



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 06/12/18**

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.

nbXX/0606

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1200882

CASE NAME: GREGORY MARK LAWRENCE \*MF\*

HEARING:

Petition for FAMILY ALLOWANCE

COUNSEL:

ALAN D DAVIS	(PET)...MICHAEL J. ULISSE
ALAN D. DAVIS	(SA )...MICHAEL J. ULISSE
GREGORY MARK LAWRENCE	(DEC)...
JOYCE M HOLCOMB	(PRO/PER
LEE LAWRENCE	(PET)...MARK D PERRYMAN
LEE LAWRENCE	(PET)...MITCHELLWEILER LAW
MCKENZIE LAWRENCE	(MIN)...
RHONDA LAWRENCE	(TP )...JOYCE M HOLCOMB
SHELBY LAWRENCE	(PET)...
STATE OF CALIFORNIA FRANCHISE	(PRO/PER
THERESA REAGAN-BLOOD	(PET)... THERESA REAGAN- BLOOD
THOMAS W DOMINICK	(THOMAS W DOMINICK
US SPECIALTY INSURANCE COMPANY	(LANAK & HANNA

Currently under review by Legal Research.  
(LR)

Future hearing:

06/27/18 First and final account

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

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500853

CASE NAME: Raymond S.G. Pryke

HEARING:  
Hearing re Final Discharge

COUNSEL:  
CHARLES S GARBER (PET)...MIRAU, EDWARDS, CANNON, LEWIN  
LINDA L. GARBER (PET)...MIRAU, EDWARDS, CANNON, LEWIN  
RAYMOND S.G. PRYKE (DEC)...

GENERAL INFORMATION:

**Continued from 05/15/18. No appearances. Court orders counsel for administrator to be personally present at hearing. No appearance will be required if the discharge is entered by the court. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Amended Order Settling First and Final Account entered 05/09/17.
2. **Need** receipt by Linda L. Garber and Charles S. Garber as Trustees of the Pryke Family Living Trust.
3. **Need** Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1601232

CASE NAME: Mary Clouser

HEARING:

Probate status report filed.

COUNSEL:

MARNIE KING

(PET)...PRO/PER

MARY CLOUSER

(DEC)...

GENERAL INFORMATION:

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

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

1. Petitioner alleges the estate is not in a condition to be closed as the real property is in the process of being sold.
2. Petitioner requests an additional 10 months to close the estate.
3. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**

RECOMMENDATION:

Need to clear note 3 then Court's discretion. If approved, set next hearing for Accounting Review on **06/18/19**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700853

CASE NAME: MTR OF CONSTANTINA REYNA RUIZ

HEARING:

petition for final distribution on waiver of Account and Report  
of JULIAN CAMPARAN and Petition for allowance of fees filed.

COUNSEL:

CONSTANTINA REYNA RUIZ (DEC)...

JULIAN CAMPARAN (PET)...PRISCILLA C SOLARIO ESQ

GENERAL INFORMATION:

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

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

1. Heirs waive accounting.
2. Petitioner waives statutory compensation.
3. Assets on Hand \$180,000 consisting of real property.
4. Attorney requests statutory fees of \$6,400.00. Calculated. Question how counsel intends to get paid as there are no liquid assets? Court to inquire.
5. **Need** Notice of Hearing with proof of service.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Require notice then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/18/19**.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800071

CASE NAME: Estate of Elizabeth J Peters

**SEE ALSO 5**

HEARING:

Hearing Re: OSC RE WAIVER OF OBJECTIONS OF CONNIE ANDERSON

COUNSEL:

CONNIE J ANDERSON	(OBJ)...PRO/PER
ELIZABETH J PETERS	(DEC)...
NANCY CATHERINE O'SHEA-SZCZEPA	(PET)...PRO/PER
VICTOR BRUCE MASON	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Waiver of Objections by Connie Anderson.

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

1. Matter set at 04/24/18 hearing, wherein, the Court took off calendar the Trial Setting Conference as stipulation was reached by parties.
2. Court sets OSC re waiver of objections: if Connie Anderson does not appear on June 12, 2018 the Court will deem non-appearance as waiver of Objections.
3. Parties sign off on stipulation and order; order is signed by the court.

RECOMMENDATION:

Court's discretion

(nb)

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800071

CASE NAME: Estate of Elizabeth J Peters

## SEE ALSO 4

### HEARING:

Petition to determine succession to Real Property

### COUNSEL:

CONNIE J ANDERSON	(OBJ)...PRO/PER
ELIZABETH J PETERS	(DEC)...
NANCY CATHERINE O'SHEA-SZCZEPA	(PET)...PRO/PER
VICTOR BRUCE MASON	(PET)...PRO/PER

### GENERAL INFORMATION:

Continued from **02/20/18**. Objections have been filed by Connie Jo Anderson- Reply to objections to be served & filed by April 3, 2018. All parties ordered to return to court on April 24, 2018 at 8:30am in department S35.

**Continued from 04/24/18.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by issues Nancy Catherine O'Shea-Szczepa and Victor Bruce Mason ["Petitioners"].

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

1. Petitioners request a determination that decedent's real and personal property located in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's children and equal beneficiaries in decedent's will. Petitioner attaches a copy of decedent's will [LF, p. 6].
2. **Objections filed by Connie J. Anderson allege substantial additional property is not included in the Inventory and Appraisal; and indicates some of the real and personal property are decedent's pre-deceased spouse's separate property.**
3. **Response to Objections filed 04/03/18 by petitioners.**
4. ~Proposed Form Order 01/24/18.

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RECOMMENDATION:  
Court's discretion  
(nb)

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



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San Bernardino District

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800302

CASE NAME: MTR OF KUROSH SOLTANIEH

**SEE ALSO 6A**

HEARING:

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

COUNSEL:

IRA KENNETH MAGID  
KUROSH SOLTANIEH

(PET)...KR HESS LAW PC  
(DEC)...

See next matter #6A.

(nb)

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800302

CASE NAME: MTR OF KUROSH SOLTANIEH

**SEE ALSO 6**

HEARING:

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

COUNSEL:

DARREN WAGONER (PET)...KR HESS LAW PC  
IRA KENNETH MAGID (PET)...KR HESS LAW PC  
KUROSH SOLTANIEH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Amended** (04/23/18) Petition for Letters of Administration with full authority under IAEA by Darren Wagoner ["Petitioner"].

