. Letters issued for special administration appear to state full powers; however, full powers may not be granted without publication Pr.C. §§ 8003, 8124. **Court may wish to vacate order/letters and issue amended.**
2. Suggested bond \$14,000,000 based on estimated estate value.
3. Petitioner was nominated by Bobbie Jo Weber, one of decedent's children; however, competing petition filed 04/12/18.
4. Decedent's son Mark Weber is allegedly on WIC §5150. Question if Mark is under conservatorship? **Need** verified supplement.
5. ~Proposed form Order: 02/01/18.

Petition #2 by Bobbie Jo Weber

6. Requested bond \$1,500,000. Appears sufficient.
7. Petitioner Bobbie Jo (daughter) seeks appointment of Joseph McCann (unknown relation) and herself as co-administrators. Question relation of Joseph McCann as it appears he does not have priority? **Need verified supplement.**
8. Nomination signed by Mark Weber attached to petition.
9. ~Proposed form Order: 04/12/18

Petition #3 by Sherri Kastilahn

10. Requested bond \$1,500,000. Appears sufficient.
11. Nominations and Objections of Ronald Weber; Cody Weber; Leoncio Weber; Barbara Weber; Luke Weber (issue of deceased son, Ronald Weber) in the form of declarations attached. [Petition, 4/30/18, LFpgs 7-11].
12. ~Proposed form Order: 04/30/18

RECOMMENDATION

Matter is contested.

Need to clear notes #4; #7. Court's discretion re bond. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

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

CASE#: PRO PS1800108

CASE NAME: RONALD DAVE WEBER

**SEE ALSO 14, 16, 17**

HEARING:

Petition for letters of full administration w/full IAEA

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...ROSE C ROSADO
NANCY L MARTIN	(REC)...GREENBERG 7 BASS, LLP

See notes on prior matter #14.

(lh)

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

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

CASE#: PRO PS1800108

CASE NAME: RONALD DAVE WEBER

**SEE ALSO 14, 15, 17**

HEARING:

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

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...ROSE C ROSADO
NANCY L MARTIN	(REC)...GREENBERG 7 BASS, LLP

See notes on prior matter #14.

(lh)

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800108

CASE NAME: RONALD DAVE WEBER

**SEE ALSO 14, 15, 17**

HEARING:

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

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...ROSE C ROSADO
NANCY L MARTIN	(REC)...GREENBERG 7 BASS, LLP

See notes on prior matter #14.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800253

CASE NAME: Marc C Lessard

HEARING:  
Spousal Property Petition hearing

COUNSEL:  
CHRISTINA LESSARD (PET)...VON ESCH & VON ESCH  
MARC C LESSARD (DEC)...

GENERAL INFORMATION:  
**Continued from 04/25/18 at request of Counsel.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Christina Lessard, spouse/executor

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

1. Petitioner, Christina Lessard, seeks Court determination of 100% of property passing to surviving spouse without administration pursuant to terms of will.
2. Notice was given.
3. ~Proposed Form Order: 03/15/18

RECOMMENDATION:  
Court's discretion.  
(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800393

CASE NAME: MTR OF ARMANDO CUEN GOMEZ

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ALBERT GOMEZ (PET)...PRO/PER  
ARMANDO CUEN GOMEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property and Personal Property by Albert Gomez, son

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

1. Petitioner, Albert Gomez (son), seeks 100% interest, in decedent's 100% interest in real property and personal property per intestate succession.
2. Decedent was survived by four adult sons: Albert Gomez; Rudolph Gomez; Ruben Gomez; Gilbert Gomez, Sr. No assignments have been filed. **Need verified supplement clarifying the following:**
  - a. How is petitioner entitled to 100% distribution as it appears surviving issue are entitled to equal shares per Pr. C. §240?
  - b. Petition, item #14, includes grandchildren: Aileen Garcia (Gomez); Armando Gomez, Jr; Aaron Gomez. Need further clarification as to their relationship to decedent and why they are included in petition; is there a deceased parent that is an intestate heir?
3. **Need** Notice of hearing as to Rudolph Gomez; Ruben Gomez; Gilbert Gomez, Sr; and grandchildren: Aileen Garcia (Gomez); Armando Gomez, Jr; Aaron Gomez (if grandchildren are entitled to notice).
4. ~Proposed Form Order: 04/25/18

RECOMMENDATION

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

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: RPR RS02462

CASE NAME: ARUTUNIAN FAMILY TRUST

HEARING:

Petition for Instructions RE obtaining Reverse Mortgage;  
Termination of Trust; etc

COUNSEL:

LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
ARUTUNIAN FAMILY TRUST	(TRU)...
BRYAN DEAN ARUTUNIAN	(PET)...PRO/PER
ERNEST ARUTUNIAN	(TEE)...ERNEST ARUTUNIAN
DIANE HARKISON	(MARIELLEN ROSS)
DONNASUE SMITH ORTIZ	(DONNASUE ORTIZ)

**CCP170.6 filed as to CYNTHIA A LUDVIGSEN**

Waiver of Court Fees and Costs filed by LAWRENCE A DEAN II is GRANTED  
Waiver of Court Fees and Costs filed by BRYAN D ARUTUNIAN is GRANTED

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: SPR SS01112

## **VACATED**

CASE NAME: IN THE ESTATE OF CRESCENCIO ESPINOSA

**SEE ALSO 22, 23**

HEARING:

Hearing re Final Discharge re Deceased Executor Manual Espinosa

### COUNSEL:

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

**XREF: SPRSS56361** *IN THE ESTATE OF REFUGIO ESPINOSA*



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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: SPR SS01112

CASE NAME: IN THE ESTATE OF CRESCENCIO ESPINOSA  
**SEE ALSO 21, 23**

HEARING:  
Hearing re Final Discharge

COUNSEL:

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

**XREF: SPRSS56361** *IN THE ESTATE OF REFUGIO ESPINOSA*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Chris Espinoza, Second  
Successor Administrator

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

1. **Need** receipts from Paul Espinosa, Manuel Espinosa, Esperanza Sandoval Trust, Mercedes Elena Pierce, Manuel P. Espinoza, Teresa Sandoval, trustee of the Esperanza Sandoval Revocable Trust, and Crescencio R. Espinosa.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.  
(lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: SPR SS56361

CASE NAME: IN THE ESTATE OF REFUGIO ESPINOSA

**SEE ALSO 21, 22**

HEARING:

Hearing re Final Discharge re Deceased Executor William Espinosa

COUNSEL:

REFUGIO ESPINOSA (PLA)...

**XREF: SPRSS01112** *IN THE ESTATE OF CRESCENCIO ESPINOSA*

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re William Espinosa  
(deceased)

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

1. **Need** receipts from Mercedes Pierce; Crescencio R Espinosa; Teresa Sandoval; administrator of the estate of Manuel Espinosa; Paul Espinosa.
2. **Need** Ex Parte Petition for Final Discharge and Order by attorney.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino  
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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601112

CASE NAME: BILL RAYMOND JACOBS  
HEARING:  
First and Final Account and Report of MARCELLO JACOBS and  
Petition for allowance of fees filed.

COUNSEL:  
BILL RAYMOND JACOBS (DEC)...  
JAMES L LEESTMA (TP )...PRO/PER  
MARCELLO JACOBS (PET)...HORSPOOL & HORSPOOL

***XREF: PROPS1601154 (The Clarence Lavon & Agnes Marguerite Jacobs family)***

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Marcello Jacobs, cousin.

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

1. Assets on hand \$256,224.12 in cash.
2. Administrator and counsel seek \$8,150.55 in statutory fees. Ok.
3. Administrator seeks a reserve of \$2,000.
4. **Need** statement to support cash balance per local rule 20-908.
5. ~Proposed Order: 04/19/18.

#### RECOMMENDATION

RFA subject to note 4. If approved, set hearing on the filing of receipts and final discharge for **06/13/19**.

(lc)

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PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 06/06/18 TIME: 8:35 DEPT: S35P  
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CASE#: CIP DS1700202

CASE NAME: CORDARO -V- BRIGHT FUTURES

HEARING:

Hearing Re: REVIEW OF SPECIAL NEEDS TRUST

COUNSEL:

GINO CORDARO (PET)...GREER & RINEER  
DANIEL CORDARO (CLA)...

GENERAL INFORMATION

**Continued from 04/18/18 at request of Counsel.**

THIS CASE IS SET FOR HEARING ON REVIEW OF SPECIAL NEEDS TRUST

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

1. Matter set on 3/21/18 at hearing re Petition for Compromise of Disputed Claim.
2. Civil (unlimited) petition of Corado was granted. Court set hearing for review of SNT and will sign Order on the dated of 4/18/18.

RECOMMENDATION

Court's discretion.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 06/06/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**SEE ALSO 25A**

HEARING:

Petition for approval and payment of interim attorney's fees and costs

**COUNSEL:**

COUNSEL:

BANK OF THE WEST	(RANDOLPH M SHARON
CARMELA C JOHNSON	(CP )...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHANIKA A LISTER	(CEP)... EDWARD B FISCHER
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
VICKI LISTER	(CP )...
VICKI LISTER	(CPE)...PRO/PER
VICKY LISTER	(CPE)...HARTNELL LAW GROUP
YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)

**CIVDS1309039** (*Hartnell-v-Lister*)

**GENERAL INFORMATION**

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mitchell I. Roth, GAL

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

1. Petitioner, Mitchell I. Roth, was appointed GAL for Shanika A. Lister on 05/28/14.
2. Petitioner requests fees of **\$80,193.75** for 213.85 hours at \$375 per hour for attorney services during the period 10/16/15 to 12/31/17. Itemized. [Petition, 04/27/18, LFpgs 10-87].
3. Petitioner requests reimbursement of costs totaling **\$1,462.34** for transcription fees, CourtCall appearances, and Federal Express fees [\$388.13].

4. Notice was given.
5. **Objection to Mitchell Roth's Petition for Approval of Attorney Fees filed 05/29/18 by Shanika A. Lister.**
6. **Reply to Conservatee's Objections filed 05/31/18 by Mitchell Roth.**
7. ~Proposed Order: 04/27/18

#### RECOMMENDATION

Court's discretion.

(lh)

Future Hearings:

6/13/18 Further Status of Purchase of a Home

6/13/18 Visitation

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**SEE ALSO 25**

HEARING:

Hearing Re: Visitation

COUNSEL:

COUNSEL:

BANK OF THE WEST	(RANDOLPH M SHARON
CARMELA C JOHNSON	(CP )...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHANIKA A LISTER	(CEP)... EDWARD B FISCHER
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
VICKI LISTER	(CP )...
VICKI LISTER	(CPE)...PRO/PER
VICKY LISTER	(CPE)...HARTNELL LAW GROUP
YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)

**CIVDS1309039** (*Hartnell-v-Lister*)

Visitation—no notes—JTD

Future Hearings:

6/13/18 Further Status of Purchase of a Home

6/13/18 Visitation

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**SEE ALSO 25**

HEARING:

Hearing Re: Petition for Successor Conservatorship of the Estate

COUNSEL:

COUNSEL:

BANK OF THE WEST	(RANDOLPH M SHARON
CARMELA C JOHNSON	(CP )...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHANIKA A LISTER	(CEP)... EDWARD B FISCHER
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
VICKI LISTER	(CP )...
VICKI LISTER	(CPE)...PRO/PER
VICKY LISTER	(CPE)...HARTNELL LAW GROUP
YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)

**CIVDS1309039** (*Hartnell-v-Lister*)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Successor Conservatorship of the Estate by Christina Erickson Taube

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

1. Petition filed on demand on 05/30/18. Court to continue to first check calendar no earlier than 07/18/18, or later Wednesday calendar.

