



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/20/18

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.

06/04/18; 06/15/18lh

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000071

CASE NAME: LASONDRA HOWARD

HEARING:

EIGHTH Account and Report of INLAND COUNTIES REGIONAL CENTER,
INC. and Petition for allowance of fees

COUNSEL:

INLAND COUNTIES REG CNTR	(PET)...	STEVEN K BECKETT
LASONDRA HOWARD		(BEN)...
SPECIAL NEEDS TRUST OF LASONDRA HOWARD		(TRU)...
SURETEC INSURANCE COMPANY		(TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Eighth Account Current and Petition for Fees by IRC, Trustee of the Special Needs Trust ["Petitioner"].

THE FOLLOWING ISSUES/DEFICIENCIES IN THE PAPERS ARE NOTED.

1. Accounting covers: 02/01/17 to 03/31/18
2. Assets on hand: \$84,230.46 consisting of cash in a pooled investment fund held in Master Trust.
3. Current bond of \$95,000. Appears sufficient. JTD.
4. Petitioner requests approval of fees already taken in the amount of **\$1,894.13** Billed at \$1,000 for first \$50,000, 2% of next \$250,000. Generally itemized. [Acct, 5/1/18, LFpg25]. JTD.
5. Petitioner requests authority to continue taking future annual fees of **\$1,250/year** for the first \$50,000 and 2% of the next \$250,000 held in trust, plus 1.65% of the next \$450,000 held in trust and to take the annual trustee fees in quarterly payments. JTD.
6. Attorney requests fees of **\$1,465** for 11.80 hours billed at \$250/hour for 9.90 hours' attorney time and \$100/hour for 1.90 hours' paralegal time. Itemized [Supp. filed 5/1/18]. JTD.
7. Notice was given.
8. ~Proposed Form Order: 05/01/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing re Accounting Review for **05/29/19**.
Account to be filed 30 days' in advance of hearing.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1401023

CASE NAME: Dominic Juarez Special Needs Trust

HEARING:

Hearing Re: RECEIPTS/FINAL DISCHARGE AS TO PREVIOUS TRUSTEE

COUNSEL:

MASS MUTUAL TRUST CO (PET)...PATRICK MCNALLY
SALVADOR JUAREZ (PET)...FULLERTON LEMANN SCHAEFER & DO
JAMIE JUAREZ (PET/CT)...PRO/PER
CRAIG E WILSON (PET)...CRAIG E WILSON
DOMINICK JUAREZ (REBECCA J THYNE)
NATALIE BLICKENSTAFF (JENNIFER M DANIEL)

GENERAL INFORMATION

Continued from 03/28/18 at request of Counsel. Notice to be given by Craig Wilson.

THIS CASE IS SET FOR HEARING ON Receipts/Final Discharge Re Jamie Juarez (previous trustee)

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

1. Court approved Second and Final Account and Report of Co-Trustees, Jamie Juarez and Salvador Juarez on 03/22/17.
2. **Need** Ex Parte Petition for Final Discharge.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 1/07/19: Accounting Review re 2nd Acct of Natalie Blickenstaff, successor trustee

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 4, 5, 6

HEARING:

Hearing Re: OSC Re: Settlement

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...VOORHEES & RATZLAFF
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 TANNER WAYNE FLECKENSTEIN

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION

Continued from **11/08/17**. Counsel requested to vacate trial date and reset motion re summary judgment. Notice to be given by David Livingstone Taub.

Continued from 01/10/18 at request of Counsel.

Continued from 02/28/18. Prior to hearing, Judicial Assistant received telephonic request for continuance to 03/28/18.

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

THIS CASE IS SET FOR HEARING ON OSC Re: Settlement/Petition for Determination that Personal Property and Real Property be Found Belong to Estate

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

1. Matter set on 09/27/17, wherein, Counsel informed Court that all parties have come to a settlement. Attorney Voorhees informed Court that she will be filing a formal notice of settlement.
2. On 6/11/18, Settlement Agreement on all issues was returned by Court for \$20.00 filing fee.

RECOMMENDATION

Inquire status of settlement.

(lh)

Future Hearings: 3/19/18-3/23/18: Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 3, 5, 6

HEARING:

Hearing Re: Motion Re: Summary Judgment/Adjudication

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...VOORHEES & RATZLAFF
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 *TANNER WAYNE FLECKENSTEIN*

FAMRS1301184 *KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN*

Currently under review by legal research.

(LR)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 3, 4, 6

HEARING:

Petition for DETERMINATION THAT PERSONAL PROPERTY AND REAL
PROPERTY BE FOUND BELONG TO THE ESTATE ETC

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...VOORHEES & RATZLAFF
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 *TANNER WAYNE FLECKENSTEIN*

FAMRS1301184 *KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN*

See notes on prior matter #3.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500082

CASE NAME: MTR OF TERESA L FLECKENSTEIN

SEE ALSO 3, 4, 5

HEARING:

Accounting Review

COUNSEL:

TIMOTHY WAYNE FLECKENSTEIN	(PET)...VOORHEES & RATZLAFF
TERESA L FLECKENSTEIN	(DEC)...
KATHLEEN HEAD	(DEF)...DAVID LIVINGSTONE TAUB
BRYAN M TURNER	(DAVID LIVINGSTONE TAUB)

XREF: GARRS1300022 TANNER WAYNE FLECKENSTEIN

FAMRS1301184 KATHLEEN M HEAD -N- TIMOTHY W FLECKENSTEIN

GENERAL INFORMATION:

Continued from **7/13/16, 09/21/16, 11/30/16, 02/01/17, 04/19/17, 06/28/17, 09/27/17**
and 01/10/18.

Continued from **02/28/18 and 03/28/18.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review re Timothy Fleckenstein

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

1. Letters of Administration issued to Timothy Fleckenstein, spouse, on 4/27/15, \$20,000 bond.
2. **Need** final inventory & appraisal.
3. **Need** an accounting or status report.

RECOMMENDATION:

Need to clear notes 2-3.

(sa/lc/ww/lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500443

CASE NAME: LOUIS SCOTT WILLIAMSON

SEE ALSO 8, 9

HEARING:

Hearing re Final Discharge

COUNSEL:

WAYNE WILLIAMSON (PET)...THE DLJ LAW FIRM
LOUIS SCOTT WILLIAMSON (DEC)...

See notes on next matter #8.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500443

CASE NAME: LOUIS SCOTT WILLIAMSON

SEE ALSO 7, 9

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 AS TO DLJ LAW FIRM

COUNSEL:

WAYNE WILLIAMSON (PET)...THE DLJ LAW FIRM
LOUIS SCOTT WILLIAMSON (DEC)...

GENERAL INFORMATION

Continued from **04/04/18**. No appearance. Matter continued for Counsel to file order on waiver of final accounting and ex parte petition for final discharge and order.

Continued from 05/02/18. No appearance. Court sets OSC re Sanction of \$500 as to DLJ Law Firm for failure to appear, and OSC re Surcharge of \$500 as to Administrator for failure to file petition for final discharge.

THIS CASE IS SET FOR HEARING ON OSC re Sanction/OSC re Surcharge/Final Discharge

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

1. Court approved waiver on final accounting on 03/29/17. **Need order.**
2. Ex Parte Petition for Final Discharge and Order returned on 04/18/17 as Order on waiver of account has not been filed.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500443

CASE NAME: LOUIS SCOTT WILLIAMSON

SEE ALSO 7, 8

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$500 AS TO ADMINISTRATOR

COUNSEL:

WAYNE WILLIAMSON (PET)...THE DLJ LAW FIRM
LOUIS SCOTT WILLIAMSON (DEC)...

See notes on prior matter #8.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600193

CASE NAME: MARILYN DOSKOCIL

SEE ALSO 11

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

NORMAN GIEBELER	(PET)...LAW & STEIN
MARILYN DOSKOCIL	(DEC)...
AUCTION-CA FINANCIAL SRVS	(TP)...

Status—no notes—JTD

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600193

CASE NAME: MARILYN DOSKOCIL

SEE ALSO 10

HEARING:

Hearing Re: PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

NORMAN GIEBELER (PET)...LAW & STEIN
MARILYN DOSKOCIL (DEC)...
AUCTION-CA FINANCIAL SRVS (TP)...

GENERAL INFORMATION:

Continued from **04/19/16 and 05/17/16**. Court deems the will submitted not a valid will. Matter will proceed as an intestate matter.

Continued from 07/19/16, 09/20/16, 11/02/16, 02/08/17 and 02/15/17 to trail contested issue of admissibility of holographic will. Letters of special Administration issued to Norman Giebeler.

Continued from 07/19/17. Counsel requests to vacate trial date and state that they agree to go to mediation. Court sets deadline for counsel to agree to a mediation date. Court sets hearing for post mediation status hearing for post mediation status hearing and trial setting conference for 11/29/17.

Continued from 11/29/17.

THIS CASE IS SET FOR HEARING ON **Amended** Petition for Probate of Will, Letters of Administration with Will Annexed Full Authority under IAEA by Norman Giebeler, brother.

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

1. Purported Will does not name an executor or waive bond. Therefore, it appears to be Petition for Probate of Will and Letters of Administration w/will annexed. Petitioner is beneficiary of will. There does not appear to be second page of will. ***Issue of admissibility of will still pending.***
2. All heirs waive bond.
3. Proof of Holographic Instrument filed 04/07/16.
4. ~Proposed Form Order, only 02/25/16.

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 for clarification of the notes only - no legal or procedural advice will be given.

RECOMMENDATION:

Court's discretion. If approved, set future hearing for Accounting/Status Review on **08/28/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc/lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600543

CASE NAME: MTR OF DAVID C HOFF

HEARING:

First & Final Account and Report of DOUGLAS P HOFF and Petition
for allowance of fees filed.

COUNSEL:

DOUGLAS P HOFF (PET)...KULKARNI
DAVID C HOFF (DEC)...

