



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/07/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

05/09/17lc; 06/01/17lh

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1100131

Vacated

CASE NAME: DONALD EVANS

HEARING:

Accounting Review

COUNSEL:

BILL EVANS

(PET)...FULLERTON LEMANN SCHAEFER & DO

DONALD EVANS

(DEC)...

Future hearing dates: 08/21/17 Status Report.

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1100741
CASE NAME: ESTATE OF JULIUS LEON SHARTSIS

HEARING: FIRST AND FINAL Account and Report and Petition for Allowance of fees.

COUNSEL:

JULIUS LEON SHARTSIS (DEC)...
JOHN D MICKUS (PET)...JOHN D MICKUS
GARY SHARTSIS (PET)...GARY C WUNDERLIN
DAVID HO (APP)...DECASTRO WEST CHODOROW MENDLER
GARY LEE SHARTSIS (APP)...GARY C WUNDERLIN
LINDA BRONKEN SHARTSIS (APP)...GARY C WUNDERLIN
DALE SHARTSIS (TP)...LAWRANCE A WIDDIS
LINDA LEE SHARTSIS BRONKEN (GARY C WUNDERLIN)
JOHN D MICKUS (JOHN D MICKUS)

XREF: CIVDS1413391

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st and Final Account of Special Administrator/Administrator and Petition for Fees and Distribution by **John Mickus**.

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

1. Petitioner seeks statutory compensation of \$44,911. Ok.
2. Petitioner seeks a reserve of \$7,500.
3. Notice of hearing and proof of service filed 04/07/17; however, image not available in LF at time of review. **Clerk notified on 05/21/17.**
4. No proposed order. Submit after hearing.
5. Court to inquire re order from 04/27/17 hearing in favor of David Ho for trial Costs.

RECOMMENDATION

Need notice. If approved, set hearing on the filing of receipts and final discharge for **06/13/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400693

CASE NAME: ELAINE LEVITT

HEARING:

Hearing re Final Discharge

COUNSEL:

JOHN BABROWSKI (PET)...COSGROVE, CO SGROVE & HUM PHRE
ELAINE LEVITT (DEC)...

GENERAL INFORMATION

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

THIS CASE SET FOR HEARING ON Final Discharge.

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. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500512
CASE NAME: GERTRUDE ELIZABETH JONES
HEARING: FIRST AND FINAL REPORT OF ADM UPON WAIVER Account and
Report of **MARY K LLOYD** and Petition for allowance of fees filed.

COUNSEL:

MARY K LLOYD	(PET)...BRUCE GIVNER
GERTRUDE ELIZABETH JONES	(DEC)...
THOMAS M ALEXANDER JR	(PET)...PRO/PER
MARY K LLOYD	(PET)...BRUCE GIVNER
AUCTION-CA FINANCIAL SERVICES (TP)	...PRO/PER

Currently under further review of examiner.

Future Hearing: 4/02/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500910

CASE NAME: MTR OF LOUIS SANCHEZ ENCISO

SEE ALSO 6

HEARING:

Hearing Re: STATUS OF COMPLIANCE TO SETTLEMENT

COUNSEL:

MIGUEL ENCISO (PET)...PRO/PER
LOUIS SANCHEZ ENCISO (DEC)...
MARIA TRIMBLE (PET)...E JOAN NELMS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Compliance to Settlement.

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

1. Matter set on 04/05/17 when a settlement was read into the record.
2. Need settlement agreement.

RECOMMENDATION

Inquire status.

(lc)

Future Hearing: 9/12/17: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500910

CASE NAME: MTR OF LOUIS SANCHEZ ENCISO

SEE ALSO 5

HEARING:

Accounting Review

COUNSEL:

MIGUEL ENCISO (PET)...PRO/PER

LOUIS SANCHEZ ENCISO (DEC)...

MARIA TRIMBLE (PET)...E JOAN NELMS

GENERAL INFORMATION

Continued from 04/13/17.

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 Maria Trimble, daughter, on 02/04/16; **limited** authority, no bond.
2. Final Inventory and Appraisal filed 05/23/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

SEE ALSO 8 9 10

HEARING:

Hearing Re: STATUS OF COMPLIANCE OF COURT'S ORDERS

COUNSEL:

GARY S WARD

LUPE G FLIN

SHARLEEN MALDONADO-WARD

CARMEN HERNANDEZ

(PET)...FRIDLEY LAW FIRM

(DEC)...

(PET)...MICHAEL C MADDUX

(OBJ)...GILBERT M GUTIERREZ

Status – No notes – JTD

Future Hearings: 2/07/18: Readiness Calendar, 2/26/18-2/28/18: Court Trial,
3/01/18-3/02/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

SEE ALSO 7 9 10

HEARING:

Hearing Re: OSC RE POSSIBLE DISMISSAL OF PETITION (5/8/16)

COUNSEL:

GARY S WARD	(PET)...FRIDLEY LAW FIRM
LUPE G FLIN	(DEC)...
SHARLEEN MALDONADO-WARD	(PET)...MICHAEL C MADDUX
CARMEN HERNANDEZ	(OBJ)...GILBERT M GUTIERREZ

Waiver of Court Fees and Costs filed by CARMEN HERNANDEZ is GRANTED

Waiver of Court Fees and Costs filed by SHARLEEN MALDONADO-WARD is GRANTED

TOTAL FEES WAIVED TO DATE: \$1305.00

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Possible Dismissal on Petition for Sharleen Maldonado-Ward.

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

1. Matter set on 04/05/17. Court sets deadline for petitioner, Sharleen Maldonado-Ward as to clear all remaining probate notes on her petition by the next hearing date. Petition will be dismissed if notes are not cleared. It appears that petitioner has recently retained Michael Maddux as counsel.

RECOMMENDATION

Court's discretion re OSC.

(lc)

Future Hearings: 2/07/18: Readiness Calendar, 2/26/18-2/28/18: Court Trial,
3/01/18-3/02/18: Court Trial

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

SEE ALSO 7 8 10

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION
WITH WILL ANNEXED

COUNSEL:

GARY S WARD	(PET)...FRIDLEY LAW FIRM
LUPE G FLIN	(DEC)...
SHARLEEN MALDONADO-WARD	(PET)...MICHAEL C MADDUX
CARMEN HERNANDEZ	(OBJ)...GILBERT M GUTIERREZ

GENERAL INFORMATION

Continued from 5/11/16, 7/6/16, 9/14/16, 10/05/16, 01/11/17 and 04/12/17. Mark Flory stated that Jack Osborn is requesting to resign as GAL for Carmen Hernandez. Court set deadline for filing of request to be relieved as GAL for 4/26/17. Written request to be appointed as successor GAL to be filed same day. Opposition to be filed by 05/10/17.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters of Administration with full authority under IAEA by grandson Gary Ward.
- Petition 2 - Petition for Letters of Administration with Will Annexed with full authority under IAEA, by Sharleen Maldonado-Ward to appoint Sylvia Hernandez.

