



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

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

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

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

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

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

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

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

(05/30/18 & 06/13/18 ww)(05/31/18 & 06/13/18 cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 06/18/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1100556

CASE NAME: \*\*\*MF\*\*\* RICHARD C MCPHERSON

HEARING: Petition for Atty's Fees and Reimbursement of Advanced Costs

COUNSEL:

PUBLIC ADMINISTRATOR	(SA )...CRAIG M PARKER
MARY BOETTCHER	(PET)...PRO/PER
RICHARD C MCPHERSON	(DEC)...
CHRISTY WOLFF	(PET)...DENNIS M SANDOVAL
DANIEL MCPHERSON	(PLA/APP/OBJ)...PRO/PER
MICHELLE MCPHERSON	(APP)...PRO/PER
DENNIS M SANDOVAL	(PET)...DENNIS M SANDOVAL
WELLS FARGO CARD SERVICES	(PRO/PER)
STATE OF CALIFORNIA FRANCHISE TAX BOARD	(PRO/PER)
ESTATE OF RICHARD C MCPHERSON	(PRO/PER)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation

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

- 1 Petitioner, Dennis M. Sandoval, represented prior administrator Christy Wolff, to defend her against complaints concerning estate administration. Per Order dated 01/27/16, Court reserved jurisdiction of payment of statutory fees, extraordinary compensation and costs.
- 2 Petitioner alleges services were rendered for which counsel has not been compensated for the period 04/27/15 to 04/12/18.
- 3 Attorney requests fees of \$5,898.47. Billed at varying rates of \$225-\$450/hour for attorney time and \$125/hour for paralegal time. Itemized
  - a. Fees of \$9.97 for costs of mailing documents listed in itemization [LFp10]. Per Local Rule 20-909, duplicating costs will not be allowed. JTD
- 4 Notice given.
- 5 ~Proposed Order: 05/08/18

RECOMMENDATION:

Court's discretion.

(CS)

Future Hearing: 8/21/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400443

CASE NAME: HEINRICH E. DEEKE FAMILY TRUST

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BRIAN J TUCKER (PET)...SWAN CARPENTER WALLIS & MCKENZ  
HEINRICH E. DEEKE FAMILY TRUST (TRU)...

**XREF: PROPS1300824** *MTR OF HEINRICH E DEEKE*

GENERAL INFORMATION:

Continued from **05/15/17**. No appearances. Court suspends the powers of the administrator and sets OSC re sanctions for failure to appear, failure to file. Citation issued to: Brian J Tucker who is cited and required to appear. Notice by judicial assistant.

**Continued from 06/19/17. Court takes off calendar the osc re sanctions and orders that the powers of administrator to be reinstated.**

THIS CASE IS SET FOR HEARING ON Accounting Review (re Trust)

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

1. First Account by Brian Tucker, PPF, approved on 11/17/15.
2. **Need** second account beginning with date of 08/16/15.

RECOMMENDATION:

Court's discretion

(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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600431

CASE NAME: MTR OF ROBERT HYATT

HEARING:

FIRST AND FINAL Account and Report of JOHN JAMES HYATT and  
Petition for allowance of fees filed.

COUNSEL:

JOHN JAMES HYATT (PET)...PRO/PER  
ROBERT HYATT (DEC)...

GENERAL INFORMATION

**Continued from 05/14/18 at request of petitioner o clear probate notes.**

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by son, John Hyatt, [Executor/Petitioner]

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

1. Assets on Hand \$346,391.10 consisting of \$60.10 in cash and remaining in real and personal property.
2. No statutory fees requested.
3. Petitioner's signature on Report and Verification is not dated. [LF pgs. 7 & 8] JTD
4. Total Charges and Total Credits do not match. **Supp. filed 06/06/18 provides an updated Summary of Account which total charges and total credits do not match. Need corrected Summary of Account and affected schedules.**
5. No Proposed Order.

RECOMMENDATION

Need to clear notes 4, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **06/24/19**.

(cs/ww/cs)

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: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601073

CASE NAME: MTR OF LINDA L EYRE

HEARING:

Probate status report filed.

COUNSEL:

JOSEPH W EYRE (PET)...JOSHUA W CENTENO  
LINDA L EYRE (DEC)...

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Testamentary issued to Joseph Eyre, spouse, on 03/10/17, full authority, no bond.
2. Petitioner requests an additional 12 months to close the estate.
3. Estate is not in a condition to close due to the only asset being a chose in action in a complaint action with the U.S. Employment Opportunity Commission filed on May 3, 2017, in case number 480-201-00603X, which is pending.
4. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201(b) advising the recipients of the right to petition for an account in accord with Pr.C. § 10950. **This form of notice is mandatory.**
5. No proposed order. Submit order after hearing.

RECOMMENDATION:

Need to clear notes 4, If approved, set next hearing for Accounting Review for **06/24/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 5A & 5B**

HEARING: Re: REVIEW STATUS REPORT FROM TREATING DOCTOR

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN LLP  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)  
JAY GAUDREAU

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Review Status Report from Treating Doctor

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

1. Matter set on 05/07/18, wherein, Mark Flory gave medical status and Court ordered that a report be filed by 4:00pm, 06/04/18 as to treating doctor Willine Gaudreau.

RECOMMENDATION:

Court's discretion.

(cs)

Future hearing dates:

01/15/19 Accounting Review

03/18/19 Readiness Calendar

03/18/19 Hearing Re: PTN for LACK OF CAPACITY UNDUE INFLUENCE ETC

03/18/19 Petition for instruction and for authority to sell real property

04/15/19 Hearing re: Court Trial (First Session)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 5 & 5B**

HEARING:

Petition for LACK OF CAPACITY UNDUE INFLUENCE ETC

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN LLP  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)  
JAY GAUDREAU

Currently under review by Legal Research

LR

NOTICE:

Continued matter- Notice not re-reviewed.

(ww/nb/cs)

Future hearing dates:

01/15/19 Accounting Review

03/18/19 Readiness Calendar

03/18/19 Hearing Re: PTN for LACK OF CAPACITY UNDUE INFLUENCE ETC

03/18/19 Petition for instruction and for authority to sell real property

04/15/19 Hearing re: Court Trial (First Session)

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: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 5 & 5A**

HEARING:

Hearing Re: VERIFIED FIRST AMENDED PETITION

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN LLP  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)  
JAY GAUDREAU

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb/cs)

Future hearing dates:

01/15/19 Accounting Review

03/18/19 Readiness Calendar

03/18/19 Hearing Re: PTN for LACK OF CAPACITY UNDUE INFLUENCE ETC

03/18/19 Petition for instruction and for authority to sell real property

04/15/19 Hearing re: Court Trial (First Session)



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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700401

CASE NAME: MTR OF VENITA ERA FLORENCE NIELSEN

HEARING:

FIRST AND FINAL Account and Report of MARCELLA TRIMBLE and  
Petition for allowance of fees filed.

COUNSEL:

MARCELLA TRIMBLE (PET)...WILLIAM K SWEENEY  
VENITA ERA NIELSEN (DEC)...

GENERAL INFORMATION:

Continued from **03/26/18**. No appearance. Court calls matter at 9:35am- Court notes that counsel has arranged court call for today's hearing but counsel did not check in for the 8:30am calendar.

**Continued from 05/07/18.**

THIS CASE IS SET FOR HEARING ON First and Final Account; for final distribution; and Petition for Fees by Marcella Trimble, sister

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

- 1 Accounting period: 12/31/16-12/20/17. Accounting period is accurate.
- 2 Assets on hand: **\$182,451.00** per Supp. filed 04/16/18 re payment of supplemental property tax bill from 2016.
- 3 Current Bond: \$258,000.00. Sufficient.
- 4 Petitioner and Attorney request statutory fees of \$9,402.00. Calculated.
- 5 Petitioner requests reimbursement for advanced costs and estate care in the amount of **\$17,467.00** of which \$388.00 will be reimbursed to Jimmy Trimble, grandson, for the decedent's water bill payment. Itemized. [LF pgs. 25-27]
  - a. Court may wish to inquire, or in alternative, require verified supplement as to the itemization for Adam Wheeler. [LF pg. 27]
    - i. For dates: 11/18/17, 11/25/17, 12/01/17 and 12/03/17 there is an amount of \$299 a day for "time taken off of work" in addition to \$10.50 an hour. (Supp. 03/22/18 indicates that Adam provided physical labor, electrical and plumbing work, and the use of his truck to clean the estate's real property in preparation for sale. Petitioner requests that Adam be reimbursed for both the time spent working in the residence

at the rate of \$10.50/hour and that he be reimbursed for losing time at his job.) **(Supp. 06/11/18) indicates that Adam Wheeler should receive a total of \$3,341.79 which includes the reimbursement of \$1,904.29 for the loan stated in the note below.) JTD**

- ii. Need clarification as to \$12,000.00 loan on 03/17/17. (Supp. 03/22/18 indicates that the load was taken out to pay for the police-ordered cremation, final expenses, clean up of bio-hazards, mortgage and to prepare real property for sale. The estate had no cash assets and the heirs did not have the funds. The loan was repaid as soon as the house sold and Adam is requesting reimbursement of the interest be paid in the amount of \$7,882.00 for the 21% interest on the loan.) **(Supp. 06/11/18 indicates that the interest rate was actually 16.81% with an origination fee of \$720.00. Petitioner is amending the request to reimburse Adam Wheeler the total amount of \$1,904.29. JTD**
- 6 Schedule F includes the fee amount of \$59.01 for postage. Does Court wish to disallow amount and add amount to the assets on hand as postage is considered overhead per Local Rule 20-909? [LF pg. 23] **(Supp. 03/22/18 Petitioner indicates that if fee is disallowed the amount will be credited back to the assets on hand.) JTD**
- 7 Petitioner requests for a reserve of \$1,500 for closing expenses. **JTD**
- 8 Petitioner requests that the distribution to Deseray Schwartz, minor, be held for 120 in client-trust account to allow parent time to file a separate proceeding under the name of the minor. **JTD**
- 9 Notice given.
- 10 Proposed Order: 06/11/18 Requested reimbursement amount of \$19,636.79 does not match petition amount of \$17,467.00. Also, reimbursement amount under #13 and #5 in prayer do not match. Need statement re: notice per Pr.C. § 9202

**RECOMMENDATION:**

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **06/24/19**.

(ww)

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: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800271

CASE NAME: MTR OF MINNIE TONG

HEARING:

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

COUNSEL:

DAVID LARA (PET)...PRO/PER  
MINNIE TONG (DEC)...

#### GENERAL INFORMATION

**Continued from 04/30/18 at request of petitioner to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by David Lara, son/Petitioner

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

1. Petitioner appears to be sole heir and waives bond. Net value of the estate consists of \$30,000.00 of which \$5,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. **Need** proof of publication
3. ~Proposed Form Order: 03/21/18

#### RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800422

CASE NAME: MTR OF MARIA G CARRASCO

HEARING:

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

COUNSEL:

DOMINGO V NAVARRETE (PET)...PRO/PER  
MARIA G CARRASCO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Limited Authority under IAEA by Domingo Navarrete, significant other

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

1. All beneficiaries are adults and waive bond. The estate consists of \$200,000.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. **Need** a copy of the original will filed as one is not attached to the petition.
3. Bertha Sotelo has priority to act under Pr.C. § 8461 as no executor is listed in the purported will. **Need** declination by Bertha.
4. Duties and liabilities is missing telephone number of petitioner. **Need** same.
5. **Need** Notice to Petition to Administer Estate and proof of service.
6. **Need** proof of publication
7. ~Proposed Form Order: 05/02/18

RECOMMENDATION

Need to clear notes 2-6 then Court's discretion re bond and note 2. If approved, set Accounting/Status Review for **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

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: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800423

CASE NAME: Aurelia Alexandru

HEARING:

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

COUNSEL:

IRINEL PIRVU (PET)...MARK J. ANDREW FLORY  
AURELIA ALEXANDRU (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by nephew, Irinel Pirvu, [Administrator/Petitioner].

