



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 06/13/18**

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

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

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

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

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

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

5/30/18lh; 06/08/18lh

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1100741

**VACATED**

CASE NAME: ESTATE OF JULIUS LEON SHARTSIS

HEARING:

Hearing re Final Discharge re John D. Mickus

COUNSEL:

DAVID HO	(APP)...DECASTRO WEST CHODOROW MENGLER
JULIUS LEON SHARTSIS	(DEC)...
GARY SHARTSIS	(PET/APP)...GARY C WUNDERLIN
LINDA BRONKEN SHARTSIS	(PET/APP)...GARY C WUNDERLIN
JOHN D MICKUS	(PET)...JOHN D MICKUS
DAVID HO	(PET)...JOHN D MICKUS
DALE SHARTSIS	(TP )...LAWRANCE A WIDDIS
LYLE STOTELMYRE	
DALE SHARTSIS	(MICHAEL J LANCASTER)
LINDA LEE SHARTSIS BRONKEN	(GARY C WUNDERLIN)
US SPECIALTY INSURANCE	

**XREF: CIVDS1413391** GARY SHARTSIS ETAL -V- DAVID HO JR

Order for final discharge as to John D Mickus entered 1/8/18.

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400651

CASE NAME: MTR OF RUBEN HERNANDEZ

HEARING:

Accounting Review

COUNSEL:

CASSANDRA IBARRA GARCIA (PET)...JOSHUA W CENTENO  
RUBEN HERNANDEZ (DEC)...  
LILIANA GARCIA (PET)...JOSHUA W CENTENO  
STATE OF CALIFORNIA FRANCHISE TAZ BOARD (TP )...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Cassandra Ibarra Garcia, administrator

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

1. Status Report filed 12/30/16 by Cassandra Ibarra Garcia, administrator, was heard on 6/14/17. Court reset accounting review for 06/13/18 due to information regarding creditor's claims from back taxes.
2. **Need** accounting or status report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500633

CASE NAME: LAUREL SCHMIDT TRUSTEE

**SEE ALSO 4**

HEARING:

Hearing Re: PRETRIAL CONFERENCE/STATUS OF SETTLEMENT

COUNSEL:

RICHARD SCHMIDT	(PET)...ROBIN MCCONNELL
DAVID SCHMIDT	(PET)...ROBIN MCCONNELL
LAUREL SCHMIDT	(OBJ)...MCINTIRE & MCINTIRE

**XREF: UDBS1600534** *SCHMIDT -V- SCHMIDT*

No notes—JTD

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: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500633

CASE NAME: LAUREL SCHMIDT TRUSTEE

**SEE ALSO 3**

HEARING:

Hearing Re: Petition for REMOVAL OF TRUSTEE LAURELL SCHMIDT

COUNSEL:

RICHARD SCHMIDT	(PET)...ROBIN MCCONNELL
DAVID SCHMIDT	(PET)...ROBIN MCCONNELL
LAUREL SCHMIDT	(OBJ)...MCINTIRE & MCINTIRE

**XREF: UDBS1600534** SCHMIDT -V- SCHMIDT

GENERAL INFORMATION:

Continued from **08/18/15 and 09/22/15**. Motion to dismiss denied as it is untimely.  
**Continued from 11/02/15 and 12/17/15**. Court orders Laurel Schmidt to file the accounting by **01/15/16**. Court notes that the trust specifies that it will be administered in San Bernardino County.

**Continued from 02/16/16, 05/23/16, 06/13/16, 08/22/16, 11/10/16, 04/20/17, 07/20/17 and 10/19/17**. Matter set for trial.

**Continued from 12/14/17**. Court inquires of both counsel regarding settlement. Hearing continued at request of Counsel. Attorney Christopher McIntire represents there is a problem in producing the timesheets petitioner requested and is currently working on resolving that matter. Attorney McIntire further represents there will be a cash buyout by Richard Schmidt and an escrow account will be opened. Court exercises its discretion and hereby terminates both counsel's ability to appear by Court call pursuant to CCP 367.5. Christopher McIntire and Robin McConnell are both ordered to appear in person at the next hearing on **06/13/18**.

THIS CASE IS SET FOR HEARING ON Petition to Remove Trustee Laurel Schmidt and Appoint Richard Schmidt as Successor Trustee; Petition for Interim Suspension and Order Staying Notice of Intent to Terminate Trust and to Evict David Schmidt from Trust Property [Pr. C. §§ 15642, 16000 *et seq.*, 17200, 17200(b)].

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

1. Petitioners allege venue is proper as the real property owned by the trust is located in San Bernardino County, California. Question where the principal place of administration of the trust is located? **Supp 09/17/15: current place of Administration is Orange County as Laurel Schmidt lives in Orange County.**
2. Petitioners, Richard Schmidt and David Schmidt, beneficiaries under the Dorothy M. Schmidt Trust, dated November 29, 1999, and as restated on June 16, 2005, allege Trustee, Laurel Schmidt, has engaged in and undertaken numerous actions that have exceeded her proper authority under the Trust; failed to protect the interest and life estate of David Schmidt in certain real property; breached the Trust's lease with David Schmidt; acted in bad faith and with a conflict of interest, placing her desire to "cash out" her portion of the Property to the detriment of David Schmidt's right to reside at the Property; and failed to protect the wishes and interest of all beneficiaries.
3. Petitioners further allege Trustee has failed to communicate with them; failed to provide an accounting despite repeated requests; has failed to provide Trust banking information and changed Trust bank accounts to prevent Petitioners' from making deposits to justify her efforts to terminate the trust and David's life estate, lease and right to reside at the property; and has allowed her own personal interest to interfere with her duties as Trustee under the Trust.
  - a. The court has the power to compel the trustee to report information about the trust or to account if the trustee fails to submit the report within 60 days after written demand and no report or account has been made within six months preceding the request. Pr.C. § 17200(b)(7). Question whether written demand has been made and whether more than 60 days have passed? **Supp 09/17/15: written requests made on 02/12/15 and 03/20/15.**
4. Petitioners request the removal of Trustee, Laurel Schmidt; for an interim order suspending Trustee's powers to prevent actions that will unreasonably jeopardize the Petitioners' interests; and for the Appointment of Successor Trustee, Richard Schmidt. Petitioners also request that Laurel Schmidt's Notice of Intent to Terminate the Trust and 60 Day Notice to Vacate served on David Schmidt be voided by this Court.
5. Alternatively, Petitioner's request that the Court issue an order authorizing Richard Schmidt to act as Successor Trustee with full rights under the Trust and Pr. C. § 16220 *et seq.*, with an agreement that the status quo will be maintained until such time as a full hearing is held.
6. Declarations in support of petition filed 07/08/15.
7. **Objections filed 08/06/15 by Trustee, Laura Schmidt; Trustee's Stipulation to Withhold Eviction proceeding Pendente Lite; and Request for Mediation Prior to Trial with p's and a's.**
8. **Amended Answer and objection filed by Laurel Schmidt, Trustee on 02/10/16.**
9. **Motion to Dismiss Petition with prejudice filed 09/15/15 by Laurel Schmidt, Trustee.**

10. **Objection to Motion to Consolidate Cases.**
11. **Declaration filed by Richard and David Schmidt in support of Petition and Court's consideration of replacing trustee – report of Trustee's improper entry onto property and confrontation/threats to David Schmidt.**
12. ~Proposed Order 07/08/15.

RECOMMENDATION:

Matter is contested.

(/lc/lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600472

CASE NAME: ESTATE OF GARY DEE PINKERTON

HEARING:

Probate status report

COUNSEL:

LEE JAY PINKERTON (PET)...KEVIN M MAHAN  
GARY DEE PINKERTON (DEC)...

GENERAL INFORMATION:

**Continued from 02/13/18 to clear probate notes. Counsel for petitioner Lee Parkinson to give notice.**

THIS CASE IS SET FOR HEARING ON Status Report [filed 11/13/17] by Executor, Lee Jay Pinkerton ["Petitioner"].

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

1. **Need** final inventory and appraisal.
2. **Need** verification signed by the personal representative.
3. Petitioner alleges the estate is not in a condition to be closed as it is unknown and undetermined if a federal estate tax return will be required. Petitioner indicates he will be meeting and conferring with a tax professional after 01/02/18.
4. Petitioner does not request a specific time to close the estate. Suggest 12 months. JTD.
5. **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 notes 1-2 & 5 then Court's discretion. If approved, set next hearing for Accounting Review on **01/16/19**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/lh)



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

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DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600721  
CASE NAME: LEWIS FREDERICK SMITH

HEARING:  
FIRST AND FINAL Account and Report of BELINDA LLONA HILL and  
Petition for allowance of fees filed.

COUNSEL:  
BELINDA LLONA HILL (PET)...RICHARD S PRICE  
LEWIS FREDERICK SMITH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of  
Executor and Petition for Fees and Final Distribution by Belinda Hill, executor

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

1. Assets on hand: **\$207,950.66**, of which \$172,950.66 is cash and remaining in mobile home.
2. Statutory fees of **\$7,159.01**, each, requested by executor and attorney. Calculated. **JTD**
3. Attorney requests extraordinary compensation totaling **\$1,050** for 4.20 hours at \$250 per hour regarding demand letters written to K. McDaniel (named beneficiary). Itemized. [Acct, 04/12/18, LFpg23]. **Need** verified supplement further explaining need for services per CRC 7.702.
4. Final Inventory and Appraisal filed 04/12/18. **Need** bank/investment statements containing date of death values per Local Rule 20-908.
5. **Need** bank/investment statements verifying final ending balance in JP Morgan Chase account x5824 per Local Rule 20-908.
6. **Need** verified supplement clarifying status of 2012 Kia and 1985 GMC truck bequeathed to Kikuko McDaniel as neither asset is included in Inventory and Appraisal nor explained within report.
7. **Need** Notice of Hearing and Proof of Service as to parent or legal guardian of minor beneficiaries: Nicholas Johnston; Brianna Hyland; Jacob Hyland per CRC 7.51(d).
8. Proposed order submitted 04/12/18; however, need at least 3 lines of content above judge's signature.

**RECOMMENDATION:**

Need to clear notes #3-7 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/19/19**.

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700192

CASE NAME: ALBERT R BALLARD

HEARING:

WAIVER OF ACCOUNT AND FINAL REPORT OF ADMIN Account and Report of JOSHUA U SUTTON and Petition for allowance of fees filed.