GENERAL INFORMATION:

Continued from 05/09/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON First and Final Report of Executor and Waiver
of Account and Petition for Fees, Reimbursement and Final Distribution.

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

1. Assets on hand: \$617,714.81, consisting of \$10,714.81 in cash and remaining in real property, vehicle, and furnishings.
2. Petitioner is sole beneficiary and waives accounting.
3. Petitioner requests reimbursement for advanced costs in the amount of **\$252.00** for costs advanced by attorney Stodden Parker. Itemized. [Acct, 03/15/18, LFpg6]. **JTD**
4. Petitioner requests approval of **\$16,089.75** in statutory attorney fees to be divided as follows:
 - a. Attorney Laura Stodden, prior counsel for petitioner, passed away on 06/04/17 and is entitled to 75% of fees at \$12,067.31 *to be paid to Laura Stodden Parker Revocable Trust.*
 - b. Attorney Deepa A. Kulkarni, current counsel for petitioner, is to receive 25% at \$4,022.44.
 - c. Question if there is a written agreement as to fees? **JTD**
5. **Need** bank/investment statements verifying date of death balances and final ending balance per Local Rule 20-908.
6. ~Proposed order: 04/09/18

RECOMMENDATION:

Need to clear note #5 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/26/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600630

CASE NAME: JOHN DOYLE

HEARING:

First Account and Report of CATHERINE JOHNSON and Petition for Preliminary Distribution allowance of fees

COUNSEL:

CATHERINE JOHNSON	(PET)...VICTORIA P MARTIN
JOHN DOYLE	(DEC)...
CATHERINE JOHNSON	(PET)...JOELLE LEE A. NICHOL
BARBARA DOYLE	(TP)...CALDWELL, KENNEDY & PORTER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Report of Executor; Petition for Preliminary Distribution, Reimbursement of Costs Advanced, Extension to Administer Estate by Catherine Johnson, Executor

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

1. Accounting period: 07/07/16 to 03/31/18; however, accounting should begin 09/27/16, the date Special Letters were issued.
2. Assets on hand: \$2,734,756.63; \$287,205.49 in cash; remaining in stock, real property interest, and vehicles
3. Corrected Partial Number #1 Inventory and Appraisal filed 05/31/18. However, Final Inventory and Appraisal has not been filed. **Court to inquire.**
4. **Need** bank/investment statements verifying date of *death balances* per Local Rule 20-908.
5. Supp filed 5/31/18; Schedule E Disbursements include various payments to Kyle Woodridge for legal services, DMV registration for Buick, and monthly Mercury auto insurance payments made after date of death of decedent. **Need verified supplement clarifying need for expenses.**
6. There is a creditor's claim from executor, Catherine Johnson, in the amount of \$2,926.36. **Need** satisfaction of claim.
7. Petitioner requests a one year extension to bring administration to a close. **Need** verified supplement clarifying reasons estate is not ready to close.

8. **Need** Notice of Hearing and Proof of Service as to Tonya Ingle and special notice to Barbara Doyle.
9. Attorney requests reimbursement for advanced costs in the amount of **\$391.80**. Itemized. However, \$150.96 is for fax fees which are considered overhead and not reimbursable unless executor is waiving statutory fees per Local Rule 20-909. Costs include FedEx and overnight mail charges totaling \$72.42. **JTD**
10. Petitioner requests a preliminary distribution to beneficiary, Tonya Ingle, to include the 2008 Chevrolet Corvette; 2012 Buick LaCrosse; E*Trade Account ending in x0159 valued at \$1,746,000 with a margin loan of \$327,199.20. **JTD**
11. No proposed order submitted.

RECOMMENDATION:

Need to clear notes #3-8 then Court's discretion. If approved, court to set next accounting review for **06/19/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601261

CASE NAME: MTR OF ERNESTINE IRENE HAMILTON

SEE ALSO 15, 16

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 ON GAUDY LAW

COUNSEL:

BRETT TOOLE (PET)...GAUDY LAW, INC
ERNESTINE IRENE HAMILTON (DEC)...

GENERAL INFORMATION

Continued from 05/02/18. No appearance. Court set OSC re Sanction for \$500 as to Gaudy Law for failure to appears and set OSC re Surcharge for \$500 on Executor for failure to file.

THIS CASE IS SET FOR HEARING ON OSC RE Sanctions of \$500/OSC Re Surcharge of \$500/Accounting Review re Brett Toole

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

1. Brett Toole was appointed Executor with full IAEA powers on 2/22/17.
2. Corrected Inventory and Appraisal filed 06/11/18.
3. First and Final Accounting filed 06/11/18.

RECOMMENDATION

Court's discretion.

(lh)

Future hearing date: 07/31/18 First and Final Account and Report by Brett Toole

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601261

CASE NAME: MTR OF ERNESTINE IRENE HAMILTON

SEE ALSO 14, 16

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$500 AS TO EXECUTOR

COUNSEL:

BRETT TOOLE (PET)...GAUDY LAW, INC
ERNESTINE IRENE HAMILTON (DEC)...

See notes on prior matter #14.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601261

CASE NAME: MTR OF ERNESTINE IRENE HAMILTON

SEE ALSO 14, 15

HEARING:

Accounting Review

COUNSEL:

BRETT TOOLE (PET)...GAUDY LAW, INC
ERNESTINE IRENE HAMILTON (DEC)...

See notes on prior matter #14.
(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700742

CASE NAME: MTR OF CONNIE BROWN

HEARING:

Waiver of Account and Report of DEBRA L MARQUEZ and Petition for allowance of fees filed.

COUNSEL:

DEBRA L MARQUEZ (PET)...CALDWELL, KENNEDY & PORTER, A.
CONNIE G BROWN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account on and Final Report of Administrator; Petition for Fees and Final Distribution by Debra Marquez, Administrator

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

1. Assets on hand: **\$74,842.36**, cash held in attorney-client trust account.
2. Statutory fees of **\$6,814.25**, each, requested by Administrator and Attorney. Calculated.
3. Attorney requests extraordinary compensation of **\$1,425** for sale of real property. Itemized. [Acct, 5/1/18, LFpg14]. **JTD**
4. Petitioner proposes the following offset totaling \$8,600 from Dean Brown's share and \$2,500 from Debra Marquez' share:
 - a. Dean Brown's unpaid rent while residing in decedent's residence ordered by Court at \$700 per month for a total of \$2,100 in unpaid rent from August, 1, 2017 through November, 30, 2017;
 - b. Advance to Dean through escrow on 12/14/17 of \$1,500 (paid without Court approval);
 - c. Advance to Dean from Estate on 03/27/18 of \$5,000 (paid without court approval);
 - d. 2004 Toyota Corolla to Debra Marquez valued at \$2,500.
5. Thomas Brown assigned his one-third interest to Debra Marquez. Debra Marquez is to receive two-thirds of client trust account; Dean Brown is to receive one-third of client trust account.
6. Waivers of account filed by Debra Marques and Dean Brown.

7. Petitioner requests reserve of **\$1,450** for closing expenses and potential tax obligations. **JTD**
8. Notice was given.
9. ~Proposed order: 05/01/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for 06/26/19.

(lh)

Future Hearing: 1/19/19 Accounting Review - VACATE

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800463

CASE NAME: Herbert N Mendonca

HEARING:

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

COUNSEL:

LINDA J BROGDON (PET)...LINCOLN, GUSTAFSON & CERCOS
HERBERT N MENDONCA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with
Full Authority under IAEA by Linda J. Brogdon, executor/trustee

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

1. Will waives bond. Estimate assets \$90,000, real property. **JTD**
2. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? **JTD**
3. Decedent was a resident of Hawaii at time of death. **Need** verified supplement clarifying location of real property.
4. **Need** Notice of Petitioner to Administer Estate.
5. **Need** proof of publication.
6. ~Proposed Form Order: 05/11/18

RECOMMENDATION

Need to clear notes #2-5 then Court's discretion re bond. If approved, set
Accounting/Status Review for **08/28/19**. Any accounting to be filed 30 days in advance
local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800483

CASE NAME: DOLORES G. ROSALES

HEARING:

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

COUNSEL:

JOSE ROSALES SR. (PET)...JT LEGAL GROUP, APC
DOLORES G. ROSALES (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jose Rosales, Sr, spouse

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

1. Petitioner alleges all heirs waive bond; however, missing bond waivers from daughter, Regina Rosales. Suggested bond \$313,000 based on real property.
JTD
2. **Need** Proof of Publication.
3. ~Proposed Form Order: 05/16/18

RECOMMENDATION

Need to clear note #2 then Court's discretion. If approved, set Accounting/Status Review for **08/28/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 21, 22

HEARING:

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

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVS	(TP)...
ALAN SHEPPARD	(PRO/PER)

GENERAL INFORMATION

Continued from **03/01/17**.

Continued from 06/07/17. Trial dates are set; time estimate one week. Court makes pretrial orders.

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

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

1. Mailed Notice of Hearing to heirs, Allan Shepard (purchaser of real property), Luis Trujillo (former personal representative), respective counsel, and the Department of Health Care Services, filed 02/01/17.
2. Decedent died intestate; heirs are: Anthony Dominguez (son), Alexander Dominguez (son), Michael Dominguez (son), David Dominguez (son), Rosemary Dominguez (daughter), and the children of post deceased son Frederic Dominguez.
3. **Need** verified supplement setting forth the names, addresses, and ages of all persons requiring notice, including the heirs of post-deceased son Frederic Dominguez. Sufficiency of notice cannot be determined without this supplement.
4. **Need** proof of publication as ordered for service as to Luis Trujillo.

5. **Need** 30-days personal service to Alan Shepard, per PC 851(a)(2); see next note.
6. **Objections filed by Alan Shepard on 05/03/17. Does court wish to deem served? JTD**
7. ~Proposed Order: 12/27/16.