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

1. Decedent died while residing in Iran; was a non-resident of California; and left an estate in this county.
2. Nominations of this petitioner by issues affixed [LF, pgs7-8].
3. Petitioner requests bond be set in the amount of \$120,000. Appears sufficient.  
**JTD.**
4. Service does not include Consulate of Switzerland. **Need** proper service per Pr. C. §8113.
5. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 4, \$120,000 bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800411

CASE NAME: JACQUELYN B. KIRCHER

HEARING:

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

COUNSEL:

JACQUELYN B. KIRCHER

(DEC)...

JOEL B. BLACK

(PET)...JEREMY A. BURNS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executor, Joel B. Black ["Petitioner"].

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

1. Petitioner requests bond be fixed at \$1,700,000. Appears sufficient. **JTD**.
2. **Need** Proof of Holographic Instrument.
3. ~Proposed Form Order/Letters 04/23/18

RECOMMENDATION:

Need to clear note 2, \$1,700,000.00 bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800413

CASE NAME: Larry Andrews

HEARING:

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

COUNSEL:

LARRY ANDREWS (DEC)...  
NANET ANDREWS (PET)...USHER LAW GROUP, PC

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$251,500. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b). **JTD.**
2. ~Proposed Form Order/Letters 04/30/18 & 05/01/18

RECOMMENDATION:

RFA then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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DATE: 06/12/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800421

CASE NAME: JUDITH IRENE HAUENSTEIN

HEARING:

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

COUNSEL:

CRAIG JAY HAUSTEIN (PET)...PRO/PER  
JUDITH IRENE HAUENSTEIN (DEC)...

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$340,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. ~Proposed Form Letters 04/30/18.

RECOMMENDATION:

RFA then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800452

CASE NAME: JOANN C. KOESTER

HEARING:

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

COUNSEL:

JOANN C. KOESTER

(DEC)...

NORMAN E. SEBERN

(PET)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother-in-law, Norman E. Sebern ["Petitioner"].

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

1. Nomination of this petitioner affixed [LF, p. 7].
2. Heir waives bond. Estimated estate valued at \$210,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. ~Proposed Form Order/Letters 05/09/18

RECOMMENDATION:

RFA then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 06/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON DS1000242

CASE NAME: KATHLEEN BACHMAN

HEARING:

Hearing Re: Status of Transfer to Sacramento County

COUNSEL:

KATHLEEN BACHMAN            (CEP)...

THERESA A TAVIANINI        (CP )...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Transfer to Sacramento County by sister and conservator of the person, Theresa Tavianini.

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

1. Order Granting Petition to Transfer Proceeding to Sacramento County entered 12/12/17.
2. **Need** signed return receipt as proof of transfer or signed acknowledgment of receipt or records.
3. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear notes 2-3.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1200073

CASE NAME: MTR OF JOHN ALBERT MAJOR

**SEE ALSO 13**

HEARING:

Hearing re Final Discharge

COUNSEL:

JOHN ALBERT MAJOR

(CEP)...

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

WILBUR E KNUDSEN

(CPE)...LAYNE A BARTHOLOMEW

WILBUR E. KNUDSEN

(CE )...LAYNE A BARTHOLOMEW

**VACATE** – final discharge order entered 02/08/18 as to conservatorship of the estate.

(nb)



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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1200073

CASE NAME: MTR OF JOHN ALBERT MAJOR

**SEE ALSO 12**

HEARING:

Hearing Re: RECEIPT OF CI REPORT (BI-ANNUAL REPORT)

COUNSEL:

JOHN ALBERT MAJOR

(CEP)...

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

WILBUR E KNUDSEN

(CPE)...LAYNE A BARTHOLOMEW

WILBUR E. KNUDSEN

(CE )...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of CI Report.

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

1. Matter set at 11/14/17 hearing, wherein, the Court referred this case to CI for bi-annual report. **CI Report filed 05/23/18.**
2. ~Proposed Form Letters 01/16/18.

RECOMMENDATION:

None.

(nb)

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DATE: 06/12/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400171

CASE NAME: MARIA DE LA CRUZ SERVIN

HEARING:

Petition for ATTORNEY FEES FOR SERVICES RENDERED

COUNSEL:

JACK B OSBORNE	(PET)...JACK B. OSBORN
JULIA SERVIN	(CPE)...VOORHEES LAW FRIM
MARIA DE LA CRUZ SERVIN	(CEP)...JACK B OSBORN

**XREF: PROPS1401030** (The Maria Servin special needs trust)

**CIVDS1311752** (Servin-v-Dignity Heath)

**GARSS1300088** (Maria, Deliah and Damian Olivas)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Attorney for Julia Servin, Conservator of the Person and Estate.

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

- 1 Petitioner, Kariann M. Voorhees, indicates that counsel has rendered services for which counsel has not been compensated.
- 2 Attorney requests fees of \$5,107.00. Billed at \$300-\$325/hour for 16.5 hours' attorney time and \$115/hour for 1.30 hours' paralegal time. Itemized [LF, pgs. 7-8]. **JTD**.
- 3 Attorney requests reimbursement of costs advanced of \$465.00. Itemized.
- 4 Petitioner requests that the Trustee of the Maria Servin Special Needs Trust pay requested sum.
- 5 No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb)

Future hearing:

11/14/18 Accounting Review

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700073

CASE NAME: ANTOINE JAMES SMITH

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of PEGGY HEIDELBERG-DUNSON

COUNSEL:

ANTOINE JAMES SMITH                      (CTP)...LENITA A SKORETZ  
PEGGY HEIDELBERG-DUNSON              (CP )...PRO/PER

GENERAL INFORMATION

Order appointing Peggy Heidelberg-Dunson Conservator of the Person entered  
08/08/17.

**Continued from 03/13/18 at request of counsel. Notice to be given by George  
Theios.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1800133

CASE NAME: Pablo Valle Balderas

**SEE ALSO 16A**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARTIN HERNANDEZ SOTO	(CP)...
ORALIA ANGELICA HERNANDEZ	(CP)...
PABLO VALLE BALDERAS	(CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by maternal aunt and uncle, Oralia A. Hernandez and Martin Hernandez Soto ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Janet Latourette.
3. **Need** Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. Court to review IRC Letter.