COUNSEL:

JOSHUA U SUTTON (PET)...CALDWELL, KENNEDY & PORTER, A.  
ALBERT R BALLARD (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Final Report; Petition for fees and Final Distribution by Joshua Sutton, administrator

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

1. Assets on hand: \$178,261.49 cash held in client-trust accounting, and remaining in stock.
2. Petitioner waives statutory fees.
3. Statutory fees of **\$7,130.38** requested attorney. Calculated.
4. Attorney requests extraordinary compensation totaling **\$4,145** for 25.5 hours at \$300/\$150 per hour for attorney/paralegal services re sale of real property and resolving creditors' claims. Itemized. [Acct, 4/25/18, LFpg17]. **JTD**
5. Petitioner requests authority to pay two creditor's claims: Alaska Federal Credit Union for \$5,000; American Express for \$1,500.
6. Stanton C. Sutton (stepson/sole heir) assigned 100% interest to his son, Joshua U. Sutton (petitioner).
7. ~Proposed order: 4/25/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **6/19/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**TRUSTS**

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DATE: 06/13/18      TIME: 8:30      DEPT: S35P  
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CASE#: TRU PS1800010

CASE NAME: THE BRUCE A BACON FAMILY TRUST

HEARING:

Hearing Re: Trial Setting Conference/Return from Mediation

COUNSEL:

GERARD KIEMENEY

BRUCE A. BACON FAMILY TRUST

JANET FRYER

PENNY GESLIN

GRACIELA BACON

(PET)...HARTNELL LAW GROUP

(TRU)...

(PET)...KEYSTONE LAW GROUP

(PET/OBJ)...SCOTT GROSSMAN

(LEE GREEN STEWART & PAUL)

TSC—no notes—JTD

Future Hearing: 6/19/18 Petition for Reformation of Trust

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

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DATE: 06/13/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800093

CASE NAME: MTR OF DOMINIQUE BEASLEY IRREVOCABLE TRUST

HEARING:

Petition for TO ESTABLISH SPECIAL NEEDS TRUST FOR THE BENEFIT OF  
DOMINIQAUE BEASLEY ETC

COUNSEL:

DEBORAH BEASLEY (PET)...SUSAN A KATZEN  
DOMINIQUE BEASLEY IRREVOCABLE TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**SEE ALSO 11, 19**

**VACATED**

HEARING:

Hearing Re: Further Status of Purchase of a House

COUNSEL:

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

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

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

Waiver of Court Fees and Costs filed by CARMELA C JOHNSON is GRANTED

Status—no notes—JTD

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**SEE ALSO 10, 19**

**VACATED**

HEARING:

Hearing Re: Visitation

COUNSEL:

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

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

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

Waiver of Court Fees and Costs filed by CARMELA C JOHNSON is GRANTED

Visitation—no notes—JTD

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1300333

CASE NAME: Floyd Casey Jr.

**SEE ALSO 13**

HEARING:

Petition for attys fees & compensation for services rendered to cnsvtee

COUNSEL:

BOBBIE J CASEY (PCR/CPE)...PRO/PER  
FLOYD CASEY JR (PCE/CEP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Rose C Rosado

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

1. Petitioner, Rose C Rosado, was appointed Counsel for Floyd Casey on 01/30/14.
2. Petitioner requests fees of **\$11,662.50** for 43.5 hours at \$350/300/150 per hour for attorney/paralegal services. Itemized. [Petition, 4/30/18, LFpgs5-10]. **JTD**
3. Petitioner was previously paid \$2,120 from the County of San Bernardino for period 01/30/14 to 12/28/18. Petitioner will reimburse County upon payment.
4. Notice is complete.
5. ~Proposed Order: 4/30/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 9/04/14 Accounting Review



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

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1300333

CASE NAME: Floyd Casey Jr.

**SEE ALSO 12**

HEARING:

THIRD & FINAL Account and Report of FLOYD CASEY JR and Petition  
for allowance of fees filed.

COUNSEL:

BOBBIE J CASEY (PCR/CPE)...PRO/PER  
FLOYD CASEY JR (PCE/CEP)...ROSE C ROSADO

Waiver of Court Fees and Costs filed by BOBBIE J CASEY is GRANTED  
TOTAL FEES WAIVED TO DATE: \$1448.00

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Third and Final Account by Bobbie Casey,  
spouse/conservator

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

1. Pre-Death accounting period: 06/24/17 to 12/04/17; aoh: \$36,042.44, cash
  - a. Note: Pre-death assets on hand schedule reflects incorrect total of \$32,704.80 [Acct, 4/30, LFpg9]; however, supporting statements reflect total of \$36,041.82. Does Court wish to deem de minimis?
2. Post-Death accounting period: 12/05/17 to 03/31/18; aoh: \$36,720.07, cash
3. **Need** facility statements for Mission of Love Care Pr.C. §2620(c)(5).
4. Petitioner requests compensation for services totaling **\$17,900** for period 05/21/14 to current date for 895 hours at \$20 per hour. [Acct, 4/30/18, LFpg17].  
**JTD**
5. Petitioner requests reimbursement of mileage totaling \$3,449.10; however, mileage is considered overhead and is generally not unless conservator is waiving compensation per Local Rule 20-1406(d). [Acct, 4/30/18, LFpg17]. **JTD**
6. Petitioner requests residue to be distributed in equal shares to surviving issue: Julius Casey and Jerrod Casey. Does Court wish to require filing of 13100 Affidavit per Pr. C. §2631(b)? **JTD**
7. Notice is complete.
8. ~Proposed Order: 04/30/18 subject to approval of reimbursement in note #5.

RECOMMENDATION

Need to clear note #3. If approved, set hearing re receipts and final discharge for **06/19/19**.

(lh)

Future Hearing: 9/04/14 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

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

**SEE ALSO 15, 16**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

MARY ANN GOLDBERG	(PET)...	FULLERTON LEMANN SCHAEFER & DO
TIMOTHY STAHL	(CTP/CEP)...	JENNIFER M DANIEL
INLAND COUNTIES REG CNTR	(CPE)...	LAYNE A BARTHOLOMEW
JOHN KEVIN STAHL	(CPE)...	STEVEN K BECKETT
MARY ANN GOLDBERG	(OBJ)...	KYLE E WOOLDRIDGE

TSC—no notes—JTD

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

**SEE ALSO 14, 16**

HEARING:

Hearing Re: TWO COMPETING PETITIONS FOR CONSERVATORSHIP

COUNSEL:

MARY ANN GOLDBERG (PET)...FULLERTON LEMANN SCHAEFER & DO  
TIMOTHY STAHL (CTP/CEP)...JENNIFER M DANIEL  
INLAND COUNTIES REG CNTR (CPE)...LAYNE A BARTHOLOMEW  
JOHN KEVIN STAHL (CPE)...STEVEN K BECKETT  
MARY ANN GOLDBERG (OBJ)...KYLE E WOOLDRIDGE

GENERAL INFORMATION

Ex parte hearing held 05/30/17. Inland Regional Center objects to the petition for conservatorship. Inland Regional Center to file competing petition by 07/18/17. Ex parte orders denied. Attorney Jennifer M. Daniel is appointed for Timothy Stahl. Court appoints Attorney J David Horspool as the Guardian Ad Litem for Timothy Stahl. **Continued from 07/18/17.** Steven Beckett indicates that the father has contacted them and reports that father may consider having their recent petition amended to include him as a proposed co-conservator of Timothy Stahl. Court reset date of petition on 10/18/17 to 10/17/17. Amended petition to be filed by 10/03/17 or it will be deemed waived. Court sets trial dates with estimate of 1 week. Court makes Pretrial Orders. Ex parte orders granted on **09/14/17**. Court appointed Inland Regional Center as temporary conservator of the person only.

**Continued from 10/17/17** at request of counsel. Court directs that Inland Counties Regional Center is to submit a report to the court but is excused from making a recommendation as to who should be appointed as conservator of Timothy Stahl as IRC is a petitioner in this case. Notice waived.

**Continued from 01/30/18.** Court signs stipulation & agreement re: visits.

**Continued from 03/20/18 to readiness hearing date of 07/24/18.**

**On 04/10/18, Court reset hearing to 06/13/18 and appointed Dr. Chalop as 730 evaluator; vacated trial readiness, trial dates, discovery cut-off, and pre-trial order. Court set TSC for 6/13/18 and status report as to 730 evaluation to be filed by 05/23/18. Transcript to be prepared at Court's expense with copies to be provided to David Horspool (as GAL) and Steven Beckett (counsel for IRC). Court reporter to prepare transcript from today's hearing.**

THIS CASE SET FOR HEARING ON

- Petition #1 [filed 05/23/17] for Appointment of Conservator person only by **Mary Ann Goldberg**
- Amended Petition #2 [filed 08/22/17] for Appointment of Conservator of person only by **IRC and John Kevin Stahl (father)**

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

**Petition #1 by Mary Ann Goldberg**

1. Proposed conservatee is developmentally disabled. It appears a Petition for Limited Conservatorship is appropriate.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
3. Petitioner seeks orders that conservatee be adjudicated to lack the capacity to make medical decisions under Pr. C. §2355. JTD
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Petition alleges Mary Ann Goldberg (petitioner/mother) was appointed conservator of Timothy Stahlwas (proposed conservatee) in Suffolk County, New York on 05/30/97, index no: 4947/97. **Supp. filed 07/18/17. Conservatee was flown to Palm Springs, CA on 06/29/14. Need copy of Suffolk County Court Order fixing residence in California.**
6. **Need** report of J David Horspool, GAL.
7. **Need** return of Citation.
8. **Need** Notice of Hearing and Proof of Service.
9. Certificate of Completion of the Conservatorship Training Class filed
10. CI Report filed 07/13/17.
11. Report of Jennifer Daniel filed 09/13/17.
12. Supporting Declaration of Carole Lieberman, M.D.M.P.H. filed 09/14/17.
13. ~Proposed Form Order: 05/23/17

**Amended Petition #2 by IRC and John Kevin Stahl (father)**

14. Petitioner seeks powers re habilitation, treatment, training, medical etc under Pr. C. §2351.5. JTD
15. Petitioner seeks civil rights be limited. JTD
16. Petitioner seeks medical powers. Capacity Declaration filed 08/25/17.
17. Proposed conservatee is developmentally disabled. **Need** report of Counsel Jennifer Daniel as to general petition.
18. Proposed conservatee is developmentally disabled. **IRC report filed.**
19. Certificate of Completion of the Conservatorship Training Class filed.
20. Return of Citation with Proof of Personal Service filed 08/25/17; however, proof of service is incomplete as to date and time of service. Amended proof of personal service filed 10/12/17.
21. Special Report by Court Investigator filed.
22. **Objection of Mary Ann Goldberg filed 09/08/17 with proof of service.**

23. ~Proposed Form Order: 08/22/17

RECOMMENDATION

**Matter is contested.**

Need to clear notes 4-8; 17-18. If approved, set hearing for Compliance Review for **01/16/19** 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  
(lh/nb/lh)

Future hearing dates: 07/31/19 Conservatorship Investigator Review

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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

**SEE ALSO 14, 15**

HEARING:

Hearing Re: STATUS OF 730 EVALUATION BY DR CHARLOP

COUNSEL:

MARY ANN GOLDBERG (PET)...FULLERTON LEMANN SCHAEFER & DO  
TIMOTHY STAHL (CTP/CEP)...JENNIFER M DANIEL  
INLAND COUNTIES REG CNTR (CPE)...LAYNE A BARTHOLOMEW  
JOHN KEVIN STAHL (CPE)...STEVEN K BECKETT  
MARY ANN GOLDBERG (OBJ)...KYLE E WOOLDRIDGE

GENERAL INFORMATION

On 04/10/18, Court reset hearing to 06/13/18 and appointed Dr. Chalop as 730 evaluator; vacated trial readiness, trial dates, discovery cut-off, and pre-trial order. Court set TSC for 6/13/18 and status report as to 730 evaluation to be filed by 05/23/18. Transcript to be prepared at Court's expense with copies to be provided to David Horspool (as GAL) and Steven Beckett (counsel for IRC). Court reporter to prepare transcript from today's hearing.