RECOMMENDATION

Need to clear notes #3-5. Matter is contested.

(lh)

Future Hearings:

7/16/18 Court Trial (Day 1)

7/17/18 Court Trial (Day 2)

7/18/18 Court Trial (Day 3)

7/19/18 Court Trial (Day 4)

7/20/18 Court Trial (Day 5)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 20, 22

HEARING:

Probate status report

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVS	(TP)...
ALAN SHEPPARD	(PRO/PER)

GENERAL INFORMATION

Continued from 03/15/18. Prior to matter being called, Judicial Assistant receives message of George Theios who indicated he would not be present for hearing this date. Court trails this matter to the date set for readiness calendar.

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Successor Administration issue to Rosemary Dominquez, daughter, on 12/02/17, full authority no bond.
2. Administrator seeks an additional year to close the estate in order to handle issues related to real property repairs, title and sale.
3. ~Proposed order 12/07/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

Future Hearings:

7/16/18 Court Trial (Day 1); 7/17/18 Court Trial (Day 2); 7/18/18 Court Trial (Day 3)
7/19/18 Court Trial (Day 4); 7/20/18 Court Trial (Day 5)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 20, 21

HEARING:

Readiness Calendar

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVS	(TP)...
ALAN SHEPPARD	(PRO/PER)

Waiver of Court Fees and Costs filed by ROSEMARY C DOMINGUEZ is GRANTED

Readiness—no notes—JTD

Future Hearings:

7/16/18 Court Trial (Day 1)
7/17/18 Court Trial (Day 2)
7/18/18 Court Trial (Day 3)
7/19/18 Court Trial (Day 4)
7/20/18 Court Trial (Day 5)

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

DATE: 06/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

SEE ALSO 24

HEARING:

Petition for value and use of real property and financial elder abuse etc

COUNSEL:

BEN C LUNA REVOCABLE TRUST (TRU)...	
STELLA JAURIGUE	(PET/OBJ)...ROSA MARQUEZ
ROBERT LUNA	(PET)...ROSA MARQUEZ
THERESA BELTRAN	(PET)...AARON F GARCIA
CAROLINE LUNA KRIEGER	(PET)...AARON F GARCIA
REGINA MARIE LUNA	(MICHAEL C MADDUX)

Waiver of Court Fees and Costs filed by STELLA JAURIGUE is GRANTED

Waiver of Court Fees and Costs filed by REGINA MARIE LUNA is GRANTED

Currently under review by legal research.

(LR)

Notice is not proper.

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859; and
- (3) a statement advising any interested person that he or she may file a response.

(lh)

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

DATE: 06/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

SEE ALSO 23

HEARING:

Petition for beneficiaries 1.to remove trustee; 2.to appoint successor trustee

COUNSEL:

BEN C LUNA REVOCABLE TRUST (TRU)...	
STELLA JAURIGUE	(PET/OBJ)...ROSA MARQUEZ
ROBERT LUNA	(PET)...ROSA MARQUEZ
THERESA BELTRAN	(PET)...AARON F GARCIA
CAROLINE LUNA KRIEGER	(PET)...AARON F GARCIA
REGINA MARIE LUNA	(MICHAEL C MADDUX)

Waiver of Court Fees and Costs filed by STELLA JAURIGUE is GRANTED

Waiver of Court Fees and Costs filed by REGINA MARIE LUNA is GRANTED

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 06/20/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST

HEARING:

Petition for TO COMPEL ACCOUNTING AND PRODUCTION OF TRUST RELATED DOCUMENTS;REMOVE TRUSTEE;APPOIT SUCCESSOR

COUNSEL:

CHARLES BUCHANAN (PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST (TRU)...
KENNETH W. BUCHANAN (TP)...DORSEY & WHITNEY LLP

Currently under review by legal research.

(LR)

Notice was given.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800100

CASE NAME: THE DIOSES FAMILY TRUST DATED 3/10/94

HEARING:

Petition for Order confirming Trust Assets

COUNSEL:

PATRICIA D. BARRETT (PET)...CHRISTINA FERRANTE
THE DIOSES FAMILY TRUST (TRU)...

Currently under review by legal research.

(LR)

Notice is waived by co-trustees, Jack D. Dioses, Donna Marie Cyrus, and Barbara Colores. [Petition, 5/7/18, LFpgs10-12].

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 06/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON DS1100023

CASE NAME: YAEKO CEFALU

HEARING:

Accounting Review

COUNSEL:

YAEKO CEFALU

(CEP)...

HERITAGE HEALTH CARE

(PET)...WARD & WARD

LOUISE A CEFALU

(CPE)...HARTNELL LAW GROUP

SUZANNE CEFALU

(OBJ)...PRO/PER

Waiver of Court Fees and Costs filed by YAEKO CEFALU is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Louise A Cefalu,
Conservator

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

1. Order approving Second Account Current entered 08/31/16.
2. **Need** Third Account Current commencing 02/16/15.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300091

CASE NAME: MARLA R. MEZIERE AKA MARLA MEZIERE

HEARING:

Fourth and Final pre and post death Account and Report of
BARBARA J MITCHELL and Petition for allowance of fees

COUNSEL:

BARBARA J MITCHELL	(CPE)...ROSE C ROSADO
MARLA R MEZIERE	(CEP)...
BARBARA MITCHELL	(CPE)...CALDWELL, KENNEDY & PORTER
ROBERTA L. TAYLOR	(PET)...ROBERTA L. TAYLOR & ASSOC

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Fourth and Final Pre and Post Death Account and Report of Conservator; Petition for Termination of Conservatorship, Allowance of Fees, Exoneration of Bond, and Distribution by Barbara Mitchell, daughter.

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

1. Pre-Death Accounting Period: 04/15/17 to 02/18/18; aoh: \$24,456.77, cash
2. Post-Death Accounting Period: 02/19/18 to 03/15/18; aoh: \$23,290.27, cash
3. Attorney requests fees of **\$2,120** for 12.2 hours at \$150/350 per hour for paralegal and attorney services. Itemized [Acct.05/2/18 LFpgs20-21]. **JTD**
4. Schedule C Disbursements include monthly payments to Chase and Capital One credit cards without any further description. [Acct, 5/2/18, LFpg16]. **Supp. 06/12/18 conservatee's income did have sufficient funds to pay for conservatee's care and court-ordered attorney fees. Conservator used two existing credit cards in the name of conservatee to satisfy shortage. JTD**
5. Petitioner is the sole beneficiary of the estate and requests remaining property on hand to be distributed outright to her with filing of receipt. Does Court wish to require a Pr. C. §13100 Affidavit to be filed? **JTD**
6. Petitioner requests exoneration of bond of \$84,480 be exonerated; however, bond may not be exonerated until entry of final discharge of conservator.
7. Proposed Order submitted 05/02/18 includes exoneration of bond.

RECOMMENDATION

Court's discretion re disbursements, fees, bond etc. If approved, set hear re final discharge for **06/26/19**. (lh)

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

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

DATE: 06/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700141

CASE NAME: APRIL EDWARDS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DEBBIE EDWARDS

COUNSEL:

DEBBIE EDWARDS	(PET)...M DANIEL SAYLOR
JON RICHARDS	(CE)...THOMAS W DOMINICK
APRIL EDWARDS	(CEE)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 03/28/18. No stipulation signed; Judge Pro Tem recuses self on this case. Matter continued.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Jon Richards (friend) was appointed conservator of the estate, only, on 08/23/17.
- 2 Notification of Conservatee's Rights filed.
- 3 **Need** final Inventory & Appraisal per Pr.C. §2610.
- 4 **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
- 5 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:

Inquire status.

(lh)

Future Hearing: 11/07/18 Accounting Review

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

DATE: 06/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700211

CASE NAME: MTR OF MILDRED C HALL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JASON PAGE

COUNSEL:

JASON PAGE (CPE)...PRO/PER
MILDRED C HALL (CEP)...ROSE C ROSADO

GENERAL INFORMATION

Continued from 03/29/18 at request of conservator.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Jason Page, grandson, appointed conservator of the person and estate on 08/24/17, \$20,000 bond.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan filed 03/20/18.
3. Notification of Conservatee's rights filed. Proof of service item #5 does not indicate whether a copy of the Order for conservatorship was served. **Need proper service.**
4. Final Inventory and Appraisal filed 06/12/18.
5. **Need** Notice of Filing of Inventory and Appraisal [form GC-042] and proof of service of including Instructions for Objection per Pr. C. §2610.
6. **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 3-6.