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

Petitioner 1 – Gary Ward, grandson

1. Petitioner alleges that will waives bond. However, will waives bond as to nominated executors. Estimated estate value is \$279,000. **Supp. (12/10/15): probate opened to transfer real property. Court may wish to grant Limited authority and waive bond.**
2. Petitioner alleges that the first named executor is unable to act and lacks capacity to decline to act [11/4/15 Petition LF p.3]. The second named executor is deceased and petitioner is nominated by one of the beneficiaries.

3. **Supp. (12/10/15): petitioner states that the estate of the beneficiary of decedent's will is being probated in Los Angeles and that petitioner is the beneficiary/heir in the Los Angeles probate.**
4. Petitioner attaches a copy of decedent's will dated 9/16/69 and a Second Codicil dated 7/26/84. Need copy of First Codicil to Decedent's Will. **Supp. (12/10/15): petitioner believes decedent destroyed the First Codicil as no one known to decedent has seen the document.**
5. **Objection to appointment and supporting declaration filed 12/15/15 by daughter, Carmen Hernandez.** Proof of service of summons filed 3/15/16 and 4/18/16.
6. **Will Contest filed 12/15/15 by Carmen Hernandez.** Proof of service of summons filed 3/15/16 and 4/18/16.
7. **Objection filed 3/15/16 by Sharleen Maldonado-Ward.**
 - a. **Need verification per Pr.C.§1021.**
 - b. **Need proof of service of objection.**
8. **Reply to objections filed 4/26/16.**
9. **Ex-parte Petition for Appointment of GAL for Carmen Hernandez filed 5/3/16 and forwarded to the department. JTD**
10. ~Proposed form order: 11/4/15

Petitioner 2 - Sharleen Maldonado-Ward to appoint Sylvia Hernandez

11. Petitioner, Sharleen Maldonado-Ward request the Court appoint Sylvia Hernandez.
12. Petitioner alleges that will waives bond. However, will waives bond as to nominated executors. Estimated estate value is \$300,000. JTD
13. Petitioner alleges that the first named executor, Carmen Hernandez, is unable to act and lacks capacity to decline to act. The second named executor, Charles Ward, is deceased.
14. Item 8 is incomplete as to *all* persons mentioned in decedent's will and codicil whether living or deceased and *all* persons checked in items 2, 5, 6, 7. Need verified supplement.
15. Need proof of publication.
16. Petitioner attaches a copy of decedent's will dated 9/16/69 and a Second Codicil dated 7/26/84. Supplement filed 12/10/15 indicates petitioner believes decedent destroyed the First Codicil as no one known to decedent has seen the document.
17. No proposed order. Submit after hearing.

RECOMMENDATION:

Need to clear notes 7 & 14-15. Matter is opposed. If approved, set hearing for Accounting/Status Review on **08/15/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(sa/lc)

Future Hearings: 2/07/18: Readiness Calendar, 2/26/18-2/28/8: Court Trial, 3/01/18-3/02/18: Court Trial

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501011

CASE NAME: LUPE G. FLIN

SEE ALSO 7 8 9

HEARING: Petition for Appointment of Guardian ad Litem

COUNSEL:

GARY S WARD	(PET)...FRIDLEY LAW FIRM
LUPE G FLIN	(DEC)...
SHARLEEN MALDONADO-WARD	(PET)...MICHAEL C MADDUX
CARMEN HERNANDEZ	(OBJ)...GILBERT M GUTIERREZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian ad Litem by Sylvia Hernandez.

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

1. On 04/12/17. Mark Flory stated that Jack Osborn is requesting to resign as GAL for Carmen Hernandez. Court set deadline for filing of request to be relieved as GAL for 4/26/17. Written request to be appointed as successor GAL to be filed same day. Opposition to be filed by 05/10/17.
2. Petitioner seeks appointment as GAL for Carmen Hernandez who is presently represented by Jack Osborn.
3. Carmen is an objector and possibly beneficiary of the estate of her mother Lupe; decedent in this case. Petitioner is alleged power of attorney and Trustee of Carmen Hernandez Trust.
4. Need notice of hearing and proof of service.
5. **Objections filed by Gary Ward on 05/10/17.**

RECOMMENDATION

Need notice; matter is contested.

(lc)

Future Hearings: 2/07/18: Readiness Calendar, 2/26/18-2/28/18: Court Trial,
3/01/18-3/02/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501141

CASE NAME: MTR OF H.H. HILL

HEARING:
Accounting Review

COUNSEL:
SHARON J BLINCI (PET)...KAREN J LA MADRID
H H HILL (DEC)...

GENERAL INFORMATION

Continued from 04/19/17. Telephonic request to continue.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Sharon Blinci, daughter, on 03/3/16; full authority, no bond.
2. Final Inventory and Appraisal filed 02/08/16. Need bank statements per local rule 20-908.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600922

CASE NAME: MTR OF ALTON FAYETTE COREY

HEARING:

WAIVER OF Account and Report of ARTHUR T COREY and Petition for allowance of fees filed.

COUNSEL:

ARTHUR T COREY (PET)...JEANNE M FITZGERALD
ALTON FAYETTE COREY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Arthur Corey, brother.

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

1. Petitioner is sole heir, waives accounting and statutory compensation.
2. Attorney seeks statutory fees of \$10,339.49. Ok. It appears that there is a loss of real property totaling \$12,500 not considered in statutory fee calculation. Need verified supplement.
3. Need bank statements to support Inventory and Appraisal balance per local rule 20-908.
4. **Report of Waiver of Account does not address creditor's claim by Onemain Financial Issuance Trust for \$8,627.34 recently filed on 05/17/17. Need verified supplement.**
5. No proposed order. Submit order after hearing.

RECOMMENDATION

Need to clear notes 2-4. If approved, set hearing on the filing of receipts and final discharge for **06/13/18**.

(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601230

CASE NAME: CHARLES M.T. WARREN, II

HEARING:

Hearing Re: RECEIPT OF REPORT FROM SANDY TURNER

COUNSEL:

MICHELLE WARREN (PET)...PRO/PER
CHARLES M.T. WARREN II (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Report from Sandy Turner.

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

1. Matter set on 04/12/17 Spousal Property Petition when Sandy Turner was appointed counsel for minor children.
2. Need GAL report.

RECOMMENDATION

Need report.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700293

CASE NAME: JOHN MINUGH STEELE JR

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

LINDA M JONES (PET)...PRO/PER
JOHN MINUGH JR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Linda Jones, friend.

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

1. Public Administrator appears to have higher priority per Pr. C. § 8461(p). Court may wish to refer to Public Administrator.
2. Petitioner requests bond of \$60,000. Ok.
3. ~Proposed Form Order: 03/29/17.