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

1. Heir waives bond, however, Petitioner is a **non-resident** and the court may require bond if the proposed personal representative resides outside of California Pr.C. §8571. Court also has discretion to require bond per Pr.C. 8481(b). **JTD**
2. Notice of hearing filed 05/08/18; however, **need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication.
4. ~Proposed Form Order: 05/02/18

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review for 08/26/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800442

CASE NAME: John Charles Hummel

HEARING:

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

COUNSEL:

KIM CLARK (PET)...HEATHER C WELLBORN  
JOHN CHARLES HUMMEL (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Kim Clark, relation unknown

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

1. All heirs allegedly waive bond, however, **need** bond waivers on mandatory judicial council form DE-142/DE-111 (A-3d) by John Hummel, Jr, son. Net value of the estate consists of \$26,928.08 of which \$2,553.65 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner is not listed in section 8 of the petition and it cannot be determined what their relationship is to the decedent. **Need** verified supplement.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication
5. No Form Order Provided.

#### RECOMMENDATION

Need to clear notes 1-4. Court's discretion re bond. If approved, set Accounting/Status Review on **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800443

CASE NAME: SUSAN C. BROOKMAN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

CHAD W. BROOKMAN (PET)...MARIVEL M ZIALCITA  
SUSAN C. BROOKMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Chad Brookman,  
[Petitioner]

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

1. Petitioner, Chad Brookman, requests determination of property passing to the surviving spouse as community property without administration. Specially, real property located at Chino Hills, CA. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? **Need** verified supplement.
2. Decedent died intestate with two issue who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real property is the separate property of decedent.
3. **Need** Notice of Hearing with proof of service to Jake Brookman.
4. ~Proposed Form Order: 09/27/17

RECOMMENDATION:

Need to clear notes 1 & 3, then Court's discretion.

(cs)

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: 06/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701213

CASE NAME: WESSEL HUGH MEYERS TRUST

HEARING:

Petition for ORDER DETERMINING INTEREST IN RESL AND PERSONAL  
PROPERTY AND TRANSFER TO TRUSTEE

COUNSEL:

ROBIN K WIPPICH	(PET)...BRIAN J HOLOHAN
WESSEL HUGH MEYERS TRUST	(DEC)...

Currently under review by Legal Research

LR

Continued matter- notice not re-reviewed.

(ww)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 06/18/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800112

CASE NAME: THE BAKER LIVING TRUST, DATED AUGUST 10, 2007

HEARING:

Petition for order compelling account for trust assets,  
financial elder abuse etc.

COUNSEL:

ROSS M BAKER (PET)...KYLE A PATRICK  
THE BAKER LIVING TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

**Notice:**

Notice given.

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 06/18/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1100071

CASE NAME: ROBERT SANCHEZ TORRES JR

**SEE ALSO 15**

HEARING:

Hearing Re: PROOF SSI REP PAYEE CHANGED BACK- OFF CAL IF FILED

COUNSEL:

ERIKA R TORRES

(CP )...PRO/PER

ROBERT SANCHEZ TORRES JR

(CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **04/09/18**.

**Continued from 05/07/18. Court sets OSC re Sanctions of \$1,000.00 on conservator for failure to appear- Hearing is set for June 18, 2018 at 9:30am; Court orders Erika Torres to be personally present in court on June 18, 2018 at 9:30am in department S35.**

THIS CASE SET FOR HEARING ON Proof SSI Rep Payee Changed Back Off Cal if filed

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

1. At hearing re: Report of Court Appointed Counsel on 03/12/18 an oral report was given by Counsel Moore.
2. **Need** proof that the SSI representative payee was changed back to Erika R. Torres.
3. If proof is filed then this matter will go off calendar.
4. CI report filed 06/12/18.

RECOMMENDATION

Court's discretion.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 06/18/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1100071

CASE NAME: ROBERT SANCHEZ TORRES JR

**SEE ALSO 14**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,000.00 ON ERIKA TORRES

COUNSEL:

ERIKA R TORRES

(CP)...PRO/PER

ROBERT SANCHEZ TORRES JR

(CTP)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Sanctions of \$1,000.00 on Erika Torres.

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

1. OSC set on 05/07/18 due to conservator Erika Torres', mother, failure to appear.
2. Conservator Erika Torres is to be personally present.
3. \$1,000.00 in sanctions may be ordered upon Court's discretion.
4. CI report filed 06/12/18.

RECOMMENDATION

Court's discretion re OSC.

(ww)

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

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

**SEE ALSO 20A**

HEARING:

Petition for ATTORNEY FEES

COUNSEL:

AISHA L.J. DEBOSE	(CP )...
GWENDOLYN F BROWN	(CPE)...PRO/PER
DALILA DAVEEN DEBOSE	(CTE)...JENNIFER M DANIEL
LARRY G DEBOSE	(TP )...

Waiver of Court Fees and Costs filed by DALILA DAVEEN DEBOSE is GRANTED

**XREF: CIPDS1700092** *IN RE DALILA DAVEEN DEBOSE*

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Jennifer Daniel.

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

1. Petitioner, Jennifer Daniel, was appointed counsel on 10/21/15.
2. Petitioner requests fees of \$22,015.00 for 62.9 hours at \$350.00 per hour for attorney services. Itemized [Pet. 05/15/18 LF pgs. 5-15]. **JTD**
3. Notice given
4. No proposed order. Submit order after hearing.

#### RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 12/17/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700063

CASE NAME: MTR OF BERTHA MAE TURNER

HEARING:

Accounting Review by \*\*\*

COUNSEL:

L'TANYA ANDERSON (CPE)...PRO/PER  
BERTHA MAE TURNER (CEP)...ROSE C ROSADO

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. L'Tanya Anderson, niece appointed conservator of the person and estate on 05/08/17, no bond.
2. Ex Parte Petition to Dispense with accounting and Order filed; however, per Pr.C. §2628, this matter is not eligible to dispense with accounting as assets reflect \$27,242.17. **Need** First Account current beginning with 05/08/17.

#### RECOMMENDATION

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700210

CASE NAME: CHARLES D CAREY SR

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DELORES E EGE

COUNSEL:

DELORES E EGE	(CP )...DENNIS M SANDOVAL
CHARLES D CAREY JR	(CE )...DENNIS M SANDOVAL
CHARLES D CAREY SR	(CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Delores Ege, former spouse, appointed as conservator of the person and Charles Carey, Jr., son, appointed conservator of the estate on 11/13/17 \$23,500.00 bond.
2. **Bond was never filed and Letters were not issued as conservatee passed on 11/24/17.**
3. Court may wish to not require the filing of the compliance documents, Final Inventory and Appraisal, and accounting as Conservators never had the authority to act.

RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 1/28/19 Accounting Review

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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800071

CASE NAME: MTR OF JOSEPH SUPANGKAT

HEARING:

Petition for Appointment of Conservator

COUNSEL:

KUSHARIYANTO SUPANGKAT	(CP )...PRO/PER
VONNY TIDAYOH	(CP )...PRO/PER
JOSEPH SUPANGKAT	(CTP)...JENNIFER M DANIEL

#### GENERAL INFORMATION

**Continued from 04/23/18 Capacity Declaration filed. Court clears probate notes 4, 7, 8, & 9. Certificate of completion of the conservatorship training class received by the court. Request to continue by IRC granted. Jennifer Daniel is appointed for Joseph Supangkat. Continued for reports from IRC and Ms. Daniel.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Kushariyanto Supangkat and Vonny Tidayoh, parents

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed 04/23/18; however, form is not dated at signature line on page 1. **JTD**
3. Proposed conservatee is developmentally disabled. **Need** report of Jennifer Daniel, Court appointed counsel.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 decisions concerning education, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, the right to consent or withhold consent to marriage/domestic partnership, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee,.
6. Petitioner seeks civil rights not be limited without court order.
7. Return of citation filed 04/18/18. Per minute order 04/23/18 note cleared.
8. Certificates of Completion of the Conservatorship Training Class filed 04/18/18.

9. CI reports filed 04/17/18.
10. ~Proposed Form Order: 04/18/18

#### RECOMMENDATION

Need report of Court appointment Counsel/IRC. If approved, set hearing for Compliance Review for **08/26/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(ww/cs)



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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800143

CASE NAME: NOE BANUELOS

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
YESENIA HERNANDEZ (PET)...PRO/PER  
NOE BANUELOS (CEE)...

#### GENERAL INFORMATION

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

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

1. No bond- person only.
2. Petitioner seeks medical powers. Capacity Declaration filed 05/24/18; however is incomplete as to office phone number, date conservatee seen, signature by Doctor not dated on page 1 and 7b is not initialed. Does Court wish to require a corrected Capacity Declaration to be filed? **JTD**
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. Court to see Confidential Letter from IRC filed 06/05/18. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee. **JTD**
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. **Need** List of Required Contacts (Local form SB-12224).
8. **Need** Confidential Screening Form.

9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. Citation with proof of service filed 05/24/18.
11. Notice given.
12. **Need** CI report.
13. ~Proposed Form Order: 05/11/18

#### RECOMMENDATION

Need appointment of Counsel, IRC report, CI report and to clear notes 7-9 then Court's discretion re: note 2 and remaining notes. If approved, set hearing for Compliance Review for **01/28/19** 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)

Superior Court of Calif, County of San Bernardino

Page: 20A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/18/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

**SEE ALSO 16**

HEARING:

Hearing re: Status of Health of the Conservatee

COUNSEL:

AISHA L.J. DEBOSE

(CP )...

GWENDOLYN F BROWN

(CPE)...PRO/PER

DALILA DAVEEN DEBOSE

(CTE)...JENNIFER M DANIEL

LARRY G DEBOSE

(TP )...

**XREF: CIPDS1700092** *IN RE DALILA DAVEEN DEBOSE*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Health of the Conservatee

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

1. Matter set on 05/21/18 at the Hearing re: Issues of Vehicle, Bed, Wheelchair, Caregivers.
2. Court directed Jennifer Daniel to email by 4pm on 05/23/18 the location and identification of conservatee to Ramona Verduzco.

RECOMMENDATION

Inquire status.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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

CASE#: SLC SS7835

**VACATED**

CASE NAME: IN THE MATTER OF TODD GLUNT

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

TODD A GLUNT

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 7<sup>th</sup> Account by PG filed 06/04/18.