(lc/lh)

Future Hearing: 11/01/18 *Accounting Review*

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

DATE: 06/20/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800152

CASE NAME: NIKOLAY RUMENOV SHEITANOV

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DEYANA N KOLEVA (CP)...LARRY R GLAZER
NIKOLAY RUMENOV SHEITANOV (CTP)...PRO/PER

GENERAL INFORMATION

Ex parte hearing taken off calendar due to non-appearance.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Deyana Koleva, mother

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

1. Court to determine whether an LPS conservatorship is appropriate as proposed conservatee allegedly has Schizophrenia, anxiety disorder and depression. [Petition, 5/17/18, LFpg11]. **JTD**
2. Proposed conservatee has currently been residing in Illinois for the past three months. **JTD**
3. Petitioner requests orders under Pr. C. 1873; Pr. C. §2351-2358; however, no attachments provided specifying orders, facts, and reasons. **Court to inquire any additional orders requested**
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. **Need** Court Investigator report. **Report of No Report filed 06/08/18.**
6. **Need** Confidential Screening form.
7. **Need** Confidential Supplemental Information.
8. **Need** return of citation.
9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. **Need** notice of hearing and proof of service.
11. ~Proposed Form Order: 05/17/18

RECOMMENDATION

Need to clear notes #4-9. If approved, set hearing for Compliance Review for **08/21/19** 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)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0701196
CASE NAME: MTR OF RAMON OTERO JR

HEARING:
Accounting Review

COUNSEL:

NINA C MUNOZ	(PET/TP)...SANDRA N. BALDONADO
RAMON OTERO JR	(DEC)...
VANESSA OTERO	(PET)...WILLIAM M NASSAR & ASSOCIATES
MICHAEL RAMOS	(PET)...DAVID E SIMON
LUKE ESSLINGER	(PET)...DAVID E SIMON
VANESSA OTERO	(PET)...WILLIAM M NASSAR & ASSOCIATES
VANESSA OTERO	(PET)...DAVID L RICE
DAVID LEE RICE	(PET)...DAVID L RICE
SIBYLLE GREBE	(CONOVER & GREBE)
MIKE MURPHY	(PRO/PER)
SPENCER ROGERS	(PRO/PER)
MARK J ANDREW FLORY	(MARK J. ANDREW FLORY)
TOYOTA MOTOR CREDIT	(RAYMOND F MOATS)

XREF: PROPS0800011 MARTHA E. OTERO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Vanessa Otero

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

1. Vanessa Otero (daughter) was appointed administrator with will annexed on 12/17/07 with full powers.
2. Partial I&As filed; **need** final Inventory and Appraisal.
3. Status Report advanced on 08/23/17 and approved. **Need Order after hearing.**
4. **Accounting or status report now due.**

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 10/17/19 Accounting Review

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 for clarification of the notes only - no legal or procedural advice will be given.

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500025

CASE NAME: YOKE YING TAN

HEARING:

Accounting Review by ***

COUNSEL:

JASON VIEGAS	(PET)...MITCHELL I ROTH
YOKE YING TAN	(DEC)...
JONATHEN VIEGAS	(OBJ)...RICHARD W.S. PERSHING

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Jason Viegas,
Administrator

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

1. Letters of Administration with full authority issued to Jason Viegas (son) on 06/16/16 with \$218,000 bond.
2. Court approved (first) Status Report on 04/19/18.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500760

CASE NAME: MTR OF MYLRID URCEIL GILES

HEARING:

FIRST Account and Report of ROSLYN TOWNSEND and Petition for allowance of fees

COUNSEL:

ROSLYN TOWNSEND (PET)...CRAIG E WILSON
MYLRID URCEIL GILES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account and Report of Administrator, Roslyn Townsend

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

1. Accounting period: 11/17/15 to 12/31/17
2. Assets on hand: \$973,934.63, consisting of \$611,208.23 in cash and remaining in real property. [Acct, 5/8/18, LFpg7].
 - a. Schedule "C" assets reflect \$933,708.23. [Acct, 5/8/18, LFpg12].
Need verified supplement clarifying assets on hand, including bank statements per Local Rule 20-908.
3. Corrected Final Inventory and Appraisal filed 05/08/18. **Need** bank statements verifying date of death balances.
4. Petitioner alleges she recently became aware that her brother, Gregory Leroy Townsend, who she thought was deceased, is alive and has been living homeless for years. It is requested the court acknowledge Gregory Leroy Townsend as an heir.
5. The following preliminary distributions were made without Court approval:
 - a. Rosalyn Townsend for \$63,000;
 - b. Brizset Giles for \$21,000;
 - c. Damien Giles for \$21,000
 - d. Joshua Giles for \$21,000;
 - e. Gregory Leroy to receive \$63,000 upon approval of this petition.
6. The estate is not in a condition to close as the real properties are in the process of being sold. Petitioner requests one year extension. **JTD**

7. Notice was given.
8. ~Proposed order: 05/08/18

RECOMMENDATION:

Need to clear notes #2-3 then Court's discretion. If approved, court to set next accounting review **for 06/26/19.**

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600104

CASE NAME: EMMA LUZ VARGAS

HEARING:

Hearing re Final Discharge

COUNSEL:

LUISA S TREJO

(PET)...PETER A GOLDBERG

EMMA LUZ VARGAS

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Luisa S Trejo,
Administrator

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

1. Order approving First and Final Account entered 06/14/17.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600336

CASE NAME: MTR OF ELIZABETH NORRIS

HEARING:

Waiver of Account and Report of VIRGINIA JOHNSON and Petition
for allowance of fees

COUNSEL:

VIRGINIA JOHNSON (PET)...VARNER & BRANDT
ELIZABETH NORRIS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Report of
Administrator, Petition for Allowance of Fees for Attorney, and for Final Distribution by
Virginia Johnson, administrator

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

1. Assets on hand: \$165,000, real property only
2. Petitioner is sole heir and waives accounting.
3. Statutory fees of \$5,950 requested by attorney. Fees to be paid by petitioner
from personal funds. Calculated.
4. ~Proposed order: 05/10/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final
discharge for **06/26/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601160

CASE NAME: JAY HOWARD GARDNER

HEARING:

Accounting Review

COUNSEL:

FRANCES GARDNER (PET)...NATALIE A ALVARADO
JAY HOWARD GARDNER (DEC)...

GENERAL INFORMATION

Continued from 04/11/18. No accounting or appearances. Petitioner and Counsel ordered to be present for next hearing.

THIS CASE IS SET FOR HEARING ON Accounting Review re Frances Gardner,
Administrator

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

1. Frances Gardner [daughter] was appointed administrator with full authority, no bond, on 02/01/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601184

CASE NAME: EDGAR DOYLE SHUPE

HEARING:

First Summary of Account and Report of JAMES L SHUPE and
Petition for allowance of fees filed.

COUNSEL:

JAMES L SHUPE (PET)...PRO/PER
EDGAR DOYLE SHUPE (DEC)...

GENERAL INFORMATION:

Continued from 04/11/18. To clear probate notes.

THIS CASE IS SET FOR HEARING ON First Summary of Account by JAMES L
SHUPE

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

1. **Amended First Summary of Account and Report filed 05/21/18. Court may wish to trail to 06/28/18.**
2. Accounting period: 10/16/16 to 02/28/18
3. Assets on hand: \$282,329.05
4. Petition is not clear as to whether this is a first account current or first and final account and petition for distribution.
5. Statutory fees are not requested.
6. **Need** bank/investment statements verifying date of death balances **and** final ending balance per Local Rule 20-908.
7. Schedule E Assets on hand only includes cash assets of \$12,129.05. **Need** verified supplement itemizing all property on hand and carrying value of each.
8. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
9. **Need** verified supplement which includes addresses of beneficiaries receiving real property.
10. **Need** findings re: sole and separate property.

11. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4). Need verified supplement.
12. There are 3 creditor's claims filed 02/21/18 from heirs: James L. Shupe for \$3,000.24; Barbara Garcia for \$7,233.23; and Laura Shupe for \$27,107.28, which appear to be requests for reimbursement of administrative expenses regarding funeral expenses, filings fees, home equity payoff, property taxes, and outstanding credit card payments. **Need verified supplement clarifying expenses and request for reimbursement.**
13. **Need** statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a). Need verified supplement.
14. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b). Need verified **supplement.**
15. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
16. There is no distribution clause. **Need same.**
17. **Report is not verified. Need same.**
18. **Need notice of hearing and proof of service to Charles Shupe, Barbara Haynes, Robert Shupe, Paul Shupe and Laura Shupe.**
19. Proposed order includes findings not requested within petition. Proposed Order is not complete within itself without reference to petition on which it's based. Need corrected proposed order in compliance with Local Rule 20-614.

RECOMMENDATION:

Matter appears moot due to amended accounting. Court to trail to 06/28/18.

(lh)

Future Hearing: 6/28/18 Amended First Summary of Account & Report

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601276

CASE NAME: MTR OF SATUR P ULAT

HEARING:

Probate status report

COUNSEL:

GERALDINE V ULAT MONDRAGON (PET)...MATHEW ALDEN
SATUR P ULAT (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status Report by Geraldine Ulat-Mondragon

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

1. Letters of Administration with will annexed, full authority, were issued to Geraldine Ulat-Mondragon on 03/14/17; \$20,000 bond.
2. Estate is not in a condition to close as the real property is in poor condition and being prepared for sale. Petitioner is hopeful to have real property sold by summer.
3. Petitioner requests an additional 4 months to close the estate.
4. No proposed Order submitted.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **10/24/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700134

CASE NAME: Michael Ray Alexander

HEARING:
Accounting Review

COUNSEL:

CHRISTOPHER ALEXANDER (PET)...LAW OFFICE OF KAZUAKI UEMURA
MICHAEL RAY ALEXANDER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Christopher Alexander,
Administrator

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

1. Letters of Administration with full authority were issued to Christopher Alexander on 04/12/17; \$20,000 bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.
(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700640

CASE NAME: MTR OF HAGAN W RICHARDS

HEARING:

PETITION FOR FINAL DISTRIBUTION AND WAIVER Account and Report of DANIEL WINFIELD RICHARDS and Petition for allowance of fees filed.

COUNSEL:

DANIEL WINFIELD RICHARDS (PET)...DONNASUE ORTIZ
HAGAN W RICHARDS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account; Petition for Final Distribution, Allowance of Attorney Fees, and Final Distribution by Daniel Richards, Executor

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

1. Assets on hand: \$501,626.76, cash
2. Petitioner waives statutory fees.
3. Attorney requests statutory fees in the reduced amount of **\$20,000**. Calculated.
4. Attorney requests reimbursement for advanced costs in the amount of **\$259.48** for costs advanced. Itemized. **JTD**
5. Petitioner requests reimbursement of costs advanced totaling **\$2,500** for court filings fees, publication, and appraisal. Itemized. [Acct, 4/23/18, LFpg6]. **JTD**
6. Petitioner requests reserve of **\$1,000** for any expenses or taxes. **JTD**
7. Notice was given.
8. ~Proposed Order submitted: 06/12/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/26/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 06/20/18 TIME: 8:30 DEPT: S36P

CASE#: CON PS1700355

CASE NAME: MTR OF NOSHEEN AHMAD

HEARING:

Petition to ESTABLISH SPECIAL NEEDS TRUST

COUNSEL:

FARZANA AHMAD

(CPE)...BROCK & ROBINSON

RIZWAN AHMAD

(CPE)...BROCK & ROBINSON

NOSHEEN AHMAD

(CEP)...MITCHELL I ROTH

Waiver of Court Fees and Costs filed by NOSHEEN AHMAD is GRANTED

Currently under review by legal research.