RECOMMENDATION

Court's discretion. As matter may be referred to Public Administrator, court may wish to continue matter to a Tuesday calendar. If approved, set Accounting/Status Review for **08/15/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

Superior Court of Calif, County of San Bernardino
Page: 14A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601091

CASE NAME: THE JOE B MELTON & MONICA T MELTON TRUST

HEARING:

Hearing Re: STATUS OF MEDIATION (MEDIATION IS TODAY)

COUNSEL:

CORA A BENIQUEZ	(OBJ)...PHILIP M FLANIGAN
JOSEPH B MELTON	(PET)...DIANA J CARLONI
THE JOE B MELTON & MONICA T ME	(TRU)...

No notes – JTD
(lh)

FUTURE HEARING: 8/10/17: HEARING RE: STATUS OF SALE OF REAL PROPERTY, PETITION TO COMPEL THE TRUSTEE TO REPORT INFORMATION ABOUT THE TRUST TO THE BENEFICIARIES

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

HEARING: Petition for TO CONFIRM TITLE OF REAL PROPERTY TO THE ESTATE
AND TO CANCEL DOCUMENTS ETC

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
ALAN SHEPPARD	(PRO/PER)

x-ref: PROPS0800715 Spousal Petition re: pre-deceased Wife's 50% interest.

GENERAL INFORMATION

Continued from 03/01/17.

THIS CASE SET FOR HEARING ON Petition to Confirm Title of Real Property to the Estate and to Cancel Documents, etc. by Rosemary Dominguez.

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

1. Mailed Notice of Hearing to heirs, Allan Shepard (purchaser of real property), Luis Trujillo (former personal representative), respective counsel, and the Department of Health Care Services, filed 02/01/17.
2. Decedent died intestate; heirs are: Anthony Dominguez (son), Alexander Dominguez (son), Michael Dominguez (son), David Dominguez (son), Rosemary Dominguez (daughter), and the children of post deceased son Frederic Dominguez.
3. Need verified supplement setting forth the names, addresses, and ages or whether adult of all persons requiring notice, including the heirs of post-deceased son Frederic Dominguez. Sufficiency of notice cannot be determined without this supplement.
4. Need proof of publication as ordered for service as to Luis Trujillo.
5. Need 30-days personal service to Alan Shepard, per PC 851(a)(2); see next note.
6. **Objections filed by Alan Shepard on 05/03/17. Does court wish to deem served? JTD**
7. ~Proposed Order: 12/27/16.

RECOMMENDATION

Need to clear notes. Matter is contested.

(jm/)

Future Hearing: 9/20/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 15A add-on

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

DATE: 06/07/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400042

CASE NAME: Carolyn Jacobson

HEARING: Hearing Re: Accounting Review

COUNSEL:

JULIE STEWART (PET)...DUANE P BOOTH
CAROLYN JACOBSON (DEC)...
STATE OF CALIFORNIA FRANCHISE (TP)...
JONI JACOBSON (LAW OFFICES OF TIMOTHY L MCCAN)
KATHERINE HALL (PRO/PER)
AJC TRUE GRIT LLC
BAKER P.M.J.,L.P.
PROJECT PROPERTY NUMBER FIVE

XREF: PROPS1300285, CIVBS1200309

GENERAL INFORMATION:

Continued from 9/22/15, 12/2/15, 01/20/16, 04/19/16, 06/14/16, 09/08/16, 11/09/16, 02/09/17 and 03/29/17. Waiting for the sale of 8 properties.

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters of Administration with Will Annexed issued to Julie Stewart 10/28/14, no bond.
2. Partial Inventory and Appraisal filed. Need final inventory & appraisal.
3. Need an accounting or status report.

RECOMMENDATION:

Inquire status.
(sa/nb/lc/lh/lc)

Future Hearings: 9/14/17: Readiness Calendar, Petition For Orders To Determine Interest Of Probate Estate And Direct Transfer. 9/25/17-9/29/17: Court Trial.

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

HEARING: THIRD Account and Report of STAN MANDELL and Petition for allowance of fees filed.

COUNSEL:

STAN MANDELL

(CPE)...LAMB MORRIS & LOBELLO

SHANIKA A LISTER

(CEP)...EDWARD B FISCHER & ASSOCIATES

EDWARD B FISCHER

(PET)...EDWARD B FISCHER & ASSOCIATES

X- REF: PROPS1400134 CIVDS1309039

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 3rd Account Current and Petition for Allowance of Fees by Stan Mandell.

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

1. Accounting period 02/01/16 – 01/31/17.
2. Assets on hand \$89,723.27 of which \$68,723.27 is cash of \$43,264.61 and remainder in personal property.
3. Petitioner is seeking fees of \$11,204.70 for 78.1 hours at \$100/160 per hour less periodic payments of \$6,000, leaving a balance of \$5,204.70. Itemized [Acct. 04/26LFpg 34-45]. JTD
4. Petitioner is seeking court approve periodic payments of \$500 per month commencing 02/01/17.
5. Attorney is seeking fees of \$12,440.50 for 37.1 hours at \$125/395 per hour for paralegal and attorney services respectively. Itemized [LFpg48 et seq].
6. Current bond is \$487,000. Ok.
7. ~Proposed Order: 04/26/17.

RECOMMENDATION

RFA, Court's discretion re fees and bond. If approved, set hearing on the next accounting review for **04/19/18** (if one year) or **04/18/19** (if two years). Accounting to be filed 30 days in advance.

(lc/lh)

Future Hearings: 11/16/17: Readiness Calendar, 12/11/17-12/15/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0900112

CASE NAME: DEIDRE DIANE WAMHOFF

SEE ALSO 18

HEARING:

Hearing Re: POSSIBLE TERMINATION OF CONSERVATORSHIP

COUNSEL:

VICKI WAMHOFF	(PCR)...D M DAVIS
ALETA BELDEN	(PCR)...PRO/PER
DEIDRE DIANE WAMHOFF	(PCE)...MITCHELL I ROTH
BRENDA S DAWSON	(PET)...PRO/PER

See notes on matter 18.

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

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0900112

CASE NAME: DEIDRE DIANE WAMHOFF

SEE ALSO 17

HEARING: Petition for TERMINATION OF CONSERVATORSHIP

COUNSEL:

VICKI WAMHOFF	(PCR)...D M DAVIS
ALETA BELDEN	(PCR)...PRO/PER
DEIDRE DIANE WAMHOFF	(PCE)...MITCHELL I ROTH
BRENDA S DAWSON	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 12/14/16. Brenda Dawson to schedule a phone interview with Court Investigator.

Continued from 02/22/17 and 04/05/17 for Brenda Dawson to file copy of order/letters re Virginia Conservatorship. Mitchell Roth may appear for Brenda if copies are filed, if not, Brenda to appear.