RECOMMENDATION

Trail to 07/18/18 or later Wednesday calendar.

(lh)



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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER  
**SEE ALSO 25, 25A, 25B, 25D, 25E**

HEARING:  
Hearing Re: Petition for Attorney's fees

COUNSEL:

COUNSEL:	
BANK OF THE WEST	(RANDOLPH M SHARON
CARMELA C JOHNSON	(CP )...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHANIKA A LISTER	(CEP)... EDWARD B FISCHER
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
VICKI LISTER	(CP )...
VICKI LISTER	(CPE)...PRO/PER
VICKY LISTER	(CPE)...HARTNELL LAW GROUP
YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)  
**CIVDS1309039** (*Hartnell-v-Lister*)

GENERAL INFORMATION

Matter initially set on 05/31/18; reset to 6/6/18.

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Yo Tashi Ko Tucker, Aunt Pr.C.§ 2642.

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

1. Petitioner Yo Tashi Ko Tucker, Aunt, was appointed temporary conservator of person only; however, was not appointed general conservator.
2. Petitioner seeks court approve fees for Counsel Bryan Hartnell in the amount of \$95,082.50 for 299.20 hours at \$50/425 an hour for paralegal and attorney services. Itemized [LFpg9 et seq]. Court to inquire the continued representation as there were other parties appointed as conservators of person

an estate since 12/23/14. Additionally, the fee request appears to be delayed as fees from 2014.

3. Petitioner also seeks reimbursement of costs to Counsel Hartnell of \$1,820.
4. 4<sup>th</sup> Account indicates assets of \$59,203.72 of which \$38,203.72 is cash.
5. **Objection filed by Yo Tashi Ko Y Tucker on 05/22/18. Need proof of service of objections.**
6. ~Proposed order: 04/23/18.

RECOMMENDATION

Matter is contested.

(lc)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER  
**SEE ALSO 25, 25A, 25B, 25D, 25E**  
HEARING:  
Hearing Re: Further Status of Purchase of A House

COUNSEL:

COUNSEL:  
BANK OF THE WEST (RANDOLPH M SHARON  
CARMELA C JOHNSON (CP )...PRO/PER

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

CHRISTINA ERICKSON-TAUBE (CP )...SHERRI L KASTILAHN  
EDWARD B FISCHER (PET)...EDWARD B FISCHER &  
MITCHELL I ROTH (PET)...MITCHELL I ROTH  
SHANIKA A LISTER (CEP)... EDWARD B FISCHER  
STAN MANDELL (CPE)...LAMB MORRIS & LOBELLO  
VICKI LISTER (CP )...  
VICKI LISTER (CPE)...PRO/PER  
VICKY LISTER (CPE)...HARTNELL LAW GROUP  
YO TASHI KO Y TUCKER (PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)  
**CIVDS1309039** (*Hartnell-v-Lister*)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER  
**SEE ALSO 25, 25A, 25B, 25C, 25D**  
HEARING:  
Hearing Re: Petition for Appointment of Conservator

COUNSEL:

COUNSEL:  
BANK OF THE WEST (RANDOLPH M SHARON)

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

CARMELA C JOHNSON	(CP )...PRO/PER
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHANIKA A LISTER	(CEP)... EDWARD B FISCHER
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
VICKI LISTER	(CP )...
VICKI LISTER	(CPE)...PRO/PER
VICKY LISTER	(CPE)...HARTNELL LAW GROUP
YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL

**XREF: PROPS1700973** (*Vicki R Lister*)  
**CIVDS1309039** (*Hartnell-v-Lister*)

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0800265

CASE NAME: MARISA NICOLE SILVA

**SEE ALSO 27**

HEARING:

Hearing Re: OSC RE SANCTIONS \$500.00 ON COUNSEL FOR C'TOR

COUNSEL:

MICHAEL ANTHONY SILVA	(CPE)...E LAWRENCE BROCK
MARISA NICOLE SILVA	(CEP)...
LEO MARTINEZ	(PET)...JENNIFER GERARD
OLGA MARTINEZ	(SC )...JENNIFER GERARD
JANINA CABRERA	(SC )...JENNIFER GERARD
LEO MARTINEZ	(PET)...GAREIT NEWSTROM
OLGA MARTINEZ	(PET)...GAREIT NEWSTROM
JANINA CABREAR	(PET)...GAREIT NEWSTROM

GENERAL INFORMATION

**Continued from 02/21/18.** No appearance or accounting filed. Court ordered Jennifer Gerard to be personally present on 04/11/18. Notice given by Judicial Assistant.

**Continued from 04/11/18. No appearance. Court sets OSC re sanctions of \$500 on Counsel for failure to appear on 06/06/18 at 9:30AM. Court orders Counsel for Conservator to be present.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for \$500**Accounting Review

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

1. Second Account of Leo and Olga Martinez and Janina Cabrera (parents and sister) approved on 08/24/17 for period ending 12/31/16.
2. **Need** Third Account Current or Waiver for period commencing 01/01/17.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/06/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS0800265

CASE NAME: MARISA NICOLE SILVA

**SEE ALSO 26**

**VACATED**

HEARING:

Accounting Review

COUNSEL:

MICHAEL ANTHONY SILVA	(CPE)...E LAWRENCE BROCK
MARISA NICOLE SILVA	(CEP)...
LEO MARTINEZ	(PET)...JENNIFER GERARD
OLGA MARTINEZ	(SC )...JENNIFER GERARD
JANINA CABRERA	(SC )...JENNIFER GERARD
LEO MARTINEZ	(PET)...GAREIT NEWSTROM
OLGA MARTINEZ	(PET)...GAREIT NEWSTROM
JANINA CABREAR	(PET)...GAREIT NEWSTROM

See notes on prior matter #26.

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700173

CASE NAME: MTR OF ALEXANDER ROMAN-VILLATORO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DORIS A VILLATORO

COUNSEL:

DORIS A VILLATORO (CP)...PRO/PER  
ALEXANDER ROMAN-VILLATORO (CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

**Continued from 04/04/18. Matter is continued for conservator to file compliance review documents. Prior to matter being called, Judicial Assistance received telephonic message that Doris Villatoro requested 60-day continuance due to surgery.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Doris Villatoro (mother) appointed Limited Conservator of the person on 08/30/17.
2. Notification Conservatee's rights filed 05/16/18; however, Proof of Service, item #5, does not indicate a copy of order was served with notice. Also, need to serve Douglas Roman (father), Tiffany Roman (sister) and Bryan Roman (brother).
3. Determination of Conservatee's Appropriate Level of Care filed 05/16/18.
4. Care Plan filed 05/16/18.

RECOMMENDATION

Inquire status re note #2.

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700311

CASE NAME: YESSICA VILLANUEVA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of GABRIELA CERVANTES

COUNSEL:

GABRIELA CERVANTES (CP )...PRO/PER  
YESSICA VILLANUEVA (CTP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Gabriela Cervantes,  
mother

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

1. Gabriela Cervantes (mother) was appointed Conservator of the person on 05/22/18.
2. **Need** Notification of Conservatee's rights per Pr. C. §1830(c) with proof of service. *Note: item #5 of proof of service to include copy of Order dated 01/03/18 with service of notice.*
3. Determination of Conservatee's Appropriate Level of Care filed 01/03/18.
4. Care Plan was filed.

RECOMMENDATION

Inquire status re note #2.

(lh)



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

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800063

CASE NAME: SAMANTHA GARCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

SAUL GARCIA (CP)...PRO/PER  
GUADALUPE DIAZ GARCIA (CP)...PRO/PER  
SAMANTHA GARCIA (CTP)...MITCHELL I ROTH

#### GENERAL INFORMATION

**Continued from 04/11/18. Case referred to Legal Aid for assistance.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Saul and Guadalupe Garcia, parents

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

1. Petitioners seek orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed Conservatee's civil rights not to be limited without court order.
3. Petitioners seek medical powers. Capacity Declaration filed 04/12/18.
4. **Need** report of appointed Counsel Mitchell Roth.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. CI Report filed 04/04/18.
7. Proof of Completion of the Conservatorship Training Class filed.
8. Return of Citation filed 03/21/18.
9. ~Proposed Form Order: 03/07/18

#### RECOMMENDATION

Need to clear notes #4-5. If approved, set hearing for Compliance Review for **11/14/18** 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)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800081

CASE NAME: Gerry Estel

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

PHYLLIS ESTEL (CPE)...PRO/PER  
GERRY ESTEL (CEP)...PRO/PER  
KATHLEEN L MILLER (CP )...  
GERRY KAY ESTEL-GRUBB (PET/TP)...PRO/PER  
RIVERSIDE CNTY ADULT PROTECTIVE SRVCS (COUNTY COUNSEL)

**XREF: VCVS00072** *GERRY ESTEL*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference re

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

1. Phyllis Estel (spouse) was appointed Conservator of the person and estate of Gerry Estel on 11/17/95 in San Bernardino County Superior Court. Conservatorship of the Estate was terminated per minute order on 10/30/00 upon approval of a Substituted Judgment Establishing Family Trust Matter.
2. Matter was transferred to Riverside County Superior Court on or about 02/13/14. On 07/21/16, Riverside Superior Court ordered an informal verified trust accounting commencing the date of sale of real property, and reserved on a trial date re petition for removal of conservator by Gerry Kay Estel-Grubb.
  - a. See full synopsis in Riverside County Court order entered 07/21/16.
3. Informal accounting was filed 12/07/16; however, it is unclear if accounting was approved. No order entered. See Riverside County Minute Order dated regarding withdrawn objections.
4. Matter was transferred back to San Bernardino County Superior on 11/14/17.
5. It appears the last court investigator report was filed 02/28/17; supplemental report filed 3/1/17. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)? **JTD**

6. **Need** post move notice per CRC 7.1063(c).
7. **Need** amended letters to reflect this county.

#### RECOMMENDATION

Need to clear notes 6-7 then Court's discretion.

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800121

CASE NAME: TERRENCE LEE JOHNSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

TERRY L. JOHNSON JR. (CPE)...PRO/PER  
TERRENCE LEE JOHNSON (CEP)...