(LR)

Need Notice of Hearing and Proof of Service as to State Director of Healthcare Services, Director of State Hospitals, and Director of Developmental Services per Pr. C. §3602(f).

(lh)

Future Hearing: 1/22/19 Accounting Review

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 for clarification of the notes only - **no legal or procedural advice will be given.**

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700006

CASE NAME: JOSEPH ALEXIS VERA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

HECTOR GERARDO VERA (CP)...PRO/PER
JOSEPH ALEXIS VERA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from **02/21/17**. Ex Parte orders granted. Due to the disposition of a pending criminal matter, all prior estate powers are revoked. The guardian ad litem will work with the proposed conservator to clear the probate notes. Notice given by guardian ad litem, Roth.

Continued from **05/02/17**. Hector Vera is allowed to apply and obtain a passport for Joseph Alexis Vera. It is noted that dementia powers are not being requested for Joseph Vera. All existing temporary orders shall remain in full force and effect until 07/18/17. Temporary letters to continue in full force and effect.

Continued from 07/18/17. Non-appearance by Hector Gerardo Vera not has required documents been filed. The court directs the temporary conservator, Hector Vera to bring the proposed conservatee Joseph Vera to court on 09/19/17.

Continued from 09/19/17 for petitioner to clear notes. All temporary orders/letters to remain in full force and effect. Court orders Hector Vera to personally be present at next hearing.

Continued from 11/14/17. Notice to be given by Mitchell Roth.

Continued from 12/27/17. Court orders Hector Gerardo Vera to be personally present in Court on 02/14/18 at 9:30AM in Dept S36. Notice given by Judicial Assistant.

Continued from 02/14/18 at request of petitioner. Attorney waives citation.

Continued from 04/11/18. Petitioner is ordered to report to Legal Aid for assistance in clearing probate notes. Case referred to Legal Aid for legal assistance.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by Hector Vera, father

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

1. No bond – person only.
2. Court to determine whether an LPS conservatorship is appropriate as proposed conservatee has Schizophrenia. **Supp filed 04/11/18.**
3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration.
4. Court Investigator's Report filed 02/15/17
5. Report by GAL, Mitchell I Roth, filed 02/21/17.
6. Certificate of Completion re Conservatorship Class filed 01/10/17.
7. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note #3. If approved, set hearing for Compliance Review for **01/23/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb/lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800026

CASE NAME: EDNA VALERO

HEARING:
Petition for Appointment of Conservator

COUNSEL:

VERONICA VALERO	(PET)...PRO/PER
ALONDRA VALERO	(PET)...PRO/PER
EDNA VALERO	(CEE)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 03/06/18. Attorney Walter T. Moore appointed for Edna Valero.
Continued from 04/25/18. Case referred to Legal Aid for legal assistance to clear probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Limited Conservatorship, person only, by mother and sister, Veronica Valero and Alondra Valero ["Petitioners"].

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

1. **Amended Petition for Limited Conservatorship of the person filed 06/11/18 by Veronica Valero and Alondra.** However, petition appears to be a supplement clarifying relatives, and withdraws request for §2351.5 powers to consent/withhold consent to marriage, control sexual/social contacts, and make decisions re education; also withdraws request to limit civil rights. *Does Court wish to deem amended petition a supplement? Court may wish to trail current matter to 07/17/18. JTD*
2. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
3. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents,

reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.

4. Proposed conservatee is developmentally disabled. **Need report of appointed Counsel Walter T. Moore.**
5. Notice filed on 02/27/18 does not include maternal and paternal grandmother named in Section 11 to petition. **Need proper service.**
6. **Need** completed Capacity Declaration.
 - a. Capacity Declaration filed 01/29/18 is incomplete starting page 2 – 3 and signature on page one is not dated.
 - b. **Capacity Declaration filed 06/11/18** is incomplete at item #3a as to whether psychologist has at least two years' experience diagnosing dementia.
7. IRC report filed 03/02/18.
8. Court Investigator Report filed.
9. Proofs of Completion of Conservatorship Class filed.
10. Citation returned served.
11. ~Proposed Form Order/Letters 01/29/18.

RECOMMENDATION

Court's discretion re amended petition.

Need to clear notes #4-6. If approved, set hearing for Compliance Review for **01/23/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb/lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800060

CASE NAME: MTR OF JAMES ANDREW SILVESTRE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JESUS A SILVESTRE (CP)...PRO/PER
ROSALIE SILVESTRE (CP)...PRO/PER
JAMES ANDREW SILVESTRE (CTP)...SANDY L. TURNER

GENERAL INFORMATION

Continued from 04/18/18. Attorney Sandy L. Turner appointed for James Andrew Silvestre.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Jesus A. Silvestre to appoint Jesus and Rosalie Silvestre, parents

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

1. Petitioner alleges proposed conservatee is developmentally disabled. Does Court wish to deem petition as a petition for limited conservatorship? **JTD**
 - a. **Need** report of appointed counsel, Sandy L. Turner.
 - b. **IRC report filed 04/16/18.**
2. Petitioner seeks medical powers. Capacity Declaration is missing physician's initials at item #7b. **JTD**
3. CI Report filed 04/10/18.
4. Notice is complete.
5. Proof of Completion of the Conservatorship Training Class filed.
6. Return of Citation filed 03/19/18.
7. ~Proposed Form Order: 02/26/18

RECOMMENDATION

Need to clear note #1. If approved, set hearing for Compliance Review for **01/23/19** 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)

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 for clarification of the notes only - no legal or procedural advice will be given.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800065

CASE NAME: JOHNNY JUSTIN ROMERO

HEARING:
Petition for Appointment of Conservator

COUNSEL:

EMMA J ROJAS (PET)...HARTNELL LAW GROUP
JOHNNY JUSTIN ROMERO (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 04/11/18. Attorney Walter T. Moore appointed for Johnny Justin Romero.

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re education.
2. Conservatee's civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 04/18/18; however, item #4b is incomplete as to whether conservatee is a patient under continuing treatment. **Need completed form.**
4. Proposed conservatee is developmentally disabled. **Need** report of appointed counsel, Walter Moore.
5. Proposed conservatee is developmentally disabled. **Need IRC Report.**
6. Proof of Completion of the Conservatorship Training Class filed.
7. CI Report filed 04/06/18.
8. Return of Citation filed 03/14/18.
9. ~Proposed Form Order: 03/09/18

RECOMMENDATION

Need to clear notes #3-5. If approved, set hearing for Compliance Review for **01/23/19** 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)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800075

CASE NAME: ALFONSO J CARRASCO

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

ILIANA CARRASCO GONZALEZ (PET)...PRO/PER
ALFONSO J CARRASCO (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference re
Conservatorship of Person and Estate

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

1. Iliana Carrasco Gonzalez was appointed Conservator of the person and estate of Alfonso J. Carrasco on 12/08/08 by Los Angeles County Superior Court, case number BP113144. Riverside County Superior Court received notice of transfer on 08/13/10 as case number RIP10001018. Notice of transfer was received by San Bernardino County on 05/09/18.
2. Court Investigator report was last filed 09/26/17. Does court wish to require a Court Investigator report per Pr. C. § 2217(b)(3)? **JTD**
3. Order dispensing with account last entered 07/14/17. Court may wish to set next accounting review hearing for 08/29/18.
4. **Need** post move notice per CRC 7.1063(c) including notice to [current assigned RC] and Inland Regional Center.
5. **Need** amended letters to reflect this county.

RECOMMENDATION

Need to clear notes 4-5 then Court's discretion's estate powers. Court to set next accounting review for **08/29/18** or later Wednesday calendar.

(lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800094

CASE NAME: MTR OF EDUARDO FELIX

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA AGUIRRE (CP)...PRO/PER
EDUARDO FELIX (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 05/09/18. Ms. Daniel still needs to meet with her client; need IRC report. Notice to be given by Ms. Daniel.

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

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

1. Proposed conservatee's civil rights not be limited without court order.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make/consent to all medical decisions. **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 03/27/18.
4. CI Report filed 05/02/18.
5. Proposed conservatee is developmentally disabled. **Need** report of appointed Counsel Jennifer Daniel.
6. Proposed conservatee is developmentally disabled. IRC letter filed 05/02/18 requesting two-week continuance. **Need** IRC report.
7. List of required contact information is missing all relatives listed in item #11 of petition. **Need completed form.**
8. **Need** Due Diligence Declarations as to Jose Guadalupe (father) and Rito Felix (paternal grandfather).
9. Certificate of Completion of the Conservatorship Training Class filed 05/03/18.
10. Return of Citation filed 04/19/18.

11. ~Proposed Form Order: 03/27/18

RECOMMENDATION

Need to clear notes #5-8. If approved, set hearing for Compliance Review for **01/23/19** 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)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800155

CASE NAME: MAYRA ALEJANDRA MOYA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

EVA MOYA	(CPE)...JOSEPH P FOLEY
LUIS E MOYA	(CPE)...JOSEPH P FOLEY
LILIANA ROSALES	(CPE)...JOSEPH P FOLEY
MAYRA ALEJANDRA MOYA	(CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person and estate by Eva Moya (mother), Luis E Moya (father), and Liliana Rosales (sister)

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

1. Petitioners request \$40,000 bond. Appears sufficient.
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, exclusive authority for medical consent, decisions re education, withhold/consent to marriage, and control social/sexual contacts **JTD**
3. Proposed conservatee's civil rights are to be limited regarding the powers listed in note #1. **JTD**
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
 - a. **IRC letter filed 06/12/18 requests 30 day continuance. Court may wish to continue to 07/18/18 or later Wednesday calendar. JTD**
7. **Need** return of citation.
8. **Proofs of Completion of Conservator Education Course filed**
9. **Need** notice of hearing and proof of service.