THIS CASE SET FOR HEARING ON Termination of Conservatorship by Aleta Belden.

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

1. Petitioner, Aleta Belden (co-conservator of person only), seeks termination. However, on 11/02/16, Court granted petition to fix residence in the State of Virginia as to Brenda Dawson; conservatee's sister. As orders to fix residence were granted, court may wish to take this matter off calendar.
2. Court Investigator requested to make investigation prior to conservatee leaving for Virginia. Court Investigator memo filed 12/12/16 and Report filed 02/06/17.
3. Supplemental report of Counsel Roth filed 01/17/17, **Supp reports filed 03/24/17 and 03/28/17.**
4. Confidential Letter from Spotsylvania Department of Social Services to Counsel Roth filed 02/27/17.
5. Need proof of Virginia Conservatorship.
6. ~Proposed Order: 10/28/16.

RECOMMENDATION

Inquire status of Virginia order/letters.

(lc/lh/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700112

CASE NAME: EDWARD URBINA DIAZ

SEE ALSO 20

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

ANGELA DIAZ

(PET)...PRO/PER

ROMAN URBINA GARCIA

(PET)...PRO/PER

EDWARD URBINA DIAZ

(CEE)...CRAIG M PARKER

Temporary hearing – No notes – JTD

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

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700112

CASE NAME: EDWARD URBINA DIAZ

SEE ALSO 19

HEARING: Petition for Appointment of Conservator

COUNSEL:

ANGELA DIAZ (PET)...PRO/PER
ROMAN URBINA GARCIA (PET)...PRO/PER
EDWARD URBINA DIAZ (CEE)...CRAIG M PARKER

GENERAL INFORMATION

Ex parte hearing held 04/06/17. Court accepted petitioner's oral request to modify their petition to **remove authorization for estate powers**. Matter trailed to 05/03.

Continued from 05/03/17. *Interpreter* Craig Parker appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Angela Diaz (mother) and Roman Urbina Garcia (father)

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

1. See Confidential Supplemental Information filed 03/30/17 [LF pg7-32].
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is therefore optional per Pr. C. § 1827.5(b).
3. Need report of Counsel Parker
4. Petition does not request medical powers; however, section 9 indicates lack of capacity for medical treatment. Need verified supplement if requesting medical powers, and file Capacity Declaration.
5. Need return of Citation.
6. **Certificate of Completion of the Conservatorship Training Class filed 05/12/17.**
7. Court Investigator Report filed 04/20/17.
8. ~Proposed Form Order: 03/30/17

RECOMMENDATION

Need to clear notes 3-5. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the required documents and hearing re Accounting Review for **08/15/18**. Any accounting to be filed 30 days in advance.

(lh/lc/lh)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700153

CASE NAME: ANABEL MARTINEZ-ZAVALA
HEARING: Petition for Appointment of Conservator

COUNSEL:

MARIA E ZAVALA (CP)...
ANABEL MARTINEZ-ZAVALA (CTP)...

GENERAL INFORMATION

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

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

1. Petitioner seeks medical powers. Capacity Declaration filed 05/03/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. Need IRC report.
5. Petitioner seeks civil rights not be limited without court order. JTD
6. **Certificate of Completion of Conservator Education filed 05/25/17.**
7. **CI Report filed 05/25/17**
8. **Notice of hearing and proof of service filed 05/18/17; however, only 29 days' notice was given to Inland Regional Center (IRC). Need at least 30 days' notice to IRC.**
9. **Return of Citation filed 05/18/17.**
10. ~Proposed Form Order: 04/26/17.

RECOMMENDATION

Need to clear notes 3-4. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS01172
CASE NAME: IN THE MATTER OF JOSHUA ERIC JONES
HEARING: FOURTH Account and Report of DAVID JONES and Petition for allowance of fees filed.

COUNSEL:

JOSHUA JONES (CEP)...
DAVID JONES (CPE)...HARTNELL LISTER & MOORE
JOSHUA JONES SPECIAL NEEDS TRUST (TRU)...
DAVID JONES (TEE)...BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 4th Account of Trustee of SNT and Petition for Reimbursement, Expenses, Payments and Allowance of Fees by David Jones, Trustee/father.

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

1. Accounting period 05/05/14 – 05/04/16.
2. Assets on hand \$155,460.47 of which \$101,693.43 is cash [\$84,500.35 is blocked].
3. Petitioner seeks court ratify payments of \$750 per month for food and shelter.
4. Petitioner requests to continue periodic payments of \$750 per month as previously ordered. JTD
5. Attorney Hartnell requests fees re Trust of \$4,370 for 27.3 hours at \$50/375 for paralegal and attorney services. Itemized [Acct. 04/27LFpg 42-44]. JTD
6. Attorney Hartnell requests fees re conservatorship of \$2,477.50 for 24.7 hours at \$50/375 for paralegal and attorney services. Itemized [Acct. 04/27LFpg 36-38]. JTD
7. Petitioner requests \$7,000 be taken from blocked account to pay fees. JTD
8. Petitioner seeks current bond of \$80,000 be reduced to \$57,000.
9. Last Court Investigator report filed 06/20/14.
10. ~Proposed Order: 04/27/17.
11. **NOTE:** Conservatorship of estate appears to still in place. Previous accounting dispensed on 08/06/14 for period ending 05/04/14 [see recommendation].

RECOMMENDATION

Court's discretion re fees. Court to set **accounting review re conservatorship estate** for **08/17/17**. If approved, set hearing on the next **accounting review** for **Trust** for (if one year) **08/17/17** or **06/21/18** (if two years). Accounting to be filed 30 days in advance.
(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 06/07/17 TIME: 1:30 DEPT: S35P

CASE#: CON PS1600257

CASE NAME: ANNIE ODEN

VACATED

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

ANNIE ODEN

(CEP)...LENITA A SKORETZ

Trial – No notes – JTD

Future Hearings: 6/08/17-6/09/17: Court Trial, 6/12/17-6/16/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 06/07/17 TIME: 8:30 DEPT: S36P

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.

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)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 06/07/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501114

CASE NAME: MTR OF FRANCOIS BRIOT

HEARING:
Accounting Review

COUNSEL:
JOHN J UGALDE (PET)...PRO/PER
FRANCOIS BRIOT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to John Ugalde, executor, on 03/30/16; limited authority, no bond.
2. Final Inventory and Appraisal filed 04/18/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.
(lc)

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

DATE: 06/07/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600115

CASE NAME: HARRIET JANE BELVEAL FAMILY TRUST

HEARING: Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

MARIE PASILLAS (PET)...KARIANN VORHEES
KORTNIE JANE BOVAIRD (MIN)...PRO/PER
BRITTANY MORGAN HOWARD (MIN)...PRO/PER
BRIANNA MASON HOWARD (MIN)...PRO/PER
KELLY LYNN HOWARD (MIN)...PRO/PER
HARRIET JANE BELVEAL FAMILY TRUST (TRU)...PRO/PER

GENERAL INFORMATION:

Continued from 11/02/16 and 11/30/16. No appearance. Jack Osborn appointed GAL for minors.