(ww)

Future hearing dates:

07/29/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1300309

CASE NAME: MTR OF FRANKLIN A MENENDEZ

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

FRANKLIN A MENENDEZ

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 01/05/19.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 07/26/17 Court approved Order that Conservator need not present 3rd Annual Account.
2. Petition and Order that Conservator need not present fourth annual account filed 05/22/18; however, need complete proof of service.
  - a. Proof of service filed 05/17/18 does not indicate full address where mailed.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON DS1000337

CASE NAME: FREDERICK D. WOODARD

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

FREDERICK D. WOODARD

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 7<sup>th</sup> Account by PG filed 06/04/18.

(ww)

Future hearing dates:

07/29/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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

CASE#: CON PS0600007

CASE NAME: MTR OF SERENA PERRY

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
SERENA PERRY

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

**VACATE- Signed Ex-Parte Order that Conservator need not present 3<sup>rd</sup> Waiver of Account sent to Clerk's Office for processing on 06/11/18. Clerk's office to set next Accounting review for 05/27/19.**

(CS)

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: 06/18/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500082

CASE NAME: Christine Piro

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

CHRISTINE PIRO	(CEP)...HARTNELL LAW GROUP
SONNA M O'DOWD	(CP )...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

Letters expire: 06/19/18

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting period: 04/03/15-07/31/16
2. Assets on Hand: \$0.28 in cash
3. Public Guardian requests compensation in the amount of \$3,200.00, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
4. County Counsel request fees in the amount of \$1,600.00, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
5. Conservator and Counsel failed to date their signatures. [LF pg. 6] **JTD**
6. Notice given.
7. ~Proposed Order 09/14/17

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as second account current is overdue.

(ww)



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: 06/18/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

**SEE ALSO 27**

HEARING:

Hearing Re: STATUS OF SALE OF PROPERTY

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MADLINE M. PRATKO TRUST	(TRU)...
MADLINE MARY PRATKO	(CEE)...SANDY L. TURNER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Status Of Sale of Property

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

1. Matter set on 03/08/18 during Receipt of Report from Connie Stringfellow, Court ordered that counsel to file proof that the property is listed on MLS.
2. Declaration filed by Connie Stringfellow re PG currently working on the statutorily required publication of the Notice of Sale.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 11/05/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

**SEE ALSO 26**

HEARING:

Hearing Re: OSC RE RECEIPT OF APPRAISAL/STATUS OF MLS

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MADELINE M. PRATKO TRUST	(TRU)...
MADELINE MARY PRATKO	(CEE)...SANDY L. TURNER

See notes on previous matter 26.

Future Hearing: 11/05/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600290

CASE NAME: OGIS DEAN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
OGIS DEAN	(CEP)...CANDICE A GARCIA-RODRIGO
CANDICE A GARCIA-RODRIGO	(PET)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

**Continued from 01/22/18.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. PG appointed conservator of person and estate on 11/14/16, no bond.
2. **Need** accounting or waiver of account beginning with date of 11/14/16.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: SLC SS4154

CASE NAME: IN THE MATTER OF BETTY JANE MEIER

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
BETTY JANE MEIER (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 08/12/18.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 12/11/17, Court approved the 23<sup>nd</sup> account; 24<sup>th</sup> accounting now due.
2. Need accounting.

#### RECOMMENDATION

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino  
Page: 29A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 06/18/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

HEARING:

Hearing Re: Motion Re: to Compel Discovery Responses

COUNSEL:

KARON A SPIGNER	(CPE)...PRO/PER
CLAUDE L. GILES	(CEP)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
JEFFALYN A GILES	(PET)... ALABA AJETUNMOBI
JENNIFER M DANIEL	(PET)...JENNIFER M DANIEL

Currently under review by Legal Research

LR

(ww)

Future Hearings:

09/17/18 Readiness Calendar  
09/17/18 Hearing re: Issue of Successor Conservator of Estate  
10/16/18 Court Trial (Day 1)  
10/16/18 Hearing re: Court trial on Successor C'Tor of Estate  
10/17/18 Court Trial (Day 2)

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

CASE#: CON PS1400033

CASE NAME: Gabriel Sean Moore

**SEE ALSO 31**

HEARING:

Hearing Re: COURT TRIAL ON ISSUE OF POSSIBLE REMOVAL

COUNSEL:

LEAH ELLEN CHRISTY

(CP)...PRO/PER

GABRIEL SEAN MOORE

(CTP)...SHERRI L KASTILAHN

Future Hearing: 6/19/18 Court Trial (Day 2)

No Notes-Court Trial- JTD.

(ww)

Superior Court of Calif, County of San Bernardino  
Page: 31 add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1400033

CASE NAME: Gabriel Sean Moore

**SEE ALSO 30**

HEARING:

Hearing Re: POSSIBLE REMOVAL OF CONSERVATOR

COUNSEL:

LEAH ELLEN CHRISTY (CP)...PRO/PER  
GABRIEL SEAN MOORE (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION:

Continued from **05/07/18** matter is set contested; time estimated of one-half day.  
**Continued from 06/04/18. Parties announce ready for trial.**

THIS CASE SET FOR HEARING ON Possible Removal Of Conservator

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

1. Matter set on 03/12/18 after oral report heard from Jolene Eastman of Angel View. and from Leah Chrisy
2. Declaration re allegations about the conservator to be filed by 04/12/18. Response to be filed by 04/23/18. If not filed by deadline, Court will deem waived.
3. **IRCs Response to OSC re Possible removal of the conservator including Responses from Ravindra Rao, MD.; Sylvia Dartgitz, RN; and Jolene Eastman filed 04/03/18.**
4. **Declaration by Rao Ravindra, MD. Filed 04/04/18**

RECOMMENDATION:

Contested matter. Court's discretion.

(cs/ww)

Future Hearing: 6/19/18 Court Trial (Day 2)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

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

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

HEARING: Amended First and Final Account and Report of DOROTHY R HARMON and Petition for allowance of fees filed.

COUNSEL:

DOROTHY R HARMON

(PET)...JENNIFER M DANIEL

ABRAHAM C. RAMIREZ

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 04/23/18.**

THIS CASE SET FOR HEARING ON First and Final Report on Waiver of Account; Petition for allowance of Fees and for Ratification and Approval of Final Distribution, by daughter, Dorothy Harmon [Administrator/Petitioner]

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

1. Assets on Hand \$0.
2. All heirs waive the accounting.
3. Petitioner alleges all assets have been distributed. [Amended Accounting 03/05/18, LF p. 6]. Distribution includes Joseph Ramirez. Question if Joseph Ramirez is the same person as Joe Ramirez named in petition. Court to clarify.
4. **Need** to file notice of Proposed Action with poof of service on the sale of the real property.
5. **Need** Notice of Hearing with proof of service of amended accounting to Public Administrator.
6. Petitioner is entitled to statutory fees of \$9,393.87, calculated. However, petitioner requests the court ratify her discounted fee of \$5,000 which has been received.
7. No attorney statutory fees are being requested.
8. No Proposed Order. Submit after hearing.

RECOMMENDATION

Need to clear notes 4 & 5, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **06/24/19**. (cs/ww)



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

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

CASE#: PRO PS1500764

CASE NAME: JASON DAVIS SPECIAL NEEDS TRUST

HEARING:

Trustee's Second Current Account and Report of CAROL ROBERTS and  
Petition for allowance of fees filed.

COUNSEL:

JASON DAVIS SPECIAL NEEDS TRUST	(TRU)...
JASON DAVIS	(BEN)...
CAROL ROBERTS	(PET)...GOMEZ LAW GROUP
J. DAVID HORSPOOL	(PET)...HORSPOOL & HORSPOOL
CAROL ROBERTS	(PET/TEE)...GOMEZ LAW GROUP

**XREF: CONPS1600318** MTR OF JASON DEAN DAVIS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current by Carol Roberts, mother.

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

- 1<sup>st</sup> accounting approved on 09/20/17 for period of 03/29/16-02/14/17.
  - Need** Order on 1<sup>st</sup> accounting submitted for signature.
- Accounting period: **06/01/17**-04/30/18; however, accounting period should begin with **02/15/17** as 1<sup>st</sup> accounting ended with 02/14/17.
  - Need** amended accounting beginning with date of 02/15/17.
- Assets on hand \$50,588.39
- Current bond is \$59,000. Ok.
- Summary of Account GC-400/405 has the following issues:
  - It indicates that it is the "First" account instead of the 2<sup>nd</sup>.
  - It does not indicate the accounting period.
  - The beginning assets on hand of \$53,648.69 are incorrect as they do not match the end assets on hand of \$53,647.34 at the close of the 1<sup>st</sup> account.  
**Need** corrected Summary of Account.
- There is no report per Pr.C.§16063. **Need** same.
- Wells Fargo Bank statement for period 04/01/18-04/30/18 is attached; however, page 3 is missing. **Need** verified supplement to include page 3.

## RECOMMENDATION

Need to clear notes 1, 3, and 5-7. If approved, set Accounting/Status Review for **08/19/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1500905

CASE NAME: MTR OF EDWARD MARK LIMON SR

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CARMEN LIMON (PET)...MARIA G NICIFOROS  
EDWARD MARK LIMON SR (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Carmen Limon, mother, on 11/19/15; full authority, no bond.
2. Previous status report approved on 12/11/17.
3. Final Inventory and Appraisal filed 08/19/16.
4. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600944  
CASE NAME: MTR OF TIMOTHY JERSCHIED

HEARING: First and Final Account and Report of PHYLLIS JERSCHIED and  
Petition for allowance of fees filed.

COUNSEL:

PHYLLIS JERSCHIED (PET)...FARHAT & ASSOCIATES  
TIMOTHY JERSCHIED (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account, Petition for Fees and for  
Final Distribution by Phyllis Jerscheid, sister

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

- 1 Accounting period: 01/15/16-12/31/17
- 2 Assets on hand: \$339,208.78 in cash.
- 3 Petitioner and Attorney request statutory fees of \$7,526.71. Calculated; however,  
calculation is incorrect. 2% of \$26,330.37 is \$526.61, therefore, statutory fees  
should be **\$7,526.61** each for petitioner and attorney. Does Court wish to require a  
verified supplement with the corrected calculation and request? [LF pg. 7] **JTD**
- 4 Sole heir waives accounting.
- 5 Assets on hand at end of accounting period are not listed in the report and is  
required pre Pr.C. § 1061. **JTD**
- 6 Petitioner requests authority to withhold \$1,000.00 as a reserve for closing costs.  
**JTD**
- 7 **Need** bank statement in support of end date of accounting period per Local Rule  
20-908.
- 8 Notice of Hearing and proof of service filed; however, notice indicates "Status  
Report". **Need** corrected Notice indicating "First and Final Account..."
- 9 No Proposed Order.

RECOMMENDATION:

Need to clear notes 7 & 8 then Court's discretion. Court may wish to vacate the Status  
Report set on **07/24/18** as it appears to now be moot. If approved, Court to set hearing on  
filing of receipts and final discharge for **06/24/19**.

(ww)

Future Hearing: 7/24/18 Probate Status Report

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: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701065

CASE NAME: ESTATE OF LINDA MARIE ROSALES

HEARING:

Hearing Re: Preliminary Injunction (Restraining Order)

COUNSEL:

MICHAEL A ROSALES (PET)...BERL HILLEL SELSKI  
LINDA MARIE ROSALES (DEC)...

No notes- JTD.

