



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/07/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

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: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

HEARING:

Hearing Re: SUMMARY OF ACCOUNT

COUNSEL:

BRYAN STEWART

(PET)...PRO/PER

DAVID STEWART

(DEC)...

GENERAL INFORMATION

On 03/29/18, administrator ordered to filed supplement/amended accounting by 05/07/18. 05/01/18 hearing vacated re Summary of Account and reset for 06/07/18.

THIS CASE SET FOR HEARING ON Summary of Account

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

1. Letters of Administration issued to Bryan Stewart on 04/06/11; full authority, no bond.
2. Previous status report approved on 09/17/14. **Need** order.
3. Summary of Account appears that a full report is missing. Petitioner must file a final report of administration per Cal Rules of Ct 7.550, Pr. C. §§ 1064, 10900. Deemed insufficient on 03/29/18. **Need** proper accounting and report.

RECOMMENDATION

Inquire status of proper accounting with report and status report order.

(ww/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501093

CASE NAME: MTR OF MILDRED B JACKSON

HEARING:

Hearing re Final Discharge

COUNSEL:

| | |
|--------------------------------|-----------------------|
| JOHN JACKSON | (PET)...DUANE P BOOTH |
| MILDRED B JACKSON | (DEC)... |
| WELLS FARGO FINANCIAL NATIONAL | (TP)... |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for John Jackson, son, approved on 06/01/17.
2. **Need** receipts for Rosie Aden and Gale Manuel.
3. **Need** reconciliation of \$2,000 reserve per local rule 20-911.
4. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Need to clear notes 2-4.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601112

CASE NAME: BILL RAYMOND JACOBS

MOVED TO 06/06/18 CALENDAR

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*)

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700061

CASE NAME: DAVID LEE HAMPTON

HEARING:

Accounting Review by ***

COUNSEL:

DAVID LEE HAMPTON (DEC)...
ROSABEL RIVARES YOUNG (PET)...E. MARIE HENNING

GENERAL INFORMATION

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 Rosabel Young, Trustee, on 03/30/17; full authority, no bond.
2. Final Inventory and Appraisal filed 03/01/18. **Need** corrected Inventory and Appraisal.
 - a. caption re date of death is incomplete
 - b. attachment 1 is missing
 - c. statements do not cover date of death of 09/20/16
 - d. signature is not dated by Executor.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

SEE ALSO 4B

HEARING: Petition for remove Steven Redfern as the Administrator of the Estate of Patricia Annette Redfern

COUNSEL:

| | |
|--------------------------|-----------------|
| PATRICIA ANNETTE REDFERN | (DEC)... |
| STEVEN REDFERN | (PET)...PRO/PER |
| SUZETTE A WHITE | (PET)...PRO/PER |
| SUZETTE A WHITE | (TP)...PRO/PER |

GENERAL INFORMATION

OSC set on 04/05/18 when Suzette White could not appear. Suzette to be personally present or petition will be dismissed.

Continued from 05/03/18. OSC taken off calendar. Contested and set for trial. Exchange statement of witnessed deadline 06/07/18. Parties and counsel to appear at readiness hearing. Court will consider sanctions if no appearance, including for dismissal or waiver of objections.

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator Steven Redfern Pr.C. § 8502(b)(c)(d) by Suzette White, daughter.

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

1. Letters of Administration issued to Steven Redfern, spouse, on 09/05/17; full authority \$65,000 bond.
2. Petitioner, Suzette, seeks removal of Steven on the basis that Steven allegedly has not complied with noticing creditors, specifically County Controller's Office for debt of \$371.59, a debt for HSN, impound fees of \$736.25. Additionally, cemetery plots valued at \$6,200 are allegedly not listed in Inventory and Appraisal.
3. Proof of citation per Pr.C. § 8500(b) filed 04/04/18.
4. **Objection filed by Steven Redfern on 03/26/18.**
5. No proposed order submitted.

RECOMMENDATION

Matter is contested.

(lc)

Future hearing:07/02/18 Court Trial 10/09/18 Accounting review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

SEE ALSO 4A

HEARING:

Readiness Calendar

COUNSEL:

| | |
|--------------------------|-----------------|
| PATRICIA ANNETTE REDFERN | (DEC)... |
| STEVEN REDFERN | (PET)...PRO/PER |
| SUZETTE A WHITE | (PET)...PRO/PER |
| SUZETTE A WHITE | (TP)...PRO/PER |

Readiness – No notes – JTD

(lc)

Future hearing:

07/02/18 Court Trial

10/09/18 Accounting review

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700091

CASE NAME: BETTY LORRAINE HARDEN

HEARING:

Accounting Review by ***

COUNSEL:

| | |
|-------------------------------|-----------------|
| BETTY LORRAINE HARDEN | (DEC)... |
| DEPT. OF HEALTH CARE SERVICES | (TP)...PRO/PER |
| LAWRENCE WILLIAM HARDEN SR | (PET)...PRO/PER |

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 Lawrence Harden, son, on 03/30/17; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700692

CASE NAME: LYNDA LEE GROVE

HEARING:

First and Final Account and Report of THOMAS HADLEY and Petition
for allowance of fees filed.

COUNSEL:

LYNDA LEE GROVE (DEC)...
THOMAS HADLEY (PET)...JEFFREY L COTTRELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Thomas Hadley, son.

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

1. Assets on hand \$24,979.37 cash.
2. Administrator and counsel seek statutory fees of \$6,994 each. Ok.
3. ~Proposed Order: 04/24/18.

RECOMMENDATION

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

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800221

CASE NAME: THOMAS L. BOUCHARD

HEARING:

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

COUNSEL:

ANGEL JUDKINS (PET)...PRO/PER
THOMAS L. BOUCHARD (DEC)...

GENERAL INFORMATION

Continued from 04/19/18.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Angel Judkins, daughter.

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

1. All heirs waive bond. Gross estate value is \$180,000. Petitioner does not indicate
whether personal or real property. Court for good cause could require bond per
Pr.C. § 8481(b).
2. ~Proposed Form Order: 03/07/18.

RECOMMENDATION

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

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800361

CASE NAME: MICHAEL F. CROSSON

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

LAURA L CROSSON (PET)...LYNN A SMILEY
MICHAEL F CROSSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Laura Crosson, sister.

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

1. All heirs waive bond. Net estate value is \$442,000 of which \$60,000 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. ~Proposed form order: 05/15/18.

RECOMMENDATION

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

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800402

CASE NAME: MTR OF ALLWYN E.D. KELLY

HEARING:

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

COUNSEL:

| | |
|----------------------|----------------------------|
| ALLWYN E.D. KELLY | (DEC)... |
| ALLWYN E.D. KELLY II | (PET)...DINA I FARHAT, ESQ |
| LEIANI KELLY | (PET)...DINA I FARHAT, ESQ |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Leiani & Allwyn Kelly II, daughter & son.

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

1. Petitioners are sole heirs and waive bond. Net estate value is \$66,095 in personal property. However, co-petitioner Allwyn is a Texas resident and court has discretion to require bond per Pr.C. §8571
2. ~Proposed Form Order: 04/25/18.

RECOMMENDATION

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

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 06/07/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701072

CASE NAME: In re: Robert and Evelyn Vannix Family Trust

HEARING:

Petition for Removal and Replacement of Trustees, Breach of
Fiduciary Duty, Compel Accounting

COUNSEL:

| | |
|--------------------------------|-------------------------|
| DAVID LEE VANNIX | (RES)... |
| LARRY LEA VANNIX | (PET)... RICHARD T MILL |
| LINDA WILLEY EINSENBERG | ()... |
| ROBERT AND EVELYN VANNIX FAMIL | (TRU)... |

Currently under review by legal research.

Notice filed.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800023

CASE NAME: Ava Shinedling 2017 Statutory Minor's Trust

HEARING:

Petition for 1)bring statutory minors trust under court supervision and 2)for court auth to invest

COUNSEL:

| | |
|-------------------------------|-------------------------------|
| AARON SHINEDLING | (PET)...RODNUSKY & ASSOCIATES |
| AVA SHINEDLING 2017 STATUTORY | (TRU)... |
| MINOR PARTY | (MIN)... |

Currently under review by legal research.

(LR)

Notice filed 02/02/18.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800024

CASE NAME: Alexia Shinedling 2017 Statutory Minor's Trust

HEARING:

Hearing Re: PETITION AS TO THE MINOR ALEXIA SHINEDLING

COUNSEL:

AARON SHINEDLING

ALEXIA SHINEDLING 2017 STATUTO

MINOR PARTY

(PET)...RODNUSKY & ASSOCIATES

(TRU)...

(MIN)...

Currently under review by Legal Research.
(LR)

Notice filed.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12A ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800102

CASE NAME: IN THE MATTER OF THE MARY A. ALLESSIO REVOCABLE TR

HEARING:

Hearing Re: PETITION TO REMOVE TRUSTEE, ETC

COUNSEL:

JOHN ANTHONY ALLESSIO (PET)...PATRICK J MALLEN

MARY A ALLESSIO (DEC)...