Continued from 12/28/16. Attorney Mark Flory present for GAL. Counsel informs the Court that there is no custodian available for the blocked account for the minors and it is a requirement of the bank to open the blocked account. Counsel requests a continuance to try to find a solution to the issue.

Continued from 01/25/17 and 04/05/17. Custodian has been found. Need additional time to resolve account issues.

THIS CASE SET FOR HEARING ON Proof of Blocked Accounts for Money Belonging to a Minor Pr.C. § 3410.

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

1. Petitioner, Marie Pasillas, is Successor Trustee of the Harriet Jane Belveal Trust created 12/27/13.
2. Need receipt and acknowledgements re proof of blocked accounts for each minor Kortnie (17) Brittany (10), Brianna (10) and Kelly (9).
3. Need report of GAL Jack Osborn.

RECOMMENDATION

Inquire status of report and receipt for blocked account.

(lc/lh/lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 06/07/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300174

CASE NAME: Maria Elena Verdugo

HEARING: SECOND Account and Report of ROSEANN TRUJILLO and Petition for allowance of fees filed.

COUNSEL:

ROSEANN TRUJILLO (PCR)...PRO/PER

MARIA ELENA TRUJILLO (VERDUGO) (CTE)...MATTHEW E SHEASBY

GENERAL INFORMATION

Continued from 03/29/17. Conservatee is Maria Elena Verdugo, not Maria Elena Trujillo. This has never been a name or AKA that she has used.

THIS CASE SET FOR HEARING ON 2nd Account Current and Petition for Allowance of Fees by RoseAnn Trujillo.

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

1. Sister, RoseAnn Trujillo, was appointed conservator on 8/5/13.
2. Accounting period 12/01/14 – 11/30/16.
3. Assets on hand \$397,309 consisting of \$8,174 in cash, remainder in securities, real and personal property.
4. Petitioner requests confirmation of payment to attorney Mary Bader for \$250 re services for consultation. Petitioner is pro per. [Acct.02/08/17 LFpg35].
5. Petitioner requests court allow petitioner to apply for a credit card not to exceed \$3,000 credit limit, to allow petitioner to do home repairs, landscape etc. JTD re liability.
6. Petitioner seeks authority to file The Maria Elena Verdugo Trust created in 1991, as conservatee allegedly has not recorded the document.
7. Petitioner does not appear to request any ongoing compensation. Court to inquire.
8. Petitioner is seeking reimbursement of costs totaling \$314.56. [Sup.02/08 LFpg6].
9. Current bond is \$74,000. Appears ok.
10. Proposed Order: 02/08/17; however, accounting period and assets on hand are incorrect; prayer does not match order.

RECOMMENDATION

Court's discretion. If approved, set next accounting review for **02/07/18** (if one year) or **02/06/19**(if two years). Accounting to be filed 30 days in advance.

(lc/lh)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300305
CASE NAME: FRANK JOSEPH ROCCO
HEARING: First and final Account and Report of KERRI BOOKER and Petition
for allowance of fees filed.

COUNSEL:

KERRI BOOKER (CPE)...FERNANDO J BERNHEIM
FRANK JOSEPH ROCCO (CEE/CTE)...

GENERAL INFORMATION

Kerri Booker appointed temporary Conservator person and estate on 12/10/13.

Conservatee died on 03/10/14.

Continued from **01/27/15, 03/03/15 and 05/05/15**. Counsel to address what the assets are currently in the estate and who the administrator of the estate will be.

Continued from **07/07/15 and 10/06/15** at request of counsel. Notice to be given by Attorney Fernando J Bernheim.

Continued from **12/15/15** for review of second amended account.

Continued from 02/23/16. Rosalie Rocco and Corin Hayes signed a release of interest. Court deems this sufficient and will not require assignments from them. Matter is continued for an amended accounting to be filed.

Continued from 06/30/16, 10/26/16 and 01/04/17. Patrick Wright as referee. Counsel to file an accounting for the temporary conservatorship.

Continued from 03/29/17 to file amended final account.

THIS CASE SET FOR HEARING ON **Fourth Amended (04/21/16)** First and Final Account for temporary Conservator Kerri Booker, sister.

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

1. Accounting period 12/10/13 – **12/10/15. Conservatee passed away on 03/10/14.**
2. An asset on hand is incomplete **\$0.00**. However, it appears that the checking account balance was used for funeral expenses.
3. Petitioner waives compensation and waives accounting as she alleges she is sole heir (**see note 5**).
4. Attorney does not request compensation.
5. Petition indicates personal property was transferred per Conservatee's wishes. Petitioner is allegedly sole heir; however, conservatee was survived by parents and a spouse. Petitioner is allegedly sole heir as mother and former spouse signed disclaimers of interest. Court to inquire whether conservatee's father is alive.

6. Final Inventory filed 09/08/14, however, Attachment 1 should reflect Bank of America Account and Attachment 2 should reflect real and personal property which requires appraisal by Probate Referee. **Inventory and Appraisal filed 12/28/16 does not clear deficiency. Need corrected inventory appraised by probate referee with supporting bank/financial statements per Local Rule 20-908.**
7. Petitioner requests bond in the amount of \$20,000 be exonerated upon approval if this petition. However, this Court does not normally exonerate bond until the filing of receipts and entry of an Ex Parte Discharge Order.
8. Petition indicates Conservatee has real property located in Ontario, CA, which was foreclosed on and sold by the bank. **Trustee's deed filed. [supp.12/28 LFpg10].**
9. Proposed Order received 02/27/15 indicates discharge and bond exoneration will be effective upon filing of receipt. Need corrected order to reflect discharge and exoneration upon entry of Ex Parte Petition for Discharge Order.

RECOMMENDATION:

Need to clear note 6. **Amended accounting filed to be heard on 06/12/17.**

(lc//nb/lc)

Future hearing dates: 06/12/17 5th Amended 1st and Final Account

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

DATE: 06/07/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700060

CASE NAME: MTR OF MARIA MOLINA

HEARING: Petition for Appointment of Conservator

COUNSEL:

GUADALUPE L MERINO (CP)...PRO/PER
MARIA MOLINA (CTP)...JEANNE KENNEDY

GENERAL INFORMATION

Continued from 03/29/17. *Interpreter* Jeanne Kennedy appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Guadalupe Merino, daughter.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/17/17.
2. Petitioner seeks dementia powers. **Report of Counsel J. Kennedy filed 05/24/17.**
3. Certificate of Completion of the Conservatorship Training Class filed 03/28/17.
4. Return of Citation filed 03/17/17; however, proof of personal service does not include name/address of server in section 4. Need corrected proof of service. **Corrected proof of service filed 05/24/17; however, Citation was not reissued by clerk. JTD.**
5. **Request to excuse notice to Juan Daniel Molina (son) and Rosalina Molina (daughter). JTD**
6. CI report filed 03/09/17.
7. ~Proposed Form Order: 02/22/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 06/07/17 TIME: 8:20 DEPT: S37P

CASE#: PRO PS1100827

CASE NAME: ESTATE OF VADIS MALONE SCOTT

HEARING:

Accounting Review

COUNSEL:

PATRICK MCDANIEL (PET)...THOMAS W DOMINICK

VADIS MALONE SCOTT (DEC)...