(ww)

Future Hearing: 4/01/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800025

CASE NAME: Paul Angle

**SEE ALSO 7**

HEARING: Hearing Re: Amended petition for letters of administration

COUNSEL:

LAURA PFEIFER (PET)...PRO/PER  
PAUL ANGLE (DEC)...

GENERAL INFORMATION

**Continued from 04/30/18. Need proof of publication and notice of petition to administer estate.**

THIS CASE SET FOR HEARING ON [**Amended 04/11/18**] Petition for Letters of Administration with Full Authority under IAEA by Laura Pfeifer ["Petitioner"-daughter].

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

1. Bond is not addressed in section 2d or 3e. Court may wish to inquire, or in alternative, need verified supplement. **JTD**
2. Waivers of bond filed by petitioner Laura Pfeifer and Sharon Wegman, daughter.
3. Net value of the estate consists of \$78,000.00 of which \$1,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b) or per Pr. C. § 8571 as petitioner is a non-resident.
4. Petition indicates that decedent was not survived by a stepchild that would have been adopted but for a legal barrier in section 5b; however, lists Bonnie Brusko and Dawn Knaus as step-daughters of decedent who were not adopted. **JTD**
5. **Need** Notice to Petition to Administer Estate and proof of service.
6. **Need** proof of publication
7. No Form Order Provided.

RECOMMENDATION

Need to clear notes 2, 4 & 5. Court's discretion re bond. If approved, set Accounting/Status Review **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (ww)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800025

CASE NAME: Paul Angle

**SEE ALSO 6**

HEARING:

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

COUNSEL:

LAURA PFEIFER (PET)...PRO/PER  
PAUL ANGLE (DEC)...

GENERAL INFORMATION:

Continued from **02/13/18** at request of petitioner to clear notes.

Continued from **03/26/18**. Petitioner Laura Pfeifer represents she sent by mail the items needed to clear all probate notes.

**Continued from 04/30/18. Reason: Need proof of publication and Notice of Petition to Administer Estate. Petitioner reports that the only beneficiaries are herself and a sister and will be filing bond waivers for both. Petitioner reports that there is a pending foreclosure on the property. Court suggests petitioner seek legal assistance with regard to filing for special administrator.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Executrix, Laura Pfeifer ["Petitioner"-daughter].

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

1. **Note: Amended petition filed 04/11/18; however, hearing was set on this same date instead of a future date. See notes on matter 6.**
2. Petitioner submits a type-written document dated 09/22/07 purportedly signed by decedent. It would appear to be a purported Will. However, the 09/22/07 document is not witnessed and thus, does not meet the requirements of Pr.C. §6110. Will is however, notarized. Question the validity of the 09/22/07 document? **Need** verified supplement with points and authorities to prove the 09/22/07 document is a valid testamentary document.
3. Will waives bond. Estimated estate valued at \$76,000. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**

4. Proof of publication filed 03/12/18 as to the initial hearing date of 02/13/18; however, the proposed personal representatives' name found in section 2 & 3 of Notice of Petition to Administer Estate is missing in the publication. **JTD**.
5. Notice of Petition to Administer Estate with proof of service filed 04/11/18; however section 3 as to the proposed personal representatives' name is not completed. **JTD**
6. No proposed order.

**RECOMMENDATION:**

Need to clear note 1 then Court's discretion re: remaining notes and bond. Court may wish to take this matter off calendar and the amended petition was filed. If approved, set future hearing for Accounting/Status Review on **08/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/cs/ww)



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: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800240

CASE NAME: LUCKY CHRISTOPHER EBEIGBE

HEARING:

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

COUNSEL:

THOMPSON EBEIGBE (PET)...PRO/PER  
LUCKY CHRISTOPHER EBEIGBE (DEC)...

#### GENERAL INFORMATION

**Continued from 04/16/18. Petitioner notes there is not an issue of a predeceased child. Need to file proof of publication.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Thompson Ebeigbe, son

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

1. All heirs allegedly waive bond. Net value of the estate consists of \$106,000.00 of which \$6,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Notice to Petition to Administer Estate and proof of service filed 04/16/18; however, server failed to date at signature line. **JTD.**
3. ~Proposed Form Order: 03/14/18

#### RECOMMENDATION

Court's discretion re note 2 and bond. If approved, set Accounting/Status Review **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800256

CASE NAME: MTR OF VICTORIA DARLENE STINSON

HEARING:

Petition for Probate of Will and for Letters of Administration  
w/will annexed w/ full IAEA

COUNSEL:

DANA LAMAR DUNN (PET)...PRO/PER  
VICTORIA DARLENE STINSON (DEC)...

GENERAL INFORMATION

**Continued from 04/30/18.**

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Dana Dunn, nephew

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

1. All beneficiaries waive bond. The estate consists of \$205,500.00 of which \$5,500.00 is personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Duties and Liabilities form is incomplete as to address and phone number in section 2; however, the address is in the caption and his phone number can be found on other filed forms. **JTD**
3. ~Proposed Form Order: 03/16/18

RECOMMENDATION

RFA subject to Court's discretion re note 2. If approved, set Accounting/Status Review for **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800466

CASE NAME: Mtr of Louella Sue Reed

HEARING:

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

COUNSEL:

ILA D REED (PET)...GREGORY M FREEZE  
LOUELLA SUE REED (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Ila Reed, mother

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

1. Petitioner is allegedly sole heir and waive bond. Net value of the estate consists of \$205,000.00 of which \$5,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b) or Pr.C. § 8571 as petitioner is a non-resident.
2. Section 5 is incomplete as to whether there is or is not a domestic partner. Court may wish to clarify on record or in alternative; need verified supplement. **JTD**
3. Duties and liabilities is missing telephone number of petitioner. **Need** same.
4. **Need** proof of publication
5. No Proposed Form Order provided.

#### RECOMMENDATION

Need to clear notes 3 & 4 then Court's discretion re bond. If approved, set Accounting/Status Review **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800474

CASE NAME: Mtr of Danny L Marsoobian

HEARING:

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

COUNSEL:

MICHAEL MARSOOBIAN (PET)...HOLLY HUTCHINS  
DANNY L MARSOOBIAN (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Michael Marsoobian, son

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

1. Bond in the amount of \$230,000.00 is being requested. Ok.Net value of the estate consists of \$230,000.00 of which \$15,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b) or Pr.C. § 8571 as petitioner is a non-resident.
2. No proposed form order provided.

#### RECOMMENDATION

RFA. \$230,000.00 bond. If approved, set Accounting/Status Review **08/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: SPR SS04872

CASE NAME: ESTATE OF LILLIAN E MICHIK

HEARING:

Accounting Review by \*\*\*

COUNSEL:

RICHARD MICHIK	(PET)...JEFFORD C DAVIS
LILLIAN E MICHIK	(DEC)...
ROBERT MICHIK	(TP )...SHORE & WURM

GENERAL INFORMATION:

Continued many times since **10/3/11**.

**Continued from 02/01/16** for Counsel to prepare and file a written Status Report and/or Accounting by the end of the month. Court is informed that the estate cannot be closed because counsel has been unable to sell the Salton Sea property which is the only asset remaining. Counsel for the petitioner has contacted the neighbors/adjacent owners to see if they would put the property up for auction or be willing to take the property.

**Continued from 03/30/16, 06/09/16, 08/18/1, 11/02/16 and 01/11/17** for a status report to be filed.

*Nothing new filed since 12/6/11.*

Continued from **3/22/17** at request of Counsel for sale of property to close.

Continued from **08/15/17 and 10/24/17** on court's motion for status of resolution. Counsel report there is a potential buyer.

Continued from **01/23/18** at request of counsel.

**Continued from 04/23/18. Non appearance by counsel nor has the accounting been filed. Court orders Attorney Davis to be present at the next hearing.**

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

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

1. Letters Testamentary issued 08/21/08 to Richard Michik, son, full authority, no bond.
2. On 10/28/10, Court deemed the accounting filed on 12/31/07 as a status report.
3. Copy of subpoenaed request filed on 05/09/16. However, it is unclear how the Chief Trial Counsel in Los Angeles is involved. Court to inquire.

4. Status report filed by counsel in the form of a declaration on **12/14/16**. **No fees paid**. Petitioner alleges the property is minimal and no one wants to purchase the property.
5. Ex parte letter appears to be filed to the Judge on 10/21/16 by Richard Michik.
6. **Need** Notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION:

Need notice and fees paid (note 4). Court's discretion.

(lc/sa/gls/lc/sa/lc/dl/sa/l/lhc/lh/nb/cs/ww)

Superior Court of Calif, County of San Bernardino  
Page: 12A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800435

CASE NAME: John Enyoze Obanor  
**SEE ALSO 12B**

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

COUNSEL:  
UWAIFO OBANOR (PET)...DONALD E FAUBUS)  
JOHN ENOTOZE OBANOR (DEC)...  
JULIANA OBANOR (PET)...

GENERAL INFORMATION

**Continued from 06/14/18. No appearance. Matter is continued to be heard with competing petition.**

THIS CASE SET FOR HEARING ON

**Petition #1** Petition for Letters of Administration with **Limited** Authority under IAEA **by Juliana Obanor, spouse**

**Petition #2** Petition for Letters of Administration with **Full** authority under IAEA **by Uwaifo Obanor, son.**

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

**Petitioner 1- Juliana Obanor, spouse**

1. Bond in the amount of \$20,000.00 is being requested. It cannot be determined if requested bond amount is sufficient as the value of the personal property is "to be determined." Estimated Net value of the estate consists of \$450,600.00 of which the known value of personal property is \$15,600.00. **JTD**
2. ~Proposed Form Order: 05/17/18

**Petitioner 2- Uwaifo Obanor, son**

3. Petitioner seeks bond of \$462,500. Ok.
4. Spouse Juliana appears to have higher priority.
5. ~Proposed Form Order: 05/04/18.

## RECOMMENDATION

Contested matter. Court's discretion re bond. If approved, set Accounting/Status Review **08/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)



Superior Court of Calif, County of San Bernardino

Page: 12B late add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/18/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1800435

CASE NAME: John Enoyoze Obanor

**SEE ALSO 12A**

HEARING:

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

COUNSEL:

JOHN ENOYOZE OBANOR

(DEC)...

UWAIFO OBANOR

(PET)...DONALD E FAUBUS

See notes on matter 12A.

(ww)

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: 06/18/18      TIME: 8:30      DEPT: S36P  
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CASE#: TRU PS1800056

CASE NAME: DINWIDDIE FAMILY TRUST

HEARING:

Petition for Transfer Assets to the Dinwiddie Family Trust  
(Probate Code 850)

COUNSEL:

DAVID R DINWIDDIE                      (PET)...PRO/PER  
DINWIDDIE FAMILY TRUST              (TRU)...

Currently under review by Legal Research

LR

**NOTICE:**

Notice of hearing to Kimberly Leisgang; David Dinwiddie, II; Christian Dinwiddie c/o David Dinwiddie (petitioner); Noah & Riley Leisgang c/o Kimberly Leisgang; William Dinwiddie; and Kirk Dinwiddie filed 04/05/18; however, **need** corrected Notice to include full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.

Continued matter from 04/30/18.

(ww)

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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

**CONSERVATORSHIPS**

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DATE: 06/18/18      TIME: 8:30      DEPT: S36P  
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CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

**SEE ALSO 16, 17**

HEARING:

FIRST Account and Report of LOWETA CARROLL and Petition for allowance of fees filed.