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9. **Need** Due Diligence Declarations as to deceased father, unknown paternal grandparents; and maternal grandparents.
10. Certificates of Completion re Conservatorship Class filed.
11. ~Proposed Form Order/Letters 05/01/18 & 05/10/18

**RECOMMENDATION:**

Need to clear notes 2-3 & 9. If approved, set hearing for Compliance Review for **01/15/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355); and Care Plan per Pr.C. §2352.5.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/12/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800133

CASE NAME: Pablo Valle Balderas

**SEE ALSO 16**

HEARING:

Hearing Re: COURT INVESTIGATOR MEMO DATED MAY 21, 2018

COUNSEL:

MARTIN HERNANDEZ SOTO (CP)...PRO/PER  
ORALIA ANGELICA HERNANDEZ (CP)...PRO/PER  
PABLO VALLE BALDERAS (CTP)...JANET LATOURETTE

Request for Waiver of Court Fees and Costs filed by PABLO VALLE BALDERAS is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CI Memo dated 05/21/18

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

1. Matter set on Courts motion upon receipt and review of CI Memo filed on 05/21/18.
2. CI Report filed 05/31/18.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/12/18 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS01473

CASE NAME: MTR OF KRISTINA D. TRIVETTE

HEARING:

Hearing Re: ESTABLISHMENT OF CONSERVATORSHIP IN TEXAS

COUNSEL:

KRISTINA D. TRIVETTE (CTP)...

MICHELLE D. TREJO (CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Establishment of Conservatorship in Texas.

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

1. Matter set on Courts motion, wherein, Court indicates that conservator is permitted to appear for the hearing via court call. If conservator is unable to appear for the hearing, conservator is to file with the court, before hearing, a declaration under penalty of perjury the status of filing for conservatorship in the State of Texas. Notice by Judicial Assistant.
2. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
3. CI Special Report filed 05/01/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

-----  
DATE: 06/12/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1400970

CASE NAME: Marcia Beller

HEARING:

Accounting Review by \*\*\*

COUNSEL:

MARCIA BELLER

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

Continued from **01/12/16** at request of counsel. Waiting on the life insurance monies to fund.

**Continued from 06/28/16, 09/20/16, 09/19/17 and 12/19/17 at request of counsel.**

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

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

1. Order Authorizing the PA to Collect and Sell the Property of Decedent per Pr.C. § 7660(a)(1) entered 12/01/14.
2. No accounting. **Need** same.

RECOMMENDATION:

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

(nb)



Superior Court of Calif, County of San Bernardino

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

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DATE: 06/12/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1500373

CASE NAME: REBIA CALLAHAN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (PRO/PER	
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
REBIA CALLAHAN	(DEC)...
ROBERT WASHINGTON III	(TP )...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from **07/11/16, 07/12/16 and 09/20/16** at request of counsel. Notice to be given by Craig Parker.

**Continued from 09/19/17 and 01/16/18 at request of counsel.**

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

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

1. Order Authorizing the PA to Collect and Sell the Property of Decedent per Pr.C. § 7660(a)(1) entered 04/27/15.
2. No accounting/status report. **Need** same.

RECOMMENDATION:

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

(dl/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS1800235

CASE NAME: TAYLOR C. GEE AKA TAYLOR CRAVEN GEE

**SEE ALSO 21**

HEARING:

Hearing Re: PETITION FILED BY PRESCOTT WILSON

COUNSEL:

PRESCOTT T WILSON	(PET)...	ALBREKTSON & SHUMATE, LLP
PUBLIC ADMINISTRATOR	(PET)...	CRAIG M PARKER
TAYLOR C. GEE	(DEC)...	

See next matter #21.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/12/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS1800235

CASE NAME: TAYLOR C. GEE AKA TAYLOR CRAVEN GEE

**SEE ALSO 20**

HEARING:

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

COUNSEL:

PRESCOTT T WILSON            (PET)...ALBREKTSON & SHUMATE, LLP  
PUBLIC ADMINISTRATOR      (PET)...CRAIG M PARKER  
TAYLOR C. GEE                (DEC)...

GENERAL INFORMATION:

Letters of Special Administration issued to PA on 03/30/18, no bond.

**Continued from 05/07/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Letters of Administration with full authority under IAEA by  
Public Administrator ["Petitioner"].

Petition #2: Petition for Letters of Administration with full authority under IAEA by  
son, Prescott T. William ["Petitioner"].

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

Petition #1 by PA:

- 1 No bond – exempt government agency.
- 2 ~Proposed Form Order/Letters 03/13/18.

Petition #2 by William:

- 3 Heir waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. Estimated value of estate \$366,000. Suggest bond of \$366,000. **JTD.**
4. Section 8 to petition and notice does not include Diane E. Gee, who has filed a Partial Assignment. **Need** verified further clarification via supplement.
5. **Need** proof of publication.

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

6. ~Proposed Form Order/Letters 04/24/18.

**RECOMMENDATION:**

Petition #1 by PA

RFA. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

Petition #2 by Wilson:

Need to clear notes 4-5 then Court's discretion re; bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**MISC**

-----  
DATE: 06/12/18      TIME: 1:30      DEPT: S35P  
-----

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

HEARING:

Hearing Re: COURT TRIAL (SECOND DAY)

COUNSEL:

KEVIN STUOT

(PET)...GUAY P WILSON

KEVIN STUOT

(TEE)...GUAY P WILSON

KRAIG STOUT

(PET)...FULLERTON LEMANN SCHAEFER & DO

STOUT TRUST

(TRU)...

No notes – Court Trial.

(nb)

Future hearing:

06/13/18 Court Trial

06/14/18 Court Trial

06/15/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO DS1000735

CASE NAME: MTR OF NATASHA MANSKER

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CAROL GROSSO

(PET)...JACK H ANTHONY

NATASHA MANSKER

(DEC)...

GENERAL INFORMATION:

**Continued from 03/13/18 and 04/17/18 to file an accounting.**

THIS CASE IS SET FOR HEARING ON Accounting Review by Carol Grosso, Trustee of the Natasha Mansker SNT.

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

1. Order Settling Third Account entered 04/19/16; fourth account now due.
2. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO DS1000934

CASE NAME: TIMOTHY JOHN OWENS

HEARING:

Accounting Review by \*\*\*

COUNSEL:

JESSICA VANDENBURG	(PET)...LAYNE A BARTHOLOMEW
SAN BERNARDINO CO. PUBLIC ADMI	(TA )...
TIMOTHY JOHN OWENS	(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Public Administrator

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

1. Court appointed Public Administrator as Successor Administrator on 04/10/17 and ordered a Status Report to be filed by next hearing on 04/10/17. **Need** same.
2. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status.