30 days' notice filed 05/17/18; image only available in Open Access.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0900213

CASE NAME: CAROL SCHINDLER

HEARING:

Accounting Review by ***

COUNSEL:

CAROL SCHINDLER

(CEP)...DONNASUE ORTIZ

CHRISTINE RICHER

(CE)...KARIN E HORSPPOOL

CHRISTINE RICHER

(CPE)... HORSPPOOL & HORSPPOOL

DONNASUE SMITH ORTIZ

(PET)...DONNASUE ORTIZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 6th Account for Christine Richer, niece, approved on 11/01/17.
2. **Need** 7th Account beginning with 10/01/16.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 13A ADD ON

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300233

CASE NAME: VIVIAN PEDROZA

SEE ALSO 13B

HEARING:

Hearing Re: POSSIBLE TRANSFER TO RIVERSIDE COUNTY

COUNSEL:

JOSEPHINE PEDROZA (CP)...PRO/PER

VIVIAN PEDROZA (CTP)...

See notes on matter 13B.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300233

CASE NAME: VIVIAN PEDROZA

SEE ALSO 13A

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 ON CONSERVATOR

COUNSEL:

JOSEPHINE PEDROZA (CP)...PRO/PER

VIVIAN PEDROZA (CTP)...

GENERAL INFORMATION

OSC set on 05/10/18 when there was no appearance. Conservator to be present at next hearing.

THIS CASE SET FOR HEARING ON **OSC re Sanctions of \$500/Possible Transfer to Riverside County.**

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

1. Josephine Pedroza, mother, appointed limited Conservator or person only on 10/15/13.
2. Change of Residence filed 04/04/18 indicates conservatee resides in Beaumont which is in Riverside County.
3. **Need** post move notice per CRC 7.1063(c).

RECOMMENDATION

Court's discretion re OSC. Need to clear note 3. If approved, set hearing for proof of transfer on **08/09/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500363

CASE NAME: CHARLENE MAYER AKA CHARLENE D. MAYER ETC

HEARING:

Accounting Review by ***

COUNSEL:

| | |
|----------------|---------------------------------|
| CHARLENE MAYER | (CEP)...WALTER T. MOORE |
| MELODY BRAVO | (CPE)...ELISABETH KEMPE-OLINGER |
| TIMOTHY MAYER | (CPE)...ELISABETH KEMPE-OLINGER |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 1st Account for Timothy Mayer and Melody Bravo, son and daughter, approved on 07/27/17.
2. **Need** 2nd Account beginning with 03/01/17.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600052

CASE NAME: HOMER N. SILACCI

SEE ALSO 16

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of STEVE COX

COUNSEL:

HOMER N SILACCI

(CEE)...MITCHELL I ROTH

STEVE COX

(PET)...FRANKLIN S ADLER

See notes on matter 16.

(lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600052
CASE NAME: HOMER N. SILACCI

SEE ALSO 15

HEARING: Accounting Review by ***

COUNSEL:

HOMER N SILACCI (CEE)...MITCHELL I ROTH
STEVE COX (PET)...FRANKLIN S ADLER

GENERAL INFORMATION

Continued from 04/27/17, 06/01/17 and 07/20/17. Court read and considered report of Counsel Roth. Conservator to file declaration re all aspects of the sale of Fontana property by 07/27/17. Declaration to include purchase contract, counter-offers, escrow instructions and closing statement. Steven cox and Franklin Alder to be present.

Continued from 08/24/17. Todd Nuccio appointed as 730 Expert [fee capped at \$750]. Parties to cooperate with investigation. Counsel to file declaration as to Conservator's knowledge of realtor who purchased property.

Continued from **09/28/17 and 12/07/17. No appearance.**

Continued from 01/25/18. Mitchell Roth is having difficulty with finding appraiser. Mitchell Roth granted appraiser with cap of \$1,000.

THIS CASE SET FOR HEARING ON Compliance Review/Accounting review.

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

1. Steve Cox, friend, appointed conservator of the person and estate on 09/22/16, \$350,000 bond.
2. Determination of Conservatee's Appropriate Level of Care form filed 05/31/17.
3. Notification of Conservatee's rights filed 05/31/17 & 08/23/17.
4. Care Plan in accord with Pr.C.§2352.5 filed 08/23/17.
5. Final Inventory and Appraisal filed 08/23/17. However; **need corrected.**
 - a. Real and personal property needs to be on attachment 2 and appraised by probate referee.
 - b. Bank account needs account number and bank statement to support.
 - c. Caption is incomplete as to date of appointment.
 - d. Bond amount is incorrect.
6. **If** the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

7. Declaration filed by Counsel Adler re sale of real property of conservatee on 07/27/17.
 - a. **Declaration filed 09/28/17** by Sara Lopez, agent, alleging the property was sold as is to investment company.
 - b. **Declaration filed 09/28/17** by neighbor John Carlo alleging the real property was inhabitable.
8. **Need** 730 evaluation.
9. **Need** accounting.
10. **Response filed by conservatee through counsel on 08/02/17.**

RECOMMENDATION

Need to clear notes 5-9.

(lc/ww/lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700282

CASE NAME: MTR OF HAYDEN JOSEF KOEPER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of KRISTA KOEPER

COUNSEL:

| | |
|---------------------|---------------------------|
| ANDREAS KOEPER | (CP)...MARIELLEN ROSS |
| HAYDEN JOSEF KOEPER | (CTP)...JENNIFER M DANIEL |
| KRISTA KOEPER | (CP)...MARIELLEN ROSS |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Krista and Andreas Koeper, parents, appointed **Limited** conservator of the person only on 11/02/17.
2. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.

RECOMMENDATION

Need to clear notes 2-4.

(lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800122
CASE NAME: Fatima Monserrat Salinas Alfaro
HEARING: Petition for Appointment of Conservator

COUNSEL:

FATIMA MONSERRAT SALINAS ALFAR (CTP)...
JOSE RENE SULINA ORNELO (CP)...
MONICA ALFARO (CP)...

GENERAL INFORMATION

Karin Horspool appointed counsel on 05/10/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Monica Alfaro & Jose Salinas, parents.

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

1. Proposed conservatee is developmentally disabled. **Need** report of Counsel Karin Horspool.
2. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351 and seek civil rights not be limited without court order. However, attachments do not appear to be submitted with petition. **Need** attachments 1h and 1j.
3. Petitioners seek medical powers. Capacity Declaration filed 04/25/18; however, is not dated by physician. **Need** dated form.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. **Need** Confidential Supplemental Information.
6. **Need** list of required contacts to include any second degree relatives; only petitioners are listed.
7. **Need** Certificates of Completion of the Conservatorship Training Class.
8. Court Investigator report filed 05/24/18.
9. Citation returned served.
10. ~Proposed Form Order: 04/25/18.

RECOMMENDATION

Need to clear notes 1-7. If approved, set hearing for Compliance Review for **01/10/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800130
CASE NAME: Isabella N Velazquez
HEARING: Petition for Appointment of Conservator

COUNSEL:

FRANCISCO MURILLO JR (CP)...SHEELA A. STARK
ISABELLA N VELAZQUEZ (CTP)...
IVONE P MURILLO (CP)...SHEELA A. STARK

GENERAL INFORMATION

James Church appointed counsel on 05/10/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Francisco Jr. & Ivone Murillo, mother & step-father.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights not be limited without court order. JTD
3. Petitioners seek medical powers. Capacity Declaration filed 04/30/18.
4. Proposed conservatee is developmentally disabled. **Need** report of Counsel Church.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** return of citation.
7. **Need** list of required contacts (Local form SB-12224) to include paternal grandparents if living as it is not clear in petition.
8. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
9. Court Investigator report filed 05/24/18.
10. Certificates of Completion of the Conservatorship Training Class filed 05/22/18.
11. Due diligence as to Father Luis Velazquez attached to petition [LFp11] JTD if sufficient per Cal Rules of Ct 7.52.
12. ~Proposed Form Order: 04/30/18

RECOMMENDATION

Need to clear notes 4-8. If approved, set hearing for Compliance Review for **01/10/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. § 1830(c); Level of Care and Care Plan per Pr.C. § 2352.5.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS01241

Vacated

CASE NAME: IN THE MATTER OF NATALIE ANN MORRIS

HEARING:

Accounting Review by ***

COUNSEL:

| | |
|--------------------------------|-----------------------------|
| EMMA J. SAMUEL | (MOT)...PRO/PER |
| INLAND COUNTIES REGIONAL CENTE | (PET)...BRUNICK MCELHANEY & |
| INLAND COUNTIES REGIONAL CENTE | (PET)...STEVEN K BECKETT |
| MURIEL TUCKER | (CP)...RUDY AGUIRRE |
| NATALIE ANN MORRIS | (BEN)... |
| NATALIE ANN MORRIS | (CTP)...C L FARRELL |
| NATALIE ANN MORRIS SPECIAL NEE | (TRU)... |

(lc)

Future hearing dates: 07/10/18 8th Account by IRC

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

Readiness Calendar

DATE: 06/07/18 TIME: 8:29 DEPT: S36P

CASE#: CON PS1800004

CASE NAME: MTR OF CAROL ANN HARRIS

HEARING:

Readiness Calendar

COUNSEL:

CAROL ANN HARRIS

(CEP)...CANDICE A GARCIA-RODRIGO

RAY STANLEY SIMON

(CPE)...PRO/PER

Readiness – No notes – JTD

(lc)

Future hearing:

06/21/18 Court trial

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500340

CASE NAME: ROY LLOYD DAVENPORT

HEARING:

Accounting Review by ***

COUNSEL:

| | |
|-----------------------|-----------------------|
| CATHLINE MAYS | (OBJ)...NIKKI B ALLEN |
| CATHLINE MAYS | (PET)...NIKKI B ALLEN |
| RICARD PAUL DAVENPORT | (PET)...PRO/PER |
| ROY LLOYD DAVENPORT | (DEC)... |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Cathline Mays, partner, appointed executor on 03/27/17; full authority no bond. However, Letters Testamentary have not yet issued; **Need** letters issued. Court to inquire as there does not appear to be proposed letters in file re Cathline.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 1-3; however, as letters have not issued accounting appears to be premature Pr.C. § 10950(b).