10. CI Report filed 06/12/18.

11. ~Proposed Form Order: 05/18/18

RECOMMENDATION

Need to clear notes #4-9. If approved, set hearing for Compliance Review for **01/23/19** 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)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02136

CASE NAME: MTR OF MICHAEL LYNN MC NABB

VACATED

HEARING:

Petition for attorney fees

COUNSEL:

JEFFREY C. MC NABB	(CPE)...JAY OBERHOLTZER
MARSHA M. BUCK	(CPE)...JAY OBERHOLTZER
MICHAEL LYNN MC NABB	(CEP)...MARK J. FLORY
MARSHA M BUCK	(CPE)...LESLIE BARNETT, ESQ.
JEFFREY C MCNABB	(CPE)...LESLIE BARNETT, ESQ.

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mark J. Andrew Flory

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

1. Petitioner, Mark J. Andrew Flory was appointed Guardian Ad Litem for Michael Lynn McNabb on 05/12/16.
2. Petitioner requests fees of **\$3,640** for 13.10 hours at \$350/125, plus an additional anticipated **\$680.50** for 1.5 hour for attorney and 1.5 hours for paralegal services. Itemized. [Petition, 5/17/18, LFpg11].
3. **Need** Notice of Hearing and Proof of Service.
4. ~Proposed Order: 10/31/16.

RECOMMENDATION

Need notice then Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS00520

CASE NAME: MATTER OF JAMIE AURINGER

SEE ALSO 21

HEARING:

Hearing Re: Resignation of Conservator/Appt of IRC

COUNSEL:

CHRISTY CLOSE (CPE)...DAVID W BROWN
JAMIE AURINGER (CEP)...JEANNE E KENNEDY

XREF: VPRVS003063 ESTATE OF LELAND WHITE AURINGER JR

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Resignation of Conservator Christy Close/Appt of IRC

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

1. Matter on 04/25/18 at hearing re CI Report, wherein, Counsel state Christy Close is not able to act as conservator at this time. Court notifies IRC for possible appointment and orders Counsel to be present at next hearing.

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS00520

CASE NAME: MATTER OF JAMIE AURINGER

SEE ALSO 20

HEARING:

Petition for LEAVE TO RESIGN AS CONSERVATOR OF PERSON

COUNSEL:

CHRISTY CLOSE (CPE)...DAVID W BROWN
JAMIE AURINGER (CEP)...JEANNE E KENNEDY

XREF: VPRVS003063 ESTATE OF LELAND WHITE AURINGER JR

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Leave to Resign as Conservator of the Person by Jeanne E. Kennedy, attorney for conservatee

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

1. Christy Close was appointed conservator of the person of Jamie Auringer on 05/16/06.
2. Petitioner alleges conservator Christy Close advised she has retired and intends to move to Arizona with her husband. As conservatee is happy and doing well with her current placement, and due to behavioral issues, conservator has determined it is not in conservatee's best interest to be moved to Arizona.
3. Conservator's resignation is attached. [Petition, 5/16/18, LFpg3].
4. Petitioner requests IRC to continue as Jamie's main caregiver, provide medical direction and receive conservatee's social security. **Need** petition for successor limited conservatorship.
5. Proposed Order submitted 6/6/18; however, need at least 3 lines of content per Local Rule 20-614.

RECOMMENDATION

Need to clear note #4.

(lh)

Superior Court of Calif, County of San Bernardino
Page: 22 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1100285

CASE NAME: GILBERT E. MADRID

HEARING:

Motion Re: NOTICE OF MOTION AND MOTION FOR RECONSIDERATION OF
THE MARCH 22, 2018 Filed by Petitioner GILBERT MADRID

COUNSEL:

GILBERT MADRID	(CPE)...DAVID M GROSSMAN
GILBERT E MADRID	(CEP)...MITCHELL I ROTH
W. A. HLAVATY	(SC)...RICHARD W S PERSHING
MITCHELL I. ROTH	(CPE)...MITCHELL I ROTH
GILBERT E. MADRID	(CEP)...MITCHELL I ROTH
GILBERT MADRID	(PET)...JOHN R SETLICH

Currently under review by legal research.

(LR)

Future Hearings:

7/12/18 4th Account & Report of Gilbert Madrid

7/12/18 Hearing Re: OSC Re Removal of Gilbert Madrid

Superior Court of Calif, County of San Bernardino

Page: 23 Late add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 06/20/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800006

CASE NAME: TERRY CORTEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

RAYMOND CORTEZ

(PET)...PRO/PER

TERRY CORTEZ

(CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Raymond Cortez, son, appointed as Temporary Conservator of the person only on 01/22/18, no bond. Counsel represents that Ms. Cortez consents to conservatorship. Continued from **02/20/18**.

Continued from 04/02/18 Court will continue matter; Judge Pro Tem, Mitchell Roth, is the assigned Attorney for Terry Cortez.

Continued from 06/11/18. Raymond Cortez wants to resign as temporary and withdrew his petition. Suzie Salazar to file a petition for temporary and general conservatorship. Court directs clerk's office to set temporary on 06/20/18 once filed.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by son, Raymond Cortez ["Petitioner"].

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

1. No bond – person only.
2. Petition has the following issues:
 - a. Section 1d requests 2590 powers;
 - b. Section 1g does not request medical powers;
 - c. Section 1k re dementia is incomplete;
 - d. Section 11 does not include petitioner or indicate relationships of those listed.

Does Court wish to require an amended petition or verified supplement? **JTD.**

3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with Dementia Attachments GC-313 & GC-335A.

4. Petitioner does not request dementia powers although temporary petition indicates conservatee has dementia. Report of Counsel, Mitchell I. Roth, filed on 02/20/18.
5. List of Required Contact Information is missing all relatives within the second degree as listed in the petition. **Need** completed form.
6. CI report filed 02/13/18.
7. Certificate of Completion re Conservatorship Class filed 02/01/18.
8. **Need** return of Citation.
9. **Need** Notice of Hearing and proof of service to all relatives within the 2nd degree.
10. **Objections filed 05/23/18 by Susie Salazar (daughter of proposed conservatee). Need proof of service to Ricky Cortez.**
11. Exhibits and witness list filed 05/23/18 by Susie Salazar. **Need** proof of service.
12. ~Proposed Form Order: 01/05/18.

RECOMMENDATION:

Inquire status of petitions by Susie Salazar.

Matter is moot.

(nb/ww/cs/lh)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400769

CASE NAME: Ralph Wilson

SEE ALSO 2, 15

HEARING:

Petition for SETTLEMENT OF THE ESTATE ACCOUNT

COUNSEL:

DAISY WILSON (PET)...THE BROUSARD LAW FIRM
RALPH WILSON (DEC)...
SILVIA P CURNE (PET)...PRO/PER
EDWARD WARREN (PET)...THE BROUSARD LAW FIRM
KEMP & ASSOCIATES INC (PET)...LAURA WOODWARD
THE RALPH T. WILSON FAMILY TRUST (TRU)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION:

Court approved Final Account for Trust on 12/07/17. Court continued a motion to compel to 02/21/18 to allow all beneficiaries to sign a Settlement Agreement related to motion.

On 02/21/18, Court denied Motion by received rejections from beneficiaries regarding Final Accounting for estate. Court continued to 6/20/18 for accountings to be filed commencing date of death to 12/31/17. Accounting to include distribution plan.

THIS CASE IS SET FOR HEARING ON Petition for Settlement of **Estate** Account Pursuant to Court Order by Jill Brouard, attorney for co-administrators

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

1. Accounting period: 03/18/13 to 03/31/18
2. Assets on hand: \$3,968.83, cash
3. Statutory compensation has been paid to co-administrators, Daisy Wilson, the amount of \$7,113; Edward Warren the amount of \$2,371, totaling \$9,484, per Court order entered 12/7/17. Receipts filed 02/15/18.
4. Attorney Brouard received statutory attorney compensation of \$9,484 per Court order entered 12/7/17.
5. Distributions totaling **\$304,139.71** were made to beneficiaries. [Acct, 05/01/18, LFpg15-16]. Receipts filed 02/15/18 and 03/12/18.

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

6. See Declaration filed 05/01/18 by attorney Debra Olsen, representing The Brouard Law Firm to determine whether all assets available for distribution have been distributed.
7. Notice given.
8. No proposed order submitted.

RECOMMENDATION:
Court's discretion.

(lh)

Future Hearing: 10/18/18 Hearing Re: Final Discharge

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400769

CASE NAME: Ralph Wilson

SEE ALSO 1, 15

HEARING:

Petition for SETTLEMENT OF THE TRUST

COUNSEL:

DAISY WILSON (PET)...THE BROUSARD LAW FIRM
RALPH WILSON (DEC)...
SILVIA P CURNE (PET)...PRO/PER
EDWARD WARREN (PET)...THE BROUSARD LAW FIRM
KEMP & ASSOCIATES INC (PET)...LAURA WOODWARD
THE RALPH T. WILSON FAMILY TRUST (TRU)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION:

Court approved Final Account for Trust on 12/07/17. Court continued a motion to compel to 02/21/18 to allow all beneficiaries to sign a Settlement Agreement related to motion.

On 02/21/18, Court denied Motion by received rejections from beneficiaries regarding Final Accounting for estate. Court continued to 6/20/18 for accountings to be filed commencing date of death to 12/31/17. Accounting to include distribution plan.