(lh/nb)

Future hearing:

06/13/18 Motion re: Judgment over etc.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1300285

CASE NAME: ROBERT LYLE MEE

HEARING:

Hearing Re: PTNRS AMENDED FIRST & FINAL

COUNSEL:

DIANE C OSTRANDER	(PET)...H. R. TOPALIAN
DIANE OSTRANDER	(PET)...DAVIT TOPALIAN
GINGER JACOBSON	(PET)...PRO/PER
GINGER JACOBSON	(TP )...PRO/PER
JULIE STEWART	(PET)... ROSE SPELLMAN, I
ROBERT LYLE MEE	(DEC)...
RYAN R MEE	(MIN)...

Request for Waiver of Court Fees and Costs filed by GINGER JACOBSON is GRANTED  
Fee waiver amount due \$1,160.00  
\$695.00 for petitions on 01/21/14  
\$465.00 for petition on 06/12/15

**XREF: PROPS1400042** (Carolyn Jacobson)

GENERAL INFORMATION:

Continued from **06/13/17** to clear probate notes.

Continued from **08/22/17**. Parties state that the amended first account is almost completed and will be filed.

**Continued from 11/07/17, 01/09/18, 02/27/18 and 04/10/18. Counsel reports that the second amended accounting will be filed today. Court reserves the date of 06/12/18 for the 2nd amended accounting.**

THIS CASE IS SET FOR HEARING ON **SECOND AMENDED** (04/10/18) First and Final Account and Petition for Fees **by Successor Administrator, Julie Stewart** ["Petitioner"- maternal aunt-GAL-guardian of the person and estate in Oklahoma].

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

1. Final Inventory and Appraisal filed on 03/15/17, Attachment No. 1 includes real and personal property that should be on Attachment No. 2 and appraised by the Probate Referee. **Need** corrected inventory.
2. Accounting period 05/12/12 to 01/31/18.

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



3. Assets on Hand \$176,484.66 consisting of \$147,734.66 cash of which \$143,225 is held in attorney's IOLTA account and remaining in personal and real property.
4. Petitioner waives statutory compensation of \$8,578.88.
5. Former Administrator, Diane C. Ostrander and her counsel, H.R. Topalian have agreed to reduced statutory fees, each, in the amount of \$3,901.27.
  - a. Topalian further agrees to credit the estate with \$3,316.93 for the monies previously withdrawn by Ostrander from Decedent's Bank of America Account XXX5568.
6. The sum of \$3,901.27 was previously approved in full in the Mutual Release and Settlement Agreement [LF, pgs. 15-20] as partial payment of the statutory fees for the prior Administrator's Attorney, H. R. Topalian, leaving a balance of statutory fees to be paid to Rose Spellman in the **amount of \$4,677.61**.
7. Attorney Rose Spellman requests extraordinary fees of \$12,603.72 and costs of \$1,279.72 for services rendered in connection with recovering \$177,925 in estate assets. Previous payments have been made by petitioner, leaving a **balance of \$3,043.22**. Billed at \$325/hour for a total of 32.3 hours' attorney time and \$95/hour for 8.7 hours' paralegal time. Generally described [LF, p. 26]. **Need** itemization per CRC 7.702 via verified supplement.
8. Summary of Receipts [LF, p. 12] reflects interest received for entire accounting period, instead of being itemized. Does Court wish to require itemization of same? **JTD**.
9. **Need** vehicle license number(s) and description.
10. **Need** address of party receiving real property.
11. Please **have** opposing party/counsel approve as to form and content.
12. Pursuant to Order entered on 06/17/15 [LF, p24] support payments are made to Ginger Jacobson on behalf of minor, Ryan Robert Mee commencing 07/01/15. Petitioner requests the Court authorize GAL, Craig M. Parker, as GAL, to make monthly payments in the amount of \$864 to Ginger Jacobson as and for support of Ryan, from the account established at Pacific Premier Bank in Redlands, until such time as Ryan Mee has reached the age of majority on 01/01/22. **JTD**.
13. Petitioner requests that all assets to be distributed to the minor, Ryan Nee, to be distributed to GAL, Craig M. Parker, and that he establish an account at Pacific Premier Bank in Redlands, CA, for the minor, Ryan Mee. Upon said Ryan Mee attaining the age of majority on 01/01/22, all of said assets can be released to him by Craig M. Parker, without further Order of this Court. **JTD**.
14. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. **JTD**.
15. Proposed Order 03/15/17. All judgments must be complete in themselves without reference to the petition on which they are based (Local Rule 20-614).

**RECOMMENDATION:**

Need to clear notes 1, 7, 9-11 then Court's discretion. If approved, set next hearing for receipts and final discharge for **06/18/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600500

CASE NAME: MTR OF ORAN WALKER PALMER

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DEBORAH PALMER MCCAIN	(PET)...PRO/PER
ORAN WALKER PALMER JR	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP )...

#### GENERAL INFORMATION

Continued from **09/19/17**. No appearance. Court orders Deborah Palmer McCain to personally be present at the next hearing. Notice by Judicial Assistant.

**Continued from 11/21/17 for petitioner to file I & A and an accounting or status report.**

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 Deborah Palmer McCain, daughter, on 07/12/17; full authority, no bond.
2. **Need** Final Inventory and Appraisal.
3. **Need** accounting or status report.

#### RECOMMENDATION

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

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1600975

CASE NAME: MTR OF DEMETRICE CHARMAINE APPLEWHITE

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DEMETRICE CHARMAINE APPLEWHITE (DEC)...

SHANIA L WARREN-BENNIKE (PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 05/01/18 at request of petitioner.**

THIS CASE IS SET FOR HEARING ON Accounting Review/Status.

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

1. Letters Testamentary issued to Shania L. Warren-Bennike, daughter, on 02/21/17, full authority, no bond.
2. Final Inventory and Appraisal filed 04/16/18.
3. **Need** accounting or status report.

RECOMMENDATION:

Inquire status of accounting.

(nb/lc/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

**SEE ALSO 6A**

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report  
of ANGELICA GUERRA and Petition for allowance of fees filed.

COUNSEL:

ANGELICA GUERRA

(PET)...E. MARIE HENNING

JUAN D GUERRA

(TP )...JOHN THEODORE DEAN

NATALIA GUERRA

(DEC)...

**XFER: UDFS1704646** (Guerra vs Ordonez)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Angelica Guerra ["Petitioner"-great-granddaughter].