#### GENERAL INFORMATION

Ex part orders granted 04/30/18. Court appointed Terry L. Johnson as Temporary Conservator of the person and estate; no bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Terry L. Johnson, Jr

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

1. Petitioner seeks additional orders under 2590 and 1873 or 1901; however, requested orders/powers are not specified in attachments. **Court to inquire.**
2. Petitioner seeks waiver of bond but did not provide reasons in attachment 1c. Need clarification as to whether proposed conservatee's pension of \$3,588 is actually monthly or yearly? If monthly, suggested bond \$47,539; if annual, suggested bond \$4,124. **Court to inquire.** [Petition, 4/23, LFpg4].
3. Petitioner seeks medical powers. Capacity Declaration filed 04/23/18 in incomplete at caption as to purpose of form; item #2 address and telephone number of physician. **JTD**
4. CI report filed 05/23/18.
5. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. Return of citation filed 05/31/18.
8. ~Proposed Form Order: 04/23/18

## RECOMMENDATION

Need to clear notes #5-6. If approved, set hearing for Compliance Review for **01/09/19** for the filing of the required documents and hearing re Accounting Review for **08/14/19**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

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DATE: 06/06/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS0700115

CASE NAME: LINDEL FIELDS

HEARING:

Second and Final Report Of Successor Admin Waiver Account and Report of JORDAN FIELDS, PAYTON FIELDS and Petition for allowance of fees filed.

COUNSEL:

BENNIE E FIELDS	(PET)...BETTYE BARNARD
LINDEL FIELDS	(DEC)...
PAYTON WILLIAMS	(PET)...LAW OFFICES OF ANDREA GEE
JORDAN FIELDS	(PET)...LAW OFFICES OF ANDREA GEE
ANDREA GEE esq	(TP )...LAW OFFICES OF ANDREA GEE
AMERICAN CONTRACTORS INDEMNITY (LANAK & HANNA)	

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Final Report Of Successor Administrators on Waiver Account and Report of and Petition for allowance of fees by JORDAN FIELDS, PAYTON FIELDS, successor administrators/ sole heirs

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

1. Assets on hand: \$86,230.97 in cash and remaining \$1,667 in unimproved property.
2. Payments of \$5,000 to prior administrator for statutory fees, and \$2,500 to Pamela Leggett Cooke for preparation of 10-year accounting were paid pursuant to Order entered 01/30/18.
3. On 07/13/17, Court approved previous unauthorized payment to prior attorney, Bettye Barnard, of \$11,000, as statutory fees paid in full.
4. Attorney Andrea Gee requests statutory fee for attorney compensation of \$28,231.11 less \$11,000 previously paid to prior attorney Barnard for total statutory fees of **\$17,231.11**.
5. Attorney Andrea Gee, requests extraordinary fees totaling **\$11,000**. Note: *The court will generally not consider awarding extraordinary fees until the executor and/or counsel establish that all ordinary fees have been actually*

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

*been earned.* (In re Walker Estate (1963) 221 Cal App. 2d 792). See attached declaration in support of request [Acct, 04/18/18, LFpg19-37] **JTD**

a. **Need separate itemization of requested extraordinary fees per Local Rule 20-904.**

6. Attorney Andrea Gee seeks reimbursement of costs totaling \$1,446. **Need itemization of costs.**
7. Notice is complete.
8. Proposed order submitted 05/14/18 is missing addresses of heirs receiving real property.

**RECOMMENDATION:**

Need to clear notes #5-6 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/12/19.**

(lh)

Future Hearing: 7/19/18 Hearing Re: Final Discharge of Bennie Fields

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300056

CASE NAME: THE DOROTHY FAYE GOFORTH SPECIAL NEEDS TRUST

HEARING:

PETITION TO SETTLE THIRD AND FINAL Account and Report of MARY L MANNING and Petition for allowance of fees filed.

COUNSEL:

MARY L MANNING (PET)...DENNIS M SANDOVAL  
DOROTHY FAY GOFORTH SPECIAL NEEDS TRUST (TRU)... BROWN WHITE &  
DOROTHY FAYE GOFORTH (BEN)...E. JOAN NELMS  
DEPT OF HEALTH CARE SRCVS (TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of Trustee and Petition for Allowance of Attorney's Fees by Mary Manning, trustee

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

1. Beneficiary, Dorothy Fay Goforth, passed away 05/11/17.
2. Pre-death accounting period: 09/01/16 to 05/11/17; aoh: \$163,259.78 (of which \$26,969.67 is cash and the balance in securities).
3. Post-death accounting period: 05/12/17 to 01/31/18; aoh: \$167,584.80 (of which \$27,628.63 is cash and balance in securities).
4. Petitioner/trustee requests compensation of \$3,010.51 for services rendered equivalent to 1% of market value of trust. No previous compensation requested.  
**JTD**
5. Attorney requests fees of \$10,732.50 less payment of \$4,507.50 for a total of \$6,225, plus costs of \$230. Billing is comprised of 97 hours at \$250/\$225/\$150/\$125 per hour for attorney and paralegal time. Itemized [Acct, 03/19/18, LFpgs90-97]. **JTD**
6. **Need** verified supplement regarding proposed distribution identifying named beneficiaries.
7. Current bond: \$240,000
8. Proposed Order submitted 03/19/18 does not specify beneficiaries.



RECOMMENDATION

Need to clear note #6. If approved, set next hearing re final discharge on **06/12/19**.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500604

CASE NAME: Anthony Edward Carter

HEARING:  
Accounting Review

COUNSEL:

MAXINE M STEWART (PET)...THOMAS W DOMINICK  
ANTHONY EDWARD CARTER (DEC)...

GENERAL INFORMATION

**Continued from 10/19/16.**

**Continued from 06/07/17. Probate was opened due to wrongful death action which is still pending.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Maxine M. Stewart, former spouse on 08/12/15; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status.  
(lc/lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600156

CASE NAME: LILY MARTINEZ

HEARING:

first and final Account and Report of ESTHER GUARDADO and  
Petition for allowance of fees filed.

COUNSEL:

ESTHER GUARDADO (PET)...FULLERTON LEMANN SCHAEFER & DO  
LILY MARTINEZ (DEC)...  
MARY MARIN (PET)...HARTNELL LAW GROUP  
DEPT OF HEALTH CARE SRVCS (TP )...PRO/PER  
INHERITANCE FUNDING (PRO/PER)  
CA VICTIM COMPENSATION BOARD (PRO/PER)  
JOE MARTINEZ  
DANIEL MARTINEZ

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

GENERAL INFORMATION:

**Continued from 02/07/18.** Pro Tem—no objections. Court ordered written objections to be filed by 03/09/18. If objections have not been filed they will be deemed waived.  
**Continued from 04/18/18. Mediation conference set for 06/06/18 at 8:30am in Dept S34P.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Esther Guardado, administrator

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

1. Accounting period: 01/19/16 to 09/29/17
2. Assets on hand: \$170,733.84, cash
3. Petitioner requests statutory administrator and attorney's fees of **\$6,468.28** each. Calculated.
4. Attorney requests extraordinary fees totaling **\$15,597** related to sale of real property. Itemized [Acct, 11/14/17, LFpgs28-39]. **JTD**
5. Petitioner requests reimbursements totaling **\$18,413.04** for advanced costs as follows: \$15,149.84 to Esther Guardado; \$1,225.20 to Annie Silva; \$1,020

to Joe Martinez; and \$1,018 to Mary Marin. Itemized [Acct, 11/14/17, LFpgs25-26]. **JTD**

6. Declaration of California Victim Compensation Board filed 11/16/17 has claim of **\$2,166.02** re Daniel Mendez to be paid prior to his distribution.
7. Petitioner requests proposed distribution to Daniel Martinez be a 1/7<sup>th</sup> share of estate, **less \$4,842.50** for costs associated with attorney's fees for his eviction, costs of recovery of real/personal property, and \$425 to re-key decedent's van. However, it does not appear Daniel Martinez' distributive share will cover all requested costs. **Supp. 2/2/18 petitioner reduced requested reserve to \$1,500; reduced surcharge to \$2,401.85, vehicle (\$950 value) to be distributed to petitioner to cover surcharge.**
8. Proposed distribution provides for Daniel Martinez' distributive share to be reduced by \$8,900 per assignment filed 9/18/17.
9. There is a creditor's claim from Department of Health Care Services in the amount of **\$21,012.05**. **Supp. 2/2/18, claim will be paid prior to final distribution.**
10. Special Notice: Dept of Health Care Services; CA Victim Compensation Board; Inheritance Funding Company, Inc.
11. Petitioner requests reserve of **\$1,500**. Note: *if approved, need informal account for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge.* **JTD**
12. **Objections by Mary Marin, Jose Martinez and Daniel Martinez filed 03/09/18.**
13. **Reply to Objection filed by Esther Guardado on 04/13/18.**
14. **~Proposed Order: 02/02/18**

**RECOMMENDATION:**

Matter is contested.

If approved, court to set hearing on filing of receipts and final discharge to include informal account/declaration re reserves for **06/12/19**.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600534

CASE NAME: MTR OF DALE LITTLE

**SEE ALSO 6**

HEARING:

Hearing Re: Status/Order/Agreement reached with David Little

COUNSEL:

DAVID C LITTLE	(PET)...PRO/PER
DALE LITTLE	(DEC)...
CHRISTINA ERICKSON TAUBE	(PET)...SHERRI L KASTILAHN
CAROL RISENER	(PET)...WILLIAM M NASSAR
CRIAG M PARKER	(TP )...CRAIG M PARKER
TREVOR D MARTIN	(TREVOR D. MARTIN)
SURETEC INSURANCE	

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status/Order/Agreement reached with David Little

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

1. Matter set on 02/08/18 at hearing re Petition for Removal of Personal Representative, wherein, Court removed David C. Little as administrator and appointed Christina Erickson-Taube as successor administrator; \$350,000 bond. Counsel to submit order.

RECOMMENDATION

Court's discretion.

(lh)

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600534

CASE NAME: MTR OF DALE LITTLE

**SEE ALSO 5**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DAVID C LITTLE	(PET)...PRO/PER
DALE LITTLE	(DEC)...
CHRISTINA ERICKSON TAUBE	(PET)...SHERRI L KASTILAHN
CAROL RISENER	(PET)...WILLIAM M NASSAR
CRIAG M PARKER	(TP )...CRAIG M PARKER
TREVOR D MARTIN	(TREVOR D. MARTIN)
SURETEC INSURANCE	

GENERAL INFORMATION

**Continued from 12/14/17, 12/21/17 and 02/08/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status re David Little,  
administrator

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

1. Letters of Administration issued to David Little, son, on 08/15/16; **limited** authority, \$20,000 bond.
2. Partial/Final Inventory and Appraisal filed 03/21/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(cs/lc/lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

**SEE ALSO 8, 9, 10, 11**

HEARING:

Hearing Re: LETTERS OF ADMINISTRATION (SUCCESSOR)

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP )...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	(TP)
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

GENERAL INFORMATION

Mitchell Roth appointed Special administrator on 11/15/17, bond \$300,000.

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

**Continued from 03/01/18** by Court to be heard with 2<sup>nd</sup> Account and Report of Kimberly Trebing.

**Continued from 03/28/18. Matter continued to trail second accounting.**

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administrator with **limited** authority under IAEA by Shawn Peterson, son, for Mitchell Roth.

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

1. Letters of Special Administration issued to Kimberly Trebing on 09/07/16 and general Administration on 12/29/16; limited authority \$250,000 bond. Powers suspended on 11/15/17; Letters of Special Administration issue to Mitchell Roth on 11/30/17, \$300,000 bond.