COUNSEL:

LOWETA CARROLL

(CPE)...KEITH S WALKER

DORIS M CARROLL

(CEP)...

GENERAL INFORMATION:

Continued from **6/17/15, 09/02/15, 10/29/15, 01/05/16, and 02/23/16**. At hearing on 02/23/16 Court appointed Walter Moore as Guardian Ad Litem for Doris M. Carroll. Clerk's office to notify of appointment.

Continued from **04/25/16, 07/12/16 and 09/20/16**. Notice to be given by Attorney Keith Walker.

Continued from 11/29/16. Court orders an account to be filed on the trust by 12/31/16. Matter is contested and set for trial. No account filed.

**Continued from 02/21/17, 03/23/17 (accounting not filed as ordered) and 03/30/17 and 04/06/17**. Notice given by Judicial Assistant to bonding company. All documents to be filed by 04/26/17. Mediation date requested.

Continued from **06/15/17** at request of Counsel. Matter set for voluntary mediation.

**Continued from 07/05/17**. Counsel is informed 2 separate accountings must be submitted to the court by the next hearing on 8-1-17: the accounting for the trust from 8-15-12 to present and the conservatorship accounting from 5-30-13 to present.

Continued from **08/01/17, 11/06/17 and 12/07/17**. As Conservatee has passed away; Objections are moot. Declaration and Pr.C. § 13100 petition to be filed by Counsel Walker.

**Continued from 02/22/18 to 05/03/18. Then 05/03/18 hearing was vacated and matter reset on 06/18/18.**

THIS CASE IS SET FOR HEARING ON **Amendment [05/02/17]**<sup>1st</sup> Account Current and Petition for fees by Loweta Carroll, daughter.

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

1. **Conservatee recently passed away on 09/18/17.**

2. Daughter, Loweta Carroll, was appointed conservator, person/estate, on 4/16/13. Recent amendment filed did not appear to have many changes.
3. Account period covers **05/30/13 - 05/29/14** and begins as of date letters were issued instead of as of date of appointment. As petitioner did not have authority until bond was posted, Assets may not have been marshaled on date of appointment.
4. Assets on hand \$4,291.33 in cash.
5. Accounting shows conservatee's estate was considerably spent down; the beginning balance was \$52,456.75 in cash. The only income is from SS benefits; Court may wish to inquire as to the **current** care plan.
6. Conservatee and conservator reside together in conservatee's home and is her full time caregiver with no alleged respite. Petitioner has not sought compensation for her services or reimbursement of funds advanced.
7. Attorney does not seek fees; however, reserves the right for a later date.
8. The \$11,918.80 paid to Keith Walker, of which \$7,465 was for services performed prior to the conservatorship and was allegedly due prior to issuance of letters.
  - a. **Declaration with itemization filed on 08/01/17. Counsel stands prepared to refund Conservator all of part of \$12,085 in fees taken out of client trust account.**
9. The \$2,500.00 paid to Ben Selters was for services rendered prior to conservatorship and were paid per Pr.C. § 2430(a)(1).
10. The \$3,000.00 paid to Margaret Arter for "attorney fees were related to creation of conservatorship per Pr.C. § 2430(a)(1).
11. Disbursements show a total of \$85.00 paid for overdraft fees [05/02 Accounting LF p.26]. Petitioner previously suggests fees are de minimis given fees are currently waived.
12. Original Report states: "Conservatee was the victim of financial and physical elder abuse perpetrated by her son, Davey Eugene Carroll and his wife and other persons. This abuse has been reported to the San Bernardino County Sheriff and Wells Fargo Bank and investigations are pending with both the Sheriff and the Bank."
  - a. Disbursements show many payments totaling \$897.58 to various payees "to locate brother and his wife."
13. Disbursements show many payments totaling \$776.03 for forms "to begin civil suit against Lillie Norton or for "access to legal website". As Conservatee is represented, question the need of these expenditures. **Supp. (11/10/15) indicates use of Conservatee's counsel for these endeavors would have cost the conservatorship attorney fees far in excess of the funds expended. JTD.**
14. Disbursements show several payments for auto supplies and AAA membership renewal. **Supp. (11/10/15) indicates Petitioner uses her own vehicle to provide all transportation for the Conservatee. JTD.**
15. Disbursements show several payments for Nico-derm beginning 11/18/13. As prior to this date there are no entries for tobacco purchases, question if these purchases were for the conservatee's benefit. **Supp. (11/10/15) indicates these purchases were for Petitioner who did not want to smoke around Conservatee; has successfully stopped smoking; and benefits Conservatee as residence remains smoke-free. JTD.**

16. Disbursements show many payments for repairs: supplies and labor. Does Court wish to require further explanation for these payments as no petition for authority to expend funds for repairs filed. **Supp. (11/10/15) indicates Conservator is not required to obtain authority to expend funds for repairs to Conservatee's home. However, as home is held in trust, question why trust should not be liable for cost of repairs? JTD.**
17. Disbursements show several payments noted as "unknown" payee. Does Court wish to require further explanation for these payments **[05/02 LF, p. 74-75].**
18. Disbursements show 2 payments to psychiatrist of \$115.00 each. Court may wish to inquire as to conservatee's care plan. **Supp. (11/10/15) indicates these payments were for fees incurred by Petitioner, personally, in her efforts to cope with caring for Conservatee full-time. JTD.**
19. Bond was set at \$21,000. Petitioner requests bond exonerated as the estate now qualifies for bond waiver under Pr.C."§2323, 2628. Ok.
20. Waiver of Objections to First Account Current filed 01/05/16 by counsel, Margaret Helen Arter, on behalf of conservatee.
21. **Objections filed 09/20/16 by GAL, Walter Moore, for Conservatee. Moot.**
  - a. **No objections to amendment filed at time of review.**
22. **Supplement filed 03/30/17 by Loweta Carrol, Conservator, which appears to be a reply to objections.**

RECOMMENDATION:

Matter is contested; however, Court indicated that objections are moot as conservatee has passed. If approved, set next Accounting Review in **60 days** as second account is overdue and conservatee is now deceased. Account to be filed 30 days' in advance of hearing date. Note requirements of Local Rules.

(kra/cbr/nb/dl/nb/lc/lh/nb/lc/ww/lc/ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 06/18/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0700204

CASE NAME: MTR OF MARCELLA VANESSA PLACENCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LOUIS R RIOS

(CP )...PRO/PER

HILDA RIOS

(CP )...PRO/PER

MARCELLA VANESSA PLACENCIA

(CTP)...SANDRA TURNER

IRENE SEPULVEDA

(PET)...PRO/PER

#### GENERAL INFORMATION

**Continued from 04/09/18. Court clears all notes with the exception of the report from IRC. Current conservator Hilda Rios is present in Court and indicates that she and co-conservator Louis Rios wish to resign as conservator of Marcella Placencia. The Court accepts oral resignation. The Court continues this matter for receipt of IRC report.**

THIS CASE SET FOR HEARING ON Petition for Appointment of **Successor** Limited Conservator, of the person only, by Irene Sepulveda, Petitioner/friend

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

1. Louis and Hilda Rios appointed conservators on 11/21/07.
2. Petitioner is seeking limited conservatorship because current conservators are older and with declining health and can no longer care for the conservatee as she is combative.
3. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re medical. **JTD**
4. Petitioner seeks civil rights be limited without court order.
5. Petition indicates biological parent's rights were terminated. Does Court wish to require juvenile court order. **JTD**
6. Petitioner seeks medical powers. Capacity Declaration filed 03/20/18 and 1st amended Capacity Declaration filed 05/02/18.
7. Proposed conservatee is developmentally disabled. **Need** IRC report.
  - a. Letter from IRC filed 03/29/18 re untimely notice and requesting an additional 30 days continuance.

8. Proposed conservatee is developmentally disabled. Report by Sandy Turner, court appointed counsel filed 03/27/18.
9. Citation with proof of service filed 03/20/18.
10. Copy of Certificate of Completion of Conservator Education Court filed 04/05/18.
11. CI report filed 04/05/18.
12. ~Proposed Form Order: 03/06/18

#### RECOMMENDATION

Need IRC Report then Court's discretion. If approved, set hearing for Compliance Review for **01/28/19** 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.

(cs/ww)



Superior Court of Calif, County of San Bernardino

Page: 16

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

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

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

**SEE ALSO 14, 17**

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner LOWETA  
CARROLL

COUNSEL:

LOWETA CARROLL

(CPE)...KEITH S WALKER

DORIS M CARROLL

(CEP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Keith Walker,  
counsel for Loweta Carroll, conservator

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

1. Petitioner Keith Walker seeks to be relieved as counsel for Loweta Carroll, current conservator of the person and estate.
2. Declaration in support of motion filed 04/23/18; however, **need** mandatory form Declaration [MC-052].
  - a. Petitioner alleges that Loweta Carroll has failed to reimburse him for costs advances for her benefit including the expense of the conservatee's cremation.
  - b. Petitioner alleges that Loweta is no longer communicating with him and that their relationship is irretrievably broken.
3. **Need** proof of service of Notice of Hearing re compliance with Rules of Court, rule 3.1362(d), including service of Notice of Motion, Declaration and Proposed Order.
4. No Form Order Provided. Submit after hearing.

#### RECOMMENDATION

Need to clear note 2 & 3, then Court's discretion.

(ww)

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

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

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

**SEE ALSO 14, 16**

HEARING: Petition for attorney's fees

COUNSEL:

LOWETA CARROLL (CPE)...KEITH S WALKER  
DORIS M CARROLL (CEP)...

GENERAL INFORMATION:

**Continued from 04/23/18. Attorney Walker to file a motion to be relieved. Clerk's office to set this petition for 06/18/18 once filed. Parties agree to advance the hearing for 05/03/18 to today's date and continue it to be heard with other pending hearing.**

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Mark J. Flory, appointed counsel for conservatee.

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

1. Petitioner, Mark J. Flory, was appointed as conservatee's counsel on 06/15/17.
2. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period of 06/15/17 to current.
3. Petitioner requests fees of \$1,789.88 for a total of 6.90 hours of attorney and paralegal time. Billed at \$350/hour for 4.30 hours of attorney time and \$105/hour for 2.60 hours paralegal time. Itemized [LF pgs. 7-12].
  - a. Petitioner is requesting \$11.88 in mileage on 10/26/17. [LF pg. 8] **JTD**
  - b. Petitioner anticipates an additional time of 1.5 hours of attorney work and 1.5 hours of paralegal work in relation to this petition and requests an additional amount of \$682.50 for a **total amount of \$2,472.38**. [LF pg. 3] **JTD**
4. Petitioner requests an order directing and ordering Conservator to pay requested sum.
5. Notice of Hearing and Proof of Service filed 03/12/18; however, **need** notice to Director of Department of Developmental Services and Director of the Department of State Hospitals.
6. ~Proposed Order: 03/08/18

RECOMMENDATION:

Court's discretion.

(cs/ww)

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

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

CASE#: CON PS1700166

CASE NAME: SAL JOE ROMERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SABINA SOLIS

COUNSEL:

SABINA SOLIS (PET)...JEREMIAH RAXTER  
SAL JOE ROMERO (CEE)...WALTER T. MOORE

THIS CASE SET FOR HEARING ON Compliance Review.