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

1. Beneficiaries waive accounting.
2. Assets on Hand \$188,900 consisting of real and personal property.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$6,667.00. Calculated.
5. Proposed Order 05/31/18 does not include findings re: all taxes have been paid,  
or reserve made for taxes.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**06/18/19.**

(nb)

Superior Court of Calif, County of San Bernardino

Page: 6A ADD ON

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

**SEE ALSO 6**

HEARING:

Hearing re Final Discharge

COUNSEL:

ANGELICA GUERRA

(PET)...E. MARIE HENNING

JUAN D GUERRA

(TP )...JOHN THEODORE DEAN

NATALIA GUERRA

(DEC)...

GENERAL INFORMATION

**Continued from 05/30/18 to be heard with pending petition. No appearance.**

THIS CASE IS SET FOR HEARING ON Final Discharge re Angelica Guerra

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

1. Matter set on 02/28/18 at mediation settlement conference, wherein, court approved a stipulation for settlement regarding an unlawful detainer action and objections to probate. Order for Mutual Release filed same date. Court set hearing re Final Discharge for 05/30/18.
2. Waiver of Account and Petition for Final Distribution by Angelica Guerra filed 04/26/18 and set for hearing on 06/12/18.

RECOMMENDATION

None.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800096

CASE NAME: ELAINE ANN BEAUCLAIR

HEARING:

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

COUNSEL:

ELAINE ANN BEAUCLAIR (DEC)...  
RICHARD JACOBS (PET)...JOHN F WEBER

GENERAL INFORMATION:

**Continued from 03/20/18 and 05/01/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full  
authority under IAEA by Executor, Richard Jacobs ["Petitioner"].

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

1. Will is not self-proving. Proof of Subscribing Witness filed.
2. Will waives bond. Estimated estate valued at \$70,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
3. ~Proposed Form Order 01/31/18.

RECOMMENDATION:

RFA, \$70,000 bond. If approved, set future hearing for Accounting/Status Review on  
**08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of  
Local Rules.

(nb/lc/nb)

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800385

CASE NAME: Elena Meza

**SEE ALSO 9**

HEARING:

Petition for (to) determine succession to real property

COUNSEL:

ELENA MEZA (DEC)...  
GEORGE FIGUEROA (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by son, George Figueroa ["Petitioner"].

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

1. Inventory & Appraisal attached to petition includes real property that exceeds \$150,000; and is appraised at \$210,000.
2. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. However, petition does not include siblings who would also share an interest in subject property.

RECOMMENDATION:

Deny.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800385

CASE NAME: Elena Meza

## SEE ALSO 8

HEARING:

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

COUNSEL:

ELENA MEZA

(DEC)...

GEORGE FIGUEROA

(PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petition indicates all heirs waive bond. **Need** Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by George Figueroa, Ernest Carillo. Andrew Carillo and Jessica Carillo.
2. Estimated estate valued at \$0.00 at Section 3d to petition [LF, p. 3]. However, per inventory and appraisal affixed to petition to determine succession, there is real property appraised at \$210,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. ~Proposed Form Letters 04/24/18.

RECOMMENDATION:

Need to clear note 1, Court's discretion re Bond. If approved, set future hearing for Accounting Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: RPR RS02935

CASE NAME: NICOLAS HARE SPECIAL NEEDS TRUST

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CLARENCE HARE

(PET)...LINDA J GLADSON

GINA HARE

(PET)...CHRIS SCARCELLA

GINA HARE

(PET)...LINDA J GLADSON

GINA HARE

(TEE)...CHRIS SCARCELLA

NICOLAS HARE SPECIAL NEEDS TRU (TRU)...

GENERAL INFORMATION:

**Continued from 04/10/18 on courts motion. No appearance, no accounting filed.  
Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Eighth Account approved on 05/26/16; need Order after Hearing.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 11  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 06/12/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600104

CASE NAME: IN THE MATTER OF COREY CAPECE

HEARING:  
Accounting Review by \*\*\*

COUNSEL:  
COREY CAPECE (CTE)...  
FRANK CAPECE (PET)...MELINDA S. BELL  
TERRI CAPECE (PET)...MELINDA S. BELL

GENERAL INFORMATION

Continued from **09/05/17, 10/17/17 and 01/23/18** at request of counsel. Notice to be given by Attorney Melinda S. Bell.

Continued **from 03/13/18** on Court's motion. No appearances. Attorney Melinda Bell and her client are ordered to be present at next hearing date. Notice by Judicial Assistant.

**Continued from 05/01/18 at request of counsel. Accounting is out for signature.**

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Frank and Terri Capece, (parents) appointed conservators of the estate of Corey Capece on 07/19/16, limited conservatorship, no bond.
2. **Need** 1<sup>st</sup> Account beginning 07/19/17.

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.

(cs/lh/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600135

CASE NAME: ALONDRA RUIZ CONTRERAS

HEARING:

Hearing Re: Confirmation of Transfer

COUNSEL:

ALONDRA RUIZ CONTRERAS (CTP)...  
NORMA IRENE CONTRERAS (CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Confirmation of Transfer.

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

1. Matter set on Courts motion, wherein, the Court ordered case transferred to LA County. Court waived transfer fees as to San Bernardino County and requests that LA County do the same.
2. Return Receipt Green Card/Acknowledgment of Receipt filed.
3. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear note 3 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1401029

CASE NAME: KAY EULENE LANDIN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

KAY EULENE LANDIN (DEC)...  
LOREE SABATINO (PET)...BROWN & BROWN

**XREF: CIVDS1612554** (Sabatino –v-Pomtario Enterprises)

GENERAL INFORMATION:

Continued from **2/17/16** at request of counsel to file a quiet title action.

Continued from **6/29/16** as Quiet Title action still needs to be filed. Nothing new filed.

**Continued from 09/28/16.** Judge McCarville has heard the request to find this case and CIVDS1612554 related actions. These matters to be heard in S30 until issue of quiet title is resolved.

Continued from **04/04/17 and 06/13/17** at request of Counsel due to pending civil litigation. Notice to be given by Mr. Morris.

**Continued from 12/19/17 and 03/13/18 at request of counsel. Quiet title action has resolved. Accounting to be filed.**

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 1/8/15, no bond.
2. **Need** final inventory & appraisal filed.
3. **Need** an accounting or status report filed. Need same.