US SPECIALTY INSURANCE COMPANY (TP)...PRO/PER

GENERAL INFORMATION:

Continued from 11/18/15, 06/01/16 and 12/07/16 at request of counsel as property has not yet sold.

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters of Administration issued to Patrick McDaniel on 1/20/12, \$50,000 bond.
2. Last status report approved 11/19/14.
3. Need an accounting or status report.

RECOMMENDATION:

Inquire status.

(sa/lc)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300069

CASE NAME: THE STEVEN VEGO JR SETTLEMENT TRUST

VACATED

HEARING:

Petition for PAYMENT OF ATTORNEY FEES AND COSTS TO FULLERTON,
LEMANN, SCHAEFER & DOMINICK, LLP

COUNSEL:

THE STEVEN VEGO JR SETTLEMENT (TRU)...
MELVIN L. FRIEDLAND (PET)...MELVIN L FRIEDLAND
MIDLAND STATES BANK, TRUSTEE (PET)...MELINDA S. BELL
SHIRLEY DOIDGE (PET)...THOMAS W DOMINICK
MIDLAND STATES BANK, TRUSTEE (TEE)...MELINDA S. BELL

Future Hearings: 6/21/17: Fifth Account and Report Of Midland States Bank; Petition for Attorney Fees

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500198

CASE NAME: MTR OF FELIX GALLEGOS

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES GUTIERREZ (PET)...PRO/PER
FELIX GALLEGOS (DEC)...

GENERAL INFORMATION

Continued from 01/18/17 and 04/05/17. No appearances. James Gutierrez to appear if receipts/discharge not filed.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of James Gutierrez approved on 01/13/16. Proposed order does not match minute order. **Need order.**
2. Need receipts for Antonio and Shirley Gutierrez.
3. Need Ex Parte Petition for Final Discharge and Order ***once note 1 is cleared.***

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500689

VACATED

CASE NAME: Julie Ann Braam

HEARING:

Hearing re Final Discharge

COUNSEL:

LISA TONE

(PET)...JAN MARK DUDMAN

JULIE ANN BRAAM

(DEC)...

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500757

CASE NAME: ROBERT CHARLES LAMAR

HEARING:
Accounting Review

COUNSEL:
MARJORIE LAMAR (PET)...LAW OFFICE OF SCOTT S STREED
ROBERT CHARLES LAMAR (DEC)...

GENERAL INFORMATION

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

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Marjorie Lamar, daughter, on 12/09/15; full authority \$95,000 bond.
2. Partial Inventory and Appraisal filed; need bank statements per local rule 20-908.
3. Need final Inventory and Appraisal
4. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501090

CASE NAME: RICHARD MURRAY JONES

HEARING:
Accounting Review

COUNSEL:
RAYMOND KELLY JONES (PET)...PRO/PER
RICHARD MURRAY JONES (DEC)...

GENERAL INFORMATION

Continued from 03/29/17. No appearance. Raymond Jones ordered to appear if accounting is not filed.

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 Raymond Jones, brother, on 01/20/16; full authority, \$241,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600129

CASE NAME: DAVID W LAFLIN

HEARING:
Accounting Review

COUNSEL:
RICHARD LAFLIN (PET)...MONICA A MIHELL
DAVID W LAFLIN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to by Richard Laflin, son, on 04/19/16; full authority, \$138,400.00 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600927

CASE NAME: FELIPE DE JESUS LEAL

SEE ALSO 9

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

FELICITAS HERNANDEZ	(PET)...JOSHUA W CENTENO
FELIPE DE JESUS LEAL	(DEC)...
MINOR CHILDREN	(MIN)...PRO/PER
MARIA LEAL	(OBJ)...

Status – No notes – JTD

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600927

CASE NAME: FELIPE DE JESUS LEAL

SEE ALSO 8

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

FELICITAS HERNANDEZ	(PET)...JOSHUA W CENTENO
FELIPE DE JESUS LEAL	(DEC)...
MINOR CHILDREN	(MIN)...PRO/PER
MARIA LEAL	(OBJ)...

GENERAL INFORMATION

Continued from 01/18/17. Maria Leal, surviving spouse, to file written objections or competing petition if she chooses to object. Court suggests Maria Leal to seek counsel. Joan Nelms appointed GAL for minors.

Continued from 04/05/17. Default was filed in family law matter, but a default judgment was not filed. Maria Leal needs to file a competing petition. A settlement is being negotiated, but not yet in writing. Bond required \$119,000.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Felicitas Hernandez.

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

1. Petitioner does not state amount of bond. Court to require bond of \$119,000 based on net estate value.
2. Petitioner does not provide attachment re relationship to decedent. Need verified supplement.
3. Decedent left 3 minor issue; Rossie [sic] 17, Jennifer 12 and Patricia 9. Report of GAL Joan Nelms filed 04/05/17.
4. **Objections by Maria Leal, claimed surviving spouse of decedent, filed 03/14/17. Appears objector has priority appointment.**
5. Proposed Form Order: None.

RECOMMENDATION

Need to clear note 2, \$119,000 bond. Matter is contested. If approved, set Accounting/Status Review for **08/15/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc)

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: JAMES ODELL ROBINSON

SEE ALSO 11 12 13

HEARING: Hearing Re: PTN FOR LTRS OF ADMINISTRATION (EVELYN ROBINSON)

COUNSEL:

EVELYN L ROBINSON (PET)...PRO/PER
JAMES ODELL ROBINSON (DEC)...
KATHY ROBINSON (PET)...GAUDY LAW, INC
GERALDINE SIMMONS (OBJ)...MARA C ALLARD

XREF: PROPS1700150 (Consolidated)

GENERAL INFORMATION

Continued from 04/05/17. Case Consolidated with PROPS17000150; PROPS1700079 master file. Copy of will to be filed by any party. Mr. Smith advised court that Lily Mae Robinson was never divorced from decedent. Kathy and Evelyn Robinson deny that is the case and are advised to file divorce decree. Bond of \$165,000 will be ordered.