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601260

CASE NAME: Tony Ruiz

HEARING:

First Account and Report of MARIA RUIZ, SALVADOR RUIZ and
Petition for allowance of fees filed.

COUNSEL:

| | |
|---------------|----------------------------|
| MARIA RUIZ | (PET)...DONALD M. MEDEIROS |
| SALVADOR RUIZ | (PET)...DONALD M. MEDEIROS |
| TONY RUIZ | (DEC)... |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Account Current by Maria and Salvador Ruiz,
parents/sole heirs.

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

1. Accounting period 03/13/17 – 04/21/18. Accounting shall begin at date of death;
07/15/16. **Need** corrected accounting period.
2. Assets on hand \$317,500 in real and personal property; no cash.
3. Administrators indicated they have recently discovered the mortgage is subject to a
Home Affordable Modification Agreement. Petitioners have been paying mortgage
payments. Petitioners do not indicate a time for estate to close.
4. **Need** Report verified per Pr.C. § 1021.
5. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 1&4. If approved, set Accounting/Status Review for **05/16/19**. Any
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule
20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700148

CASE NAME: MTR OF SANDRA KAYE

HEARING:

PETITION FOR FINAL DISTRIBUTION AND WAIVER OF Account and Report
of MICHAEL COLE and Petition for allowance of fees filed.

COUNSEL:

MICHAEL COLE (PET)...DAVID E JACOBS
SANDRA KAYE (DEC)...

***CCP170.6 filed as to Judge TARA REILLY, case reassigned to
Judge CYNTHIA A LUDVIGSEN for all purposes.***

GENERAL INFORMATION

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

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

1. Assets on hand \$1,338,534.04 in cash, investments and vehicle.
2. All heirs waive accounting.
3. Administrator waives statutory compensation.
4. Counsel seeks statutory fees of \$27,041.78. Ok.
5. Administrator seeks a total reserve of \$2,000.
6. Administrator seeks proposed distribution of vehicle to heir Nina Cook in lieu of \$14,000 deducted from her total estate distribution. Original value appraised at \$19,000. All parties have consented.
7. Proposed Order submitted 05/29/18; however, there is description of assets on hand, whether taxes and creditors are paid etc. All orders must be complete in themselves. Local rule 20-614. Submit order after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **06/13/19**.
(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700454

CASE NAME: ROSENBERRY TRUST *ADMINISTRATIVE TRUST*

HEARING:

THIRD ACCOUNT AND REPORT OF KATIE HERNANDEZ and Petition for Allowance
of Fees

COUNSEL:

EDWARD LEE ROSENBERRY REVOCABL (TRU)...JAMES B CHURCH
EDWARD LEE ROSENBERRY REVOCABL (PET)...JAMES B CHURCH

XREF: CONDS1000118 (Edward Lee Rosenberry)

PROPS1700455 (Rosenberry Trust**Sub-Trust FBO Unborn Heirs)

PROPS1700299 (Edward Lee Rosenberry)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 3rd Account Current and Petition for Allowance of
Fees by Katie Hernandez, Successor Trustee.

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

1. Accounting period 01/01/17 – 12/31/17.
2. Assets on hand \$2,590,680.69 of which \$125,880.69 is cash.
3. Current bond is \$4,400,000 which reportedly covers all sub-trusts as well.
4. Trustee and counsel seek fees be allowed per terms of trust. No amount specified;
however, \$70,000 was paid to Trustee during accounting period. **JTD**
5. ~Proposed Order: 05/07/18.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/07/19**. Any
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule
20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700455

CASE NAME: ROSENBERRY TRUST* **SUB-TRUST FBO UNBORN HEIRS*

HEARING:

THIRD ACCOUNT AND REPORT OF KATIE HERNANDEZ and Petition for Allowance
of Fees

COUNSEL:

EDWARD LEE ROSENBERRY REVOCABL (TRU)...JAMES B CHURCH
EDWARD LEE ROSENBERRY REVOCABL (PET)...JAMES B CHURCH

XREF: CONDS1000118 (Edward Lee Rosenberry)
PROPS1700454 (Rosenberry Trust Administrative)
PROPS1700299 (Edward Lee Rosenberry)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 3rd Account Current and Petition for Allowance of
Fees by Katie Hernandez, Successor Trustee of Sub-Trusts.

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

1. Accounting period 01/01/17 – 12/31/17.
2. Assets on hand \$229,100.27 of which \$25,459.58 is cash.
3. Current bond is \$4,400,000.
4. Trustee and counsel seek fees be allowed per terms of trust. No amount specified.

JTD

5. ~Proposed Order: 05/07/18.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/07/19**. Any
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule
20-908.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700474
CASE NAME: MTR OF ROSA GODINEZ
HEARING: First & Final Account and Report of ENRIQUETA QUILLIN and
Petition for allowance of fees filed.

COUNSEL:

CALIFORNIA VICTIM COMPENSATION (TP)...PRO/PER
ENRIQUETA QUILLIN (PET)...EDWARD A. SMITH
ROSA GODINEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Enriqueta Quillin, daughter.

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

1. Assets on hand \$170,722.71 in cash.
2. Administrator and counsel seek statutory fees of \$9,100.12 each.
3. Administrator seeks ratification of costs reimbursed to her [\$1,837] for filing fees and bond premium and Javier Services [\$1,600] for Clean-up of property and Shantel Rangel for security deposit refund [\$500] for a total of \$3,937. **JTD**
4. Administrator seeks ratification of costs paid to Rosio Cardona re funeral expenses etc. **JTD**
5. Counsel seeks reimbursement of balance of costs totaling \$968.43. Itemized in separate declaration. **JTD**
6. Heir Jose Godinez has outstanding restitution fees of \$1,100 that will be deducted from his distribution.
7. Administrator seeks a reserve of \$1,500.
8. Proposed Order: 04/18/18; however, need assets on hand and paragraph 20 should also include the \$1,100 from Jose's share. Submit order after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **06/13/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700600

CASE NAME: MTR OF SUSAN JOKAI

HEARING:

First & Final Account and Report of FRANK JOKAI and Petition for allowance of fees filed.

COUNSEL:

FRANK JOKAI
SUSAN JOKAI

(PET)...LAW OFFICES OF FORREST F WOLFE
(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Frank Jokai, son/sole heir

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

1. Assets on hand \$308,278.14 in cash and real property.
2. Administrator is sole heir and waives statutory compensation.
3. Counsel seeks statutory fees of \$9,165.56. Ok.
4. ~Proposed Order: 04/30/18.

RECOMMENDATION

RFA. If approved, set hearing on the filing of final discharge for **06/13/19**.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700905

CASE NAME: MTR OF ETHEL RYAN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

| | |
|-----------------|------------------------|
| DEBORAH PHILIPS | (OBJ)... |
| ETHEL RYAN | (DEC)... |
| ROBERT RYAN | (PET)...GAUDY LAW, INC |

GENERAL INFORMATION

Continued from 12/07/17. Parties Audrey Herren, Deborah Philips and Kathy Ryan object to will.

Continued from 01/18/18 and 03/01/18 for objections to be filed.

Continued from 04/12/18. Objections filed with court this morning; matter continued for response.

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Robert Ryan, son.

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

1. Petitioner seeks 100% interest in decedent's interest in real property per terms of the will.
2. **Objections filed by Deborah Philips, granddaughter, on 04/12/18.**
3. As matter is now contested and a summary probate under Pr.C. § 13152 **does not require** admission of will and/or determine validity, petitioner must file a petition to probate a will and a will contest to be filed by objector in that matter per Pr.C. § 8250.
4. ~Proposed Form Order: 11/28/17.