RECOMMENDATION:

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

(sa/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500769

CASE NAME: MTR OF FELIPE CURIEL

### SEE ALSO 3

HEARING:

Hearing Re: RECEIPT OF REVISED ORDER

COUNSEL:

ANA ISABEL SANCHEZ	(PET)... MARIO D VEGA
ANA ISABEL SANCHEZ	(TP )...PRO/PER
CURIEL MINORS	(MIN)...
FELIPE CURIEL	(DEC)...
FELIPE CURIEL	(GREGORY J. LEDERMAN
GLORIA CURIEL	(GREGORY J. LEDERMAN
ROBERT SCHNIEDERS	(PET)...RODNUNSKY & ASSOCIATES

GENERAL INFORMATION:

**Continued from 01/02/18. Signature page is still without text. Matter continued for modified settlement agreement to be filed. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Receipt of Revised Order.

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

1. Matter set at 12/11/17 hearing, wherein, the Court directed that an order be revised adding three lines of text to signature page.
2. Proposed order received on 12/13/17 is not signed by GAL for minors, Walter Moore. **Need** same.
3. Proposed Order 01/18/18 requests court to approve and confirm in its entirety, a Settlement Agreement and Mutual Release dated 05/24/17. **Need** copy of settlement agreement.

RECOMMENDATION:

Need to clear notes 2-3.

(nb)

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

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500769

CASE NAME: MTR OF FELIPE CURIEL

## SEE ALSO 2

### HEARING:

Accounting Review by \*\*\*

### COUNSEL:

ANA ISABEL SANCHEZ	(PET)... MARIO D VEGA
ANA ISABEL SANCHEZ	(TP )...PRO/PER
CURIEL MINORS	(MIN)...
FELIPE CURIEL	(DEC)...
FELIPE CURIEL	(GREGORY J. LEDERMAN
GLORIA CURIEL	(GREGORY J. LEDERMAN
ROBERT SCHNIEDERS	(PET)...RODNUNSKY & ASSOCIATES

### GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Administrator, Robert Schneiders ["Petitioner"].

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

1. Letters of Administration issued 04/04/16, full authority, \$3,514,000.00 bond.
2. **Need** final inventory & appraisal.
3. No accounting or updated status report. **Need** same.

### RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500880

CASE NAME: Carol A. Ayres

HEARING:  
Hearing Re: STATUS REPORT

COUNSEL:	
AUDESI AYRES	(PET)... F DAVID E WE ISS
CAROL A. AYRES	(DEC)...
LAWRENCE	(TP )...

**VACATE** – first and final account filed and set for 06/28/18.  
(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500937

CASE NAME: SANTOS TORRES MARTINEZ

## SEE ALSO 6

HEARING:

Hearing Re: RPT SALE & PTN FOR ORDER CONFIRMING SALE

COUNSEL:

CATHERINE MARTINEZ RISTER'STRA (PET)...PRO/PER  
INES MINERBA AVILA (PET)...KAREN B. MILLER  
SANTOS TORRES MARTINEZ (DEC)...

GENERAL INFORMATION:

*Petitioners, Ines Minerba Avila and Faustino Mondrago, represent purchasers MJGF Avila, LLC as co-trustees of Alvarado F& G Trust, and manager.*

**Continued from 12/28/17.** Petition denied. The Court refers matter to the Public Administrator to investigate and report on special administration and whether a probate needs to be opened.

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

Address	3412 Cajon Blvd, San Bernardino 92407, APN: 0267-241-10-0-000
Appraised value	\$80,000.
<b>Reappraisal</b>	<b>\$210,000</b>
Sale Price	\$49,238.33, which appears insufficient. <b>Need</b> 90% of appraised value per §10309(a)(3).
Deposit	\$21,238.33
First overbid	\$84,500
Commission	Sale without broker.
Bond	Incomplete.

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



Reason for sale	Taxes
Exposure to market	<b>None. Supp 12/19/17, it is unknown what actions Catherine Martinez Rister'stra took to expose property to market. Petitioners Avila and Mondrago were only involved in redeeming property from a Tax Lien Sale by paying delinquent property taxes prior to auction.</b>
Notice	<b>Need to file original Proof of Publication notice per Pr. C. §10300 Supp. 12/19/17 alleges publication was responsibility of the petitioner for probate, Catherine Martinez Rister'stra. Publication was never made. Petition for probate was dismissed without prejudice on 10/25/17 for failure to clear probate notes.</b>
~Proposed form order:	11/16/17
(lc/nb)	

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500937

CASE NAME: SANTOS TORRES MARTINEZ

## SEE ALSO 5

### HEARING:

Petition for Instruction (PC 17200) re Sale of Subject Property  
and/or Return of Money

### COUNSEL:

CATHERINE MARTINEZ RISTER'STRA	(PET)...PRO/PER
INES MINERBA AVILA	(PET)...KAREN B. MILLER
SANTOS TORRES MARTINEZ	(DEC)...

Request for Waiver of Court Fees and Costs filed by CATHERINE MARTINEZ RISTER'STRAW is GRANTED

### GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Instructions re: Sale of Subject Property and/or Return of Money Paid by Petitioner Avila for the Purchase of Subject Property and Property Taxes by Ines Minerba Avila ["Petitioner"]. (Pr. C. §17200)

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

1. Caption references Pr. C. §17200 re trusts. Question whether property is held in trust? **Need** verified supplement. Alternatively, **require** copy of vesting document. **JTD.**
2. Petition indicates that on or about 05/12/17, Petitioner Avila and her husband, Faustino Mondragon ["Mondragon"] purchased the property at 3412 Cajon Blvd., San Bernardino, CA, 92407, from seller, Catherine Martinez Rister-Straw ["Rister-Straw"], on the condition that buyers pay owed property taxes of \$19,238.33; allow the seller 6 months to continue living in the subject property; and the giving of an additional \$30,000 to the owner upon closing of escrow [see agreement at LF, p.8].
3. Petitioner states she and her husband Mondragon were shown "Letters of Special Administration" by Rister-Straw who stated that she had the ability to preserve the assets of the estate and since the estate was being lost in a tax sale, she had the authority to sell the property. However, per Order of Special Administration entered on 05/10/17, Rister-Straw was allowed to negotiate with

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

the mortgage holder and/or tax authorities to postpone tax sale until after 07/12/17.