2. Petitioner requests bond of \$250,000 (present bond in estate), for monies to be held in estate account and used for the orderly administration of the estate with all other assets/receipts to be placed into a blocked account. Estate consists of \$3,269,200 with \$957,200 in personal property. JTD
3. Randall and Peterson Patterson, sons, nominate Mitchell Roth.
4. **Objections filed 12/12/17 by Kimberly Trebing. Need proof of service.**
5. ~Proposed Form Order: 11/09/17

#### RECOMMENDATION

Need proof of service of objections. Court's discretion re bond. Matter is contested. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lc/lh)



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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

**SEE ALSO 7, 9, 10, 11**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP )...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	(TP)
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

Waiver of Court Fees and Costs filed by KIMBERLY P TREBING is GRANTED

TSC—no notes—JTD

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

**SEE ALSO 7, 8, 10, 11**

HEARING:

Motion Re: Application for order of immediate removal of  
personal representative Filed by Petitioner SHAWN PETERSON

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP )...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	(TP)
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

Waiver of Court Fees and Costs filed by KIMBERLY P TREBING is GRANTED

Currently under review by legal research.

(LR)

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

**SEE ALSO 7, 8, 9, 11**

HEARING:

Petition for REMOVAL OF ADMINISTRATOR AND REVOCATION LETTERS OF  
ADMINISTRATION; SURCHARGE AND REMOVAL ETC

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP )...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	(TP)
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

GENERAL INFORMATION

**Continued from 05/31/17.** I&A to be filed by 06/30/17 and accounting by 08/31/17.  
Discovery has not yet begun.

**Continued from 09/27/17.** Mr. Annigan reports parties have met and conferred and  
are attempting settlement. He further reports his is waiting for the inventory and  
appraisal. Notice to be given by Mr. Annigan.

**Continued from 11/15/17 and 12/20/17.**

**Continued from 03/01/18** at request of Court to be heard with 2<sup>nd</sup> Account and Report  
of Kimberly Trebing.

**Continued from 03/28/18. Matter to trail second accounting.**

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

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

1. Letters of Special Administration issued to Kimberly Trebing on 09/07/16 and general Administration on 12/29/16; limited authority \$250,000 bond.
2. Petitioner seeks removal of administrator Kimberly Trebing. Petitioner alleges that Kimberly has not taken any action relating to the decedent's rental property insurance. Petitioner further alleges that grounds for removal are based on wasted or mismanagement of estate. Rental property have reportedly past due utilities etc.
3. **Supp 09/25/17** contains further allegations as to improper accounting, property used for executor's benefit, unaccounted property, neglect, etc. However, no supporting documentation has been filed.
4. **Supp 11/07/17** asserts administrator continues to waste and mismanage estate; four properties remain unsold; administrator is incapable of properly executing duties and is now on her 5<sup>th</sup> attorney, and continues to defy court orders by failing to provide account statements every 60 days. Petitioners request a third-party administrator.
5. **Objection filed by Kimberly Trebing on 05/23/17 and 02/14/18.**
6. Bonding company has been noticed.

RECOMMENDATION

Court's discretion.

(lc/lh/lc/lh)

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

**SEE ALSO 7, 8, 9, 10**

HEARING:

Second Account and Report of KIMBERLY P TREBING and Petition for allowance of fees filed.

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP )...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	(TP)
TIMOTHY J MCELFISH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN**

GENERAL INFORMATION:

**Letters of Special Administration issued to Kimberly P. Trebing on 09/07/16** with expiration date of 10/17/16; special letters were not reissued.

**Letters of Administration with limited authority were issued to Kimberly P. Trebing on 12/29/16; \$250,000 bond.**

**Letters of Special Administration issued to Mitchell I Roth on 11/15/17** with \$300,000 bond. Present administrator was ordered to turn over all assets. Blocked accounts with respect to all but amounts needed for administration of estate to remain blocked. Monies needed for administration of estate to be turned over to new special administrator. Mr. Lewis will provide the exact amount of funds in operating account. All personal property is left to the discretion of the special administrator.

**Continued from 03/28/18.** Bond to remain in place. Attorney Mitchell Roth represents there are currently 3 houses in escrow, a 4<sup>th</sup> house will follow. Proceeds from sale to be placed in a blocked account. Mitchell Roth to prepare Order and give notice.

THIS CASE IS SET FOR HEARING ON Second Account and Report and Petition for Allowance of Fees by [former] Administrator, Kimberly P. Trebing

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

1. Amended First Account of Special Administrator filed 06/20/17 has not been approved by Court. **Need Order on Amended First Account of Special Administrator prior to approval of this “Second” Account and Report.**  
*Note: Hearing on amended first account [of special administrator] set on 03/01/18 was previously vacated. However, no future hearing on calendar.*  
**JTD**
2. Accounting period: 12/29/16 through 11/15/17. It appears this is administrator’s ‘first account current’ as accounting period commences the date general letters were issued. Does Court wish to deem this a first and final account? **JTD**
3. Declaration of Mitchell I. Roth filed 03/22/18 regarding status of sale of real property.
4. Assets on hand: \$2,723,601.13, consisting of \$714,601.13 in cash and remaining in real property. However, not all assets have been marshalled.
5. Petitioner requests partial payment of statutory fees of \$21,500.00. **Supp filed 05/29/18 with calculation. JTD**
6. Petitioner requests reimbursement for advanced costs in the amount of \$8,508.76 and \$1,054.57.
  - a. Costs of \$1,054.57 includes copies and faxes (totaling \$168.41) generally not allowed per Local Rule 20-909. Also, question what are maintenance fees from Preserve Maint Comm Corp? **Court to inquire.**
  - b. **Supp 05/29/18 alleges costs of \$8,505.76 were carried over from first accounting and have not yet been paid. Costs are itemized within first accounting. However, first accounting costs total \$13,928.83 [See 1<sup>st</sup> Acct, 4/11/17, LFpgs11-13]. Supplement does not clear note. Need reconciliation of costs requested from first accounting.**
7. **Need** bank statement re Logix account per Local Rule 20-908.
8. Notice was given.
9. No proposed order submitted.

RECOMMENDATION:

Need Order on Amended First Account of Special Administrator.

Need to clear note #7 then Court’s discretion. If approved, Court to set hearing re receipts and final discharge for **06/12/19**.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700064

CASE NAME: MTR TINA MAE LEACH

HEARING:

Accounting Review Laura Archung

COUNSEL:

LAURA ARCHUNG (PET)...MOGA LAW FIRM  
TINA MAE LEACH (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Laura Archung,  
administrator

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

1. Letters of Administration with full authority issued to Laura Archung on 04/20/17; \$50,000 bond.
2. Final Inventory and Appraisal filed 07/31/17; however, statement about the bond is incorrect.
3. **Need** accounting and status report.

#### RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700735

CASE NAME: MTR OF JERRY N FREEMAN

HEARING:

First and final Account and Report of JUNE C FREEMAN and  
Petition for allowance of fees

COUNSEL:

JUNE C FREEMAN (PET)...CECILIA R AGUAYO  
JERRY N FREEMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and final Account and Report of  
Executor; Petition for allowance of fees and Final Distribution by JUNE C FREEMAN  
(executor/sole beneficiary)

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

1. Assets on hand: \$331,000, consisting of real property and two vehicles
2. Petitioner waives statutory fees.
3. Attorney requests statutory compensation of \$9,620. Petitioner previously advanced fees held in attorney's trust account to cover fees. The advance was not included in fee calculation.
4. Creditor's claims: Chad D. Freeman \$3,394 settled for \$480 on 2/28/18. Sri Devel \$16,440.09 was approved for \$4,212 on 2/28/18.
5. ~Proposed order: 04/25/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **08/14/19**.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 14

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700896

CASE NAME: CHRISTINE BROWN SPECIAL NEEDS TRUST DATED:11-28-16

HEARING:

Petition for void or terminate trust or replace trustee of fraudulently established trust

COUNSEL:

CHRISTINE BROWN (PET)...RONALD W ASK  
CHRISTINE BROWN SPECIAL NEEDS (TRU)...

Currently under review by legal research.

(LR)

Notice was given.

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

-----  
DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701061

CASE NAME: MTR OF JUDIE L REEDER

HEARING:

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

COUNSEL:

JONNI JOSWICK-TERRY (PET)...PATTERSON LAW FIRM, APC  
JUDIE L REEDER (DEC)...  
DARREN E REEDER (PET/TP)...THOMAS W DOMINICK

**XREF: PROPS1700975** DAVID HAROLD REEDER

GENERAL INFORMATION:

**Continued from 02/07/18.** Court [Dept S35] notes there is a related case PROPS1700975. Court reassigned this case to S36.

**Continued from 04/11/18. Petition for Letters of Administration with full powers granted. Jonnie Joswick-Terry appointed administrator; \$100,000 bond required. Ms. Miller to prepare Order.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jonni Joswick-Terry, sister

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

1. Decedent Judie L. Reeder died intestate on 12/04/08 and was survived by her spouse, David H. Reeder, who later died intestate on 07/13/17.
2. Proof of bond filed 04/12/18.
3. Order filed 04/25/18.
4. Letters issued to Jonni Joswick-Terry on 05/10/18.

RECOMMENDATION:

None.

(lh)

Future Hearing: 6/19/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701105

CASE NAME: Michael Edward Clayvon

**SEE ALSO 17**

HEARING:

OSC re: Dismissal of Spousal Property petition filed by VERNA CLAYVON

COUNSEL:

VERNA CLAYVON (PET)...PRO/PER  
MICHAEL EDWARD CLAYVON (DEC)...

GENERAL INFORMATION

**OSC set on 02/01/18** when there was no appearance.

**Continued from 03/29/18. Matter continued for probate notes to be cleared; Court advised petitioner to seek legal advice.**

THIS CASE SET FOR HEARING ON **OSC re Dismissal on** Spousal Property Petition by Verna Clayvon.

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

1. Petitioner, Verna Clayvon, seeks court confirm petitioner's half and determine that decedent's half of community property located on **Pennsylvania St.** passes to petitioner without administration.
2. Section 7 b is also checked regarding confirmation of petitioner's community property; however, section 1b is not check indicating same. **Need** verified supplement.
3. Petitioner states she and decedent were married on 04/19/86 and the property was acquired 07/02/1982; 4 years prior to marriage. However, the property is currently held in Trust [see LFpg35].
  - a. Question how this is the proper vehicle to administer trust property? **Need** verified supplement with points and authorities.
  - b. Question how 100% of the property can be given to petitioner as the will and Trust bequests 51% [LFpg11&20]? **Need** verified supplement with points and authorities.
4. ~Proposed Form Order: 11/03/17.

## RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-3. Alternatively, court may wish to deny petition.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701105

CASE NAME: Michael Edward Clayvon

**SEE ALSO 16**

HEARING:

OSC re: Dismissal of Petition for Spousal Property filed by VERNA CLAYVON

COUNSEL:

VERNA CLAYVON (PET)...PRO/PER  
MICHAEL EDWARD CLAYVON (DEC)...