THIS CASE IS SET FOR HEARING ON STATUS OF 730 EVALUATION BY DR CHARLOP

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

1. Status Report re Evidence Code §730 evaluation filed by Steven Beckett on 05/23/18.

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 17

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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700261

CASE NAME: MTR OF ELLA MARIE BODELL

HEARING:

Petition for substituted judgement to: 1) create and fund  
special needs trust

COUNSEL:

DAVID BODELL	(CPE)...TREVOR D. MARTIN
ELLA MARIE BODELL	(CEP)...SANDY L. TURNER
PLATTE RIVER INSURANCE	(TP )...

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

Future Hearings:

8/29/18 Conservatorship Compliance Review Hearing

6/29/19 Accounting Review



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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700411

CASE NAME: MTR OF ARTHUR GENE FELDMAN

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

JESSICA ROUNDTREE	(PET)...PRO/PER
CORRY FELDMAN	(CPE)...PRO/PER
ARTHUR GENE FELDMAN	(CEP)...WALTER T. MOORE

**X-REF: CIFMS 1700007** (RO re: son, Mark Bruner)

GENERAL INFORMATION

**Continued from 12/19/17.** Walter T. Moore appointed for Arthur Feldman. Next hearing set 02/21/18. Court set deadline for filing of competing petition for 4:00PM on 01/23/18. Court noted if competing petition is not filed by that date, Court will deem objections waived. Notice given by Judicial Assistant.

**Continued from 02/21/18.** Court cleared note re citation as proposed conservatee was present this date. Matter continued for petitioner to clear remaining probate notes.

**Continued from 04/11/18 for petitioners to be present; Counsel to give notice.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by son, Corry Feldman as petitioned by Jessica Roundtree.

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

1. Outdated petition used that does not include Indian Ancestry questions. **JTD.**
2. Petitioner requests bond be fixed in the amount of \$10,000. However, estimated estate valued at \$85,000. Suggest bond of \$93,500 (includes recovery). **JTD.**
3. Petitioner seeks medical powers. **Capacity Declaration filed 04/18/18 is incomplete at item #5 as to whether proposed** Section 1 to petition [LF, p. 2] does not specify the type of orders sought. **Need** verified supplement.
4. **conservatee can attend hearing; signatures are not dated. JTD**
5. Petitioner requests dementia powers. **Need report of Counsel Moore.**
6. List of Required Contact form does not include Corry Feldman. **Need** completed form.

7. **Need** Court Investigator's Report.
8. **Need** Notice of Hearing with proof of service
9. Certificate of Completion re: Conservatorship Class filed.
10. ~Proposed Form Order/Letters 11/09/17.

RECOMMENDATION:

Need to clear notes 3-8. Courts discretion re notes 1 & 2. If approved, set hearing for Compliance Review for **01/16/19** 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); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **08/21/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)

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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: PRO PS1400134

CASE NAME: Vicki R. Lister

**SEE ALSO 11, 12**

HEARING:

Accounting Review

COUNSEL:

YO TASHI KO Y TUCKER	(PET)...BRYAN C HARTNELL
VICKI R LISTER	(DEC)...
KARIMI SUTTON SR,	(OBJ)...PRO/PER
SHANIKA LISTER	(PRO/PER)
CARMELA JOHNSON	(PRO/PER)

**XREF: CONDS1000281** SHANIKA LISTER

**CIVDS1309039** HARTNELL-V-LISTER

GENERAL INFORMATION:

Continued from **09/12/16** and **04/10/17**. Bryan Hartnell is relieves as counsel.

**Continued from 01/22/18.** Matter is continued to April 30, 2018; accounting to be filed by 4pm March 26, 2018. Clerk's office is ordered to set the accounting for April 30, 2018 at 8:30am in department S35 (or an earlier date if available) if the accounting is filed by the deadline of 4pm March 26, 2018. Probate examiners are ordered to review accounting and have probate notes available for the date of the accounting.

**Continued from 04/30/18. Matter specially set for 06/13/18 at 9:30AM in department S35; Court orders Shanika Lister to be personally present. Notice to be given by George Theios.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Terry Allen, son-in-law, was appointed as conservator of person and estate on 1128/01. Petition for resignation approved on 06/29/15. Final accounting approved on 04/10/17; however, order on final accounting and Ex Parte Petition for Final Discharge and Order were returned for corrections on 04/18/17.
  - a. **Need** order on Amended Final Accounting by Terry Allen.
  - b. **Need** Ex Parte Petition for Final Discharge and Order by Terry Allen.
2. Partial Inventory and Appraisals filed 06/11/14, 09/02/14, and 02/05/18.
3. PG appointed as successor conservator of the person and estate on 06/29/15.

4. **Need** accounting or waiver of account by PG filed.

RECOMMENDATION:

Inquire status of accounting.

(sa/nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

-----  
DATE: 06/13/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1600381

CASE NAME: MATTER OF STOUT TRUST

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

KRAIG STOUT  
STOUT TRUST  
KEVIN STUOT

(PET)...FULLERTON LEMANN SCHAEFER & DO  
(TRU)...  
(PET/TEE)...GUAY P WILSON

Court trial—no notes—JTD

Future Hearings:

6/14/18 Court Trial (Day 4)

6/15/18 Court Trial (Day 5)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 06/13/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1300805

CASE NAME: Twana R. McCallon

HEARING:

Pet for Final Distribution & Pet for Order Waiving Account and Report of AURELL P CATER and Petition for Allowance of fees

COUNSEL:

AURELL P CATER  
TWANA R MCCALLON

(PET)...JAMES L. HEYWOOD & ASSOC.  
(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Order Waiving Account and for Final Distribution, and Petition for Fees by Aurell Cater, administrator

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

1. Assets on hand: \$0
2. Prior to retaining counsel, petitioner naively distributed the following assets without Court Order for distribution:
  - a. Real property in Victorville, CA, was distributed to all heirs as Tenants in Common; grant deed recorded 12/19/14;
  - b. 2005 Chrysler to all heirs;
  - c. 2000 Lexus ES 300 to all heirs;
  - d. Furniture, tools, and clothing to all heirs.
    - i. **Need** verified supplement clarifying individual distributions; copy of grant deed; and copy of title to vehicles.
    - ii. **Need** verified supplement with proposed distribution, including names and addresses of heirs receiving real property.
    - iii. Decedent was survived by issue, namely: Kevin McCallon, Elana McCallon, and Da'Sha McCallon. **Question** if any distributions were made to Clemmieten Jordan (mother) as it appears she is **not** entitled to intestate succession per Pr. Code §240? **Need verified supplement.**
3. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4). Need verified supplement.

4. **Need** Notice of Hearing and Proof of Service as to Kevin McCallon, Elana McCallon, and Da'Sha McCallon.
5. All heirs waive accounting.
6. Petitioner waives statutory compensation.
7. Attorney was retained to "clean up" administration and requests a flat fee of **\$2,000** in lieu of statutory fee of \$5,210 to be paid by administrator. Calculated. **JTD**
8. Proposed order submitted 5/2/18 is missing distribution, including names and addresses of heirs; missing findings re sole and separate property.

**RECOMMENDATION:**

Need to clear notes #2-4 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/19/19**.

(lh)

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400316

CASE NAME: Maurene E. Lehner

HEARING:

Hearing re Final Discharge

COUNSEL:

PAUL EUGENE LEHNER (PET)...STEVEN J BROWN  
MAURENE E LEHNER (DEC)...

#### GENERAL INFORMATION

**Continued from 04/11/18 at request of Court for receipts. Paul Lehner and his counsel are ordered to be present next hearing date.**

THIS CASE IS SET FOR HEARING ON Final Discharge re Paul Lehner, administrator

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

1. **Need** receipt from Lawrence M. Lehner.
2. **Need** Ex Parte Petition for Final Discharge and Order. *Note: Proposed ex parte petition returned by Court on 06/04/18.*

#### RECOMMENDATION

Inquire status.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400624

CASE NAME: Lucretia May Medley

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

HEARING:

Petition for Partition of Real Property

COUNSEL:

LOUIS SCOTT YOUNG	(PET)...KEITH S WALKER
LUCRETIA MAY MEDLEY	(DEC)...
ELMER FRED GREEN JR.	(PET/OBJ)...KYLE A PATRICK,
ELMER FRED GREEN JR.	(PET)...RYAN GALLANT

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400685

**VACATED**

CASE NAME: BETTEANNE BURCHELL

HEARING:

Accounting Review

COUNSEL:

DENNIS SHOGREN

(PET)...E JOAN NELMS

BETTEANNE BURCHELL

(DEC)...

MELVIN L FRIEDLAND

(PET)...MELVIN L FRIEDLAND

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Dennis Shogren, PPF

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

1. Status Report approved on 12/07/17.
2. **Need** accounting and status report.

#### RECOMMENDATION

Inquire status.

(lh)

Future hearing date: 07/31/18 – Accounting Review re Dennis Shogrent, PPF

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

HEARING:

Hearing Re: STATUS REPORT

COUNSEL:

ELAINE TAPIA (PET)...SALLY ANNE COX  
PETRA AMADOR RAMIREZ (DEC)...  
RICHARD RAMIREZ (PET/OBJ)...PRO/PER

**XREF: CIVDS1610559** RICHARD RAMIREZ -V- ELAINE TAPIA  
**CIVDS1600795** TAPIA VS RAMIREZ

GENERAL INFORMATION:

Continued from **11/21/16**. Matter set to trail CIVDS1610559 and CIVDS1600795.  
Continued from **02/27/17**. Richard Ramirez advises court a motion for summary judgment was filed on related case CIVDS1610559 and is set for 05/16/17. This matter will be continued to be heard on that date. Notice waived.  
Continued from **05/16/17 and 09/28/17**. Matter set for trial  
**Continued from 10/12/17 and 12/05/17**; no appearance, case under submission.  
**Continued from 03/29/18. Counsel represents property is ready for sale; final accounting to follow. Counsel to file status report.**

THIS CASE IS SET FOR HEARING ON Status Report by Elaine Tapia, daughter.