THIS CASE IS SET FOR HEARING ON Petition for Settlement of **Trust** Account Pursuant to Court Order by Jill Brousard, attorney for co-administrators

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

1. Accounting period: 08/31/15 to 03/31/18
2. Assets on hand: **-\$41,595.14**
3. Compensation has been paid to co-trustees, Daisy Wilson, the amount of \$4,083.94; Edward Warren the amount of \$2,777.10, totaling \$6,861.04, per Court order entered 12/7/17. Receipts filed 02/15/18.
4. Attorney Brousard received statutory attorney compensation of \$1,695.14, plus \$609.00 in reimbursements per Court order entered 12/7/17.
5. Distributions totaling **\$345,857.11** were made to beneficiaries. [Acct, 05/01/18, LFpg14-15]. Receipts filed 02/15/18 and 03/12/18; however,

- missing receipts from Sheila Burnett, Daryl Burnett, Terrance Burnett, Earl Burnett for \$3,416.75, each, and from Mary Burnett for \$6,833.49.
6. See Declaration filed 05/01/18 by attorney Debra Olsen, representing The Brouard Law Firm to determine whether all assets available for distribution have been distributed.
 7. Petitioner requests Court direct Attorney Brouard to keep withholding of \$10,446.79 as recouplement of excess monies paid out as distribution.
 8. Notice given.
 9. No proposed order submitted.

RECOMMENDATION:

Court's discretion.

(lh)

Future Hearing: 10/18/18 Hearing Re: Final Discharge

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600680

CASE NAME: MTR OF ELSIE S OLIVER

HEARING:

Hearing re Final Discharge

COUNSEL:

EVELYN GONNELLA (PET)...CALDWELL, KENNEDY & PORTER, A.
ELSIE S OLIVER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Evelyn Gonnella,
Administrator

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

1. **Need** receipts from George R. Huber, Christine R. Rozo, Isabelle Huber, Kelly Huber, Mark Huber, Mathew Huber, Edmund Huber, Andrea Hoover, Lori Murdock, Michael F. Yeates.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600899

CASE NAME: MTR OF ANTHONY HENRY MARTINEZ SR

HEARING:

FIRST AND FINAL Account and Report of MARLO R MARTINEZ and
Petition for allowance of fees

COUNSEL:

MARLO R MARTINEZ (PET)...MICHAEL C MADDUX
ANTHONY HENRY MARTINEZ SR (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

Waiver of Court Fees and Costs filed by MARLO R MARTINEZ is GRANTED
TOTAL FEES WAIVED TO DATE: **\$920.00**

XREF: CIVDS1616871 *IN RE: 3442 GRAY STREET*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of
Administrator; Petition for Allowance of Statutory Fees and Extraordinary Fees; Final
Distribution by Marlo R. Martinez, administrator

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

1. Assets on hand: \$43,659.80, cash
2. Attorney and petitioner request statutory fees of **\$10,962**, each. Calculated
in supplement filed 6/14/18.
3. The estate's only assets were two parcels of real property which were both
lost to foreclosure. **Need copy of Trustee's Deed of Sale for each
property.**
4. **Need** bank/investment statements verifying final ending balance per Local
Rule 20-908.
5. Attorney requests extraordinary fees of **\$4,225** for 13 hours at \$325 per hour
regarding sale of real property, preparing claims for surplus of funds, and
preparing tax returns. Itemized. [Acct, 5/8/18, LFpg7] **JTD**
6. Petitioner owes \$480 to Patrick Wright, probate referee, to be paid through
final distribution. **JTD**

7. The caption of report does not indicate *Waiver of Final First and Final Account*; however, all heirs have signed waivers of accounting filed 4/12/18 and 5/8/18. **JTD**
8. Petitioner alleges one of the heirs of decedent, Damon Moore, is confined in a prison; notice has been given to Director of CA Victim Compensation and no creditor's claim has been received. However, Damon Moore is not reflected in initial Petition for probate, notice has never been given to Damon Moore in these proceedings, nor is purported heir reflected in proposed distribution. [Acct, 5/8/18, LFpg9]. **Need verified supplement clarifying relationship to decedent.**
9. There is a creditor's claim from Franchise Tax Board in the amount of \$9,968.71. Petitioner alleges the 2013 and 2014 taxes have been filed and no taxes are due. **Need** satisfaction of claim.
10. Notice was given; however, Damon Moore was not given notice. **Need** to clear note #8 to determine if notice is complete.
11. Does Court wish to reconsider fee waivers totaling \$920.00 as it appears there are sufficient funds available? **JTD**
12. Proposed Order submitted 05/08/18 does not reflect approval of waiver of final accounting.

RECOMMENDATION:

Need to clear notes #3; 8-9 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/26/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601199

CASE NAME: SUSAN KATHRYN HIRSCH

HEARING:

First & final report of administrator w/waiver of Account and
Report of MICHAEL D AYALA and Petition for allowance of fees

COUNSEL:

MICHAEL D AYALA (PET)...HORSPPOOL & HORSPPOOL
SUSAN KATHRYN HIRSCH (DEC)...
MCCARTHY & HOLTHUS, LLP (TP)...MCCARTHY & HOLTHUS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account and Petition
for Fees, and Final Distribution by Michael D. Ayala, administrator/sole heir

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

1. Assets on hand: \$339,208.38 of which \$58,708.38 is cash and remaining in real property and personal effects.
2. Petitioner is sole heir, waives accounting and statutory fees.
3. Attorney requests statutory fees of **\$11,942.80** requested. Calculated.
4. Attorney requests extraordinary compensation of **\$11,463.00** for 35.20 hours at \$315/hour and 1 hour at \$375/hour for serviced rendered preventing foreclosure of real property, fraud, and preserving estate. Itemized. [Acct, 5/9/18, LFpg13-21]. **JTD**
5. Special Notice: McCarthy & Horthus, LLP
6. Notice was given.
7. ~Proposed order: 05/09/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/26/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700098

CASE NAME: HECTOR ROLANDO RAMIREZ

HEARING:

Accounting Review

COUNSEL:

KATHLEEN ANN RAMIREZ (PET)...PRO/PER
HECTOR ROLANDO RAMIREZ (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Kathleen Ann Ramirez, Executor

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

1. Letters Testamentary with full authority issued to Kathleen Ann Ramirez on 04/12/17; no bond.
2. Declaration of Kathleen Ramirez regarding status of administration filed 05/25/18. Executor alleges the sole purpose of opening probate was to gain standing in a class action lawsuit for wrongful death of decedent. Litigation is still pending without resolution.
3. **Need** final Inventory and Appraisal.
4. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700199

CASE NAME: MTR OF STACY A VIETH

HEARING:

Petition for settlement of first and final Account and Report of
MARTHA GAGLIARDI and Petition for allowance of fees filed.

COUNSEL:

MARTHA GAGLIARDI (PET)...ROBERT A KRASNEY
STACY A VIETH (DEC)...

XREF: PROPS1200239 *MTR OF RALPH E VIETH TRUST*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
and Settlement

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

1. Assets on hand: \$101,826.81, cash
2. Petitioner and Attorney request statutory fees of \$5,049.57, each.
Calculated. However, calculation is based on value in *Reappraisal for Sale*.
Need verified supplement with calculation to include date of death value per
Pr. C. §10810.
3. Reappraisal for Sale filed 03/02/17; however, **need Final Inventory and
Appraisal** with date of death value.
4. **Need** bank/investment statement verifying final ending balance per Local
Rule 20-908.
5. **Need** verified supplement clarifying whether rental income was received
prior to sale of real property.
6. **Need** supporting Schedules per Pr. C. §1062 regarding receipts of any
rental income, gains/losses, disbursements, etc.
7. Proposed distribution includes equal 1/6 distributions to decedent's siblings.
However, in the initial petition for probate, the list of relatives includes David
Allen Vieth (father). [Petition, 3/2/17, LFpg5].
 - a. **Need verified supplement** clarifying status of father and mother (not
listed) to verify proper intestate succession.

8. Notice of Hearing filed 5/14/18. However, **need notice as to David Vieth (father). Also, need proper mailed service** directly to Maria Petrovski, Jesse Gagliardi Vargas, Vanessa Walters, Kelly Koleszar, and Donald W. Vieth per CRC. 7.51(a).
9. Proposed Order submitted 05/11/18 is missing findings re sole and separate property; missing names of heirs and specified shares.

RECOMMENDATION:

Need to clear notes #2-8 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **06/26/19**.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700388

CASE NAME: Salazar 2015 Family Trust

HEARING:

Petition for to Determine construction of Trust Instrument and
determine title to personal property etc

COUNSEL:

SONJA SALAZAR BROWN	(PET)...DOONAN & DOONAN,
SALAZAR 2015 FAMILY TRUST	(TRU)...
JOYCE SALAZAR	(BEN)...DIANA J CARLONI
DAVID ROBERTS-SALAZAR	(MIN)...PRO/PER
JOSHUA BENDER	(MIN)...PRO/PER
JEANNE E KENNEDY	(TP)...YEE & BELILOVE
MICHELLE MILLER	(ZUMBRUNN LAW CORPORATION)

Currently under review by legal research.

(LR)

Notice was given.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701169

CASE NAME: ESTATE OF SCOTT REITZ

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

HEARING:

Petition for CONFIRM OWNERSHIP OF LIFE INSURANCE POLICY

COUNSEL:

LINDA REITZ-DOUGHTY (PET)...BARULICH DUGONI LAW GROUP

SCOTT REITZ (DEC)...

KRISTY JAYE VAUGHT-REITZ (OBJ)...PRO/PER

Waiver of Court Fees and Costs filed by KRISTY JAYE VAUGHT-REITZ is GRANTED

Future Hearing: 8/01/18 Hearing Re: Citation Return

Currently under review by legal research.