GENERAL INFORMATION

**OSC set on 2/01/18 when there was no appearance.**

**Continued from 03/29/18. Matter continued for probate notes to be cleared; Court advised petitioner to seek legal advice.**

THIS CASE SET FOR HEARING ON **OSC re Dismissal on Spousal Property Petition** by Verna Clayvon.

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

1. Petitioner, Verna Clayvon, seeks court determine that decedent's half of community property located on **Blackstone St.** passes to petitioner without administration.
2. Petitioner states she and decedent were married on 04/19/86 and the property was acquired 06/11/05. However, the property is currently held in decedent's name solely [see LFpg11]. Date of acquisition occurred during marriage. Petitioner states decedent died intestate; however, the concurrent petition indicates a will and trust. **Need** verified supplement explaining how this petition is intestate when there appears to be a will in existence.
3. ~Proposed Form Order: 11/03/17.

RECOMMENDATION

Court's discretion re OSC. Need to clear note 2.

(lc/lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800045

CASE NAME: BRENDA A HANDY

HEARING:

Hearing Re: Petition for Authority to Enjoin Lienholder

COUNSEL:

LISA M HANDY (PET)...DARLYNN MORGAN  
BRENDA A HANDY (DEC)...

Currently under review by legal research.

(LR)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800375

CASE NAME: JEANETTE A. SPANGLER

HEARING:

Hearing re: Petition for Letters Testamentary with Full IAEA

COUNSEL:

IMELDA G. JARANILLA (PET)...BARBARA J DIBBLE  
JEANETTE A. SPANGLER (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Limited Authority under IAEA by Imelda Jaranilla, executor/trustee

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

1. Will waives bond. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b) **JTD**
2. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes.
  - a. Does Court also wish to require a copy of decedent's Trust? **JTD**
3. Notice of Petitioner to Administer Estate filed 05/11/18; however, need to clear note #2 to verify notice is complete.
4. ~Proposed Form Order: 04/23/18

#### RECOMMENDATION

Need to clear notes #2-3 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

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DATE: 06/06/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST

**SEE ALSO 20A, 20B**

HEARING:

Petition for (verified) by Cheryl Fulkerson for order compelling redress of breach of trust

COUNSEL:

CHERYL FULKERSON (PET)...GRESHAM SAVA GE NOLAN AND TIL

THE 1997 BERTOLINO FAMILY TRUST(TRU)...

DOLORES BERTOLINO (OBJ)...ROY A BARRY

Currently under review by legal research.

(LR)

Notice was given.

(lh)



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

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DATE: 06/06/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST  
**SEE ALSO 20, 20B**

HEARING:

Petition for (VERIFIED) PETITION BY CHERYL FULKERSON FOR THE  
REMOVAL OF DOLORES BERTOLINO ETC

COUNSEL:

CHERYL FULKERSON (PET)...GRESHAM SAVA GE NOLAN AND TIL  
THE 1997 BERTOLINO FAMILY TRUST(TRU)...  
DOLORES BERTOLINO (OBJ)...ROY A BARRY

Currently under review by legal research.

(LR)

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

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DATE: 06/06/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST

**SEE ALSO 20, 20A**

HEARING:

FIRST ACCOUNT CURRENT Account and Report of CHERYL FULKERSON and  
Petition for allowance of fees filed.

COUNSEL:

CHERYL FULKERSON (PET)...GRESHAM SAVA GE NOLAN AND TIL  
THE 1997 BERTOLINO FAMILY TRUST(TRU)...  
DOLORES BERTOLINO (OBJ)...ROY A BARRY

GENERAL INFORMATION:

On 04/12/17, at hearing re Petition for Removal of Dolores Bertolino and Appointment of Successor Trustee, Court ordered an accounting to be filed and the 1,000 shares of stock not to be transferred or sold.

**Continued from 02/07/18** to clear notes. Notice waived.

**Continued from 05/08/18. Court notes there is a new petition filed by Cheryl Fulkerson set on 6/6/18. Matter continued for Court to make a determination on all issues, and for Counsel to file all appropriate pleadings and objections.**

THIS CASE IS SET FOR HEARING ON First and Final Account Current and Report of Trustee for the Bypass Trust of the 1997 Bertolino Family Trust and Survivor's Trust by Dolores Bertolino (trustee/surviving spouse)

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

1. Antonin Bertolino and Dolores Bertolino were the settlors and trustees of the 1997 Bertolino Family Trust established 12/02/1997. Antonin Bertolino died on 06/06/99. The *Bypass Trust* was funded with the maximum estate deduction of \$650,000, consisting of 273 shares of stock in Bertolino Enterprises, Inc; the *Survivor's Trust* was funded with 727 shares of stock in Bertolino Enterprises, Inc, as well as other assets and liabilities.
2. Accounting period: 01/01/01 to 12/31/16 covers the Bypass Trust and Survivor's Trust; however, it is unclear when the Bypass Trust and Survivor's Trust were funded. **Need** verified supplement

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

3. Bypass Trust assets on hand: **\$454,761** (191 shares of stock); Survivor's Trust assets on hand: **\$1,920,239** (809 shares of stock)
  - a. Summary of Account [Acct, 11/13/17, LFpg13] indicates assets on hand in Survivor's Trust is \$1,920,239; however, Schedule "D" assets on hand indicate carry value is \$5,986,660. **Need verified supplement with corrected Summary of Account and/or Schedules.**
  - b. Question what other assets funded the Survivor's Trust as alleged on page 1, paragraph 1 of accounting [See Acct, 11/13/17, LFpg 3]. **Need verified supplement clarifying any "other" assets [e.g. motor home] and affected Summary of Account/Schedules.**
4. **Need** bank/investment statements verifying date of death balances and ending balance per Local Rule 20-908.
5. **Need** verified supplement which includes names and addresses of beneficiaries per CRC 7.902.
6. **Need** verified supplement with statement regarding agents hired by trustee, their relationship to trustee, and their compensation, if any, per Pr. C. §16063.
7. **Need** Notice of Hearing and Proof of Service as to beneficiary, Gary Bertolino, and Agent for Service of Process of Bertolino Enterprises, Inc. per Pr. C. 17203.
8. Petitioner distributed a total of \$2,974,941 from Bertolino Enterprises Inc, during accounting period as reflected in Schedule C Receipts [Acct, 11/13/17, LFpg18].
9. Petitioner transferred a total of 82 shares of stock from the Bypass Trust to the Survivors Trust pursuant to a "5 and 5 power" per terms of Trust, paragraph 6.2(d). [Copy of Trust attached to Petition by Cheryl Fulkerson filed 02/08/17].
  - a. On 04/12/17, Court ordered trustee may not exercise her *5 and 5 powers*; however, petitioner requests she be allowed to exercise this power per terms of Trust. **JTD.**
10. **Objection to First Account Current filed by Cheryl Fulkerson on 02/2/18.**
11. No proposed order submitted.

RECOMMENDATION:

Matter is contested. Need to clear notes 2-7.

(lh/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 06/06/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000174

CASE NAME: RENEE DUSKO

HEARING:

Accounting Review

COUNSEL:

ELLEN M. PIACENTINI      (CPE)...D M DAVIS

ELLEN M. PIACENTINI      (PET)...D M DAVIS

RENEE DUSKO      (CEP/CEE)...SHERRI L KASTILAHN

FRED W JACKSON JR      (PRO/PER)

GENERAL INFORMATION

**Continued from 12/12/17** due to nonappearance nor has accounting been filed.

Notice given by Judicial Assistant.

**Continued from 01/31/18.** Counsel to file a waiver along with the Edward Jones statements.

**Continued from 04/04/18.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Fred Jackson, trustee

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

1. Order Settling Account by Successor Trustee, Fred Jackson, entered 01/14/16; second account now due beginning 10/01/15.
2. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON DS1000175

CASE NAME: VIRGINIA L. LOPEZ

HEARING:  
Accounting Review

COUNSEL:

THOMAS M LOPEZ	(CPE)...D M DAVIS
VIRGINIA L LOPEZ	(CEP)...PRO/PER
VIRGINIA L. LOPEZ	(CEE)...JEANNE KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Thomas M. Lopez,  
conservator

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

1. Fourth account current of conservator, Thomas M. Lopez, approved/granted on 03/08/17.
2. **Need** Fifth Account Current.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0700044

CASE NAME: MTR OF MELISSA DAYTON

**SEE ALSO 24**

HEARING:

Hearing Re: SUCCESSOR TRUSTEE'S ACCOUNT

COUNSEL:

JEANNE DAYTON	(CPE)...JAMES BRUCE MINTON
MELISSA DAYTON	(CEP)...
SHERRI L KASTILAHN	(PET)...
JAMES BRUCE MINTON	(PET/TEE)...JAMES L HEYWOOD
THE MELISSA DAYTON SPECIAL NEEDS TRUST (TRU)...	

See notes on next matter #24

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0700044

CASE NAME: MTR OF MELISSA DAYTON

**SEE ALSO 23**

HEARING:

Hearing Re: FIRST ACCOUNTING OF JAMES HEYWOOD

COUNSEL:

JEANNE DAYTON	(CPE)...JAMES BRUCE MINTON
MELISSA DAYTON	(CEP)...
SHERRI L KASTILAHN	(PET)...
JAMES BRUCE MINTON	(PET/TEE)...JAMES L HEYWOOD
THE MELISSA DAYTON SPECIAL NEEDS TRUST (TRU)...	

GENERAL INFORMATION

**Continued from 11/01/17, 01/10/18 and 03/21/18 at request of Counsel.**

THIS CASE SET FOR HEARING ON Accounting review re James Heywood, successor Trustee.

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

1. James Heywood appointed successor Trustee on 08/11/15.
2. **Need** accounting.

RECOMMENDATION

Inquire status of accounting.

(lc/lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1200292

CASE NAME: ANNIE LEE GRAHAM

HEARING:

Hearing re Final Discharge

COUNSEL:

WILLIE ALLEN GRAHAM	(CPE)...PRO/PER
ANNIE LEE GRAHAM	(CEP)...
WALTER T MOORE	(PET)...
JUDIE GRAHAM MORRISON	(CPE)...PRO/PER
JETHRO GRAHAM	(OBJ)...PRO/PER
CHARLENE HOOPER	(CHRISTOPHER NELSON)
HELEN LAMAR	(CHRISTOPHER NELSON )

GENERAL INFORMATION

**Continued from 03/28/18 for order on final accounting to be processed.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Court approved final account of conservator Judie Morrison on 05/12/17. Court ordered funds remaining in the conservatorship to be disbursed to conservator as fees. **Need Order approving first and final account. Note requirements in Local Rule 20-614 regarding probate orders.**
2. **Need** receipt of Judie Morrison.
3. **Need** Ex Parte Petition for Final Discharge and Order.
4. **Proposed Order Approving Final Account submitted on 03/23/18 was returned by Court on 05/14/18.**

RECOMMENDATION

**Need Order approving first and final account.**

Inquire status.