4. Petitioner requests Instructions by this court allowing the estate to execute the agreement to sell or in the alternative, in the event the court finds that Rister-Straw did not have the authority to sell subject property, that Petitioner and Mondragon be reimbursed for the following from Rister-Straw: all monies (unspecified) paid by petitioner regarding subject property; payment of property taxes totaling \$19,238.33; attorney fees and costs; all consequential damages resulting from said transaction; or in the alternative, that Petitioner be awarded the whole amount of the bond posted in this matters.
5. **Need** Notice of Hearing with proof of service to include bonding company.
6. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 1 & 5 then Court's discretion. Further, it appears this may not be a trust matter; and a proper petition and notice should be filed.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1700067

CASE NAME: MTR OF FLORENCE Y SNOWBALL

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BRAD SNOWBALL

(PET)...ROBERT A KRASNEY

FLORENCE Y SNOWBALL

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Brad Snowball.

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

1. Letters of Administration issued 06/01/17, full authority, \$206,800 bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1700077

CASE NAME: GEFREY EDMUND NOVAK

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GEFFREY EDMUND NOVAK      (DEC)...

MYRON F NOVAK      (PET)...G STEVEN CUEVAS

**VACATE** – Waiver of Account filed and set for 07/12/18.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1700328

CASE NAME: THE MARY ELLA STUBBS REVOCABLE TRUST

HEARING:

Accounting Review by \*\*\*

COUNSEL:

JOHN STUBBS

THE MARY ELLA REVOCABLE TRUST

(PET)...MATTHEW E SHEASBY

(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by now deceased Trustee, John Stubbs.

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

1. Matter set at First and Final Account hearing held on 02/27/16, wherein, The Court approved accounting, however, required bank statements to be filed prior to signing the order and deems this accounting to be a first and current accounting. The Court authorized distribution according to the spreadsheet filed as Attachment D to the supplement filed 2/26/18.
2. First and current accounting approved/granted. **Order entered 05/22/18.**
3. The Court will not exonerate bond until final discharge is approved.

RECOMMENDATION:

Second account is premature. Set next hearing for Accounting Review to **10/02/18**  
(nb)

Superior Court of Calif, County of San Bernardino

Page: 9A ADD ON

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800317

CASE NAME: CHRISTOPHER DAVID BISHOP

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:  
CHRISTOPHER DAVID BISHOP (DEC)...  
GAYNOR E DEWEESE (PET)...PRO/PER

**VACATE** – bond posted.  
(nb)

Future Hearing:  
07/23/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 9B ADD ON

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800318

CASE NAME: Sharlene Ann Pusch

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:  
MICHELE HAMILTON (PET)...FULLERTON LEMANN SCHAEFER & DO  
SHARLENE ANN PUSCH (DEC)...

**VACATE** – bond posted.  
(nb)

Future Hearing:  
07/23/19 Accounting Review.



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 06/12/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1800380

CASE NAME: Joalla Lydia Cordell

HEARING:

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

COUNSEL:

BRYAN SCHRADER                      (PET)...PRISCILLA C SOLARIO ESQ  
JOALLA LYDIA CORDELL              (DEC)...

GENERAL INFORMATION:

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

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

1. Petition alleges all heirs waive bond. **Need** Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111, by sibling, Terri Cordell.
2. Estimated estate valued at \$100,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. ~Proposed Form Order/Letters 04/24/18.

RECOMMENDATION:

Need to clear note 1 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **08/20/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 06/12/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1800419

CASE NAME: BRIAN WAYNE DAVIS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BRIAN WAYNE DAVIS

(DEC)...

BRIDGET D. GREGOIRE

(PET)...PRO/PER

**X-REF: GARPS 1800126**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Guardian of the Estate of Alyssa Lynn Davis, Bridget D. Gregoire ["Petitioner"].

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

1. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is the Guardian of the Estate of decedent's daughter, Alyssa Lynn Davis.
2. Petition includes a "Waiver of Interest in Estate" [LF, p.12] signed by decedents surviving spouse, Michelle Dausman aka Michelle Davis, under Pr. C. §141.
3. ~Proposed Form Order 05/01/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/12/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800448

CASE NAME: LUVENIA VIRGINIA JOHNSON

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LUVENIA VIRGINIA JOHNSON (DEC)...  
STEVEN R. JOHNSON (PET)...JOHN F WEBER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by son, Steven R. Johnson ["Petitioner"].

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

1. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is the decedent's son and sole beneficiary in decedent's will. Petitioner attaches a copy of decedent's will [LF, p.4] showing that petitioner is decedent's only devisee.
2. ~Proposed Form Order 05/09/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

-----  
DATE: 06/12/18      TIME: 8:35      DEPT: S37P  
-----

CASE#: PRO PS1700837

CASE NAME: ROBERT DETAR AND JEAN DETAR TRUST

HEARING:

Petition for TO MODIFY TRUST

COUNSEL:

ROBERT DETAR

(PET)...AARON CHARLES GREGG

ROBERT DETAR AND JEAN DETAR TR

(TRU)...PRO/PER

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

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

-----  
DATE: 06/12/18 TIME: 8:35 DEPT: S37P  
-----

CASE#: TRU PS1800047

CASE NAME: Special Needs Trust for Xitlalli Sanchez

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
NATIONAL FOUNDATION FOR SPECIA	(PET)...DENNIS M SANDOVAL
SPECIAL NEEDS TRUST FOR XITLAL	(TRU)...
STEPHEN W DALE	(PET)...THE DALE LAW FIRM, PC
XITLALLI SANCHEZ	(BEN)...WILLIAM G SULLIVAN
XITLALLI SANCHEZ	(PET)...WILLIAM G SULLIVAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CMC re Transfer-in from Riverside County.

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

1. Order re: Petition for Order to Establish and Fund a SNT entered 12/10/14, trustee'd by Stephen W. Dale of Golden State Pooled Trust, of a settlement in the amount of \$775,935.33. Bond was set at \$788,000.
2. Order Approving First and Final Account of prior Trustee, entered 05/16/17, with Assets on Hand of \$1,572,387.32 for the period 12/01/14 to 01/28/17. Suggest Court require Inventory and Appraisal. **JTD**.
3. Prior order to purchase home, at the purchase price of \$450,000, entered 04/17/17.
4. Lawrence A. Dean, II, appointed Successor Trustee of SNT on 11/18/16, \$1,777,000.00 bond. **Need** amended bond that reflects San Bernardino County.