RECOMMENDATION

Matter is contested, court may wish to deny petition without prejudice and direct petitioner to file petition to probate will.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700935

CASE NAME: MTR OF JAMES RALPH TOLLIVER

SEE ALSO 11

HEARING:

Hearing Re: STATUS OF ADMINISTRATION

COUNSEL:

DAVID SHERAK OF VOGT,RESNICK (PET)...VOGT,RESNICK & SHERAK, LLP
JAMES RALPH TOLLIVER (DEC)...

GENERAL INFORMATION

Continued from 03/29/18 to file Petition for General Probate.

THIS CASE SET FOR HEARING ON Status of Administration

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

1. Letters of Special Administration issued to David Sherak, named executor/creditor, 09/28/17.
2. No general petition for administration has been filed. Court to inquire whether any assets have been discovered.
3. Status report filed 03/23/18 to be heard on 05/02/18.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700935

CASE NAME: MTR OF JAMES RALPH TOLLIVER

SEE ALSO 10

HEARING:

Probate status report filed.

COUNSEL:

DAVID SHERAK OF VOGT,RESNICK (PET)...VOGT,RESNICK & SHERAK,
JAMES RALPH TOLLIVER (DEC)...

GENERAL INFORMATION

Continued from 05/02/18 to be heard with pending petition.

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Special Administration issued to David Sherak, named executor/creditor, 09/28/17.
2. Special Administrator seeks an additional 6 months to close the estate due to ongoing search for several of decedent's assets e.g., financial accounts, rent on real property received prior to decedent's death, unclaimed property held by state of California, and additional funds believed to have been taken from decedent prior to his death by beneficiary, Tania Hussein. These assets may require Special Administrator to request the Court to compel responses from parties.
3. **NOTE:** Special administrator is limited without general powers after publication and appears *Pr.C. § 8544(c) does not appear to allow special administrator to take action on decedent re creditor without general powers/publication.*
4. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201.
5. No proposed Order submitted. Submit after hearing.

RECOMMENDATION:

Need to clear note 4. If approved, set Accounting/Status Review for **12/12/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800415

CASE NAME: DARRYL FRANK MEADORS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

DARRYL FRANK MEADORS (DEC)...
KATHLEEN L LIKES (PET)...SCOTT D FISHER
TORIA MEADORS (PET)...SCOTT D FISHER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Kathleen Likes, spouse, for Toria Meadors

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

1. Petitioner seeks bond of \$217,000. Ok.
2. **Need** phone number listed on Duties form. Late supplement filed 06/01/18; however, no image available for review.
3. Does court wish to deem duties form as consent or require separate consent by Toria? **JTD**
4. ~Proposed Form Order: 04/30/18.

RECOMMENDATION

Need to clear note 2, \$217,000 bond. If approved, set Accounting/Status Review for **08/15/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

DATE: 06/07/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800005

CASE NAME: MTR OF JAMES L & LOUISE R GORIN TRUST

HEARING:

Petition for VERIFIED PETITION FOR INSTRUCTIONS OF THE COURT AS
TO ETC

COUNSEL:

JAMES L & LOUISE R GORIN TRUST

(TRU)...

PENELOPE GUTTMAN

(PET)...PRICE LAW FIRM, APC

Currently under review by legal research.

(LR)

Notice filed 03/02/18.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800095

CASE NAME: MTR OF SHARON A SWANSON REVOCABLE LIVING TRUST

HEARING:

Petition for to confirm: existence & Validity of trust & to
appoint successor trustee etc

COUNSEL:

DALE BRUCE HANCOCK (PET)...FULLERTON LEMANN
SHARON A SWANSON REVOCABLE LIV (TRU)...

Currently under review by legal research.

30 days' notice filed 04/30/18. Notice complies with 2018 updated code Pr.C. § 851.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 06/07/18 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000134

CASE NAME: MTR OF JONATHAN HARDT

HEARING:

Hearing re Final Discharge

COUNSEL:

AMERICAN CONTRACTORS INDMENITY (TP)...PRO/PER

JONATHAN HARDT (CEP)...

LENORE ROTH (CE)...E JOAN NELMS

LENORE ROTH (CPE)...JACK B. OSBORN

LENORE ROTH (PET)...BROWN, WHITE &

GENERAL INFORMATION

Continued from 04/12/18. Proposed order for final account submitted.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Lenore Roth, sister, approved on 04/04/17. Order sent to dept for signature on 05/10/18; however, does not appear to be processed as of 06/04/18.
2. **Need** receipt for Florence Robb and/or her power of attorney Janet McMillan.
3. **Need** Ex Parte Petition for Final Discharge and Order once note 1 is cured.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900250

CASE NAME: ELOISA PRECIADO RAMOS

HEARING:

Hearing Re: TRANSFER CASE TO SAN LUIS OBISPO

COUNSEL:

| | |
|-----------------------|-----------------|
| EDWARD MADRID | (CPE)...PRO/PER |
| ELOISA PRECIADO RAMOS | (CEP)... |
| IRAIS MENDOZA | (CP)...PRO/PER |
| VANESSA MENDOZA | (CPE)...PRO/PER |

GENERAL INFORMATION

Continued from 04/26/18. No appearance. Conservator to personally appear.

THIS CASE SET FOR HEARING ON Transfer to San Luis Obispo.

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

1. Vanessa Mendoza and Edward Madrid appointed Conservators of person and estate on 03/01/10, Edward was removed on 10/24/11, but **did not discharge Edward**. Conservatorship of estate terminated on 02/21/12. Vanessa and Irais Mendoza appointed successor Conservators of person only on 04/24/12.
 - a. **Need** order terminating conservatorship of estate; then
 - b. **Need** Ex Parte Petition for Final Discharge and Order as to **estate only** for both Edward and Vanessa.
2. Matter set after review Court Investigator report filed 03/23/18 indicating Conservator resides in Nipomo, SLO County.
3. **Need actual** post move notice form per CRC 7.1063(c).

RECOMMENDATION

Need to clear note 1 & 3. If transferred, set hearing re proof of transfer for **08/23/18**.
(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1100219

CASE NAME: IN MATTER RE ADELLIA FAUSTORILLA

HEARING:

Hearing Re: CONCERNS RE CI REPORT

COUNSEL:

ADELLIA FAUSTORILLA (CPE)...DUANE P BOOTH
IVY FAUSTORILLA (CP)...PRO/PER

GENERAL INFORMATION

Continued from 04/12/18. No appearance. Ivy Faustorilla and Duane Booth ordered to appear.

THIS CASE SET FOR HEARING ON Concerns re Court Investigator Report.

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

1. Ivy Faustorilla, daughter, appointed conservator of person only on 11/14/11.
2. Matter set after review of Court Investigator memo/reports filed 02/23/18.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 06/07/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800124

CASE NAME: GLADYS FREEMAN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
GLADYS FREEMAN (CEE)...
LARRY W FREEMAN (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Larry Freeman, son.

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

1. Petitioner seeks medical and dementia powers. Capacity Declaration filed 04/26/18.
2. Petitioner seeks powers re habilitation, treatment, fix residence etc. per Pr.C. § 2351-2358 JTD
3. Petitioner lists personal and real property; however, does not appear to seek estate powers. Court to **clarify**.
4. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
5. **Need** Certificate of Completion of the Conservatorship Training Class.
6. **Need** notice of hearing and proof of service.
7. **Need** Court Investigator report.
8. Citation returned served.
9. ~Proposed Form Order: 04/26/18.

RECOMMENDATION

Need to clear notes 4-7. If approved, set hearing for Compliance Review for **01/10/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

Readiness Calendar

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: CON PS1700189

CASE NAME: VIRGINIA QUEVEDO

SEE ALSO 2, 3

HEARING: Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON AND ESTATE

COUNSEL:

AMAY GUILLEN

(CPE)...LENITA A SKORETZ

FRANK GUILLEN

(CPE)...LENITA A SKORETZ

MICHELLE T MAYFIELD

(PET)...CHRISTIAN U ANYIAM

VIRGINIA QUEVEDO

(CEE)...J. DAVID HORSPOOL

GENERAL INFORMATION

Temporary orders denied 05/30/17. Court makes interim orders that no one is to discuss facts in this case nor give documents to Virginia Quevedo. No visitation ordered until further notice. Attorney David Horspool appointed counsel.

Continued from 07/11/17. Counsel's report filed in Courtroom. Michelle Mayfield appointed temporary conservator of the person and estate; \$347,000 bond. Powers of attorney to make healthcare decisions and of the estate are suspended pending further order. Objections and competing petition will be filed by Amay Guillen. Court has no objection to conservatee being in a non-secured facility but orders that conservatee remain in her current placement pending further order of the Court. Court makes visitation orders. Court appointed E Joan Nelms as Guardian Ad Litem for Virginia Quevedo.

Continued from 08/29/17. Per request of Counsel, hearing on 09/5/17 advanced and continued to 10/04/17.