THIS CASE SET FOR HEARING ON

- Petition 1- **Amended** Petition for Letters of Administration with full authority under IAEA by Evelyn & Kathy Robinson, daughters.
- Petition 2 - Petition for Letters of Administration with full authority under IAEA by Geraldine Simmons, alleged daughter, for Sam Hlavaty.

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

Petitioners 1 - Evelyn & Kathy Robinson, daughters

1. Petitioners seeks bond of \$200,000.
2. Need Notice to Petition to Administer Estate and proof of service as to amended petition.
3. Publications filed on 03/17/17 & 03/28/17 does not appear to reflect publication of notice, but rather petition; therefore, is missing information re creditors notice. Need proper publication of notice. Additionally, need proper publication as amended petition was filed.
4. **Objections filed by Geraldine Simmons, alleged daughter.**
5. Amended proposed form order not submitted.

Petitioners 2 – Geraldine Simmons for Sam Hlavaty PROPS1700150

6. Petitioners seek bond of \$320,000. Ok.
7. Petitioner Hlavaty is nominated by Lily Robinson, Cecelia Banks and Karen Abrames.
8. **Notice to Petition to Administer Estate and proof of service filed 05/23/17. Need notice to Lily Mae Robinson, purported spouse.**
9. Proof of publication reflects 06/15/17 hearing. Need corrected publication.
10. Petition indicates 2 unknown children. Need due diligence.
11. ~Proposed Form Order: 03/20/17

RECOMMENDATION

Petition 1 by, 8-10; matter is contested. If approved, set Accounting/Status Review for **08/15/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: JAMES ODELL ROBINSON

SEE ALSO 10 12 13

HEARING:

Hearing Re: PTN FOR LTS OF ADMINISTRATION (KATHY ROBINSON)

COUNSEL:

EVELYN L ROBINSON (PET)...PRO/PER
JAMES ODELL ROBINSON (DEC)...
KATHY ROBINSON (PET)...GAUDY LAW, INC
GERALDINE SIMMONS (OBJ)...MARA C ALLARD

XREF: PROPS1700150

Petition appears to be moot as Withdrawal of Petition for Letters of Administration by Kathy Robinson filed 02/16/17 was filed 05/26/17.

See notes on matter 10 as amended petition was filed adding Kathy to Evelyn's petition.

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: JAMES ODELL ROBINSON

SEE ALSO 10 11 13

HEARING:

Hearing Re: PTN FOR LTRS OF ADMINISTRATION (GERALDINE SIMMONS)

COUNSEL:

EVELYN L ROBINSON (PET)...PRO/PER

JAMES ODELL ROBINSON (DEC)...

KATHY ROBINSON (PET)...GAUDY LAW, INC

GERALDINE SIMMONS (OBJ)...MARA C ALLARD

XREF: PROPS1700150

See notes on matter 10.

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: JAMES ODELL ROBINSON

SEE ALSO 10 11 12

HEARING:

Hearing Re: SPOUSAL PROPERTY PTN BY GERALDINE SIMMONS

COUNSEL:

EVELYN L ROBINSON (PET)...PRO/PER
JAMES ODELL ROBINSON (DEC)...
KATHY ROBINSON (PET)...GAUDY LAW, INC
GERALDINE SIMMONS (OBJ)...MARA C ALLARD

XREF: PROPS1700150

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Spousal Property Petition by Geraldine Simmons.

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

1. Petitioner seeks court determine that the decedent's half of the 6 properties is community and to pass to petitioner without administration. However, section 7a is not checked as to determination, but rather 7b as to confirmation that petitioner's community property is confirmed. Need verified supplement to clarify confirmation and/or determination.
2. Petition is not dated by petitioner. Need same.
3. Petitioner does not set forth when properties were acquired, how they were acquired, when the date of marriage took place etc. Need verified supplement.
4. Petition indicates 2 unknown children. Need due diligence.
5. ~Proposed Form Order: 03/27/17.

RECOMMENDATION

Need to clear notes 1-4.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700277

CASE NAME: ANNE BATTLE KERR

HEARING:

Petition for LETTERS TESTAMENTARY W/WILL ANNEXED FULL IAEA

COUNSEL:

KIMERA KERR-BEDNEY (PET)...FULLERTON LEMANN SCHAEFER & DO
ANNE BATTLE KERR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Will Letters of Administration WWA, with full authority under IAEA by Kimera Kerr-Bedney, daughter.

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

1. Petitioner is sole beneficiary of the will and waives bond. Net estate value is \$184,500 of which \$22,500 is personal property.
2. Will is holographic. Proof of holographic instrument filed 03/27/17.
3. ~Proposed Form Order: 03/27/17.

RECOMMENDATION

RFA. If approved, set Accounting/Status Review for **08/15/18**. 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: TARA REILLY

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700278

CASE NAME: MTR OF CAROLE DONSTEAD

HEARING:

Petition to determine succession to Real Property

COUNSEL:

TAMILLE NEWNHAM	(PET)...JAMES E NEWNHAM
TAWNDA FLOWERS	(PET)...JAMES E NEWNHAM
CAROLE DONSTEAD	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property by Tamille Newnham & Tawnda Flowers, daughters.

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

1. Petitioners are seeking 100% percent interest in decedent's 100% interest in real and personal property per intestate succession. Petitioner does not specify if specific interests for each petitioner in petition or order. Need verified supplement.
2. Decedent's spouse predeceased decedent. Petitioner is seeking an order authorizing the Clerk of the Court to sign Affidavit of Death of Joint Tenant due to a possible could in title [Deed pg14]. Court may wish to issue an interlocutory order authorizing petitioners to sign the Affidavit of Death of Joint Tenant to be recorded before this petition is granted.
3. ~Proposed Form Order: 03/27/17.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700279
CASE NAME: THE ESTATE OF LARESE WHITE
HEARING: Petition to determine succession to Real Property

COUNSEL:

PAULINA HAMILTON	(PET)...ROBERT A KRASNEY
WILLIE MAE DUNN	(PET)...ROBERT A KRASNEY
LINSON WHITE	(PET)...ROBERT A KRASNEY
CARL WHITE WILLIS	(PET)...ROBERT A KRASNEY
JOHNNY RAY WHITE	(PET)...ROBERT A KRASNEY
ELLA FAYE WARE	(PET)...ROBERT A KRASNEY
LOLA MAE FIELDS	(PET)...ROBERT A KRASNEY
ELLA MAE FILEDS	(PET)...ROBERT A KRASNEY
ELLA ROSE MCDANIEL	(PET)...ROBERT A KRASNEY
ALICE MAE WALKER	(PET)...ROBERT A KRASNEY
CHARLES WHITE	(PET)...ROBERT A KRASNEY
MABEL ELAINE JOHNSON	(PET)...ROBERT A KRASNEY
JASMINE ANDRE WHITE	(PET)...ROBERT A KRASNEY
GARY WILLIAMS	(PET)...ROBERT A KRASNEY
TAIGAN WILLIAMS	(PET)...ROBERT A KRASNEY
LORETTA ARVIS BIGGARS	(PET)...ROBERT A KRASNEY
LONNIE B WHITE JR	(PET)...ROBERT A KRASNEY
JACQUELINE SMITH WHITE	(PET)...ROBERT A KRASNEY
KENNETH WHITE	(PET)...ROBERT A KRASNEY
CHERYL MCGHEE WHITE	(PET)...ROBERT A KRASNEY
JOHNETTA BOYD	(PET)...ROBERT A KRASNEY
JAMES WHITE	(PET)...ROBERT A KRASNEY
QUEEN BRINSON	(PET)...ROBERT A KRASNEY
SHIRLEY RATCLIFFE	(PET)...ROBERT A KRASNEY
TRAVIS LEE CARTWRIGHT	(PET)...ROBERT A KRASNEY
TINRKE LACY	(PET)...ROBERT A KRASNEY
KECIA MAYS	(PET)...ROBERT A KRASNEY
LARESE WHITE	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property

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

1. All 26 petitioners seek 100% interest in real property per the laws of intestate succession divided as such.

- a. Need verified supplement explaining which siblings have passed, which nieces/nephews have also passed in order to determine who is entitled to the property and how percentages are determined. **Supp. filed 05/26/17 clarifies surviving heirs and allocated percentages. Petitioner alleges decedent was survived by 7 siblings and had 9 siblings who passed away with surviving issue. Question if there are any surviving spouse issues entitled to intestate share per Pr. C. §6401.**
2. Inventory and Appraisal is not complete at sections 3-5, nor is the Inventory and Appraisal dated by counsel or signed by a petitioner. **Supp. 05/26/17 attached amended Inventory and Appraisal is missing page two with probate referee's signature. Need same.**
3. ~Proposed Form Order: 03/28/17.

RECOMMENDATION

Need to clear notes.

(lc/lh)

Superior Court of Calif, County of San Bernardino
Page: 15B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 06/07/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501147

CASE NAME: THE ROSE PEREZ LIVING TRUST

HEARING:
Hearing Re: CONFIRMATION OF JUDGMENT

COUNSEL:
CHRISTINE JOY LARSEN (PET)...FULLERTON LEMANN SCHAEFER & DO
THE ROSE PEREZ LIVING TRUST (TRU)...
RUSSELL A DURAN (RES)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from 05/03/17. Counsel report escrow is set to close 05/09/17. If escrow falls through, ex parte request may be filed.

Continued from 05/17/17. Counsel reports escrow closed last week but distribution need to be amended to accommodate counsel's increased fee, and will fund on Monday.

THIS CASE SET FOR HEARING ON Confirmation of Judgment.

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

1. On 02/22/17, petitioner Christine Larsen agreed to hold judgment to 05/03/17 for escrow to close. Should there be no movement on escrow, petitioner will act on judgment.

RECOMMENDATION

Inquire status.

(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/07/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700259

CASE NAME: THE MARGE VOLK 2012 REVOCABLE LIVING TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

LISA SUTTON

(PET)...DEBRA S POPINEAU

THE MARGE VOLK 2012 REVOCABLE TRUST (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. Notice filed 04/03/17. Court may wish to inquire if property has a mortgage; if so, require notice to mortgage company.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 06/07/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600051

CASE NAME: ANDREW B HUBBARD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JOSEPH HUBBARD

COUNSEL:

JOSEPH HUBBARD (PCR)...MATTHEW J SINGER
MARIA MINDA HUBBARD (PCR)...MATTHEW J SINGER
ANDREW B HUBBARD (CEE)...PRO/PER

GENERAL INFORMATION

Continued from 01/18/17 and 04/05/17. No appearance at last hearing. Conservators ordered to appear.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Joseph & Maria Hubbard, parents, appointed conservator of the person only on 09/14/16.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 06/21/16; however, proof of service is not dated or signed. Additionally, section 5 is incomplete as to service of the order. Need corrected proof of service.
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600267
CASE NAME: SABRINA A. MOORE
HEARING: Petition for Appointment of Conservator

COUNSEL:

MICHELLE MOORE (CPE)...PRO/PER
TIFFANY MOORE (CPE)...PRO/PER
SABRINA A MOORE (CEP)...ROSE C ROSADO

GENERAL INFORMATION

Continued from 11/15/16. Court waives return of Citation. Attorney Rose Rosado appointed for Sabrina Moore.

Continued from 01/17/17 and 04/05/17. Corrected attachment 1e to be filed.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person only by Michelle and Tiffany Moore, mother and sister.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 09/02/16.
2. Proposed Conservatee is developmentally disabled. Report of Counsel Rosado, filed 12/28/16.
3. Certificate of Completion of Conservatorship Class by Tiffany Moore.
4. IRC requests continuance on 12/20/16. IRC report filed 04/03/17.
5. Court Investigator's Report filed 11/07/16.
6. ~Proposed Form Order/Letters 09/02/16.

RECOMMENDATION:

Court's discretion. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(nb/lh/nb/lc/lh)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700067

CASE NAME: MTR OF SERGIO GAONA ROSAS

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MA CELERINA ROSAS DE GAONA (CPE)...PRO/PER
SERGIO GAONA ROSAS (CTP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 04/05/17.*Interpreter*; Craig Parker appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Ma Celerina Rosas De Gaona, mother.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 02/28/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Proposed conservatee is developmentally disabled. IRC report filed 04/03/17.
5. Certificate of Completion of the Conservatorship Training Class filed 03/24/17.
6. Proposed conservatee is developmentally disabled. Need report of Counsel Parker.
7. Need return of citation. **Citation filed 06/01/17 not in LF at time of review.**
8. Need notice of hearing and proof of service. **Notice filed 06/01/17 not in LF at time of review.**
9. Court Investigator report filed 03/30/17.
10. ~Proposed Form Order: 02/28/17.

RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.
(lc/lh/lc/lh)

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

DATE: 06/07/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700069

CASE NAME: CHRISTIAN LIGHTER SIAGIAN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAN SIAGIAN (CP)...PRO/PER
CHRISTIAN LIGHTER SIAGIAN (CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

Continued from 04/05/17. Candice Garcia-Rodrigo appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Dan Siagian, brother.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/02/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. List of required contacts (Local form SB-12224) does not include grandparents. Court to inquire.
5. Proposed conservatee is developmentally disabled. Report of Garcia-Rodrigo filed 05/01/17.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Certificate of Completion of the Conservatorship Training Class filed 03/20/17.
8. Citation returned served.
9. CI report filed 03/16/17.
10. ~Proposed Form Order: 03/02/17.

RECOMMENDATION

Need IRC report. If approved, set hearing for Compliance Review for **01/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/lc)