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

1. Letters of administration issued to Elaine Tapia, daughter, on 05/22/15, full authority \$140,000 bond.
2. Administrator alleges the estate is not in a condition to be closed as there are numerous civil complaints being litigated that are preventing this administration from closing; however, does not specify the additional time in which to close the estate.
3. **Need** notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need notice. If approved, set next Accounting Review for **09/27/18**. Note requirements of Local Rules.

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

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600744

CASE NAME: MTR OF ALICE L WALL

**SEE ALSO 7**

HEARING:

Hearing Re: 1st Accounting (General Administration)

COUNSEL:

JENNIFER JUNE WALL WALSTEN

(PET)...LUELLA G HAIRSTON

ALICE L WALL

(DEC)...

BILL WALL

(PET)...EDWARD G. OPERINI

GENERAL INFORMATION

Matter set on 7/06/17 at hearing on First and Final Account of *Special* Administrator.

**On 1/22/18**, Court advanced the 1<sup>st</sup> accounting hearing set for 03/29/18 and continued to 03/28/18. Notice to be given to Attorney Cheryl Houde.

**Continued from 03/28/18 at request of Counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review re General Administration

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

1. Jennifer June Wall Walsten was appointed executor on 11/30/16 with full authority; letters issued 01/10/17, and \$638,000 bond filed.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report regarding **general administration**.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600744

CASE NAME: MTR OF ALICE L WALL

**SEE ALSO 6**

HEARING:

FIRST AND FINAL Account and Report of JENNIFER JUNE WALL WALSTEN  
and Petition for allowance of fees filed.

COUNSEL:

JENNIFER JUNE WALL WALSTEN	(PET)...LUELLA G HAIRSTON
ALICE L WALL	(DEC)...
BILL WALL	(PET)...EDWARD G. OPERINI

GENERAL INFORMATION

Continued from **03/30/17, 05/18/17 and 07/06/17** at request of counsel. The Court notes general letters testamentary were previously issued and therefore sets a Hearing Re: 1st accounting for general administrator on 3-29-18.

Continued from **10/17/17** Sisters are in negotiations/to file accounting.

**Continued from 11/28/17** to complete accounting.

**Continued from 01/22/18.** Court advanced the 1<sup>st</sup> accounting hearing set for 03/29/18 and continued to 03/28/18. Notice to be given to Attorney Cheryl Houde.

**Continued from 03/28/18. Accounting on Special Administrator is waived.**

**Hearing continued at request of Counsel to clear probate notes.**

THIS CASE SET FOR HEARING ON **Amended (07/10/17)** First and Final Account of **Special Administrator** by Jennifer June Wall Walsten, daughter.

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

1. Letters of special administration issued to June Wall Walsten on 10/28/16; general letters of testamentary issued 01/10/17; \$638,000 bond.
2. Accounting period 05/12/11 to 01/10/17.
3. Assets on hand \$505,252.73
4. Summary of account does not comply with Pr.C. § 1061. **Need** proper summary of account and schedules.
5. Partial and reappraisal for sale inventories filed 03/23/17. Final Inventory and Appraisal has yet to be filed.
6. Petition indicates a completed inventory has yet to be conducted as Petitioner has been unable to gain access to autos and the Bennet Avenue residence.

However, Property on Hand [LF, pg. 3] includes subject real and personal property. **As this account is for special administration, Petitioner should only account for assets she has actually marshalled.**

7. Petition makes reference to an attached "Exhibit A" in regards to funds and the statement of the estate account; however, one is not attached. [LF pg. 3] **Need same.**
8. No proposed order. Submit order after hearing.

#### RECOMMENDATION

Need proper accounting to be set on first check calendar no sooner than **07/25/18.**

(lc/nb/ww/lh)

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1601084

CASE NAME: GARY SCOTT MESTAS

**SEE ALSO 8A**

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARY WATKINS	(PET)...CHARLES K. MILLS
GARY SCOTT MESTAS	(DEC)...
BRYAN C HARTNELL	(TP )...

GENERAL INFORMATION

**Continued from 01/10/18 and 04/11/18 to clear notice issues. Notice to be given by Mr. Willis.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Mary Watkins, mother/administrator

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

1. Court appointed Mary Watkins (mother) administrator with full authority on 03/08/17, \$137,000 bond. Note: letters have not been issued.
2. Petitioner seeks 100% interest in decedent's 100% interest in real property per the will.
3. Notice of hearing and proof of service filed 01/02/18. Addresses of daughters: Erica Rivas, Rita Rivas, Rebecca Rivas, and Tawny Rivas are unknown.
  - a. Due Diligence Declarations as to Erica and Rita previously filed 01/17/17.  
**JTD**
  - b. **Need** Due Diligence Declarations as to Rebecca and Tawny.
4. No written objections filed at time of review.
5. No proposed order submitted.

RECOMMENDATION

Need to clear note #3. Court's discretion.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 8A add-on

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1601084

CASE NAME: GARY SCOTT MESTAS

**SEE ALSO 8**

HEARING:

Accounting Review

COUNSEL:

MARY WATKINS	(PET)...CHARLES K. MILLS
GARY SCOTT MESTAS	(DEC)...
BRYAN C HARTNELL	(TP )...

GENERAL INFORMATION

**Continued from 05/16/18. Matter continued to be heard with the pending petition for succession. Attorney Theios states he will be filing objections on behalf of his client to the petition to determine succession to real property.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Mary Watkins,  
administrator

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

1. Court appointed Mary Watkins (mother) administrator with full authority on 03/08/17, \$137,000 bond; however, **Letters have never been issued/bond not filed.**
2. No Inventory and Appraisal has been filed; however, there is a pending petition for succession to real property set this date. See notes on prior matter. **JTD**

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 10, 11, 12**

HEARING:

Petition for ORDER 1.DETERMINING THAT CERTAIN REAL PROPERTY  
IS AN ASSET OF THE REVOCABLE TRUST ETC.

COUNSEL:

ANTHONY SANDERS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
TREBIEN BELLOWS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
IN RE REVOCABLE TRUST OF SAMUEL J SANDERS (TRU)...  
SAMUEL J. SANDERS JR. (PET/OBJ)...GIFFORD, DEARING & ABERNATHY,  
ELVIA SANDERS (FULLERTON LEMANN SCHAEFER & DO)

Currently under review by legal research

(LR)

Notice deemed sufficient.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 9, 11, 12**

HEARING:

Petition for 1.SUSPENSION OF TRUSTEE SAMUEL SANDERS, JR:2.REMOV  
AL OF TRUSTEE; ETC

COUNSEL:

ANTHONY SANDERS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
TREBIEN BELLOWS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
IN RE REVOCABLE TRUST OF SAMUEL J SANDERS (TRU)...  
SAMUEL J. SANDERS JR. (PET/OBJ)...GIFFORD, DEARING & ABERNATHY,  
ELVIA SANDERS (FULLERTON LEMANN SCHAEFER & DO)

Currently under review by legal research

(LR)

Notice deemed sufficient.

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 9, 10, 12**

HEARING:

FIRST Account and Report of SAMUEL J. SANDERS JR. and Petition  
for allowance of fees

COUNSEL:

ANTHONY SANDERS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
TREBIEN BELLOWS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
IN RE REVOCABLE TRUST OF SAMUEL J SANDERS (TRU)...  
SAMUEL J. SANDERS JR. (PET/OBJ)...GIFFORD, DEARING & ABERNATHY,  
ELVIA SANDERS (FULLERTON LEMANN SCHAEFER & DO)

GENERAL INFORMATION

**Continued from 08/16/17** at request of parties. Notice waived.

**Continued from 11/29/17** at request of Counsel due to ongoing discovery.

**Continued from 03/21/18.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current by Samuel Sanders Jr  
Trustee.

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

1. Petitioner, Samuel Sanders Jr., acting trustee since the death of his father on 07/20/15.
2. Accounting period 07/20/15 – 03/31/17.
3. Assets on hand \$9,671.20 and account receivables of \$138,604.14.
4. Petitioner alleges Samuel Sr. passed away with debts in excess of \$190,000 of which was a Bank of America credit line and a Los Angeles Housing Dept. loan. Cash on hand consisted of \$1,212.92. The real property was valued at \$500,000.
5. Trustee allegedly purchased the real property for \$417,000, given his 1/5<sup>th</sup> share, and later transferred the funds to the beneficiaries. Petitioner reports that he owes Trust approximately \$113,000 to equalize payment.
6. Petitioner alleges some beneficiaries have refused to cooperate with distribution by not cashing checks and failing to return the W-9 forms.
7. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. No future hearing dates as trust is not court supervised.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 9, 10, 11**

HEARING:  
Trial Setting Conference

COUNSEL:

ANTHONY SANDERS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
TREBIEN BELLOWS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
IN RE REVOCABLE TRUST OF SAMUEL J SANDERS (TRU)...  
SAMUEL J. SANDERS JR. (PET/OBJ)...GIFFORD, DEARING & ABERNATHY,  
ELVIA SANDERS (FULLERTON LEMANN SCHAEFER & DO)

TSC—no notes—JTD

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700354

CASE NAME: MTR OF EDWARD NEIDICH

HEARING:

Waiver first and final Account and Report of KC NEIDICH and  
Petition for allowance of fees

COUNSEL:

KC NEIDICH (PET)...JASON EBERT  
EDWARD NEIDICH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver on First and Final Account and Report  
of Administrator; Petition for Fees and Final Distribution by KC Neidich,  
administrator/sole heir

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

1. Assets on hand: \$142,123.69, in cash; remaining in real property,  
promissory note, stock, vehicles, and miscellaneous furnishings
2. Statutory fees of **\$25,908** requested by attorney. Calculated.
3. Petitioner is sole heir and as such waives statutory commission.
4. Partial #1 I&A filed 12/07/17; Supplemental I&A filed 03/27/18. **Need**  
bank/investment statements verifying date of death balances Local Rule 20-  
908.
5. Creditor's Claim from American Express in the amount of \$472.26 filed  
11/6/17. **Need** satisfaction of claim.
6. Notice is complete.
7. Proposed order submitted 04/30/18 is missing findings re sole/separate  
property; statements re taxes and creditor's claims; notice

RECOMMENDATION:

Need to clear notes # 4-5 then Court's discretion. If approved, court to set hearing on  
filing of receipts and final discharge for **06/19/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700704

CASE NAME: MTR OF DEBORAH ANN HICKEY

**SEE ALSO 15**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JOHN MICHAEL VUKICH

(PET)...HORSPPOOL & H ORSPOOL

DEBORAH ANN HICKEY

(DEC)...

JACOB HICKEY

(PET)...CRAIG E WILSON

#### GENERAL INFORMATION

Letters of special administration issued to John Vukich on 07/25/17; no bond.

**Continued from 09/13/17** to be heard with competing petition.

**Continued from 11/29/17** at request of Counsel. Temporary Letters continue in effect as to John Vukich, Special Administrator.