Continued from 10/04/17. Dr. Sawicky's report filed in Courtroom. Court orders Michelle Mayfield to arrange an evaluation of Virginia Quevedo by a geriatric psychiatrist as soon as possible. She is to notify Amay and Frank Guillen who will be making evaluation. Psychiatrist and counsel to be given a copy of Dr. Sawicky's report. Parties may review report in Counsel's office but may not release any information provided in report. Matter continued for Counsel to review Dr. Sawicky's report. No one is to discuss issues in this case with Virginia Quevedo, or else it may negatively impact their positions in this matter. Court makes visitation orders.

Continued from 12/06/17. Court denied Dee Konczal's request to take Virginia Quevedo to lunch. Counsel represent the appointing with geriatric psychiatrist is scheduled for 12/12/17 in San Bernardino with Dr. Kikani. As to *petition 1 – required bond \$382,000*. As to *petition 2 – required bond \$550,000*. Court admonishes all parties that Virginia Quevedo is not to leave the facility in company of petitioners. Conservatee's friends may take her

out of the facility as long as they are not joined by petitioners, or a petitioner from each side must attend as well. Conservatee's friends are not to discuss any litigation matters. Referred to Court Investigator for investigation and report. *Court orders a CI report regarding petition 2.*

Continued from 02/28/18. Conservatee appeared. Citations waived. No parties to have visitation without a party on competing petition present. Conservatee not to be removed from residence wither competing party present. If medical emergency, temporary Conservator may be with conservatee without competing party, but at end of emergency she is not to visit without competing party present. A party may be present at conservatee's 92nd birthday party without a competing party as long as a representative from GAL's office is present. GAL requests party be at residence of conservatee. Parties may Skype/Facetime with conservatee. Conservatee objects to visitation orders as structured. GAL to facilitate the parties receiving a copy of psychiatrist's report subject to Counsel to be provided with a copy of the psychiatrist's report. The parties may review the report in Counsel's office. They may not have a copy of the report outside of Counsel's office and they may not speak with anyone outside Counsel's office about the report. Trial requested. Parties urged to meet and confer re settlement. Continued from 04/12/18 due to court's unavailability, readiness hearing is continued with possible trial dates of 6/18, 06/20 6/25, 06/27.

THIS CASE SET FOR HEARING ON

- **Amended** Petition - 1 for Appointment of Conservator person and estate by **Michelle Mayfield**, friend/caregiver.
- Petition - 2 for Appointment of Conservator of person and estate by **Amay and Frank Guillen**, granddaughter and son.

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

Petitioner 1 - Michelle Mayfield, friend/caregiver.

1. Court will require bond of \$382,000.
2. It appears petitioner now seeks appointment as conservator of the **person only.** **Need Notice to reflect amended petition to all relatives within the 2nd degree.**
3. Petitioner seeks medical powers. Capacity Declaration filed 07/14/17 is not dated at signature. **Need** dated Capacity Declaration.
4. Petition is incomplete at item 9b and 9d re medical treatment. **Need** verified supplement. Alternatively, court to clarify on record.
5. **Need** report of E. Joan Nelms, GAL.
6. Report of Counsel Horspool filed 07/11/17.
7. CI Report filed 07/07/17. Supplemental CI report filed 09/19/17.
8. Proof of Completion of Conservatorship Training Class filed 07/17/17.
9. Court suspended Power of Attorney and Healthcare Directive as to agent Amay Guillen.
10. ~Proposed Form Order: 05/19/17

Petitioners 2 - Amay and Frank Guillen, granddaughter and son.

11. Court will require bond of \$550,000.

12. Petitioners seek orders re powers under Pr. C. §2590 to: alter, improve, replace and rebuild property of the estate; requests court approval to clear, repair, and replace items in conservatee's home to preserve character and livability. JTD
13. Petitioners seek medical powers. Capacity Declaration filed 09/15/17.
14. Petitioners seek dementia powers. JTD
15. Supplemental Information filed 10/03/17.
16. Proof of Completion of Conservatorship Training Class filed.
17. CI Report filed 02/21/18.
18. ~Proposed Form Order: 08/29/17

RECOMMENDATION

Need to clear notes 2-5; court to trail **06/28/18** hearing by Christina Erickson-Taube. If approved, set hearing for Compliance Review for **01/10/19** for the filing of the required documents and hearing re Accounting Review for **08/15/19**. Any account to be filed 30 days in advance. Note requirements of Local Rules.

(lh/lc)

Future hearing dates: **06/28/18** Petition for Appointed of Conservator by Christina Erickson-Taube.

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: CON PS1700189

CASE NAME: VIRGINIA QUEVEDO

SEE ALSO 1, 3

HEARING:

Petition for Appointment of Conservator

COUNSEL:

| | |
|---------------------|----------------------------|
| AMAY GUILLEN | (CPE)...LENITA A SKORETZ |
| FRANK GUILLEN | (CPE)...LENITA A SKORETZ |
| MICHELLE T MAYFIELD | (PET)...CHRISTIAN U ANYIAM |
| VIRGINIA QUEVEDO | (CEE)...J. DAVID HORSPOOL |

See notes on matter 1.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: CON PS1700189

CASE NAME: VIRGINIA QUEVEDO

SEE ALSO 1, 2

HEARING:
Readiness Calendar

COUNSEL:

| | |
|---------------------|----------------------------|
| AMAY GUILLEN | (CPE)...LENITA A SKORETZ |
| FRANK GUILLEN | (CPE)...LENITA A SKORETZ |
| MICHELLE T MAYFIELD | (PET)...CHRISTIAN U ANYIAM |
| VIRGINIA QUEVEDO | (CEE)...J. DAVID HORSPOOL |

Readiness – No notes – JTD

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3A ADD ON

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

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1700327

CASE NAME: PIPER ELIZABETH CHILDRESS

SEE ALSO 3B, 3C

HEARING:

Hearing Re: GUARDIAN AD LITEM REPORT

COUNSEL:

| | |
|---------------------------|-------------------------------------|
| AUROURA FOSTER | (PET)...COREY SALISBURY |
| GARY ALAN CHILDRESS | (GP)...JOSEPH W HOWINGTON |
| MICHAEL MITCHELL | (FAT)...CALDWELL, KENNEDY & PORTER, |
| MICHAEL MITCHELL | (PET)...D KEVIN PORTER |
| PIPER ELIZABETH CHILDRESS | (MIN)...PRO/PER |
| SANDRA CHILDRESS | (GP)...JOSEPH W HOWINGTON |

See notes on matter 3B.

(lc)

Future Hearing:

06/27/18 petition for Michael Mitchell's visitation

08/29/18 Hearing re: Petition for termination of guardianship

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

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1700327

CASE NAME: PIPER ELIZABETH CHILDRESS

SEE ALSO 3A, 3C

HEARING: Hearing re: Petition for Appointment of Guardian

COUNSEL:

| | |
|---------------------------|-------------------------------------|
| AUROURA FOSTER | (PET)...COREY SALISBURY |
| GARY ALAN CHILDRESS | (GP)...JOSEPH W HOWINGTON |
| MICHAEL MITCHELL | (FAT)...CALDWELL, KENNEDY & PORTER, |
| MICHAEL MITCHELL | (PET)...D KEVIN PORTER |
| PIPER ELIZABETH CHILDRESS | (MIN)...PRO/PER |
| SANDRA CHILDRESS | (GP)...JOSEPH W HOWINGTON |

XREF: CIVVS1700412 (Gary Alan Childress -N- Cory Tyler)

CIVVS1700403 (Gary Alan Childress -N- Aurora Foster)

CIVVS1700402 (Corey Salisbury)

CIVVS1700622(Georgette Foster v Gary Childress)

FAMVS1703296 (Michael Mitchell-v-Aurora Foster)

GENERAL INFORMATION:

Temporary Orders granted on 07/05/17. Gary and Sandra Childress are appointed Temporary Guardians of the person of Piper Childress.

Continued from 07/31/17. Matter to be heard with Petition for Termination.

Continued from 08/09/17 Referred to Court Investigator and Family Court Services. Court makes visitation orders. Mr. Howington to prepare order after hearing.

Continued from 12/18/17. Request to take judicial notice filed in courtroom and request granted. Aurora Foster and Michael Mitchell appeared, Kabmriana Inventory and Appraisal paternal aunt. Matter re-referred for Court Investigator to interview mother, father and minor's therapist. Last opportunity for mother to be interview. Parties to sign up for talkingparents.com by days' end. Parties to send weekly emails re what happened in minor's life. Text and email outside of Talkingparents.com in emergencies only. Previous order reiterated that upon drop off and pick up, parties immediately text the other party informing them of minor's whereabouts. When Georgette is involved in transportation, she is also to immediately text. Gary and Sandra Childress inform the Court that they intend to take minor to Texas next year for a week. The Court recommends that if they do take minor out of state they allow mother to take minor for a full week as well and that they provide each other with contact information for minor and minor have telephonic contact with the other party at least 4 times that week.