**Continued from 04/16/18.**

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

1. Sabrina Solis, non-relative/common law spouse, appointed conservator of the person only on 09/11/17, no bond.
2. Notification of Conservatee's rights per Pr.C. §1830(c), Determination of Conservatee's Appropriate Level of Care form GC-355, and Care Plan in accord with Pr.C. §2352.5 filed 06/07/18.

RECOMMENDATION

None.

(ww)

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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700185

CASE NAME: MTR OF KYLAND DEON MARTINEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of TERESA MARIE MARTINEZ

COUNSEL:

TERESA MARIE MARTINEZ (CP)...PRO/PER  
KYLAND DEON MARTINEZ (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Teresa Martinez, mother, appointed conservator of the person only on 11/13/17, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 06/12/18; however, notice to Alex Martinez and Maureen Lynwood, paternal grandparents was not provided. **Need** corrected notice.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 06/12/18.

RECOMMENDATION

Need to clear note 2.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 06/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700296

CASE NAME: MTR OF JUDITH ANN JARAMILLO

HEARING:

Conservatorship Compliance Review Hearing on SUPPLEMENTAL  
PETITION FOR CONSERVATORSHIP of RICHARD ARVIZU

COUNSEL:

RICHARD ARVIZU (CPE)...DAVID P COLELLA  
JUDITH ANN JARAMILLO (CEP)...JENNIFER M DANIEL

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Richard Arvizu, son, appointed conservator of the person and estate on 11/13/17, \$20,000.00 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/06/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 01/23/18.
4. **Need** Final Inventory & Appraisal per Pr.C.§2610.
5. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. If the conservatorship estate holds interest in real property, **need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

#### RECOMMENDATION

Need to clear notes 4-6.

(ww)

Future Hearing: 1/28/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

**SEE ALSO 2, 3**

HEARING:

Hearing Re: Amended first account & status report

COUNSEL:

ALEX HUANG (PET)...LAW OFFICES OF YVONNE HS U  
CHIA HSIN HUANG (DEC)...  
J DAVID HORSPOOL (PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

**Continued from 03/27/18 at request of counsel to clear probate notes.**

THIS CASE IS SET FOR HEARING ON **AMENDED [12/26/17]** First Account Current and Status Report by Administrator, Alex Huang ["Petitioner"].

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

1. Amended Final Inventory and Appraisal affixed to supplement filed on 03/03/17 [LF, pgs. 12-15] is not filed. **Need** conformed copy of corrected Final Inventory and Appraisal.
2. Order Approving First Account entered on 04/13/17. **Need** Amended First Account Order.
3. Accounting period 06/04/13 to 05/06/15.
4. Assets on Hand \$985,387.67 consisting of real property and interests in several partnerships that own real property.
5. No compensation or fees are requested.
6. Petitioner requests reimbursements of costs totaling \$38,629.67. Itemized [LF, pgs. 7-8]. However, costs include postage fees that normally considered overhead. Does Court wish to reduce costs by \$116.74? **JTD**.
7. Other Liabilities – Schedule B [LF, p. 8] reflects "Estate Tax Returns" totaling \$20,000. Does Court wish to require invoices? **JTD**.
8. Petition indicates a creditor's claim in the amount of \$345,000 was allowed by Petitioner and approved by the court on 02/26/15. However, review of the register of actions and laser fiche do not reflect an allowance of same. **Need** conformed copy of Allowance of Creditor's Claim..
9. **Need** Assets on Hand at End of Account Schedule.

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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.

10. **Need** Notice of Hearing with proof of service.
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1-2, 8-10. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review on first check calendar no sooner than **07/30/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 2

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

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

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

**SEE ALSO 1, 3**

HEARING:

Hearing Re: Amended Second account & status report

COUNSEL:

ALEX HUANG	(PET)...LAW OFFICES OF YVONNE HS U
CHIA HSIN HUANG	(DEC)...
J DAVID HORSPOOL	(PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

Continued from **01/10/17** at request of counsel. Notice to be given by Ms. Park.  
Continued from **03/14/17** at request of Court for recently filed supplement to be reviewed.  
Notice waived.

Continued from **05/16/17** at request of counsel. Notice to be given by Mr. Park  
Continued from **07/18/17** at request of counsel. Notice to be given by Chun Kyong Park.  
Continued from **09/05/17**. Court orders each accounting to be separate and distinct with  
orders requesting each accounting period. Petitioner's request for costs advanced is not  
allowed at this time. Court needs a corrected order for first Accounting.

Continued from **11/13/17** at request of counsel. The Court notes that until the Court is  
provided with an order on the 1st accounting the Court will not proceed on the 2nd  
accounting. Notice to be given by Ms. Park. Notice by Judicial Assistant.

Continued from **01/09/18**. The Court needs the corrected Inventory and Order for the  
FIRST Accounting.

**Continued from 03/27/18 at request of counsel to clear probate notes. Court needs  
corrected Inventory and Order for the First accounting.**

**\*\*\* Court to rule on matter #1 prior to addressing this matter.\*\*\***

THIS CASE IS SET FOR HEARING ON **AMENDED (12/26/17)** Second Account and  
Petition for Fees by Administrator, Alex Huang ["Petitioner"].

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

1. First accounting approved on 10/15/15. Proposed Order Approving First Account  
affixed to supp. filed 07/12/17 [LF, p5] is not complete in and of itself. Local Rule



- 20-614. **Need** proper order to include accounting period; balance; and description of the assets on hand. LR 20-614c.
2. Accounting period **05/07/15** to 05/31/16.
  3. Assets on Hand \$985,387.67 (carry value) consisting of real property and interests in several partnerships that own real property. However, beginning assets on hand do not match ending assets on hand of prior, first accounting period of \$1,522,462.36. **Supp. (07/12/17, LF, pgs. 6-11]** includes amended schedules for first accounting period (*that has previously been approved*) to reflect Assets on Hand at Beginning and End of Account period of \$985,387.67. **JTD.**
  4. Amended Final Inventory and Appraisal affixed to supplement filed 03/03/17 [LF, p. 12]. **Need** conformed copy of same.
  5. Statutory compensation will be requested at close of probate.
  6. Petitioner requests costs advanced of **\$12,374.00 for the second account** period when funds become available. Itemized [LF, pgs. 10-11]. However, costs include postage fees that normally considered overhead. Does Court wish to reduce costs by \$20.29? **JTD.**
  7. **Need** Summary of Account.
  8. Expenses Incurred [LF, p. 9] reflects outstanding balance for estate tax returns in the amount of \$3,187.50. Does Court wish to require invoices? **JTD.**
  9. **Need** Assets on Hand at End of Account period schedule.
  10. Petitioner requests full authority under IAEA in order to facilitate the sale of the partnership asset, Mission Bell Ranch Development, A California Limited Partnership which is partially owned by the Estate and is in the process of negotiating the sale of a real estate owned by the partnership. If approved, need Notice of Proposed Action with proof of service. **JTD.**
  11. **Need** Notice of Hearing with proof of service.
  12. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 1, 4, 7, & 11. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review on first check calendar no sooner than **07/30/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

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

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

**SEE ALSO 1, 2**

HEARING:

SECOND Account and Report of ALEX HUANG and Petition for allowance of fees filed.

COUNSEL:

ALEX HUANG	(PET)...LAW OFFICES OF YVONNE HS U
CHIA HSIN HUANG	(DEC)...
J DAVID HORSPOOL	(PET)...J. DAVID HORSPOOL

See notes on matter 2.  
(nb/cs)

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400897

CASE NAME: Faye Quesada Carrera

HEARING:

FIRST AND FINAL Account and Report of CORRINE C GARCIA and  
Petition for allowance of fees filed.

COUNSEL:

CORRINE C GARCIA	(PET)...JACK B OSBORN
FAYE QUESADA CARRERA	(DEC)...
CORINNE C. GARCIA	(PET)...MARK J. ANDREW FLORY
JANET VASQUEZ	(TP )...ELISABETH KEMPE-OLINGER
BRYAN C. HARTNELL Esq	(HARTNELL LAW GROUP)

**X-REF CONPS0900146 (Conservatorship of Faye Q. Carrera)**

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for allowance of fees by daughter, Corinne Garcia [Administrator/Petitioner]

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

1. Assets on Hand \$226,260.27 cash.
2. Bond of \$20,000.
3. Petitioner requests to pay prior to distribution attorney fees of \$31,788.41 to Brown White & Osborn LLP, for services rendered in related conservatorship of Faye Q. Carrera matter which have been previously court approved as follows:
  - a. \$8,580.00 plus 10% per annum, total of \$12,393.39 per order dated 05/10/11
  - b. \$5,347.50 plus 10% per annum, total of \$7,565.66 per order dated 02/25/14
  - c. \$9,674.50 plus 10% per annum, total of \$11,829.36 per order dated 01/27/16
4. Statutory fees requested \$8,638.74. Calculated.
5. Attorney requests extraordinary fees of \$4,189.50 for services rendered in connection with the obtaining independent powers to expedite the pending sale of the real property and reviewing documents from the realtor on behalf of the estate.. Billed at varying amount of \$105-\$350/hour for a total of 14.70 hours' attorney time and paralegal time. Itemized [LF, p. 23-26].
  - a. **Need** paralegal qualification per CRC 7.703.

- b. Prayer indicates extraordinary fees of \$4,150.50. **Need** correct amount of extraordinary fees requested.
6. Attorney requests reimbursement for costs advanced of \$3,638.68. Itemized [LFp7].
  7. Petitioner requests reimbursement of \$2,000 advanced to estate for retainer/cost payments made to Brown White & Osborne LLP on behalf of the estate.
  8. Notice of hearing to Janet Vasquez lists a different address from that listed on Petition and Request for Special Notice. Court to inquire.
  9. **Need** Notice of hearing to Bryan C. Hartnell, Esq. who requested special notice.
  10. **Need** copies of bank statements verifying balances of property on hand per Local Rule 20-908 for Community Bank and Pacific Premier.
  11. **Need** Copy of Escrow statement per Local Rule 20-910.
  12. **Need** statement of compliance with Pr.C. § 9202(b) re notice to the California Victim's Compensation Board.
  13. ~Proposed Order submitted: 05/17/18 Need to include findings re sole and separate property and statement of compliance with Pr.C. § 9202(b) re notice to CA Victim's Compensation Board.