**Continued from 03/21/18 due to ongoing discovery.**

#### THIS CASE SET FOR HEARING ON

- Petition #1 for Letters of Administration with Full Authority under IAEA by **John Vukich, brother**
- Petition #2 for Probate of Will, Letters Testamentary with Full Authority under IAEA by **Jacob Hickey, executor/step-son**

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

##### Petition #1 by John Vukich, brother

1. Bond in the amount of \$466,000 is being requested. Ok.
2. Section 2b is blank as to proposed administrator's name; however it is clear that John Vukich is the petitioner. JTD
3. **Objection by Jacob Hickey with proof of service filed 08/29/17.**
4. ~Proposed Form Order: 07/17/17

##### Petition #2 by Jacob Hickey, executor/step-son

5. Will waives bond. JTD
6. **Need** Notice of Petition to Administer Estate with proof of service [form DE-121].
7. **Need** Proof of Publication.
8. ~Proposed form Order: 08/29/17

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



## RECOMMENDATION

Matter is contested.

Need to clear notes 6-7. If approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700704

CASE NAME: MTR OF DEBORAH ANN HICKEY

**SEE ALSO 14**

HEARING:

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

COUNSEL:

JOHN MICHAEL VUKICH	(PET)...HORSPPOOL & H ORSPOOL
DEBORAH ANN HICKEY	(DEC)...
JACOB HICKEY	(PET)...CRAIG E WILSON

See notes on prior matter #14.

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800414

CASE NAME: Johanna Blakely

HEARING:

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

COUNSEL:

DANIEL WALTER BLAKELY (PET)...COSGROVE, CO SGROVE & HUMPHREY  
JOHANNA BLAKELY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by Daniel Walter Blakely, son/executor

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

1. Will waives bond. Estimated value of estate assets is \$229,500. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b))
2. **Objection to Petition for Probate of Will filed by Donna Leavitt on 06/07/18.**
3. *Note: Competing petition by Donna Leavitt (daughter) filed 06/07/18. Court to trail to 07/12/18.*
4. No proposed order submitted.

RECOMMENDATION

Matter is contested. Court to trail to 07/12/18 to be heard with competing petition.

If approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800434

CASE NAME: Connie Morris

HEARING:

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

COUNSEL:

REGINA RIECK (PET)...JAMES L HEYWOOD AND ASSOCIATES  
CONNIE MORRIS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Regina Rieck (sister)

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

1. Petitioner requests bond but did not specify amount. Suggested bond \$167,500 based on \$40,000 in personal property and remaining in real property. **JTD**
2. Petitioner alleges decedent's only child and sole heir, Nicholas Morris, lacks capacity to act as administrator, and further alleges she will be filing a petition for conservatorship for Nicholas Morris.
  - a. Question status of petition for conservatorship? **Court to inquire.**
  - b. Does Court wish to appoint Guardian Ad Litem? **JTD**
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. **Need** Proof of Publication.
5. No proposed Order submitted.

#### RECOMMENDATION

Need to clear notes #3-4. Court's discretion re bond. If approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/13/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO DS1000934

CASE NAME: TIMOTHY JOHN OWENS

HEARING:

Motion Re: Notice of Motion and Motion for Judgment Over Filed  
by Petitioner LIBERTY MUTUAL INSURANCE COMPANY

COUNSEL:

JESSICA VANDENBURG (PET)...LAYNE A BARTHOLOMEW  
TIMOTHY JOHN OWENS (DEC)...  
SB COUNTY PUBLIC ADMINISTRATION (TA )...

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/13/18 TIME: 8:35 DEPT: S36P  
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CASE#: TRU PS1800045

CASE NAME: THE HERRERA FAMILY TRUST

HEARING:

Petition for to determine interest in Property

COUNSEL:

BERNADETTE M LAYVAS (PET)...DENNIS M SANDOVAL  
THE HERRERA FAMILY TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 06/13/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0900248

CASE NAME: MICHAEL WYHOWANEC

HEARING:

Accounting Review

COUNSEL:

KIMBERLY L. TRAUT	(PCR/CPE)...CARROLL M LAWSON
MICHAEL WYHOWANEC	(PCE/CEP)...MARK J. FLORY
MARK J. ANDREW FLORY	(PET)...JAMES B CHURCH & ASSOCIATES
KIMBERLY L TRAUT	(CPE)...BRYAN C. HARTNELL
LIBERTY MUTUAL INSURANCE	(TP )...PRO/PER

GENERAL INFORMATION

Continued from **06/22/17 and 07/12/17.**

Continued from **09/20/17 to file accounting.**

Continued from **12/13/17 and 02/28/18. Additional time needed to file accounting.**

**Continued from 04/11/18 requesting additional time to complete accounting.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5<sup>th</sup> Waiver of Account for Tracy West, mother, approved on 10/19/16.
2. **Need** 6<sup>th</sup> Account beginning with 01/10/16.

RECOMMENDATION

Inquire status of accounting.

(lc/ww/lh)

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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300006

CASE NAME: SIERRA MARTIN

HEARING:

FIRST Account and Report of MARY MARGARET MARTIN and Petition  
for allowance of fees filed.

COUNSEL:

MARY MARGARET MARTIN (CP )...LAW OFFICES OF JOSEPH P FOLEY  
SIERRA MARTIN (CTP)...

**XREF: CIVVS1105356** *MATTER OF SIERRA MARTIN*

GENERAL INFORMATION

Continued from 03/30/17 and 05/25/17 for counsel to file supplement re concerns read  
into record regarding accounting.

Continued from 07/27/17. **Rose Rosado appointed GAL for conservatee.**

Continued from 09/21/17. Any Settlement funds to be held in attorney client trust  
account of Mr. Foley until further order.

**Continued from 11/02/17.** No appearance by counsel or his client. Citation issued to  
Joseph Foley and Mary Margaret Martin.

**Continued from 12/14/17 and 02/07/18.** Notice to be given by Attorney Rosado.

**Continued from 04/04/18 at request of Counsel due to possible settlement.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current of Trust and Petition for  
discharge of bond by Mary Margaret Martin, paternal grandmother.

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

1. Mary Margaret Martin, paternal grandmother, was appointed limited  
Conservator of **person only** on 04/03/13. Mary is also Trustee of Special  
Needs Trust created on 04/15/14 due to an automobile accident.
2. Accounting period 04/15/14 – 03/26/16.
3. Assets on hand \$1,332.97.
4. Petitioner requests exoneration of \$20,000 bond. JTD
5. Disbursements indicate car loan of \$488 and \$2,000 for home equity loan  
payments [Acct.01/18 LFpg6-7]. Question who owns the vehicle and real  
property as there are none listed in the property on hand? **Supp 03/27/17:**



Petitioner states that she owns the vehicle. The SNT is not the lienholder. Court to inquire how these payments fit under “special needs” and why SNT is not the lienholder. **Supp 07/25: Payments allegedly reimbursements for household expenses and repairs. Court to clarify situation with vehicle.**

6. **Need** proof of service of supplement.
7. **Need** report of GAL.
8. **Need** return of citations for Joseph Foley and Mary Martin.
9. No proposed order.

#### RECOMMENDATION

Need to clear notes 6-8, clarify note 5. If approved, set hearing on the next accounting on **06/28/18** or next Thursday calendar. Accounting to be filed 30 days in advance.

(lc/lh)

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

-----  
DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300026

CASE NAME: CHERI LYNN AUCOIN

HEARING:  
Trial Setting Conference

COUNSEL:

CHERI CLAYTON (CP)...PRO/PER  
CHERI LYNN AUCOIN (CTP/CEP)...ROSE C ROSADO  
PUBLIC GUARDIAN (CP)...COUNTY COUNSEL  
DIRECTOR, DEPT OF DEVELOPMENTAL SRVCS (CP)...

TSC – no notes—JTD

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600032

CASE NAME: JACQUELINE BEARCE

HEARING:

Accounting Review by Kathleen Bearce Clarke

COUNSEL:

ROBERT L BEARCE	(PCR)...PRO/PER
SHERI L KASTILAHN	(PET)...SHERRI L KASTILAHN
KATHLEEN BEARCE CLARKE	(CPE)...PRO/PER
JACQUELINE BEARCE	(CEP/CEE)...SHERRI L KASTILAHN

Waiver of Court Fees and Costs filed by JACQUELINE BEARCE is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review by Kathleen Bearce Clarke, sister-in-law

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

1. Kathleen Bearce Clarke was appointed successor conservator of the person and estate on 04/05/17 with \$80,000 bond.
2. On 10/04/17, Court waived the filing of a final accounting of prior conservator, Robert L. Bearce. **Need** Order after hearing.
3. **Need** Inventory and Appraisal.
4. **Need** accounting commencing.

RECOMMENDATION

Inquire status.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700265

CASE NAME: MTR OF PEGGY ANN CHRISTIAN

**SEE ALSO 24A**

HEARING:

Petition for TO TERMINATE THE CONSERVATORSHIP OF PEGGY ANN  
CHRISTIAN

COUNSEL:

PAUL EDWARD CHRISTIAN (CPE)...SKOUSEN LAW  
PEGGY ANN CHRISTIAN (CEP)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Terminate Conservatorship of  
Peggy Anny Christian, filed by Paul Edward Christian

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

1. Paul Edward Christian was appointed conservator of the person and estate on 08/23/17; \$77,500 bond.
2. Peggy Ann Christian, conservatee, passed away on 01/05/18.
3. Petitioner, Paul Edward Christian, seeks termination of conservatorship due to death of conservatee. Note: conservatorship of the person terminates upon death per Pr. C. §1860, while the court retains jurisdiction of the estate to settle accounts per Pr. C. §2630. Question if conservator marshaled any assets?
4. Supplement to petition filed 05/15/18 requesting exoneration of bond; however, bond may not be exonerated until discharge of conservator.
5. **Need** final Inventory and Appraisal.
6. **Need** final accounting to include pre-death and post-death accounting periods per Pr. C. §2620.
7. **Need** Notice of Hearing and Proof of Service.
8. No proposed order submitted.

RECOMMENDATION

Deny. Court may wish to reset accounting review to **08/15/18** or later Wednesday calendar.

(lh)

Future Hearing: 10/31/18 Accounting Review

Superior Court of Calif, County of San Bernardino  
Page: 24A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700265

CASE NAME: MTR OF PEGGY ANN CHRISTIAN

**SEE ALSO 24**

HEARING:

Accounting Review

COUNSEL:

PAUL EDWARD CHRISTIAN (CPE)...SKOUSEN LAW  
PEGGY ANN CHRISTIAN (CEP)...WALTER T. MOORE

GENERAL INFORMATION

**On 03/28/18**, Court was informed conservatee passed away [on 01/05/18]. Petition to Terminate Conservatorship to be filed by Mr. Skousen. Court vacates accounting review set for 10/31/18 and resets to 05/30/18.