The Court orders that mother have minor for Christmas beginning 10am Christmas morning. Mother to pick up minor and return minor at the normal Wednesday exchange. If minor is going to be taken out of the five Southern California counties of San Diego, Orange, Riverside, San Bernardino or Los Angeles overnight, the parties are to be informed of minor's whereabouts and given contact information. The Court determines this is a related action to FAMVS1703296 and advises Counsel if they want these actions heard together this Court will hear the family law matter. The guardianship will not be sent to trail the family law matter

Continued from 05/24/18. No discovery cutoff at this time. Mitchell Roth appointed GAL. Estimated trial 10 days.

THIS CASE SET FOR HEARING ON Amended Petition for Appointment of Guardian, of the person only, by Gary and Sandra Childress, maternal grandparents, Piper 5.

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

1. Mother Christina Childress and father Michael Mitchell signed Nomination, Consent and Waiver filed 06/28/17. Note Aurora Foster is listed on birth certificate.
2. **Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on
 - a. Paternal grandmother Carol Gilbert re Michael Mitchell "father"
 - b. Paternal" grandparents re Aurora Foster "father on birth certificate"
3. Duties of Guardian form by Sandra Childress is not dated at signature line. **Need** same; alternatively, verify on the record. JTD
4. **Need** order after hearing re 08/09/17 visitation.
5. **Need** report of GAL Mitchell Roth.
6. Petitioners indicate the willingness to adopt.
7. Declarations in support of guardianship filed 07/28/17.
8. Declaration of Barbara Burrows filed 10/11/17 in support of guardianship.
9. Declaration of Gary Childress filed 10/11/17 re visitation and request for a home visit.
10. Declaration filed by Aurora Foster on 12/15/17 indicating a serious of events from birth to present.
11. **Objection to guardianship filed 08/08/17 by Aurora Foster, "named father" on birth certificate.**
12. **Declaration filed in support of objections by Georgette Foster on 12/15/17.**
13. **Declarations filed by parties associated with Lone Wolf Colony Health Ranch on 05/23/18 where Aurora Foster was manager caretaker.**
14. Court Investigator report filed 12/11/17. Supplemental report filed 05/17/18.
15. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 2-5.

(cs/lh/cs/lh/cs/lc)

Future Hearing:

06/27/18 petition for Michael Mitchell's visitation

08/29/18 Hearing re: Petition for termination of guardianship

Superior Court of Calif, County of San Bernardino

Page: 3C ADD ON

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

DATE: 06/07/18 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1700327

CASE NAME: PIPER ELIZABETH CHILDRESS

SEE ALSO 3A, 3B

HEARING:
Readiness Calendar

COUNSEL:

| | |
|---------------------------|-------------------------------------|
| AUROURA FOSTER | (PET)...COREY SALISBURY |
| GARY ALAN CHILDRESS | (GP)...JOSEPH W HOWINGTON |
| MICHAEL MITCHELL | (FAT)...CALDWELL, KENNEDY & PORTER, |
| MICHAEL MITCHELL | (PET)...D KEVIN PORTER |
| PIPER ELIZABETH CHILDRESS | (MIN)...PRO/PER |
| SANDRA CHILDRESS | (GP)...JOSEPH W HOWINGTON |

Readiness – No notes – JTD *

(lc)

Future Hearing:
06/27/18 petition for Michael Mitchell's visitation
08/29/18 Hearing re: Petition for termination of guardianship

Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400394

CASE NAME: Charlene Rae Rands

HEARING:

Accounting Review by ***

COUNSEL:

CHARLENE RAE RANDS

(DEC)...

LILA E KOEGLE

(PET)...DAVID E JACOBS

STEVEN GUTTERY

(PET)...LAYNE A BARTHOLOMEW

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.

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 **Successor** Administration WWA issued to Steven Guttery, brother, on 11/19/15; full authority, \$200,000 bond.
2. 1st Account approved on 06/01/17.
3. **Need** next accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400700

CASE NAME: Denny Gene Dunlap Jr

HEARING:
Hearing re Final Discharge

COUNSEL:

| | |
|----------------------|--------------------------|
| DENNY GENE DUNLAP JR | (DEC)... |
| GERALDINE M MULLER | (PET)...BRYAN C HARTNELL |
| MINKA DAWN HALL | (PET)...GOURI G NAIR |

GENERAL INFORMATION

Continued from 03/15/18. No appearance. Geraldine Muller ordered to appear.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Geraldine Muller, sister, approved on 03/09/17.
2. Receipts filed 05/10/18.
3. Exparte Petition for Final Discharge submitted 05/29/18 and sent to department by clerk's office on 05/31/18.

RECOMMENDATION

Court to sign discharge order.
(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400900

CASE NAME: Jordan Jeffrey Corder

HEARING:
Hearing re Final Discharge

COUNSEL:
JORDAN JEFFREY CORDER (DEC)...
MARK CORDER (PET)...KEVIN STAPLETON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Mark Corder, father, approved on 06/01/17; order filed 01/12/18.
2. **Need** receipts for mother Diane Corder and Patrick Wright Probate referee who filed notice of non-payment of \$26.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipts and discharge order.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500797

CASE NAME: KASHANI A MOHSEN

HEARING:

Hearing Re: EXTRAORDINARY ATTORNEY FEES/FINAL DISCHARGE

COUNSEL:

KASHANI A MOHSEN (DEC)...
SHADI K WEINBERGER (PET)...ZEV S BROOKS

GENERAL INFORMATION

Continued from 03/08/18. Neda currently lives in Iran and is refusing to accept her distribution. Counsel to have funds placed in a blocked account. Mr. Brooks to prepare order. Declaration re extraordinary fees to be filed. Court approves \$5,000 reserve to be held.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Shadi Weinberger, daughter, approved on 03/02/17.
2. Proof of blocked account for Roja Kashani, minor, filed 07/05/17.
3. **Need** receipt for Neda Mousavizadegan.
4. **Need** proof of blocked account for Neda. Does court wish to require funds be held with county treasurer? JTD
5. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Need to clear notes 3-5.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600129

Vacated

CASE NAME: DAVID W LAFLIN

HEARING:

Accounting Review by ***

COUNSEL:

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

XREF: CONPS1800082 (Steven Anthony Laflin)

(lc)

Future hearing dates: 07/05/18 1st and Final Account by Richard Laflin
07/25/18 Petition for Attorney's Fees by Melvin Friedland.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700148

CASE NAME: MTR OF SANDRA KAYE

MOVED TO S36P CALENDAR SEE PAGE 4

HEARING:

PETITION FOR FINAL DISTRIBUTION AND WAIVER OF Account and Report
of MICHAEL COLE and Petition for allowance of fees filed.

COUNSEL:

MICHAEL COLE (PET)...DAVID E JACOBS
SANDRA KAYE (DEC)...

***CCP170.6 filed as to Judge TARA REILLY, case reassigned to
Judge CYNTHIA A LUDVIGSEN for all purposes.***

Moved to S36.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 11, 12, 13, 14

HEARING:

Hearing Re: Receipt of Settlement

COUNSEL:

| | |
|--------------------------------|--------------------------|
| ALBERT KNOTT | (PET)...L'TANYA M BUTLER |
| MARIE T KNOTT LIVING TRUST DAT | (TRU)... |
| SHRINERS HOSPITALS FOR CHILDRE | (PET)...KEITH L MEEKER |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Settlement.

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

1. Matter set on 04/11/18 when settlement was placed on the record.
2. ~Proposed stip and order submitted 05/18/18.

RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 10, 12, 13, 14

HEARING:

Petition for bring trust under court supervision and to permit
the successor trustee to purchase life ins

COUNSEL:

| | |
|--------------------------------|--------------------------|
| ALBERT KNOTT | (PET)...L'TANYA M BUTLER |
| MARIE T KNOTT LIVING TRUST DAT | (TRU)... |
| SHRINERS HOSPITALS FOR CHILDRE | (PET)...KEITH L MEEKER |

Currently under review by legal research.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 10, 11, 13, 14

HEARING:

Petition for order requiring respondents to reimburse and restore to the Marie T Knott Living Trust

COUNSEL:

| | |
|--------------------------------|--------------------------|
| ALBERT KNOTT | (PET)...L'TANYA M BUTLER |
| MARIE T KNOTT LIVING TRUST DAT | (TRU)... |
| SHRINERS HOSPITALS FOR CHILDRE | (PET)...KEITH L MEEKER |

Currently under review by legal research.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 10, 11, 12, 14

HEARING:

Petition for OBJECTIONS TO TRUSTEE'S ACCOUNT DATED 01/24/17
PETITION FOR RELIEF, SURCHARGE, AND REMOVAL ETC

COUNSEL:

| | |
|--------------------------------|--------------------------|
| ALBERT KNOTT | (PET)...L'TANYA M BUTLER |
| MARIE T KNOTT LIVING TRUST DAT | (TRU)... |
| SHRINERS HOSPITALS FOR CHILDRE | (PET)...KEITH L MEEKER |

Currently under review by legal research.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

SEE ALSO 10, 11, 12, 13

HEARING: FIRST Account and Report of ALBERT KNOTT and Petition for allowance of fees filed.