RECOMMENDATION:

Need to clear notes 5, 9-12, then Court's discretion. If approved, set next hearing for receipt and final discharge for **06/24/19**.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 5

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

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

CASE#: PRO PS1600057

CASE NAME: CASSIE C SHARP TRUST

**SEE ALSO 6, 7**

HEARING:

Hearing Re: Setting Mediation Date

COUNSEL:

DARCY CLOUTIER-FERNALD	(PET)...ALBERTSON & DAVIDSON LLP
THE CASSIE C SHARP TRUST	(TRU)...PRO/PER
IRIS ROBERTSON	(OBJ)...JACK B. OSBORN
GARY N ROBERTSON	(BROWN WHITE & OSBORN)

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Setting Mediation Date

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

1. Matter set on 03/26/18, during status of mediation hearing, wherein, Counsel reported mediation has not yet occurred.

RECOMMENDATION:

None

(cs)

Superior Court of Calif, County of San Bernardino

Page: 6

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

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

CASE#: PRO PS1600057

CASE NAME: CASSIE C SHARP TRUST

**SEE ALSO 5, 7**

HEARING:

Petition for TO DETERMINE INVALIDITY OF TRUST

COUNSEL:

DARCY CLOUTIER-FERNALD	(PET)...ALBERTSON & DAVIDSON LLP
THE CASSIE C SHARP TRUST	(TRU)...PRO/PER
IRIS ROBERTSON	(OBJ)...JACK B. OSBORN
GARY N ROBERTSON	(BROWN WHITE & OSBORN)

Currently under review by Legal Research.  
(LR)

Continued matter. Notice not re-reviewed.  
(ww/cs)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1600057

CASE NAME: CASSIE C SHARP TRUST

**SEE ALSO 5, 6**

HEARING:

Trial Setting Conference

COUNSEL:

DARCY CLOUTIER-FERNALD	(PET)...ALBERTSON & DAVIDSON LLP
THE CASSIE C SHARP TRUST	(TRU)...PRO/PER
IRIS ROBERTSON	(OBJ)...JACK B. OSBORN
GARY N ROBERTSON	(BROWN WHITE & OSBORN)

No notes – TSC. JTD

HONORABLE: TARA REILLY

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

CASE#: PRO PS1600298

CASE NAME: MTR OF MIATTA NATALIE O MASSAQUOI

**SEE ALSO 9**

HEARING:

Petition for REMOVAL OF COURTNEY VIVIAN ROGERS-WRIGHT AS  
ADMINISTRATOR, AND APPOINT CO-ADMINISTRATORS

COUNSEL:

GIFTY FOWLER	(PET)...HOWARD R HAWKINS
MIATTA NATALIE O MASSAQUOI	(DEC)...
COURTENAY VIVIAN ROGERS-WRIGHT	(PET)...HOWARD R HAWKINS
ALBERT S MASSAQUOI	(PET/TP)...PRO/PER

GENERAL INFORMATION:

**Continued from 03/13/18 Mr. Rodgers Wright reports his counsel is unable to be present today. Continued for counsel to be present. Mr. Massaquoi reports his wishes to withdraw his petition. Mr. Massaquoi to give notice.**

THIS CASE IS SET FOR HEARING ON Request for Removal of Courtney Vivian Rogers-Wright as Administrator and for Appointment of Albert Massaquoi and Gifty Fowler as Co-Administrator's ["Petitioner"].

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

1. Petitioner, Albert Massaquoi, is an heir of Decedent. Gifty Fowler and Albert Massaquoi are the parents of the Decedent.
2. **Request for withdrawal of Motion to Remove Courtney Rogers-Wright as Administrator and order thereon filed 06/12/18.**
3. Petitioner alleges Administrator, Courtney Vivian Rogers-Wright, has neglected to locate the assets of the estate; not contacted the Federal Reserve about Decedent's pension or 401K; or addressed funeral expenses paid by petitioner.
4. Petitioner states that Courtenay has breached his fiduciary duties to both the estate and beneficiary by refusing to communicate with him; neglected to act in good faith; has demonstrated and acknowledged to petitioner that he is incapable of properly executing the duties of the office or otherwise not qualified to do so.
5. Petitioner requests the Court remove Courtney Vivian Rogers-Wright as Administrator and Letters of Administration issued to him be revoked.



6. Petitioner requests to be appointed Administrator and that letters of administration be issued, accordingly.
7. Need Notice of Hearing with proof of service to include brother, Albert N. Massaquoi and bonding company, Suretec Insurance Company.
8. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Require notice then Court's discretion. If approved, require proper petition for appointment to be filed.

(nb/cs)

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

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

CASE#: PRO PS1600298

CASE NAME: MTR OF MIATTA NATALIE O MASSAQUOI

**SEE ALSO 8**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GIFTY FOWLER	(PET)...HOWARD R HAWKINS
MIATTA NATALIE O MASSAQUOI	(DEC)...
COURTENAY VIVIAN ROGERS-WRIGHT	(PET)...HOWARD R HAWKINS
ALBERT S MASSAQUOI	(PET/TP)...PRO/PER

GENERAL INFORMATION

Continued from **11/27/17**. Petition for successor/removal of administrator may be filed.

**Continued from 02/13/18 at request of counsel. Counsel reports beneficiaries have not been cooperative. The court orders beneficiaries to cooperate with Administrator.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Courtney Rogers-Wright, friend, on 11/22/16, full authority, \$75,000 bond.
2. **Need** Final Inventory and Appraisal.
3. **Need** accounting or status report.
4. **Notice of Non-payment of Bond Premium filed.**

RECOMMENDATION

Inquire status

(cs/nb/cs)

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600319

CASE NAME: ESATE OF GILDA JOAN DONCHE

HEARING: Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

BRUCE BRAZEAU

(PET)...ROBERT G PETROVICH

GILDA JOAN DONCHE

(DEC)...

Address: 61843 Valley View Circle, Joshua Tree, CA 92252

Appraised Value: \$105,000

Sale price: \$115,000

First overbid: \$121,250

Deposit: \$15,000

Commission: 5% - \$5,750

Additional bond: Current bond set at \$623,000.

Reason for Sale: The sale is necessary to pay debts, expenses of administration, and taxes.

Exposure to Market: Entered into exclusive listing with licensed broker. Property placed on multiple listings, online advertising.

Notice: Notice given.  
Positing completed 14 days after sale date of 05/08/18  
1sts day of Proof of publication completed 04/05/18

Future Hearing Dates: 07/23/18 Probate Status Report

~Proposed Form Order: 05/21/18

(CS)

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

-----  
DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600417

CASE NAME: DACIA ANTHIA LUCIDI

## **VACATED**

HEARING:

Hearing re Final Discharge

COUNSEL:

TIA MARIE GARNDER  
DACIA ANTHIA LICIDI

(PET)...E. MARIE HENNING  
(DEC)...

### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Order for Final account/distribution on Waiver of accounting of Tia Marie Gardner, approved on 06/12/18.
2. Need receipts for Robin Lucidi, David Lucidi, Jr., Robert McNease, Mark D. Lucidi, and Tia Marie Gardner..
3. Local Rule 20-911 requires informal accounting on reserves of \$1,500 or greater requested. Petitioner requested reserves of \$2,000 per order filed 06/12/18.
  - a. Receipt for payment to County Tax Collector provided for a total of \$1,356.44 and distribution of \$583.79 filed to heirs provided. Need verified supplement.
4. **Signed Ex Parte Petition for Final Discharge and Order forwarded to probate Clerk's Office for processing on 06/01/18.**

### RECOMMENDATION

Need to clear note 3, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700090

CASE NAME: PHYLLIS ALICE LAUGHTON

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PHILLIP RAYMOND LAUGHTON

(PET)...PRO/PER

PHYLLIS ALICE LAUGHTON

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting review by Phillip Laughton,  
[Son/Petitioner]

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

1. Phillip Laughton, son, was appointed administrator with full authority on 04/10/17.  
\$15,000 bond. Letters issued 04/12/17.
2. Final Inventory and Appraisal filed 08/17/17.
3. **Need** accounting or status report.

RECOMMENDATION:

Inquire status.

(cs)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700397

CASE NAME: RICHARD MELVIN STEVENSON

HEARING:

Settlement of Waiver of First and Final Account and Report of  
CHRISTOPHER P WENZEL and Petition for allowance of fees filed.

COUNSEL:

CHRISTOPHER P WENZEL (PET)...JIM L. DAVIS  
RICHARD MELVIN STEVENSON (DEC)...

GENERAL INFORMATION:

**Continued from 03/26/18 at request of counsel to file bank statements to support end date of accounting.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by friend, Christopher Wenzel, [Executor/Petitioner]

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

1. Petitioner is trustee and sole beneficiary and waives accounting.
2. Assets on Hand \$239,727.37 in cash
3. Statutory fee of \$8,360.00 requested. Calculated.
4. Attorney and petitioner waive any extraordinary fees that would be due.
5. Notice given.
6. ~Proposed order. 04/19/18.

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **06/24/19**.  
(ww/cs)

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701098

CASE NAME: MTR OF PRISCILLA ANN VASQUEZ

HEARING: INITIAL Account and Report of SALLY VANGORKUM and Petition for allowance of fees filed.

COUNSEL:

SALLY VANGORKUM (PET)...EDWARD W O'CONNELL JR  
PRISCILLA ANN VASQUEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by sister, **Sally Vangorkum** [Administrator/Petitioner]

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

1. **Need** a proper summary of account, report and accounting schedules as provided in Pr.C. §1060 et seq. and Pr.C. §10900.
2. Partial Inventory and Appraisal filed 04/30/18; however, need the following:
  - a. **Need** to indicate whether property listed in attachment 1 is separate or community property.
  - b. **Need** account statements confirming date of death balance per Local Rule 20-908 for Chase bank account.
  - c. **Need** Final Inventory and Appraisal.
3. Assets on Hand \$45,875.96 cash
4. **Need** bank statement to support ending balance per Local Rule 20-908.
5. **Need** bond information.
6. No statutory fees are being requested.
7. **Need** findings re character of property per Local Rule 20-906.
8. **Need** Notice of Hearing with proof of service to include notice per Pr.C. §§9201-9202.
9. **Need** details of proposed distribution per Local Rule 20-907(c).
10. **Need** petition to be verified per Pr.C. § 1021.
11. No Proposed Order

## RECOMMENDATION

Need to clear notes. This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. . If approved, set next Accounting Review on first check calendar no sooner than **08/27/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(cs)



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

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DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800427

CASE NAME: MTR OF STEVEN CUESTAS SANCHEZ

HEARING:

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

COUNSEL:

TINA MONIQUE ASENCIO (PET)...PRO/PER  
STEVEN CUESTAS SANCHEZ (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by granddaughter/nominee, Tina Asencio [Administrator/Petitioner]

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

1. All heirs waive bond. Net estate value is \$296,500. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. Petitioner, Tina Asencio, is not listed in section 8 of petition.
3. Declination and Nomination signed by children of decedent.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication.
6. ~Proposed Form Order: 05/02/18

#### RECOMMENDATION

Need to clear notes 4-5. Court's discretion re bond. . If approved, set Accounting/Status Review for 08/26/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 06/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800467

CASE NAME: Mtr of Johnny Angel Sanchez

HEARING:  
Spousal Property Petition hearing.

COUNSEL:  
BROOKE A SANCHEZ (PET)...PRICE LAW FIRM APC  
JOHNNY ANGEL SANCHEZ (DEC)...

Currently under review by Legal Research.  
(LR)

**Notice:**  
Notice given.  
(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 06/18/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700949

CASE NAME: MTR OF RONALD J ZWOLINSKI

HEARING:

Spousal Property Petition hearing.

COUNSEL:

GINA ZWOLINSKI

(PET)...DENNIS M SANDOVAL

RONALD ZWOLINSKI

(DEC)...

Currently under review by Legal Research.