(lh)



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

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800074

CASE NAME: JACKIE V VASQUEZ

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

CLAUDIA I VAZQUEZ (CP)...PRO/PER  
JACKIE V VAZQUEZ (CTP)...STEVEN PATRICK BELTRAN

GENERAL INFORMATION

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

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

1. Claudia I Vazquez was appointed Limited Conservator of the person only of Jackie Vazquez on 08/04/15 in Los Angeles County. Case received by San Bernardino County on 04/24/18
2. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)?  
**JTD**
3. Does court wish to require an IRC inquiry/report? **JTD**
4. **Need** post move notice per CRC 7.1063(c) including notice to [current assigned RC] and Inland Regional Center.
5. **Need** amended letters to reflect this county.

RECOMMENDATION

Need to clear notes 4-5 then Court's discretion.

(lh)

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CIVPRO San Bernardino District  
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HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/06/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1200054

CASE NAME: MTR OF ABRAHAM GOMEZ

HEARING:

Hearing Re: Concerns in CI Report

COUNSEL:

MILAGROS RUIZ (CP)...PRO/PER  
ABRAHAM GOMEZ (CTP)...JEANNE E KENNEDY

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Concerns in CI Report

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

1. Matter set on 05/11/18 upon Court's review of memo by Court investigator filed 04/27/18. Court reappointed Jeanne E Kennedy and set for hearing.
2. Need report from appointed counsel.

#### RECOMMENDATION

Inquire status.

(lh)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/06/18 TIME: 1:30 DEPT: S36P  
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CASE#: CON PS1500272

CASE NAME: MTR OF CHELSEA STOYKOVICH

**SEE ALSO 29**

HEARING:

Hearing Re: Status on Visitation

COUNSEL:

CHELSEA STOYKOVICH	(PCE)...MITCHELL I ROTH
MERLINA BURTON	(PET)...PRO/PER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL

Visitation—no notes—JTD

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/06/18 TIME: 1:30 DEPT: S36P  
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CASE#: CON PS1500272

CASE NAME: MTR OF CHELSEA STOYKOVICH

**SEE ALSO 28**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MERLINA BURTON

COUNSEL:

CHELSEA STOYKOVICH	(PCE)...MITCHELL I ROTH
MERLINA BURTON	(PET)...PRO/PER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL

GENERAL INFORMATION

**Vacated from 04/26/18 and rescheduled for 05/16/18 at request of Deputy Counsel.**

**Continued from 05/16/18.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. **Merlina Burton**, mother appointed **limited** conservator of the person only on 09/20/17. **Merlina** suspended and **Public Guardian** appointed temporary successor on 11/09/17.
2. Proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights filed 10/02/17; however, states petitioner **Isela Cevallos** in caption. **Need corrected notice/proof of service.**
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed **by Merlina** on 10/02/17.
4. Care Plan filed by **Merlina** on 10/02/17 by Public Guardian on 01/09/18.
5. Public Guardian report filed 03/21/18.
6. Report of Rose Rosado filed 03/21/18.

RECOMMENDATION

Need to clear note 2. Court to inquire whether Public Guardian will be seeking general conservatorship or court will reinstate Merlina Burton's powers.

(lc/lh)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/06/18 TIME: 1:30 DEPT: S36P  
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CASE#: CON PS1800005

CASE NAME: CARL RENE RUFFIN

HEARING:  
Hearing Re: Visitation

	COUNSEL:
CARL RENE RUFFIN	(CTP)...ROSE C ROSADO
GLORIA HAYDEN	(CP )...PRO/PER
ROBBIE M TAYLOR	(PET)...PRO/PER

Visitation—no notes—JTD

Future Hearings:  
8/15/18 Petition for Appointment of Conservator  
8/15/18 Petition for Appointment of Conservator of the Person Limited Conservatorship

Superior Court of Calif, County of San Bernardino

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

# CONSERVATORSHIPS

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DATE: 06/06/18      TIME: 8:30      DEPT: S37P  
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CASE#: CON PS1700367

CASE NAME: GARY M MAJINSKI

HEARING      Petition for Termination/Accounting Review

COUNSEL:

CHICE A DAVISON                      (CE )...JOSEPHINE A RICH  
GARY M MAJINSKI                      (CEP)...PRO/PER

GENERAL INFORMATION

**Continued from 03/28/18. Hearing continue at request of Court for an accounting or waiver of accounting to be filed by 05/06/18. Accounting review set for 06/06/18.**

THIS CASE IS SET FOR HEARING ON Petition for Termination of Further Proceedings; For Discharge of Conservator of the Estate Only of a Missing Person and for Exoneration of Bond.

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

1. On 10/18/17, Chice A. Davison was appointed Temporary Conservator of the estate only of Gary M. Majinski, a then missing person, on with strict orders allowing petitioner to sell property belonging to conservatee subject to a nuisance lawsuit brought by City of Colton. Chice A. Davison was subsequently appointed conservator of the estate on 11/30/17 with \$55,000 bond.
2. On or about 01/04/18, conservatee Gary M. Majinski appeared out of hiding, stating he disappeared due to grieving the death of his girlfriend. Conservatorship of the estate is no longer necessary.
3. Petitioner states the only asset of the estate is real property; however, petitioner has not marshalled the asset since appointment as conservator.
4. Petitioner seeks termination of estate, to be discharged as conservator, and for exoneration of bond; however, neither the caption of petition nor the petition itself cite the applicable code section authorizing relief per Local Rule 20-601. Question under what authority is petitioner seeking relief? Court to inquire. **JTD**
5. Notice was given.
6. **Waiver of accounting by conservatee, Gary M. Majinski, filed 04/11/18.**
7. Proposed Order submitted 02/15/18. Caption does not contain applicable code section authorizing relief.

RECOMMENDATION  
Court's discretion.

(lh)

Future Hearings:  
7/05/18: Conservatorship Compliance Review Hearing  
2/07/19: Accounting Review

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 2A**

HEARING:

Hearing Re: PETITION TO ENFORCE JUDGMENT

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

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

Currently under review by legal research.

(LR)



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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 2**

HEARING:

Hearing Re: First and Final Account and Report of Darcey Northrup

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

GENERAL INFORMATION

Continued from **12/08/16, 03/16/17, 07/27/17, 10/12/17, 11/13/17 and 02/08/18** at request of counsel. Matter to be heard with motion for joinder.

**Continued from 03/27/18** to clear notes. Court notes that objections have been filed and the accounting has issues.

**Continued from 05/08/18 to clear probate notes. Counsel for petitioner, Darcey Northrup to give notice.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees of Dacre Northrup Trustee.

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

1. **Need** notice of hearing and proof of service.
2. Creditor's Claim re Pamela Churchick for \$3,889,700.00 was rejected on 09/07/16. 90 days did not pass at time of filing of the accounting on 10/05/16. The period has now passed.
3. Petitioner, Dacre, alleges that there are ground leases subject to probate matter in Orange County and the subject of a court-approved settlement [Acct.10/05 LFpg4]. . Question why there are probate matters in both counties?  
**Supp 01/09/17: George lived in San Bernardino and Skaidrite lived in Huntington Beach around 1993/1994.**

4. Petitioner disputes that the Orange County real property is or was a part of the decedent's estate.
5. There is not a proper balanced accounting with schedules. However, there was only a vehicle and boat valued at \$800. Accounting does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. JTD
6. There appears to be other pending matters in this case. Question how the estate can close? **Supp 01/09/17: Petitioner alleges as there are no assets, the estate may close.**
7. **Objections filed by Pamela Ann Williams Churchick on 12/01/16.**

#### RECOMMENDATION

Need proper notice; matter is contested. If approved, set hearing on the filing of receipts and final discharge for **08/14/19**.

(lc/nb/lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400577

CASE NAME: \*\*MASTER FILE\*\* REVEKKA ALVA

HEARING:

Accounting Review

COUNSEL:

JOHN D SALAS	(PET)...HORSPPOOL & HORSPPOOL
REVEKKA ALVA	(DEC)...
MOUSES ANTONIO SALAS SOTO	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JOHN D SALAS  
is GRANTED

Request for Waiver of Court Fees and Costs filed by MOUSES  
ANTONIO SALAS SOTO is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re John Salas,  
administrator

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

1. Status report approved on 09/27/17 for period 09/01/16 to 02/28/17.
2. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500580

CASE NAME: MARGARET A. CLEMENTS

HEARING:

Probate status report

COUNSEL:

CLARE E CLEMENTS (PET)...RICHARD S PRICE  
MARGARET A CLEMENTS (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report by Clare E. Clements, co-executor

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

1. Clare E Clements and Dino Clements were issued Letters Testamentary on 08/23/17 with full authority and \$210,000 bond.
2. Estate is not in a condition to close due to a pending petition for removal of co-executor Dino L. Clements as he has been uncooperative during administration. Estate is not in a position to close estate until petitioner can pay for costs of administration.
3. Petitioner requests an additional 12 months to close the estate.
4. Notice was given.
5. No proposed order submitted.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **04/24/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

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

CIVPRO San Bernardino District  
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HONORABLE: TARA REILLY

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

**SEE ALSO 6, 7**

HEARING:

Petition for Removal of Executor Wayne Fawcett & revocation of Letters of administration

COUNSEL:

WAYNE FAWCETT	(PET)...J. PETER WAKEMAN
MARILYN MILLER	(DEC)...
DEBBIE DELMAN	(PET)...RODNUSKY & ASSOCIATES
CARLTON T LARRABEE	(PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition [filed 04/25/18] for Removal of Executor Wayne Fawcett and Revocation of Letters of Administration by **Deblyn Delman** (executor)

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

1. Letters Testamentary with Full Authority were issued to Wayne Fawcett on 04/05/16 upon court approval on 03/23/16 of petition for probate of lost will dated 08/31/05, lost codicil dated 1/10/11, and lost codicil dated 01/31/11.
2. Petitioner, Deblyn Delman, alleges decedent unknowingly executed a holographic will on 06/13/15 revoking all prior wills, codicils and trust documents executed by decedent, providing for alternate distribution. Said will was held by Deblyn Delman until it was lodged with the Court on 01/26/18.
3. Petitioner, Deblyn Delman, seeks Court order revoking Letters of Administration issued to Wayne Fawcett and appointment as executor named in holographic will. However, petition does not cite authority upon which it is based. **Need verified supplement.**
4. Note: Petition for Removal of Executor Wayne Fawcett, and Petition for Letters of Administration were filed 05/21/18 by Nicholas Gomez (a named beneficiary of holographic will). However, both petitions seek appointment of Deblyn Delman as successor executor. Both petitions are set for hearing on 06/26/18. **Court may wish to trail to 06/26/18. JTD**

5. Notice was given.
6. No proposed order submitted.

#### RECOMMENDATION

Need notice then Court's discretion.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

**SEE ALSO 5, 7**

HEARING:

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

COUNSEL:

WAYNE FAWCETT	(PET)...J. PETER WAKEMAN
MARILYN MILLER	(DEC)...
DEBBIE DELMAN	(PET)...RODNUSKY & ASSOCIATES
CARLTON T LARRABEE	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Will and for Letters of Administration with will annexed by Deblyn Delman, executor/grandniece

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

1. Letters Testamentary were previously issued to Wayne Fawcett on 04/05/16. There is currently no vacancy. Petition for Removal filed concurrently. See notes on prior matter #5.
2. Petition seeks probate of holographic will; however, copy of will is not attached; only a typewritten copy was included. **Need** verified supplement.
3. **Need** receipt of lodged will.
4. It appears petitioner is the nominated executor within the typewritten copy of holographic will. Question if petitioner is seeking appointment as executor? **Need verified supplement.**
5. **Need** Notice of Petitioner to Administer Estate as to Debbie Delman, Nicholas Gomez, Marijam Quershi, Tony Larabee, personal representative of Estate of Millie Evan (post-deceased sister), Rancho Mesa Care Center, Wayne Fawcett, Dustin Nelson, Rick Dunn, Tawny Gomez, Nicholas Delman, Matthew Delman, and Linda Gomez. **Notice of Hearing filed 05/30/18 is an improper form.**
6. **Need** proof of publication.
7. Note: a Petition for Removal of Executor Wayne Fawcett, and a Petition for Letters of Administration was filed 05/21/18 by Nicholas Gomez (a named beneficiary of holographic will). However, both petitions seek appointment of



Deblyn Delman as successor executor. Both petitions set for hearing on 06/26/18. ***Court may wish to trail to 06/26/18. JTD***

8. ~Proposed Form Order:

#### RECOMMENDATION

Need vacancy prior to approval.