COUNSEL:

| | | |
|--------------------------------|----------|------------------|
| ALBERT KNOTT | (PET)... | L'TANYA M BUTLER |
| MARIE T KNOTT LIVING TRUST DAT | (TRU)... | |
| SHRINERS HOSPITALS FOR CHILDRE | (PET)... | KEITH L MEEKER |

GENERAL INFORMATION

Continued from 12/07/17 at request of counsel. Attempting settlement.

Continued from 01/16/18. Petitioner and Counsel not present. Matter set for Trial.

Continued from 03/15/18 and 04/11/18 for receipt of settlement.

THIS CASE SET FOR HEARING ON 1st Account Current and Report of Successor Trustee Albert Knott Jr.

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

1. Albert Knott Jr. was appointed successor Trustee concurrently as Albert Knott Sr. was removed on 09/09/97; Los Angeles County.
2. Accounting period 09/09/97 – 09/30/17.
3. Assets on hand \$940,956.78 of which \$246,804.53 is cash.
4. Trustee inadvertently overpaid himself \$137,122.92 in distribution and owes the Trust. Trustee proposes to rectify overpayment by placing balance of Trust funds in a blocked account and having Trust purchase a life insurance policy of \$250,000 to have Trust beneficiary.
5. Trustee alleges that prior Trustee, Albert Sr., exhausted any liquid capital held by trust prior to abandoning his family and Trustee duties. Therefore, the only remaining asset was the real property.
6. Real property in Redondo Beach was sold 06/28/16 for \$1,300,000 and real property in Rancho Cucamonga was purchased for \$650,000.
7. **Objections filed by Shriners Hospital on 10/19/17.**
8. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion as matter is reportedly settled. If approved **and Court takes jurisdiction** of trust, set next Accounting review for **12/13/18**.

(lc/nb/lc/lh/lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800147

CASE NAME: GERALD PAUL HANSON

HEARING:

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

COUNSEL:

GAIL ULRICH (PET)...MARIVEL M ZIALCITA
GERALD PAUL HANSON (DEC)...

GENERAL INFORMATION

Continued from 03/15/18 to clear notes.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Gail Ulrich, daughter.

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

1. Will waives bond; however, petitioner alleges all beneficiaries waive bond [section 3e(2)]; yet not bond waivers filed. Estate value is \$277,000 in real property. However, petitioner is a non-resident and court has discretion to require bond per Pr.C. §8571.
2. Notice to Petition to Administer Estate and proof of service; filed 04/03/18; however, section 5 is not marked re request for IAEA authority. **Need** corrected notice.
3. This appears to be an ancillary probate; decedent was domiciled in Arizona. **Need** authenticated copy of order admitting will in domiciliary state per Pr.C. § 12521.
4. Proof of publication filed 05/18/18; however, verbiage re IAEA authority is missing. **Need** corrected publication.
5. ~
6. Proposed Form Order: 02/01/18

RECOMMENDATION

Need to clear notes 2-4, Court's discretion re bond. If approved, set Accounting/Status Review for **08/15/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800399
CASE NAME: Judith L Russell
HEARING: Hearing re: Petition for Probate, Letters of Testamentary With Full Authority Under IAEA.

COUNSEL:

DANIEL S CLAYTON (PET)...LOUIS PACELLA ATTORNEY AT LAW
JUDITH L RUSSELL (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of **Lost Will**, Letters Testamentary with Full Authority under IAEA Daniel Clayton, son.

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

1. The will is allegedly lost; declaration attached [LFpg14-17]. When a will is lost, and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it. Pr. C. 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. **JTD** if sufficient.
2. Will waives bond. Net estate value is \$290,000 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
3. Notice to Petition to Administer Estate and proof of service filed 04/27/18; however, section 5 is not checked re IAEA authority. **Need** corrected notice.
4. **Need** verified supplement as Irene Ryn and Trustee of trust are mentioned in will but are not listed in section 8.
5. 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. Does Court also wish to require a copy of decedent's Trust? **JTD**
6. No proposed order submitted.

RECOMMENDATION

Need to clear notes 3-5, Court's discretion re bond. If approved, set Accounting/Status Review for **08/15/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 06/07/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS03958

CASE NAME: MTR OF THE BAILY ANN MCNEIL SPECIAL NEEDS TRST
HEARING: first Account and Report of KIRK HOFFMAN and Petition for
allowance of fees filed.

COUNSEL:

| | |
|--------------------------------|-------------------------|
| BAILEY ANN MCNEIL S.N. TRUST D | (TRU)... |
| BAILY ANN MCNEIL | (MIN)...JUDITH RUNYON |
| KIRK HOFFMAN | (PET)...M DANIEL SAYLOR |

GENERAL INFORMATION

Continued from 04/12/18. Karen Key to file objections if necessary.

THIS CASE SET FOR HEARING ON 1st SNT Account Current for Kirk Hoffman,
Successor Trustee.

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

1. Accounting period 11/26/16 – 11/30/17.
2. Assets on hand \$77,178.59 in cash and bed.
3. Trustee seeks fees of \$3,837.50 for 30.7 hours at \$125 per hour. [Acct. 02/13LFpg11-16]. JTD
4. Counsel seeks fees of \$3,654.75, including costs of \$86, for 45.45 hours at \$125/375 per hour for paralegal and attorney services. [Acct. 02/13LFpg 18-20]. JTD
5. Report of GAL Mitchell Roth filed 02/22/18. Does court wish to vacate 06/11/18 hearing? JTD
6. Trustee seeks authorization to provide caregiver Karen Key in continuing \$450 monthly allowance to spend on transportation, medical incidentals and unreimbursed care. JTD
7. Trustee seeks a bond increase of \$5,000 from \$95,000 to \$100,000.
8. ~Proposed Order: 02/13/18.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **02/28/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc) Future hearing: 06/11/18 Hearing re: Guardian ad litem's report 07/02/18 Final discharge

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 06/07/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600207

CASE NAME: EDDIE HERNANDEZ

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner KOREN
MATTSON

COUNSEL:

| | |
|-----------------|------------------------|
| EDDIE HERNANDEZ | (DEC)... |
| KOREN MATTSON | (PET)...JUDD MAYSUNAGA |
| USHER LAW GROUP | (TP)...PRO/PER |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Judd
Matsunago.

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

1. Counsel seeks to be removed as counsel for Koren Mattson, administrator, as there
Is allegedly an attorney client breakdown.
2. ~Proposed form order: 05/07/18.

RECOMMENDATION

Court's discretion. Bond company was noticed.
(lc)

Future hearing: 06/11/18 Fist and final account etc.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 06/07/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400328

CASE NAME: ROBIN ELLEN CHARTIER

SEE ALSO 20

HEARING:

Order to Show Cause re: TRANSFER CASE TO LOS ANGELES COUNTY
filed by CHRISTOPHER CHARTIER.

COUNSEL:

CHRISTOPHER CHARTIER (CPE)...HARTNELL LAW GROUP
ROBIN ELLEN CHARTIER (CEP)...CRAIG M PARKER

XREF: CONPS1400329 (*Charles Richard Chartier*)

GENERAL INFORMATION:

Continued from **02/02/16 and 05/03/16**. Court advised case can be transferred after the first accounting has been filed.

Continued from **07/14/16 and 10/04/16**. Matter will be transferred upon approval of accounting.

Continued from 02/07/17, 05/02/17, 08/15/17 and 11/07/17. Bond premium not paid. Christopher Chartier suspended. Public Administrator appointed as Conservator of estate. Christopher cited to appear. Bench warrant to issue if no appearance.

Continued from 03/15/18. Clerk's office to provide copy of file for Public Guardian.

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

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

1. Christopher Chartier, son, appointed conservator of the person and estate on 03/02/15, \$59,000 bond.
2. Matter set as conservatee is now residing in Los Angeles County.
3. Pre-Move Notice of Change of Residence of Conservatee filed 12/24/15.

RECOMMENDATION:

Court's discretion re OSC. If approved, set hearing re proof of transfer on **08/23/18**.

(nb/lc/nb/lh/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400328

CASE NAME: ROBIN ELLEN CHARTIER

SEE ALSO 19

HEARING:

Accounting Review by ***

COUNSEL:

CHRISTOPHER CHARTIER (CPE)...HARTNELL LAW GROUP
ROBIN ELLEN CHARTIER (CEP)...CRAIG M PARKER

XREF: CONPS1400329 (*Charles Richard Chartier*)

GENERAL INFORMATION

Continued from **05/03/16, 07/14/16, 10/04/16, 02/07/17, 05/02/17, 08/15/17** and 11/07/17.
Bond premium not paid. Christopher Chartier suspended. Public Administrator appointed as Conservator of estate. Christopher cited to appear. Bench warrant to issue if no appearance.