**Continued from 05/30/18 to be heard with other pending petition.**

THIS CASE SET FOR HEARING ON Accounting Review

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

1. Paul Edward Christian (son) was appointed conservator of the person and estate of Peggy Ann Christian on 08/23/17; \$77,500 bond filed 09/07/17; letters issued 11/16/17.
2. **Need** final Inventory & Appraisal per Pr.C.§2610.
3. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
4. 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.
5. **Need Final Accounting for pre-death and post-death accounting periods per Pr. C. §2620.**
6. Petition to Terminate Conservatorship filed 05/07/18. Court may wish to trail to 06/13/18.

RECOMMENDATION

Inquire status.

(lh)

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

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700286

CASE NAME: MTR OF ASHLEY LORIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of BLANCA LORIA

COUNSEL:

BLANCA LORIA (CP)...PRO/PER  
JONATHAN LORIA (CP)...PRO/PER  
ASHLEY LORIA (CTP)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 04/11/18 at request of Counsel to file documents. Attorney Parker will assist petitioner in clearing notes.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Blanca Loria (mother) and Jonathan Loria (brother) appointed Limited Co-Conservators of the person on 09/06/17.
2. Notification of Conservatee's rights filed 06/05/18.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan filed 06/05/18.

RECOMMENDATION

None.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800016

CASE NAME: RITA STULLER

HEARING:

Hearing Re: Dismissal of Ptn for Conservatorship

COUNSEL:

KRISTEL MELDRUM (PET)...PRO/PER  
RITA STULLER (CEE)...ROSE C ROSADO

#### GENERAL INFORMATION

**Continued from 03/05/18** at request of Court for petitioner to clear probate notes.  
Attorney Rose C Rosado is appointed for Rita Stuller.

**Continued from 04/23/18.** Petitioner is not present nor have the probate notes been cleared.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by daughter, Kristel Meldrum, [daughter/Petitioner].

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

1. Petitioner requests that bond not be required but attachment 1c re: reasons why is missing. Court may wish to inquire, or in alternative, need verified supplement.
2. Petitioner indicates that proposed conservatee lacks capacity to give informed consent to treatment; however, medical powers are not being requested in section 1g. Court to inquire. **If** they are being requested, then need Capacity Declaration.
3. Confidential Screening form filed; however, signature is dated with future date of 01/22/19. **JTD.**
4. Petitioner seeks dementia powers. Report of Counsel Rosado filed 04/23/18.
5. Section 3f is marked; however, **need** attachments 3f(1) and 3f(2) as to proposed conservatee's relatives and proposed conservatee's preferences concerning appointment.
6. List of Required Contacts is filed; however, it does not match the petition. **Need** completed form to include all relatives within the 2<sup>nd</sup> degree.

7. Confidential Supplemental form in incomplete as to section 2, 4c1, and 5. **Need** completed form.
8. **Need** return of Citation.
9. Notice of Hearing and proof of service filed 04/04/18; however, Proof of Service, item #5, does not indicate a copy of petition was served with notice. Also, need separate mailed notice to each individual per CRC 7.51(a)(3). **Need proper service.**
10. Certificate of Completion of the Conservatorship Training Class filed 02/13/18.
11. CI report filed 02/15/18.
12. No Form Order Provided.

#### RECOMMENDATION

Need to clear notes 5-9. Court's discretion re notes 2-4. If approved, set hearing for Compliance Review for **01/16/19** 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

(ww/cs/lh)



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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800085

CASE NAME: MTR OF COOKIE GILESPIE

HEARING:

Hearing Re: Petition for Appointment of Conservator

COUNSEL:

CLAUDIA MCKEE (CPE)...PRO/PER  
COOKIE GILESPIE (CEE)...SHERRI L KASTILAHN  
INLAND COUNTIES REG CNTR (STEVEN K BECKETT)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Claudia McKee (sister)

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

1. It appears proposed conservatee is developmentally disabled. Court to determine if a limited conservatorship is appropriate. **JTD**
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
4. Petitioner seeks no bond. Estimated assets consist of \$894. Question if assets are solely public benefits? If so, question if petitioner is representative payee?
5. **IRC report filed 06/07/18 not in LF at time of review.**
6. **CI Report filed 06/05/18.**
7. Petitioner seeks medical powers. **Need** Capacity Declaration.
8. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
9. **Need** Confidential Supplemental form.
10. **Need** Certificate of Completion of the Conservatorship Training Class.
11. **Need** list of required contacts (Local form SB-12224).

12. **Need** notice of hearing and proof of service to Susie Gillespie (sister)
13. **Need** return of citation.
14. **Objection by Inland Counties Regional Center filed 04/03/18. Does Court wish waive notice to IRC?**
15. No proposed order submitted.

#### RECOMMENDATION

Matter is contested.

Need to clear notes #7-13. If approved, set hearing for Compliance Review for **01/16/19** for the filing of the required documents and hearing re Accounting Review for **08/21/19**. Any accounting to be filed 30 days in advance.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800140

CASE NAME: GABRIEL PULIDO

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
ROSARIO P. CONTRERAS (CP)...PRO/PER  
GABRIEL PULIDO (CTP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Rosario Contreras, mother

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 05/08/18; however, item #4 is incomplete as to whether proposed conservatee is a continuing patient. **Need completed form.**
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need** notice of hearing and proof of service.
8. CI Report filed 06/08/18.
9. Return of Citation filed 05/17/18.
10. ~Proposed Form Order: 05/08/18

#### RECOMMENDATION

Need to clear notes #3-7. If approved, set hearing for Compliance Review for for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800156

CASE NAME: MOLLIE FLORENCE FISHER

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
LAVONNE E SAXBURY (CPE)...LAW OFFICE OF JOHN G WURM  
MOLLIE FLORENCE FISHER (CEP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Lavonne Saxbury, daughter

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

1. Petitioner seeks waiver of bond but did not include reason in Attachment 1c. However, it appears estate assets qualify for bond waiver as they are under \$15,000 per year. **JTD**
2. Petitioner, Lavonne Saxbury, is the designated attorney in fact and healthcare agent for proposed conservatee. Petitioner is also the co-trustee of the Mollie Florence Fisher Revocable Trust, and is named on proposed conservatee's accounts. Question need for estate powers? If necessary, Court to determine whether to obtain jurisdiction of trust. **JTD**
3. It appears the sole purpose petitioner seeks conservatorship is to prevent two of the adult children, Kevin and Ron Fisher, from taking proposed conservatee. See Declaration attached to petition. [Petition, 5/23/18, LF pg30]. See also supporting declaration by Gary Fisher (son) filed 05/31/18. **JTD**
4. CI Report filed 06/07/18.
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. **Need** return of citation.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** notice of hearing and proof of service.
9. ~Proposed Form Order: 05/23/18

## RECOMMENDATION

Need to clear notes #5-8 then Court's discretion. If approved, set hearing for Compliance Review for **01/16/19** for the filing of the required documents and hearing re Accounting Review for **08/21/19**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 06/13/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1600698

CASE NAME: JAMES M COOPER

HEARING:

FIRST AND FINAL Account and Report of DONNA COOPER and Petition  
for allowance of fees

COUNSEL:

DONNA COOPER

(PET)...MAUREEN MURATORE

JAMES M COOPER

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report; Petition  
for Allowance of Community Property Reimbursement; Fees; and Final Distribution by  
Donna Cooper, administrator/spouse

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

1. Assets on hand: \$181,824.09, cash
2. Statutory fees of **\$7,198**, each, requested by attorney and administrator. Calculated.
3. Petitioner requests reimbursement of **\$3,726.04** for advanced costs related to filing fees, taxes, and preparing property for sale. Itemized. [Acct, 4/25/18, LFpg20].
4. Petitioner alleges estate consists entirely of *separate property* of decedent; however, also alleges a *community property* interest in real property, "the Wildwood property," the sole asset of the estate. As such, petitioner is seeking court order confirming a community property interest of \$140,616 and approving payment to petitioner for \$70,308.50 as reimbursement for one-half of community property per the *Moore-Marsden* rule. **Suggest proper petition and notice of hearing.**
5. **Exhibit A not attached as alleged. Need** copy of escrow closing statement for sale of real property per Local Rule 20-910.
6. **Need** bank/investment statements verifying final ending balance per Local Rule 20-908.
7. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr. C. § 1064(a)(5).

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

8. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4). Need verified supplement.
9. Petitioner requests reserve of \$5,000. Note: if approved, need informal account/declaration for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge.
10. Notice was given.
11. ~Proposed order submitted 04/25/18 subject to approval of reimbursement of community property interest.

**RECOMMENDATION:**

Suggest proper petition for order confirming community property.

Need to clear notes #4-8 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **06/19/19**.

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600990

CASE NAME: MTR OF MARY L HICKS

HEARING:

Accounting Review

COUNSEL:

SHARON LEE HIGHLAND (PET)...LAW OFFICES OF RICHARD SAMUEL  
MARY L HICKS (DEC)...

GENERAL INFORMATION

**Continued from 02/14/18 at request of Counsel. Additional assets have been found; Inventory and Appraisal out to Probate Referee.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Sharon Highland, executor

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

1. Letters testamentary issued to Sharon Highland on 01/11/17 with full authority and \$508,000 bond.
2. Partial #1 Inventory and Appraisal filed 08/07/17.
3. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
4. No accounting or status report of administration. **Need** same.

RECOMMENDATION

Inquire status.