Need to clear notes #3-6. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

CIVPRO San Bernardino District  
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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

**SEE ALSO 5, 6**

HEARING:

FIRST AND FINAL Account and Report of WAYNE FAWCETT and Petition  
for allowance of fees

COUNSEL:

WAYNE FAWCETT	(PET)...J. PETER WAKEMAN
MARILYN MILLER	(DEC)...
DEBBIE DELMAN	(PET)...RODNUSKY & ASSOCIATES
CARLTON T LARRABEE	(PET)...PRO/PER

#### GENERAL INFORMATION

**Continued from 10/18/17.** Court called this matter with Mr. Wakeman appearing via court call. After matter had been heard, Ms. Delman appeared stating she objects to the accounting as filed. Due to the objection of Ms. Delman, Court vacates its prior ruling and continues the matter to 12/06/17. Court orders Ms. Delman to file and serve written objections no later than 11/06/17. Notice given by Judicial Assistant.

**Continued from 12/06/17.** Parties to meet and confer regarding objections. Court encourages Debbie Delman and Carlton Larabee to obtain counsel. Notice waived.

**Continued from 03/14/18. Stipulation for continuance filed.**

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Wayne Fawcett/Trustee.

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

1. Petitioner waives accounting and statutory compensation as trustee.
2. Attorney requests statutory fees of \$36,216.50. Ok.
3. **Objection to Final Accounting by Carlton Larrabee filed 11/06/17. Need proof of service.**
4. **Objection to Executor's 1<sup>st</sup> and Final Accounting by Debbie Delman filed 11/06/17 with proof of service.**
5. **Further Objections to 1<sup>st</sup> and Final Report by Deblyn "Debbie" Delman filed 02/02/18 with proof of service.**

6. **Response to Objections of Debbie Delman by Wayne Fawcett filed 11/13/17.**
7. **Response to Objections of Carlton Larrabee filed 11/13/17.**
8. **Stipulation and Order received 03/06/18 and forwarded to department for review.**
9. No proposed order. Submit after hearing.

#### RECOMMENDATION

Matter is contested.

If approved, set hearing on the filing of receipts and final discharge for **06/12/19**.

(lc/lh)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
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CASE#: PRO PS1600180

CASE NAME: MARLIN DELAINE SPEARS

**SEE ALSO 8A**

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT/PROOF OF SALE

COUNSEL:

DELAINA M SPEARS (PET)...SANFORD H. MARGOLIN  
MARLIN DELAINE SPEARS (DEC)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...  
ZUMBRUNN LAW CORPORATION (PRO/PER)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Settlement/ Proof of Sale.

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

1. Petition for Partition of Decedent's Real Property was taken off calendar on 02/21/18 as parties indicated escrow was to close on 03/07/18.
2. Matter set on 02/21/18 for settlement agreement and proof of sale of real property to be filed within 60 days.

RECOMMENDATION

Inquire status.

(lc/lh)

Future Hearing: 11/30/18 Accounting Review

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600180

CASE NAME: MARLIN DELAINE SPEARS

**SEE ALSO 8**

HEARING:

Petition for to approve settlement of the estate without an accounting

COUNSEL:

DELAINA M SPEARS (PET)...SANFORD H. MARGOLIN  
MARLIN DELAINE SPEARS (DEC)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...  
ZUMBRUNN LAW CORPORATION (PRO/PER)

Matter added on at second check. Currently under review due to time constraints.  
Court to continue to first check calendar on 7/18/18 or later Wednesday calendar.

(lh)

Future Hearing: 11/30/18 Accounting Review

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CASE#: PRO PS1700177

CASE NAME: SELINA JOAN RAMIREZ

HEARING:

Waiver of account and for final distribution.

COUNSEL:

LENA LOPEZ BRADLEY (PET)...MOGA LAW FIRM  
SELINA JOAN RAMIREZ (DEC)...

GENERAL INFORMATION:

**Continued from 03/14/18 to clear probate notes. Notice to be given by Mr. Moga.**

THIS CASE IS SET FOR HEARING ON Petition for Distribution on Waiver of Account and Petition for Fees and Reimbursements

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

1. Assets on hand: \$86,988.33, cash
2. Petitioner and attorney requests statutory fees of **\$8,700**, each. Calculated.
3. Attorney reimbursed himself for costs advanced totaling **\$2,747.48**. Itemized [Acct, 12/05/17, LFpg15].
4. All heirs have waived accounting.
5. Notice was given.
6. No proposed order submitted. Submit after hearing.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/12/19**.

(lh)

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

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CASE#: PRO PS1701269

CASE NAME: SEVERO RODRIGUEZ AND MARIA RODRIGUEZ TRUST

HEARING:  
Petition for INSTRUCTIONS

COUNSEL:

ANNA COZENS	(PET)...GUAY P WILSON
SEVERO RODRIGUEZ AND MARIA RODRIGUEZ TRUST (TRU)...	
ROBERTO RODRIGUEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
RUBEN RODRIGUEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
MARIA G RODRIGUEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
ALBERTO RODRIGUEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
RAMIRO RODRIGUEZ	(PET)...WILLIAM M NASSAR & ASSOCIATES
MINERVA MARIN	(PET)...WILLIAM M NASSAR & ASSOCIATES

Currently under review by legal research.

(LR)

Notice given.

(nb)

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



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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800167

CASE NAME: DENNIS MICHAEL DELANEY

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ZUE DELANEY (PET)...ORROCK POPKA TUCKER & DOLEN  
DENNIS MICHAEL DELANEY (DEC)...

GENERAL INFORMATION:

**Continued from 03/21/18. Court needs a copy of current Grant Deed.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Zue Delaney,  
spouse

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

1. Petitioner, Zue Delaney, seeks court confirm her half of community property and determine that decedent's half transfers to petitioner without administration.
2. Petitioner alleges she was decedent's fourth wife having married on 09/20/07 until his death on 09/10/17. Prior to their marriage, decedent acquired real property with his former spouse, Elizabeth Delaney, on 12/20/93 taking title as husband and wife, joint tenants. Following Elizabeth's death, decedent filed an Affidavit of Death of Joint Tenant and title has not changed since. Petitioner contends the real property was maintained with community funds during their entire marriage, including mortgage payments, insurance, taxes, and improvements, etc. **Copy of Grant Deed and Death Certificate of Elizabeth Delaney filed 04/23/18.**
3. Decedent has two biological children, John Delaney and Kathleen Delaney Corte; two adopted children, Nellie Delaney Pennington and Rachel Delaney McCaw, and 5 stepchildren. Petitioner alleges none of the biological or adopted children have objected to distribution of property to petitioner.
4. Notice was given.
5. ~Proposed Form Order: 02/21/18

RECOMMENDATION:

Court's discretion.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800279

CASE NAME: SONIA M EMERSON

HEARING:

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

COUNSEL:

STEVEN EMERSON (PET)...ANTHONY E DIBENEDETTO  
SONIA M EMERSON (DEC)...

#### GENERAL INFORMATION

**Ex parte orders entered 05/03/18. Steven Emerson appointed Special Administrator with limited powers to marshal assets, speak with mortgage holder, cure default, attempt refinance and/or place real property on the market. Bond required \$75,000.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Steven and Scott Emerson (sole heirs) to appoint Steven Emerson (son)

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

1. Petitioners request waiver of bond. Estimated value of estate consists of real property at \$270,000 and remaining \$10,000 in personal property. **JTD.**
2. Amended petition filed 04/24/18 appears to be a supplement clarifying bond, and includes dated signature. However, Scott Emerson, co-petitioner, has not signed either petition. **Need Notice of Petition to Administer Estate and Proof of Service as to Scott Emerson.**
3. **Need** Proof of Publication.
4. ~Proposed Form Order: 03/26/18

#### RECOMMENDATION

Need to clear notes #2-3. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

CIVPRO San Bernardino District  
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HONORABLE: TARA REILLY

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800367

CASE NAME: WILLARD H REMAI

HEARING:

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

COUNSEL:

WILLIAM REMAI (PET)...ROGER VON KAESBORG  
WILLARD H REMAI (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by William Remai, brother

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

1. Suggested bond \$350,000 based on estimated personal property. **JTD**
2. ~Proposed Form Order: 04/19/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800370

CASE NAME: Michael Robert Lozich

HEARING:

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

COUNSEL:

JOEL LOZICH (PET)...LAW OFFICE OF WILLIAM M NASSAR  
MICHAEL ROBERT LOZICH (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Joel Lozich (son/sole heir)

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

1. Petitioner is sole heir and seeks waiver of bond. Estimated value of estate is \$365,000 based on real property only. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b). **JTD**
2. **Need** Proof of Publication.
3. ~Proposed Form Order: 04/20/18

RECOMMENDATION

Need to clear note #2 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/14/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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DATE: 06/06/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700577

CASE NAME: MARGARET GLENNA HARRIS

HEARING: Petition for final distribution on waiver of Account and Report of  
MARGARET G REED and Petition for allowance of fees

COUNSEL:

MARGARET G REED (PET)...HAROLD CHRISTOPHER HERITAGE  
MARGARET GLENNA HARRIS (DEC)...

Matter added on at second check. Court to continue to first check calendar no earlier than 07/18/18 or later Wednesday calendar.

(lh)

Future Hearing: 1/14/19 Accounting Review

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CIVPRO

San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**TRUSTS**

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DATE: 06/06/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1500387

CASE NAME: THE SPECIAL NEEDS TRUST OF CHANTE BOYD

HEARING:

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

COUNSEL:

THE SPECIAL NEEDS TRUST OF CHANTE BOYD      (TRU)...  
INLAND COUNTIES REG CNTR      (PET/TEE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

**Continued from 01/03/18** at request of Court for Counsel to be present. Court inquires why no monies have been spent on Chante Boyd in this accounting.