Continued from 03/15/18. Clerk's office to provide copy of file for Public Guardian.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Christopher Chartier appointed conservator of the person and estate on 03/02/15, \$59,000 bond.
- 2 **Need 1st accounting.**
- 3 **Notice of non-payment of bond premium filed on 10/24/17.**

RECOMMENDATION:

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

(nb/lc/nb/lh/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400329

CASE NAME: CHARLES RICHARD CHARTIER

SEE ALSO 22

HEARING:

Order to Show Cause re: TRANSFER TO LOS ANGELES COUNTY filed by
CHRISTOPHER CHARTIER.

COUNSEL:

CHRISTOPHER CHARTIER (CPE)...HARTNELL LAW GROUP
CHARLES RICHARD CHARTIER (CEP)...CRAIG M PARKER

XREF: CONPS1400328 (*Robin Ellen Chartier*)

GENERAL INFORMATION:

Continued from 05/03/16, 07/14/16 and 10/04/16. Matter will be transferred upon approval of accounting.

Continued from **02/07/17, 05/02/17, 08/15/17 and 11/07/17**. Companion case CONPS1400328, bond premium has not been paid. Christopher Chartier as Conservator of estate pending payment of bond premium.

Continued from 03/15/18 for counsel to be present. Christopher Cartier to be present.

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

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

1. Christopher Chartier, son, appointed conservator of the person and estate on 03/02/15, \$59,000 bond.
2. Matter set as conservatee is now residing in Los Angeles County.
3. Pre-Move Notice of Change of Residence of Conservatee filed 12/24/15.

RECOMMENDATION:

Court's discretion re OSC. If approved, set hearing re proof of transfer on **08/23/18**.
(nb/lc/nb/lh/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400329

CASE NAME: CHARLES RICHARD CHARTIER

SEE ALSO 21

HEARING:

Accounting Review by ***

COUNSEL:

CHRISTOPHER CHARTIER (CPE)...HARTNELL LAW GROUP
CHARLES RICHARD CHARTIER (CEP)...CRAIG M PARKER

XREF: CONPS1400328 (*Robin Ellen Chartier*)

GENERAL INFORMATION

Continued from **05/03/16, 07/14/16, 10/04/16, 02/07/17, 05/02/17, 08/15/17** and 11/07/17.
Companion case CONPS1400328, bond premium has not been paid. Christopher Chartier as Conservator of estate pending payment of bond premium. Public Guardian appointed Conservator of estate. Citation issued to Conservator.

Continued from 03/15/18 to clear notes.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Christopher Chartier, son, appointed conservator of the person and estate on 03/02/15, \$59,000 bond.
- 2 First account now due. **Need** same.
- 3 Citation returned as unserved as to Christopher Chartier.

RECOMMENDATION:

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

(nb/lc/nb/lh/nb/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/07/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02847

CASE NAME: MTR RE CHERYL MCCOLLUM

HEARING:
Hearing re Final Discharge

COUNSEL:

CHERYL MCCOLLUM (CTE)...
INLAND COUNTIES REGIONAL CENTE (CE)...STEVEN K BECKETT

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Waiver of Account for IRC approved on 06/21/17.
2. No receipts required as all funds appear to go to Trustee and counsel for fees.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of discharge order.
(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC

DATE: 06/07/18 TIME: 2:30 DEPT: S37P

CASE#: CON PS1300147

CASE NAME: MARY F CARROLL

SEE ALSO 25, 26

HEARING: Hearing Re: FIRST AND FINAL ACCTG OF N BLICKENSTAFF

COUNSEL:

| | |
|----------------------|----------------------------|
| ALAN CARROLL | (OBJ)...PAMELA Y VALENCIA |
| LALANEYA D STAIGLE | (PET)...HARTNELL LAW GROUP |
| MARY FRANCES CARROLL | (CEP)...MITHCHELL I ROTH |
| NATALIE BLICKENSTAFF | (CPE)...JENNIFER M DANIEL |
| PUBLIC GUARDIAN | (SC)...DENNIS M SANDOVAL |

*****Court to rule on following matter 26 prior to approving this matter.*****

GENERAL INFORMATION:

Continued from 11/20/17 on court's motion. Counsel to file a supplement correcting the value of the vehicle to be \$2,300 instead of \$23,000.

Continued from 04/10/18.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by **Successor** Natalie Blickenstaff, PPF/conservator

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

- 1 **Conservatee passed away 11/13/16.**
- 2 Accounting period: Pre Death 05/02/16-11/13/16; Post 11/14/16 – 09/07/17.
- 3 Assets on hand \$67,974.78 cash
- 4 Conservator requests fees in the amount of \$10,649.00 for 87.4/hours at various rates between \$95-125, [Supp. filed 11/13/17]. JTD
- 5 Attorney requests fees in the amount of \$20,017.50. Billed at 56.4/hours at \$325.00/hour and for paralegal at 13.5/hours at \$125.00/hour, [LFpgs. 45–58]. **JTD**
- 6 Prior Conservator Staigle filed final/partial Inventory and Appraisal on 02/02/15. **Need** final Inventory and Appraisal. Alternatively, if no other assets, does court wish to deem as final? **JTD**
- 7 **Need** verified supplement indicating which heirs are entitled to distribution along with Pr.C. §13100 affidavits for heirs receiving real property.
- 8 Conservator Blickenstaff disputes the estimated value indicating that the vehicle 01 Mitsubishi renders it unmarketable. Accordingly the vehicle is reflected as a loss in order to match the values represented in the accounting filed by previous conservator.

- 9 Conservator alleges the estate owes the following attorney or professional fees:
 - a. Mitchell Roth: \$5,287.50
 - b. Pamela Valencia \$15,577.85 and
 - c. Alan Carroll reimbursement of \$15,100.00
- 10 Current bond \$155,000.
- 11 Proposed Order: 11/08/17; however, need names of heirs receiving property.

RECOMMENDATION:

Need to clear notes 6-7; prior Conservator's account to be approved prior to this matter. If approved, Court to set hearing on filing of receipts and final discharge for **06/13/19**.
(cs/nb/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/07/18 TIME: 2:30 DEPT: S37P

CASE#: CON PS1300147

CASE NAME: MARY F CARROLL

SEE ALSO 24, 26

HEARING:

Mandatory Settlement Conference

COUNSEL:

ALAN CARROLL

(OBJ)...PAMELA Y VALENCIA

ALAN CARROLL

(SC)...DENNIS M SANDOVAL

LALANEYA D STAIGLE

(PET)...HARTNELL LAW GROUP

MARY FRANCES CARROLL

(CEP)...MITCHELL I ROTH

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

NATALIE BLICKENSTAFF

(CPE)...JENNIFER M DANIEL

PUBLIC GUARDIAN

(SC)...DENNIS M SANDOVAL

M.S.C. – No notes – JTD

(lc)

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

DATE: 06/07/18 TIME: 2:30 DEPT: S37P

CASE#: CON PS1300147
CASE NAME: MARY F CARROLL

SEE ALSO 24, 25

HEARING: second & final Account and Report of LALANEYA D STAIGLE and
Petition for allowance of fees filed.

COUNSEL:

| | |
|----------------------|----------------------------|
| ALAN CARROLL | (OBJ)...PAMELA Y VALENCIA |
| LALANEYA D STAIGLE | (PET)...HARTNELL LAW GROUP |
| MARY FRANCES CARROLL | (CEP)...MITHCHELL I ROTH |
| NATALIE BLICKENSTAFF | (CPE)...JENNIFER M DANIEL |

GENERAL INFORMATION:

Conservatee passed away on 11/13/16.

Continued from 01/29/18. Parties are attempting settlement. Supplement clearing notes and attorney fee petition of Bryan Hartnell to be filed by 2/28/18. Hearing set 1/30 is advanced and continued to be heard with this hearing. Notice waived.

Continued from 04/10/18 to clear notes. Counsel Hartnell will file supplement by end of day. M.S.C. set.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by **prior** conservator Lalaneya Staigle, granddaughter.

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

- 1 Accounting period 05/31/14 to 05/01/16.
- 2 Assets on hand: \$136,191.04 consisting of \$3,891.04 in cash the remaining in real property and personal property
- 3 Conservator Staigle waives compensation.
- 4 Conservator requests reimbursement of costs advanced of \$450.00. Itemized.
- 5 Attorney requests fees of \$44,015.00. Billed at \$250-\$425/hour for 100.10 hours' attorney time and \$50-\$125/hour for 121.3 hours' paralegal time. Itemized [see supp. 2/28/18, LF, pgs. 13-31]. JTD.
- 6 **Need** verified declaration for acknowledgment of receipt of fees by Conform Keepers per Local Rule 20-1406(c).
- 7 **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610. Does court wish to waive as conservatee has passed away? **JTD**
- 8 Conservator requests to be discharge upon approval of this petition; however, discharge approved upon final discharge.

9 Current bond \$20,000

10 **Objections filed 01/25/18 by son, Alan Carroll.**

11 Proposed order 12/21/17 indicates incorrect accounting period. Assets on hand do not appear to match.

RECOMMENDATION:

Matter is contested. Court's discretion re notes 6-7.. If approved, set hearing on filing of receipts and final discharge for **06/13/19.**

(cs/nb/lc)