(LR)

**Notice:**

Notice given.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUST

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DATE: 06/18/18      TIME: 8:35      DEPT: S37P  
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CASE#: TRU PS1800099

CASE NAME: MEAL FAMILY TRUST CREATED JULY 19 2001

HEARING:

Petition for Order Confirming Trust Assets

COUNSEL:

ROBERT W MEALS III  
MEALS FAMILY TRUST

(PET)...PHILIP M SAVAGE  
(TRU)...PRO/PER

Currently under review by Legal Research.  
(LR)

**Notice:**

1. Timely Notice of Hearing and proof of service filed 05/08/18; however, notice did not comply with requirements of amended Pr.C. § 851.
2. **Notice of hearing and proof of service filed 06/08/18; however, only 10 days' notice given. JTD**

(CS)

Superior Court of Calif, County of San Bernardino  
Page: 18A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 06/18/18 TIME: 8:35 DEPT: S37P  
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CASE#: CON PS1500195

CASE NAME: RUTH PISCIONERI

**SEE ALSO 19**

HEARING:

Petition for PAYMENT OF DEBTS INCURRED FOR NECESSARIES OF LIFE AND LIVING EXPENSES OF CONSERVATEE

COUNSEL:

JOANNA AVERETT	(CPE)...MAUREEN MURATORE
COLLEEN J STEPHEN	(PCR)...KRISTINE BORGIA
RUTH E PISCIONERI	(PCE/CEP/CEE)...WALTER T. MOORE
WALTER T MOORE	(PET)...WALTER T. MOORE
COLLEEN STEPHEN	(PET)...FULLERTON LEMANN SCHAEFER & DO
RUTH PISCIONERI	(PET)...WALTER T. MOORE
SEAN PISCIONERI	(CPE)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH

GENERAL INFORMATION

**Continued from 11/29/17** at request of Keith Walker. Notice to be given either by Keith Walker or the attorney representing Sean Piscioneri.

**Continued from 02/14/18.** Pro Tem Judge, Mitchell I. Roth, recuses himself from this matter. Notice to be given by Attorney Thomas Dominick.

**Continued from 03/18/18.** No stipulation signed. Judge Pro Tem recuses herself and matter is continued.

**Continued from 05/23/18 Mr. Dominick makes oral motion to dismiss petition. Matter continued for written response to counsel's oral motion to be filed by 06/08/18.**

**Verified supplement need not be filed by next hearing. Motion to disqualify counsel may be filed. Notice to be given by Mr. Walker.**

THIS CASE IS SET FOR HEARING ON Petition for Payment of Debts Incurred for Necessaries of Life and Living Expenses by Sean Piscioneri (son/prior temporary conservator)

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

1. Petitioner, Sean Piscioneri, was appointed temporary conservator of the person on 09/16/15 thru 04/29/16.

2. Petitioner alleges he was the primary caregiver of conservatee from 08/01/15 through 05/20/16 and spent a minimum of 40 hours per week taking care of conservatee during this period.
3. Petitioner alleges on 08/01/15, conservatee fell at her home resulting in a broken hip. For a period of two weeks, petitioner solely provided 24-hour care to conservatee.
4. Petitioner seeks compensation of **\$58,080** for 1,936 hours at \$30/hour. **Need itemization of services via verified supplement.**
5. Petitioner seeks reimbursement of **\$1,800** of rent at \$600/month paid to trustee Collen Stephen. Petitioner contends he purchased a nearby home, but remained in conservatee's home as a live-in caregiver. **Need itemization of rent via verified supplement.**
6. Petitioner seeks reimbursement of groceries, sundries, and meals provided to conservatee at **\$2,200**, and for funeral expenses at **\$1,000**. **Need itemization of reimbursements via verified supplement.**
7. **Need** Notice of Hearing and Proof of Service to include Walter Moore.
8. **Petitioner's Response to Objector's Oral Motion to Dismiss Petition filed 06/08/18.**
9. No proposed order submitted.

#### RECOMMENDATION

Need to clear notes 4-7, then Court's discretion.

(lh)

Future Hearing: 6/18/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 06/18/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1500195

CASE NAME: RUTH PISCIONERI

**SEE ALSO 18A**

HEARING:

Hearing re Final Discharge

COUNSEL:

JOANNA AVERETT	(CPE)...MAUREEN MURATORE
COLLEEN J STEPHEN	(PCR)...KRISTINE BORGIA
RUTH E PISCIONERI	(PCE/CEP/CEE)...WALTER T. MOORE
WALTER T MOORE	(PET)...WALTER T. MOORE
COLLEEN STEPHEN	(PET)...FULLERTON LEMANN SCHAEFER & DO
RUTH PISCIONERI	(PET)...WALTER T. MOORE
SEAN PISCIONERI	(CPE)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
DEPT. OF CONSUMER AFFAIRS	

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge

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

1. First and Final account of Joanna Averett, PPF, approved on 06/19/17.
2. **Need** receipts for Parent Care Management Services.
3. **Need** Ex Parte Petition for Final Discharge and Order. Ex Parte Petition for Final Discharge was return by Court on 04/02/18 due to need receipt from Parent Care Management Services, Inc.

RECOMMENDATION

Inquire status.

(cs)

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

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700259

CASE NAME: CARMEN DACANAY

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DONNA AARFLOT

COUNSEL:

DONNA AARFLOT (PET)...LAW OFFICE OF MATTHEW SHEASBY  
CARMEN DACANAY (CTE)...DONNASUE ORTIZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Conservatorship Compliance Review Hearing

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

1. Donna Aarflot, daughter, appointed conservator of the person and estate on 11/13/17, \$38,280 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 04/10/18.
3. Care Plan filed 04/27/18.
4. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5.
5. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. 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.

RECOMMENDATION

Need to clear notes 4-7. Inquire Status

(cs)

Future Hearing: 1/28/19 Accounting Review



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

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700368

CASE NAME: NATALIE RINGLUND

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of GLENDA M BAYLESS

COUNSEL:

GLENDA M BAYLESS	(CPE)...WILLIAM J BRUNICK
GERRY D BAYLESS	(CPE)...WILLIAM J BRUNICK
BRETT M BAYLESS	(CPE)...WILLIAM J BRUNICK
NATALIE RINGLUND	(CEP)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Glenda M. Bayless, Gerry D. Bayless and Brett M. Bayless, appointed co-conservators of the person and estate on 01/10/18, \$200,000 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 05/10/18.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.
5. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. Proof of recordation of letters filed 05/10/18.

RECOMMENDATION

Need to clear notes 3-6. Inquire Status  
(cs)

Future Hearing: 1/28/19 Accounting Review

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

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700427

CASE NAME: GHADEER MOHAMMED MOHSIN

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
LATEEFAH MUSLIM ALI SAXON (CP)...PRO/PER  
GHADEER MOHAMMED MOHSIN (CTP)...SANDY L. TURNER

GENERAL INFORMATION

Continued from **12/27/17** to clear notes and IRC Report. Due to time constraints in filing for a passport for proposed conservatee an ex parte requesting temporary conservatorship may be filed.

**Continued from 03/19/18 at request of counsel to clear probate notes/counsel will contact petitioner.**

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

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

1. Letter from IRC filed 12/14/17 requests an additional 30 days to file report due to improper notice received.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract.
3. Petitioner seeks additional orders to obtain a passport for proposed conservatee to travel to foreign countries for legal necessities and vacation not to exceed 30 days. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 05/21/18; however, doctor indicates proposed conservatee is not a patient under continuing treatment, section 4b. [LFp.2] and form is not dated at signature line. Section 7B appears to be completed by a different doctor who provides signature and initials but did not signed form under penalty of perjury. JTD
5. Proposed conservatee is developmentally disabled. Report of Counsel Sandy Turner filed 01/08/18.
6. Proposed conservatee is developmentally disabled. IRC report filed 03/16/18.

7. List of Required Contact Information filed 11/20/17 is missing Mohammed Mohsin, father. **Need** completed form.
8. Certificate of Completion of the Conservatorship Training Class filed.
9. CI report filed 12/12/17.
10. Return of Citation filed 12/07/17.
11. ~Proposed Form Order: 11/20/17

#### RECOMMENDATION

Need to clear notes 7, Courts discretion re note 4. If approved, set hearing for Compliance Review for **01/28/19** 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/cs)

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

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800139

CASE NAME: EDWARD CAMARENA

HEARING: Petition for Appointment of Conservator

COUNSEL:

MICHELLE S MUNOZ (PET)...PRO/PER  
EDWARD CAMARENA (CEE)...SANDY L. TURNER

GENERAL INFORMATION

Temporary orders denied on 05/14/18. Attorney Sandy Turner is appointed for Edward Camarena.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by Michelle Munoz, Girlfriend/Petitioner.

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

1. No Bond- Person only.
2. Petitioner seeks dementia powers. **Need** report of court appointment counsel, Sandy Turner.
3. Section 11 of Petition does not include all relatives to the second degree. **Need** verified supplement clarifying the status of the relatives
4. List of Required Contacts filed 05/07/18 does not include second degree. **Need** verified supplement clarifying the status of the relatives.
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. **Court Investigator reports filed 06/06/18.**
10. ~Proposed Form Order: 05/07/18.

RECOMMENDATION:

Need to clear notes 3-8.. If approved, set hearing for Compliance Review for 01/28/19 for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

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

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800149

CASE NAME: MTR OF EVELYN HERNANDEZ GUZMAN

HEARING: Petition for Appointment of Conservator  
COUNSEL:

ELVA ARACELI GUZMAN (CP)...PRO/PER  
EVELYN HERNANDEZ GUZMAN (CTP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, of the person only, by mother, Elva Guzman, [Petitioner]

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

1. Person only- no bond.
2. Proposed conservatee will be age 18 on 06/30/18. **JTD**
3. Petitioner seeks powers re habilitation, treatment, training, medical etc. **JTD**
4. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re education. **JTD**
5. Petitioner seeks civil rights not be limited without court order.
6. Request to Excuse Notice with Due Diligence Declaration filed 06/06/18 as to Jose Hernandez (father) and unknown (paternal grandfather). **JTD**
7. Proposed conservatee is developmentally disabled. **Report of Sandy Turner, court appointed counsel filed 06/06/18.**
8. Petitioner seeks medical powers. Capacity Declaration filed 06/08/18 is incomplete at item #1 and 2 as to general information of doctor and item 7b is missing doctor's initials. **Need** complete form.
9. **Citation filed 06/06/18; however, section 3a of proof of service re date and time served is incomplete and proof is not dated by server at signature line. Need** proof of service of citation.
10. **Need** Certificate of Completion of the Conservatorship Training Class.
11. Proposed conservatee is developmentally disabled. **IRC letter filed 06/05/18. Need** IRC report. **JTD**
12. **Need** Court Investigator report.
13. ~Proposed Form Order: 05/16/18.

## RECOMMENDATION

Need report from IRC, & CI. Court's discretion re note 9. Need to clear notes 8-10 . If approved, set hearing for Compliance Review for 01/28/19 for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 06/18/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS03138

CASE NAME: MTR OF MARCEL BROWN

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

PAMELA BROWN	(CPE)...VICTORIA VELARDE
MARCEL BROWN	(CEP)...MARK J. FLORY
VICTORIA VELARDE	(PET)...VICTORIA VELARDE
MARCEL BROWN	(CEP)...JAMES B CHURCH

GENERAL INFORMATION:

T

HIS CASE SET FOR HEARING ON Court Investigator Report

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

1. Matter set on 03/23/18, after review of Court Investigator report filed 02/28/18 and orders matter set on to discuss possible transfer to Los Angeles County.

RECOMMENDATION:

Court's discretion.

(cs)