(lh)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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CASE#: PRO PS1601028

CASE NAME: BRINKSMA FAMILY TRUST

HEARING:

Hearing Re: Status of Settlement

COUNSEL:

SUSAN ANN BRINKSMA	(PET)...NEIL J DE LEON
BRINKSMA FAMILY TRUST	(TRU)...
MARK SYDNEY BRINKSMA	(PET/OBJ)...COPENBARGER & COPENBAR

No notes—status only

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700047

CASE NAME: ETTA LLOYD

HEARING:

Petition for termination of probate estate

COUNSEL:

STEVEN JACOBO (PET)...PRO/PER  
ETTA LLOYD (DEC)...  
DEBORRAH DENISE CANNADY (PET)...CHIMA A ANYANWU

**X-Ref: CIVDS1722532** – Deposit Surplus of Funds

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Termination of Probate Estate;  
Declaration in Support Thereof by Deborah Denise Cannady, daughter

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

1. On 12/16/16, Deborah Denise Cannady (purported sole heir) signed an Irrevocable Assignment of Entire Beneficial Interest to Steven Jacobo in which Steven Jacobo would pay \$140,000 in exchange for assignment.
2. Steven Jacobo was issued Letters of Administration with full IAEA authority on 06/08/17; no bond. Letters are still in full force and effect.
3. Petitioner alleges since appointment of Steven Jacobo, there has been no activity in the case; no Inventory and Appraisal has been filed.
4. The estate contained real property in Fontana, California, which was lost to foreclosure on 08/25/17 with a surplus of funds totaling \$57,827.75.
5. An interpleader action was filed by Quality Loan Service Corp (trustee under Deed of Trust) regarding the surplus in related action CIVDS1722532, pending in Dept S27 of this Court. Order to Deposit Surplus of Funds totaling \$57,827.75 entered 11/17/17 and 01/08/18.
6. Claimants in interpleader action are Deborah Denise Cannady (petitioner herein), Michael Rosenborough, and Bridget Rosenborough, who are *purportedly the three heirs in the estate*.
  - a. Purported heirs: Michael Rosenborough and Bridget Rosenborough are not identified in initial petition for letters of administration filed 01/20/17,

nor were they given notice of petition to administer estate. **Need verified supplement clarifying their relationship to decedent.**

- b. **Need** Notice of Related Case.
7. Petitioner alleges notices have been sent to administrator in the interpleader action; however, Steven Jacobo has not responded or appeared, nor has Steven Jacobo paid the \$140,000 to petitioner in exchange for assignment.
8. Petitioner seeks order terminating probate petition, to waive accounting, and to discharge administrator.
  - a. The caption and petition does not cite authority on which it is based per Local Rule 20-601. **Need** amended petition.
  - b. No waiver of account has been filed by any heir. Furthermore, a final report would still be required by administrator notwithstanding the filing of account waivers per Pr. C. §10954(c).
  - c. It does not appear this petition is proper as this is not a no-asset estate. Furthermore, action appears to be premature as the accounting review date is set for 08/16/18. **JTD**
9. **Need** Notice of Hearing and Proof of Service as to Steven Jacobo, administrator, and to Michael Rosenborough and Bridget Rosenborough (if intestate heirs).
10. ~Proposed Order submitted 5/1/18 approved as to form; need to clear issues.

#### RECOMMENDATION

Need to clear notes #6, #8, #9 then Court's discretion.

(lh)

**Future Hearing: 8/16/18 Accounting Review re Steven Jacobo, administrator**

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700404

CASE NAME: FULLER FAMILY TRUST

HEARING:

First Account and Report of W A HLAVATY and Petition for allowance of fees

COUNSEL:

W A HLAVATY (PET)...RICHARD W S PERSHING  
THE MATTER OF FULLER FAMILY TRUST (TRU)...PRO/PER  
JUNE M FULLER (OBJ)...ROSE C ROSADO

**XREF: CONPS1700289** MTR OF JUNE M FULLER

GENERAL INFORMATION:

**Continued from 03/21/18. Objections of Hlavaty received in Court today. Hearing continued at request of Court to review objections.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Trust and Petition for Approval of Fees and Exoneration of Bond, by successor trustee W.A. Hlavaty

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

1. Accounting period: 06/05/17 to 09/29/17
2. Assets on hand: **\$313,860.59**, of which \$33,312.10 is cash, \$117,000 in real property, and remaining in securities.
3. Successor Trustee Hlavaty requests compensation of **\$12,057.00** for 121.2 hours at various rates from \$35-\$150/hour itemized in supporting declaration filed 12/27/17, LFpgs8-23. **JTD**
4. Richard Pershing, attorney for successor trustee, requests compensation of **\$16,650** for 81.75 hours at the reduced amount of \$203.67/hour itemized in supporting declaration filed 12/27/17, LFpgs8-25. **JTD**
5. Lynn Purkey, the daughter of settlor June M. Fuller, requests reimbursement of **\$495** advanced for the initial filing fee of petition. **JTD**
6. Current bond \$300,000. Petitioner requests exoneration of bond; however, bond may not be exonerated until entry of final discharge order.
7. Notice was given.

8. **Objections to Petition for First and Final Report by June M. Fuller filed 03/14/18.**
9. **Reply of W.A. Hlavaty to Objections of June M. Fuller filed 03/21/18.**
10. Proposed Order submitted 03/12/18; however, trustee and bond may not be relieved until entry of final discharge.

RECOMMENDATION:

Matter is contested.

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

(lh)

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

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DATE: 06/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700570

CASE NAME: MTR OF PAULA HENDRICKS

HEARING:

First and Final Account and Report of ROSS HENDRICKS and  
Petition for allowance of fees

COUNSEL:

ROSS HENDRICKS (PET)...THE WERNER LAW FIRM  
PAULA HENDRICKS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Approval of First and Final Account; Petition for Fees and Final Distribution by Ross Hendricks, administrator/sole heir

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

1. Assets on hand: \$94,750.32, cash
2. Petitioner is sole heir and waives statutory fees.
3. Statutory fees of \$7,630.42 requested by attorney. Calculated. **JTD**
4. Attorney requests reimbursement for advanced costs in the amount of \$2,865.55 for Court filings fees and appraisal. Itemized. [Acct, 4/30/18, LFpg6]. **JTD**
5. Final Inventory and Appraisal filed 2/15/18. **Need** bank/investment statements verifying date of death balances
6. **Need** bank statements supporting final ending balance per Local Rule 20-908.
7. **Need** copy of escrow closing statement for sale of real property per Local Rule 20-910.
8. **Need** findings re: sole and separate property.
9. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr. C.§ 1064(a)(5).
10. There is a creditor's claim filed 01/09/18 from California Business Bureau for \$1,316 rejected by petitioner on 02/28/18.
11. Proposed order submitted 4/30/18 is missing findings re sole and separate property.

**RECOMMENDATION:**

Need to clear notes 5-9 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/19/19**.

(lh)

CIVPRO San Bernardino District  
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CASE#: PRO PS1800429

CASE NAME: ROBERT E. SPRINKLE JR.

HEARING:

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

COUNSEL:

KATHY SARDINA (PET)...LEAH LARKIN  
ROBERT E. SPRINKLE JR. (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Kathy Sardina, daughter

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

1. Both heirs waive bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Estimated value of estate is \$200,000 based on real property only. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b) **JTD**
2. ~Proposed Form Order: Not Submitted

#### RECOMMENDATION

RFA, if approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)



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

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DATE: 06/13/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800449

CASE NAME: SARAH MACIAS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

DEBRA S OLGUIN (PET)...PRO/PER  
SARAH MACIAS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Debra Olguin, daughter

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

1. All heirs waive bond. Estimated value of estate is \$22,941 based on real property and personal property. Appears sufficient.
2. **Need** Notice of Petition to Administer Estate with proof of service.
3. **Need** Proof of Publication.
4. Duties and Liabilities filed 5/9/18 is missing telephone number of petitioner. **Need** completed form.
5. ~Proposed Form Order: 05/09/18

#### RECOMMENDATION

Need to clear notes #2-4 then Court's discretion re bond. If approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 06/13/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700058

CASE NAME: IVAN SAUCEDO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of NANCY SAUCEDO

COUNSEL:

NANCY SAUCEDO

(CP)...PRO/PER

IVAN SAUCEDO

(CTP)...MELVIN L FRIEDLAND

GENERAL INFORMATION

**Continued from 01/03/18** at request of Court for petitioner to appear. Court ordered Nancy Saucedo to be present at next hearing. Mr. Friedland will supply Ms. Saucedo with a copy of compliance documents.

**Continued from 03/21/18 to file required documents.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Nancy Saucedo (mother) appointed limited conservator of the person only on 05/31/17.
2. Notification of Conservatee's Rights filed 03/21/18
3. Determination of Conservatee's Appropriate Level of Care filed 03/21/18.
4. Care Plan filed 03/21/18.

RECOMMENDATION

None.

(lh)

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HONORABLE: TARA REILLY

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DATE: 06/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700202

CASE NAME: RENIEL FRANCO S. REYES

**SEE ALSO 11, 12**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of RENAN F REYES

COUNSEL:

RENAN F REYES	(PET)...PRO/PER
FELICITAS S REYES	(PET)...PRO/PER
REA FATIMA S REYES	(PET)...PRO/PER
RENIEL FRANCO S. REYES	(CEE)...SANDY L. TURNER

**XREF: CONPS1700217** *Rina Fe S Reyes*

**CONPS1700218** *Ral Francis S Reyes*

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Renan Reyes (father)  
Felicitas Reyes (mother) and Rea Reyes (sister)

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

1. Renan Reyes, Felicitas Reyes and Rea Reyes were appointed Co-Conservators of the person only on 11/08/17.
2. Notification of Conservatee's rights filed 12/06/17.
3. Determination of Conservatee's Appropriate Level of Care filed 12/06/17.
4. Care Plan filed 12/06/17.

#### RECOMMENDATION

None.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700217

CASE NAME: Rina Fe S Reyes

**SEE ALSO 10, 12**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of RENAN F REYES

COUNSEL:

RENAN F REYES	(PET)...PRO/PER
FELICITAS S REYES	(CPE)...PRO/PER
REA FATIMA S REYES	(CPE)...PRO/PER
RINA FE S REYES	(CEP)...SANDY L. TURNER

Waiver of Court Fees and Costs filed by RENAN FREYES, FELICITAS S REYES & RINA FE S REYES is GRANTED

**XREF: CONPS1700202** *RENIEL FRANCO S. REYES*  
**CONPS1700218** *Ral Francis S Reyes*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Renan Reyes (father)  
Felicitas Reyes (mother) and Rea Reyes (sister)

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

1. Renan Reyes, Felicitas Reyes and Rea Reyes were appointed Co-Conservators of the person only on 11/08/17.
2. Notification of Conservatee's rights filed 11/17/17.
3. Determination of Conservatee's Appropriate Level of Care filed 12/06/17.
4. Care Plan filed 12/06/17.

RECOMMENDATION

None.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700218

CASE NAME: Ral Francis S Reyes

**SEE ALSO 10, 11**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of RENAN F REYES

COUNSEL:

RENAN F REYES (PET)...PRO/PER  
FELICITAS S REYES (CPE)...PRO/PER  
REA FATIMA S REYES (CPE)...PRO/PER  
RAL FRANCIS S REYES (CEP)...SANDY L. TURNER

Waiver of Court Fees and Costs filed by RENAN F REYES, FELICITAS S REYES & RAL FRANCIS  
S REYES is GRANTED

**XREF: CONPS1700202** *RENIEL FRANCO S. REYES*  
**CONPS1700217** *Rina Fe S Reyes*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Renan Reyes (father)  
Felicitas Reyes (mother) and Rea Reyes (sister)

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

1. Renan Reyes, Felicitas Reyes and Rea Reyes were appointed Co-Conservators of the person only on 11/08/17.
2. Notification of Conservatee's rights filed 11/17/17.
3. Determination of Conservatee's Appropriate Level of Care filed 12/06/17.
4. Care Plan filed 12/06/17.

RECOMMENDATION

None.