**Continued from 03/21/18 by Court. No appearance.**

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Report of Trustee and Petition for Allowance of Attorney's Fees and for Approval of Payment of Trustee Fees

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

1. Accounting covers period: 06/01/15 to 06/30/17
2. Assets on hand: \$22,103.20 (cash)
3. Petitioner has estimated the beneficiary's future needs to include seasonal clothing, ongoing medical and dental care that are not covered by insurance.
4. Petitioner requests approval of trustee's fees already taken in the amount of \$2,000 in accordance with their fee schedule. JTD
5. Attorney requests fees of \$700 for services during this accounting period. Billed at 1.6 hours attorney time and 3.0 hours paralegal time at \$250/\$100 per hour. Itemized. [4<sup>th</sup> Acct, 09/14/17, LFpg42-43] JTD
6. Petitioner alleges current bond of \$30,000 should be reduced to \$25,000 based on calculation. Appears sufficient.
7. Petitioner proposes a revised Master Trust of California Agreement to include reimbursement of any benefits paid by any other state's Medicaid program and notice to such other's state agencies to comply with Social Security regulations. JTD

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

8. Petitioner requests biannual accountings due to low balance of trust. JTD
9. **Need** verified supplement as to why no monies have been spent on Chante Boyd during accounting period per 1/3/18 minute order. **Consumer Information by IRC filed 03/15/18.**
10. Notice given.
11. ~Proposed Order: 09/14/17

#### RECOMMENDATION

Court's discretion. If approved, set hearing on next accounting review for **08/29/18** (if one year) or **08/28/19** (if two years). Accounting to be filed 30 days in advance.

(lh)

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

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DATE: 06/06/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1600347

CASE NAME: MTR OF BEINSCHROTH FAMILY TRUST

HEARING:

Petition for INSTRUCTIONS RE DISPUTED CLAIM AND SPECIFIC BEQUEST

COUNSEL:

JOAN BEINSCHROTH-PAUSTEL	(PET)...	JAMES L HEYWOOD AND ASSOC
BEINSCROTH FAMILY TRUST	(TRU)...	
MICHAEL BEINSCHROTH	(PET)...	JASON L GAUDY
LAWARENCE A DEAN II	(PET)...	SHERRI L KASTILAHN
MICHAEL BEINSCHROTH	(RES)...	PRO/PER
ANDREW BEINSCHROTH	(PRO/PER)	

Future Hearing: 3/19/19 Hearing Re: Final Discharge

Currently under review by legal research.

(LR)



Superior Court of Calif, County of San Bernardino

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

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DATE: 06/06/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1600967

CASE NAME: THE BECKER FAMILY REVOCABLE LIVING TRUST

**SEE ALSO 18**

HEARING:

Petition for REMOVAL OF TRUSTEE AND APPOINTMENT OF SUCCESSOR  
TRUSTEE, TO COMPEL ACCOUNTING

COUNSEL:

ELAINE S SHOOSHAN (PET)...THOMAS W DOMINICK  
JANET B OWENS (PET)...THOMAS W DOMINICK  
THE BECKER FAMILY REVOCABLE TRUST (TRU)...  
DARLENE SHERRYL BECKER (OBJ)...JESSIKA MEYER

Currently under review by legal research.

(LR)

Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/06/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1600967

CASE NAME: THE BECKER FAMILY REVOCABLE LIVING TRUST

**SEE ALSO 17**

HEARING:

Trial Setting Conference

COUNSEL:

ELAINE S SHOOSHAN (PET)...THOMAS W DOMINICK  
JANET B OWENS (PET)...THOMAS W DOMINICK  
THE BECKER FAMILY REVOCABLE TRUST (TRU)...  
DARLENE SHERRYL BECKER (OBJ)...JESSIKA MEYER

TSC—no notes—JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## CONSERVATORSHIPS

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DATE: 06/06/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS0700070

CASE NAME: ABRAHAM ISAAC ARRIOLA

### HEARING:

Petition for Removal of Willaim Mastalier as Co-Conservator of  
Abraham Issac Arriola

### COUNSEL:

RAMONA D MASHTALIER	(CP )...JANET M HERRING
WILLIAM B MASTALIER	(CP )...PRO/PER
FAITH MICHELLE ARRIOLA	(CP )...PRO/PER
JEANNE E. KENNEDY	(PET)...JEANNE E KENNEDY
ABRAHAM ISAAC ARRIOLA	(CEP/CEE)...JEANNE E KENNEDY

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Removal of Willaim Mastalier as  
Co-Conservator of Abraham Issac Arriola by Jeanne E. Kennedy, appointed counsel

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

1. Ramona Mashtalier (mother), William Mashtalier (stepfather), and Faith Arriola (sister) were appointed co-conservators of the person only of Abraham Isaac Arriola on 10/31/07.
2. Petitioner, Jeanne E. Kennedy, was appointed Counsel for conservatee on 12/07/17.
3. Petitioner, Jeanne E. Kennedy, seeks removal of co-conservator, William Mashtalier, former husband of Ramona Mashtalier, co-conservator, who divorced in late 2013/early 2014 and are no longer in contact. Petitioner alleges William suffered from a severe stroke prior to divorce and his care became too much for Ramona in addition to the ongoing care of conservatee.
4. Petitioner believes William Mashtalier currently resides in a care facility and is no longer interested or able to perform duties as a co-conservator.
5. **Need** notice of hearing and proof of service as to co-conservator, William Mashtalier.
6. ~Proposed Order: 04/25/18 provided William Mashtalier is not present on date hearing.

## RECOMMENDATION

Need to clear note #5 then Court's discretion.

(lh)

Future Hearing: 6/27/18 Hearing Re: Possible Removal of Co-Conservator

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200280

CASE NAME: EMANUEL RIOS

HEARING:

Hearing Re: COURT INVESTIGATOR'S REPORT

COUNSEL:

MIRNA HENNICKE	(CP )...BROCK, MARTIN & VOORHEES, PC
EMANUEL RIOS	(CTP)...ROSE C ROSADO
JOELLE LEE A NICOL	(PET)...ROBERTA L. TAYLOR & ASSOCIATES
ROSE C. ROSADO	(PET)...ROSE C ROSADO

**XREF: PROPS1500243** EMANUEL RIOS SELF-SETTLED SPECIAL NEEDS TRUST

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON COURT INVESTIGATOR'S REPORT

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

1. Mirna Hinkle (sister) was appointed conservator of the person only on 01/09/13 of Emanuel Rios.
2. Matter set on 03/09/18, wherein, Court having read and considered the Court Investigator's report filed 02/23/18 orders counsel reappointed for conservatee and matter placed on calendar to address mother's concerns. Attorney Jeanne E Kennedy appointed for Emanuel Rios. Next hearing set for 06/06/18.
3. On 03/19/18, it was brought to Court's attention that Rose C Rosado was previous Counsel for conservatee. Jeanne E Kennedy is relieved as Counsel and Rose C Rosado remains as Counsel for conservatee, Emanuel Rios.
4. **Need** report of attorney Rosado.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400268

CASE NAME: Sherard E Jones

HEARING:

Hearing Re: COURT INVESTIGATOR'S REPORT

COUNSEL:

SERENITY Z JONES (CP)...PRO/PER  
SHERARD E JONES (CTP)...JEANNE E KENNEDY

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON COURT INVESTIGATOR'S REPORT

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

1. Serenity Jones (sister) was appointed limited conservator of the person only of Sherard E. Jones on 01/28/15.
2. Matter set on 03/09/18, wherein, Court having read and considered the Court Investigator's report filed 02/16/18 orders Counsel reappointed and matter placed on calendar to discuss mother's concerns. Attorney Jeanne E. Kennedy appointed for Sherard E. Jones.
3. Second Report of Counsel Kennedy filed 05/16/18.

#### RECOMMENDATION

Court's discretion.

(lh)

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700084

CASE NAME: MTR OF ARTHUR MARTIN LUNA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ALBERT A JIMENEZ

COUNSEL:

GILBERT SALINAS	(CPE)...PRO/PER
ARTHUR MARTIN LUNA	(CEP)...MITCHELL I ROTH
ALBERT A JIMENEZ	(PET/CPE)...TOMOHIRO J KAGAMI
DORA L VILLASENOR	(CPE)...LAW OFFICE OF JOHN R RAMOS

**XREF: PROPS1700209** *ARTHUR LUNA*  
**CIFDS1700033** *LUNA V. VILLASENOR*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Albert A Jimenez and Gilbert Salinas, co-conservators of the person and estate

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

- 1 Albert A Jimenez and Gilbert Salinas were appointed co-conservators of the person and estate on 11/01/17.
- 2 Determination of Conservatee's Appropriate Level of Care filed.
- 3 Notification of Conservatee's Rights filed 11/7/17.
- 4 Care Plan filed 05/31/18 not in LF at time of review. Clerk's office notified 6/1/18. **JTD**

RECOMMENDATION:

Court's discretion.

(lh)

Future Hearing: 7/02/18 Status on Visitation/Restraining Order

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

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DATE: 06/06/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700157

CASE NAME: MARTINA CRUZ

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

DONNA KATHLEEN MORENO  
MARTINA CRUZ

(PET)...PRO/PER  
(CTE)...E. JOAN NELMS

GENERAL INFORMATION

**Continued from 02/07/18. Court is advised the only asset of the estate is the home. Court is further advised conservatee, conservator and her husband plan on moving into conservatee's home. Counsel report an 850 petition and trust will be prepared. Conservator to file petition/trust or declarations from all children asserting conservatee is competent to file petitioner to be filed. Bond may not be needed.**

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Court appointed Donna Kathleen Moreno appointed conservator of the person and estate of Martina Cruz, \$30,000 bond.
2. **Need** petition/trust and/or declaration per minute order on 02/07/18.

RECOMMENDATION

Need to clear note #2. Court's discretion re bond.

(lh)

**XREF: CIFDS1700020** CRUZ VS BELTRAN

**CIFDS1700021** CRUZ VS CRUZ

**CIFDS1700022** CRUZ VS CRUZ



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

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DATE: 06/06/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700288

CASE NAME: THOMAS QUAID

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JEANNETTE OCHOA

COUNSEL:

JEANNETTE OCHOA (PET)...PRO/PER  
THOMAS QUID (CEE)...JEANNE KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Jeannette Ochoa,  
conservator/mother

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

1. Jeannette Ochoa (mother) was appointed Limited Conservator of the person on 11/01/17.
2. Notification of Conservatee's rights filed 04/25/18.
3. Determination of Conservatee's Appropriate Level of Care filed 04/25/18.
4. Care Plan filed.

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino  
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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **ELDER ABUSE**

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DATE: 06/06/18 TIME: 1:30 DEPT: S37P  
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CASE#: EAP PS1800058

CASE NAME: KIDD VS NEAL

HEARING:

Court Trial set for ELDER/DEPENDANT ADULT ABUSE of ANN KIDD

COUNSEL:  
ANN KIDD (PP)...PRO/PER  
JOHNNIE MAE NEAL (RP)...PRO/PER

Court trial—no notes—JTD