RECOMMENDATION:

Need amended bond then Court's discretion re: note 2. If approved, set next hearing for Accounting Review (re SNT) on **03/26/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

-----  
DATE: 06/12/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

HEARING:

Hearing Re: PTN FOR ATTY FEES BY MARC HANKIN

COUNSEL:

CHARLES NAJJAR	(PET)...MARC B HANKIN
ISABELLA PLACENTIA	(PRO/PER
JACOB NIXA	(PRO/PER
JOHN MOIO	(CPE)...MARC B HANKIN
JOHN MOIO	(PET)...MITCHELL I ROTH
JORDAN NIXA	(PRO/PER
MARC B HANKIN	(PET)... MARC B HANKIN
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NAJLA FORD	(CEP)...PRO/PER
NAJLA FORD	(PET)...SANDY L. TURNER
NAJLA FORD	(PP )...MITCHELL I ROTH
NATALIE BLICKENSTAFF	(CE )...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
SANDY TURNER	(PET)...SANDY L. TURNER
TINA MARIE NIXA	(JEREMIAH RAXTER
TINAMARIA A NIXA	(CP )...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

GENERAL INFORMATION:

**Ex Parte Orders granted 02/15/18.** Mr. Roth objects to request for further time to file attorney billings. Mr. Hankin is ordered to file attorney billing by 03/02/18.

**Continued from 03/13/18 by stipulation. Notice given by Mr. Roth.**

THIS CASE IS SET FOR HEARING ON **Amended** (03/05/18) Petition for Fees and Compensation by Attorney for Attorney-in-fact for Charles Najjar and as Special Litigation Guardian ad Litem for Najla Ford, John Moio by Attorney Marc B. Hankin ["Petitioner"].

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

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

1. Amended petition by Marc B. Hankin proffers case law. Referred to Legal Research.
2. Petitioner alleges that services have been rendered for which counsel has not been compensated. The services included those as Attorney-in-fact for Charles Najjar and as Special Litigation Guardian ad Litem for Najla Ford, John Moio.
3. Petitioner alleges he is too ill to properly prepare a petition that requires supplements.
4. Attorney requests fees of \$\$40,000 plus \$10,000, the same amount of fees that Attorney Roth requested. Generally described. **Itemization of e-mails, only, affixed to amended petition filed 03/05/18 [LF, pgs. 18-34]. JTD.**
5. Attorney requests reimbursement of costs advanced of **\$3,632.26**. Itemization affixed to amended petition filed 03/05/18 [LF, p16]. **JTD.**
6. Declaration filed by John Moio alleges there is no attorney fee retainer agreement between myself and Mr. Hankin; there is nothing in writing; and requests the Court honor the oral contract between he and Mr. Hankin and allow \$10,000 to suffice as payment in full for all attorney fees.
7. **Objections by John Moio filed requests petition to be denied in its entirety.**
8. **Objection filed by GAL, Mitchell I. Roth, contends the court should handle the request tantamount to a law and motion matter, without the necessity of having a trial.**
9. **Need** Notice of Hearing with proof of service.
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION: Matter is contested.

Need to clear notes 3 & 9 then Court's discretion

(nb)

(LR)

Future hearing:

12/24/18 Final discharge

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

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DATE: 06/12/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700378

CASE NAME: MATILDE ALVARADO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA ALVARADO (PET)...PRO/PER  
MATILDE ALVARADO (CEE)...MARK J. FLORY

GENERAL INFORMATION:

Continued from **01/02/18**. Counsel's report filed in the courtroom. Counsel to assist petitioner in providing a capacity declaration and checking into IRC services. Petitioner to take conservatorship class. The Court recommends the on-line Spanish speaking class.

**Continued from 03/20/18. Medical Capacity Declaration is filed in the courtroom. Petition to file a supplement adding father to petition. The Court requests IRC provide a report to the court. Father to attend and show proof of completion of conservatorship training class.**

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother Maria Alvarado [Petitioner].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Report by court-appointed counsel, Mark Flory, filed.**
3. Medical Capacity Declaration does not include physician's phone number. **Need** verified supplement.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.

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



5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.
9. **Need** Duties of Conservator form signed by father, Martin Alvarado.
10. **Need** Certificate of Completion re Conservatorship Class by father, Martin Alvarado.
11. Notice filed on 11/28/17 does not include IRC. **Need** proper service.
12. **Need** Proposed Form Order/Letters that include father, Martin Alvarado.
13. **Supplement (06/04/18)** requests that father, Martin Alvarado, be added to petition for limited conservatorship.

RECOMMENDATION:

Need to clear notes 2-3, 8-12, then Court's discretion. If approved, set hearing for Compliance Review for **01/15/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355); and Care Plan per Pr.C. §2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 06/12/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800029

CASE NAME: DAYANIRA LANAY HILL

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARLEAN HOLLOWAY (PET)...PRO/PER  
DAYANIRA LANAY HILL (CEE)...ROSE C ROSADO

GENERAL INFORMATION:

**Continued from 03/20/18 on courts motion for capacity declaration and counsel's report to be filed.**

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Carlean Holloway ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Rose Rosado.
3. Sections 1 & 2 to Medical Capacity Declaration are incomplete. **Need** verified supplement.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned SERVED.
7. Court Investigator Report filed
8. Inland Regional Center Report filed.
9. Certificate of Completion re Conservatorship Class filed.

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

10. ~Proposed Form Order/Letters 02/13/18.

**RECOMMENDATION:**

Need to clear notes 2-3 then Court's discretion. If approved, set hearing for Compliance Review for **01/15/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

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DATE: 06/12/18 TIME: 9:30 DEPT: S37P  
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CASE#: RC RS00049

CASE NAME: IN THE MTTR OF THELMA RAE SCHONEVELD

HEARING:

Accounting Review by \*\*\*

COUNSEL:

HENRIETTA SCHONEVELD	(PET)...ALAN D PAUW
JOHN SCHONEVELD	(PET)...ALAN D PAUW
LORETTA SCHEENSTRA	(SC )...ALAN D. PAUW, INC
THELMA RAE SCHONEVELD	(PCE)...MATTHEW E SHEASBY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Successor Conservator of the Person and Estate, Loretta Scheenstra ["Petitioner"-sister].

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

1. Ex Parte Petition to Dispense with Accounting and Order Approving entered 10/06/05 for period 07/18/13 to 08/05/05.
2. Waiver of Account filed on 04/23/18 for period 01/01/05 to 12/31/17 needs to be a noticed hearing per Pr. C. §1041. Alternatively, require Ex Parte Petition to Dispense with Accounting and Order Approving, Local Form SB-2628, beginning on 08/06/05.

RECOMMENDATION:

Need to clear note 2.

(nb)