(lh)

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

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DATE: 06/13/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700467

CASE NAME: MTR OF HUGO A HERNANDEZ

**SEE ALSO 14**

HEARING:

Petition for Appointment of Conservator of the Person and Estate  
(Competing)

COUNSEL:

HUGO DELLANO	(CPE)...PRO/PER
HUGO A HERNANDEZ	(CEP/CTP)...CRAIG M PARKER
WILMA CASTANO	(PET)...LENITA A SKORETZ

**XREF: EAPPS1800010** *HERNANDEZ VS. DELLANO*

GENERAL INFORMATION

**Continued from 02/05/18.** Ms. Skoretz reports competing petition has been filed and served and ex parte is set for 2/13/18. The Court orders EAPPS1800010 be transferred to department S37P to be heard with this matter. The Court appoints Walter Moore as guardian ad litem for Hugo A. Hernandez.

**Continued from 02/13/18** at request of Counsel to trail competing petition set. Ex parte orders denied.

**Continued from 03/21/18** at request of petitioner to file required documents.

THIS CASE SET FOR HEARING ON

- **Petition #1** [filed 12/29/17] for Appointment of Conservator person and estate by Hugo Dellano, son
- **Petition #2** [filed 02/02/18] for Appointment of Conservator person and estate by Wilma Castano, domestic partner

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

**Petition #1 by Hugo Dellano**

1. Petitioner requests for bond to be waived due to proposed conservatee receiving social security, having dementia and having very low income. Estimated estate value consists of \$240,000 in real property and \$54,400 in personal property. Suggest \$324,000. JTD

2. Petitioner seeks Pr.C. §2590 powers to alter and improve conservatee's real property for the advantage, benefit, and best interest of the proposed conservatee's estate. JTD
3. Petitioner does not seek medical powers; however, section 9 has been checked.
4. Petitioner seeks dementia powers; however, Capacity Declaration not filed. **Need** Capacity Declaration with required attachments.
5. Petitioner seeks dementia powers. **Need** report of Craig Parker, appointed counsel.
6. **Need report by GAL, Walter Moore.**
7. **Need** notice of hearing and proof of service.
8. **Need** return of Citation.
9. Court Investigator report filed 01/31/18.
10. Certificate of Completion of the Conservatorship Training Class filed.
11. Court to see Confidential Screening form, LF pgs. 2/4.
12. ~Proposed Form Order: 12/29/17

### **Petition #2 by Wilma Castano**

13. Petitioner Wilma Castano requests funds to be placed in blocked account in lieu of bond. Estate assets consist of real property at \$377,000, \$184,000 in personal property, and \$22,248 pension. Alternatively, suggested bond \$643,000 per bond calculation. **JTD.**
14. Petitioner request special orders for powers under Pr. C. §2590 to sell personal residence of conservatee at public or private sale without Court confirmation. JTD
15. Court Investigator report filed 03/12/18.
16. Petitioner seeks medical powers. **Need** Capacity Declaration.
17. Petitioner seeks dementia powers.
  - a. **Need** report of appointed Counsel Craig Parker.
  - b. **Need** report of Walter Moore, GAL
18. Certificate of Completion of the Conservatorship Training Class filed 03/19/18.
19. Due Diligence Declarations as to grandsons Peter Brabant and Hunter Dellano filed 03/16/18. **JTD.**
20. Petitioner Wilma Castano refers to herself as spouse and as domestic partner within petition and other filings. *Court to clarify petitioner's relationship to proposed conservatee.*
21. Return of Citation with proof of personal service filed 02/08/18.
22. ~Proposed Form Order: 02/02/18

### RECOMMENDATION:

Need to clear notes 4-8; 16-17. If approved, set hearing for Compliance Review for **01/16/19** for the filing of the required documents and hearing re Accounting Review for **08/21/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(cs/nb/lh)

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CASE#: CON PS1700467

CASE NAME: MTR OF HUGO A HERNANDEZ

**SEE ALSO 13**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

HUGO DELLANO	(CPE)...PRO/PER
HUGO A HERNANDEZ	(CEP/CTP)...CRAIG M PARKER
WILMA CASTANO	(PET)...LENITA A SKORETZ

Waiver of Court Fees and Costs filed by HUGO A HERNANDEZ is GRANTED

**XREF: EAPPS1800010** *HERNANDEZ VS. DELLANO*

See notes on prior matter #13.

(lh)



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CASE#: PRO PS1800338

CASE NAME: Mtr of Jack L Duncan

HEARING:  
Hearing Re: RECEIPT OF BOND.

COUNSEL:  
KAREN L SALSMAN (PET)...GREGORY L ZUMBRUNN  
JACK L DUNCAN (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Matter set on 05/16/18. Court approved Petition for Letters of Administration on 05/16/18. Court appointed Karen L. Salsman as administrator of the estate with full IAEA powers; \$50,000 bond
2. **Need** proof of bond.

#### RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 7/24/19 Accounting Review

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CASE#: CON PS1800038

CASE NAME: PATRICIA ANN KESTER

HEARING:

Hearing Re: Accounting and/or waiver of accounting (estate)

COUNSEL:

CINDY O'LOUGHLIN	(PET)...RICHARD A LEWIS ESQ
WILLIAM H KESTER	(PET)...CALDWELL, KENNEDY & PORTER
PATRICIA ANN KESTER	(CEE)...PRO/PER

#### GENERAL INFORMATION

William H. Kester was appointed temporary conservator of the person and estate of Patricia Ann Kester on 02/14/18.

THIS CASE IS SET FOR HEARING ON Accounting and/or waiver of accounting (estate) re William Kester, temporary conservator

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

1. Matter set on 03/21/18. Court was informed of conservatee's passing on 02/19/18. Conservatorship terminates by operation of law.
2. **Waiver of Final Accounting filed 06/07/18 not in LF at time of review.**

#### RECOMMENDATION

Court's discretion.

(lh)

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CASE#: EAP PS1800057

CASE NAME: NIEVES VS. RIVERA

HEARING:  
Hearing Re: Elder Abuse Restraining Order

COUNSEL:  
NILDA NIEVES (PP)...PRO/PER  
PAUL PHILLIP RIVERA (RP)...PRO/PER

Notice was given to respondent, Paul Phillip Rivera

(lh)

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CASE#: CON PS1700127

CASE NAME: MTR OF ISAAC MEJIA

HEARING:

Motion Re: TO RE-OPEN CASE PREVIOUSLY DISMISSED filed by  
Petitioner WENDY BARRETO

COUNSEL:

WENDY BARRETO (CP )...PRO/PER  
ISAAC ARMANDO MEJIA (CTP)...

Currently under review by legal research.

(LR)

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CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

**SEE ALSO 18, 19, 20**

HEARING:

Court Trial set for PETITION FOR WILL AND LETTERSTESTAMENTARY of  
DEBORAH WILKINSON

COUNSEL:

DEBORAH WILKINSON	(PET)...MORTENSEN & REINHEIMER, PC
EUGENE L WILKINSON	(DEC)...
JANET WILKINSON	(OBJ)...PETER M BOCHNEWICH
LINDSEY NAYLOR	(PET)...PETER M BOCHNEWICH

Court trial—no notes—JTD

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CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

**SEE ALSO 17, 19, 20**

HEARING:

Hearing Re: PETITION FOR INVALIDITY OF SPECIFIC DIRECTIVE ETC

COUNSEL:

DEBORAH WILKINSON (PET)...MORTENSEN & REINHEIMER, PC

EUGENE L WILKINSON (DEC)...

JANET WILKINSON (OBJ)...PETER M BOCHNEWICH

LINDSEY NAYLOR (PET)...PETER M BOCHNEWICH

Currently under review by legal research.

(LR)

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CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

**SEE ALSO 17, 18, 20**

HEARING:

Hearing Re: PTN FOR PROBATE WITH FULL AUTHORITY

COUNSEL:

DEBORAH WILKINSON	(PET)...MORTENSEN & REINHEIMER, PC
EUGENE L WILKINSON	(DEC)...
JANET WILKINSON	(OBJ)...PETER M BOCHNEWICH
LINDSEY NAYLOR	(PET)...PETER M BOCHNEWICH

GENERAL INFORMATION

**Continued from 08/04/16.** Written objections to be filed or objections will be waived. Rodney Lee's client to file the original will within 20 days.

**Continued from 11/10/16.** Deborah Wilkinson appointed special administrator; \$2,150,000 bond.

Continued from **01/26/17**. Written objections filed to the codicil but will contest has not been filed. Will contest to be filed and served by 03/30/17. Objector notes that the copy of the will provided does not appear to be the copy of the original. Counsel to meet and confer regarding marshalling of assets by Special Administrator. Counsel to report on status of discovery at next hearing. All existing orders remain in effect.

Continued from 05/25/17. Amended order re special administration signed for Deborah Wilkinson; \$2,150,000 bond. Mr. Bochnewich newly retained. This matter has been delayed and advised counsel appropriate steps needed to be taken to get case moving.

Continued from **07/27/17**. Will contest will be filed by 7/31/17. No response or objection on any filings needed after mediation.

**Continued from 08/31/17, 10/05/17, 10/24/17 and 03/01/18, and 05/10/18.** Trial dates set.

**Matter set on 05/23/17 vacated and reset to 06/13/17.**

THIS CASE SET FOR HEARING ON Petition for Probate of **Lost** Will, Letters Testamentary with Full Authority under IAEA by Deborah Wilkinson, daughter.

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

1. Petitioner, Deborah Wilkinson, is named executor in codicil. However, codicil does not waive bond as to petitioner. Petitioner waives bond; however, no other beneficiaries waived bond. **Supp 07/29/16:** Petitioner alleges that decedent intended the will terms did not change. However, petitioner is not named as executor in the will. Supplement does not cure deficiency. **Supp11/07/16:** Petitioner requests bond of \$200,000 as bulk of the personal property is to go to petitioner. **Estate value \$2,150,000.** JTD
2. The original will is apparently lost. 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. **Supp 07/29/16: Petitioner alleges that decedent's wife has confirmed having original will.** Declarations filed **11/23/16** indicating that Janet Wilkinson **does not** have the original will.
3. Petitioner alleges she has the original codicil.
4. Decedent and spouse were legally separated at time of death. See declaration filed 05/27/16.
5. **Objections filed by Janet Wilkinson, surviving spouse, on 09/22/16.**
6. **Response filed by Deborah Wilkinson on 11/07/16.**
7. ~Proposed Form Order: 05/27/16.

RECOMMENDATION

Court's discretion re bond; matter is contested. If approved, set Accounting/Status Review for **08/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh)



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CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

**SEE ALSO 17, 18, 19**

HEARING:

Hearing Re: PTN FOR L NAYLOR TO EST RIGHT TO SHARE AS OMITTED

COUNSEL:

DEBORAH WILKINSON	(PET)...MORTENSEN & REINHEIMER, PC
EUGENE L WILKINSON	(DEC)...
JANET WILKINSON	(OBJ)...PETER M BOCHNEWICH
LINDSEY NAYLOR	(PET)...PETER M BOCHNEWICH

Currently under review by legal research.

(LR)