(LR)

Parties appeared 01/04/18.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701249

CASE NAME: THE GRETA L. TOLIVER TRUST DATED 11/30/1995

HEARING:

Petition for Confirmation of Trust ownership of personal property

COUNSEL:

THE GRETA L. TOLIVER TRUST (TRU)...
LINDA LEW HEWISH (TEE)...PRO/PER

Waiver of Court Fees and Costs filed by LINDA LEW HEWISH is GRANTED

Currently under review by legal research.

(LR)

Need Notice of Hearing and Proof of Service as to heirs of
Edward Toliver estate and filed Due Diligence Declaration as to Bobby Toliver.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800109

CASE NAME: MTR OF MARION THOMAS TONGATE

HEARING:

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

COUNSEL:

SHARON ABUGHAZALEH (PET)...MARK E CARRILLO
MARION THOMAS TONGATE (DEC)...

GENERAL INFORMATION

Continued from 03/28/18.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with
Full Authority under IAEA by Sharon Abughazaleh, Petitioner/daughter

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

1. Will waives bond. Net estate value \$561,000 with \$36,000 personal property.
The court may for good cause require that a bond be given, either before or
after issuance of letters. (Prob. Code, § 8481(b)).
2. Proof of Subscribing Witness form filed 06/15/18 is missing attachment 1 copy
of will. **Need same.**
3. No proposed Form Order/Letters. Submit after hearing.

RECOMMENDATION

Need to clear note #2. Court's discretion re bond If approved, set Accounting/Status
Review for **01/23/19**. Any accounting to be filed 30 days in advance local rule 20-901.
Note requirements of local rule 20-908.

(cs/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800329

VACATED

CASE NAME: MTR OF DEBORAH D PENDERGRAFT

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JULIE A LAMA	(PET)...AMBROSI & DOERGES, APC
DEBORAH D PENDERGRAFT	(DEC)...
SURETEC INSURANCE	(TP)...PRO/PER

Bond in the amount of \$50,000 issued to Julia A. Lama, administrator, on 05/23/18.

(lh)

Future Hearings:

7/14/18 Accounting Review

8/01/18 Petition for Verified Petition for Return of Property to Estate Etc

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800470

CASE NAME: Sperry A Maxwell

HEARING:
Spousal Property Petition hearing.

COUNSEL:
BEVERLY JEAN MAXWELL (PET)...PRO/PER
SPERRY A MAXWELL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Beverly Jean Maxwell (spouse)

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

1. Petitioner, Beverly Jean Maxwell, seeks Court determination of property passing to petitioner without administration
2. Petitioner alleges she and decedent purchased the residence in question on 03/14/97 during their marriage. Petitioner and decedent were told they could not qualify to purchase condo with petitioner's name on title; thus, title was held in decedent's name only. Petitioner and decedent lived in residence as husband and wife, paying all bills together up until his death on 07/22/12. Petitioner and decedent had no children together; however, decedent has 3 children from a previous marriage who purportedly do not contest the proceedings.
 - a. Does court wish to require a copy of marriage certificate? **JTD**
3. **Need** Notice of Hearing with proof of service as to issue: Kathleen Brown, Cyndi Maxwell, and Troy Maxwell.
4. ~Proposed Form Order: 05/14/18

RECOMMENDATION:

Need notice then Court's discretion.

(lh)

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

DATE: 06/20/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800480

CASE NAME: LAVON J ROUSSEAU

HEARING:

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

COUNSEL:

DEBBIE L PARKINS (PET)...CALDWELL, KENNEDY & PORTER, A.
LAVON J ROUSSEAU (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner requests all liquid funds be placed in client-trust account with Counsel in lieu of bond. Bond waivers missing from issue, Samma Lemaster and Tammy Rousseau. Petitioner is a non-resident; court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Estimated value of estate is \$303,000 based on \$1,000 in cash and remaining in real property. **JTD**
2. **Need** Proof of Publication.
3. No proposed order submitted.

RECOMMENDATION

Need proof of publication. If approved, set Accounting/Status Review for **06/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 06/20/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1400769

CASE NAME: Ralph Wilson

SEE ALSO 1, 2

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

DAISY WILSON (PET)...THE BROUSARD LAW FIRM
RALPH WILSON (DEC)...
SILVIA P CURNE (PET)...PRO/PER
EDWARD WARREN (PET)...THE BROUSARD LAW FIRM
KEMP & ASSOCIATES INC (PET)...LAURA WOODWARD
THE RALPH T. WILSON FAMILY TRUST (TRU)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION

Continued from 02/21/18. Oral report given by Attorney Orlando Flores. Hearing continued at request of Counsel. Objections to be filed by Attorney Woodward regarding supplemental filed 02/13/18. Settlement agreement has not been signed by all heirs. Court orders a trust accounting be completed and filed with the Court by 05/15/18. Accounting to begin from date of death and end 12/31/17. The accounting is also to include a plan for distribution.

THIS CASE IS SET FOR HEARING ON RECEIPT OF SETTLEMENT

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

1. Matter set on 12/20/17. Counsel reported issued have settled. A written settlement is to be filed.
2. See prior matters #1 and #2 regarding accountings.

RECOMMENDATION

Inquire status of settlement agreement.

(lh)

Future Hearing: 10/18/18 Hearing Re: Final Discharge

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000217

CASE NAME: MTR OF VERA M JOHNSON (MASTER FILE)

HEARING:

Fifth Account and Report of PHILIP D LONG SR and Petition for allowance of fees

COUNSEL:

PHILIP D LONG SR	(CPE)...CALDWELL, KENNEDY & PORTER, A.
VERA M JOHNSON	(CEP)...SHERRI L KASTILAHN
SHERRI L KASTILAHN	(PET)...
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR & ASSOCIATES
WILLIAM H JOHNSON	(CEP)...ROBERTA L. TAYLOR & ASSOCIATES
ROBERT WYNN	(OBJ)...CRAWFORD & RANSOM APLC

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 5th Account Current and Petition for Attorney's Fees by Philip D. Long, Sr, conservator

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

1. Accounting covers period: 05/01/16 to 01/31/18
2. Assets on hand: \$915,730.70 of which \$405,625.18 is cash and remaining in real property and securities.
3. Petitioner was previously authorized pursuant to Court order on 5/2/12 to pay himself the sum of **\$1,720.00**/month for his services. Petitioner requests the court's approval to continue such payments on a monthly basis. **JTD**
4. Attorney requests fees of **\$5,162.50** for 28.45 hours at \$350/\$300/\$275/\$150 per hour for attorney and paralegal services. Itemized [LFpgs8-9]. **JTD**
5. Current bond is \$825,000, appears sufficient.
6. ~Proposed Order: 05/09/18

RECOMMENDATION

Court's discretion. If approved, set next accounting review for **03/27/19** (if one year) or **03/25/20** (if two years). Accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900147

CASE NAME: JESSICA AURORA RODARTE

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

AURORA RODARTE (CP)...PRO/PER
JESSICA AURORA RODARTE (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 03/14/18. Counsel reports she has been unable to contact her client.

THIS CASE IS SET FOR HEARING ON Court Investigator Report

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

1. Matter set by Court on 01/19/18 upon review of CI Report filed 01/02/18. Court reappointed Counsel Donnasue Ortiz for Jessica Aurora Rodarte. Notice given by Judicial Assistant.
2. **Need** Report of Counsel.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100149

CASE NAME: DENNIS S POULSEN

HEARING:
Accounting Review

COUNSEL:

KERRY ANNE POULSEN	(CPE)...JAMES B CHURCH
DENNIS S POULSEN	(CEP)...
DARRON POULSEN	(CPE)...GREGORY L ZUMBRUNN
KERRY ANNE POULSEN	(CPE)...RYAN SHEEHAN
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
KERRY POULSEN	(PET)...BRYAN C. HARTNELL
DARRON POULSEN	(SC)...WIL R MULLINS ESQ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Darron Poulsen,
Successor Conservator

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

1. Order approving Second Account Current of Darron Poulsen entered
09/09/16
2. **Need** Third Account Current commencing 11/01/15.

RECOMMENDATION

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100269

CASE NAME: KENNETH BRIAN BOX

HEARING:

Petition for APPOINTING CO CONSERVATOR OF THE PERSON / LIMITED

COUNSEL:

DALTON M BOX JR	(CP)...CHRISTOPHER A POULOS
PHYLLIS R. BOX	(CP)...CHRISTOPHER A POULOS
KENNETH BRIAN BOX	(CTP)...
DENICE MCCREARY	(CP)...CHRISTOPHER A POULOS
WILLAM MCCREARY	(CP)...CHRISTOPHER A POULOS

GENERAL INFORMATION

Phyllis R. Box was appointed Limited Conservator of the person only on 6/30/86 in Los Angeles County Superior Court.

Matter was transferred and received by San Bernardino County Superior Court on 11/18/11.

Amended Letters were issued to Phyllis R. Box on 05/22/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Co-Conservators of the person only by Phyllis Box, limited conservator/mother

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

1. Petitioner Phyllis Box seeks appointment of limited co-conservators to include Phyllis Box, Denice McCreary (aunt) and William McCreary (uncle). As Phyllis R. Box is currently the limited conservator of the person, does Court wish to deem this a petition to add Denice McCreary and William McCreary, only? Alternatively, Court may wish to require amended petition. **JTD**
2. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, consent or withhold consent of marriage, access confidential records, limit right to contract, control social/sexual contacts, and make decisions re education.

JTD

3. Proposed conservatee's civil rights described in note #2 are to be limited.
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
 - a. Note: Attorney Mitchell Roth was relieved as appointed Counsel on 06/09/12. Court may wish to reappoint. **JTD**
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. **Need** Court Investigator report.
8. **Need** Confidential Supplemental Information.
9. **List** of required contacts is missing proposed co-conservators, William and Denise McCreary. **Need** completed form.
10. **Need Proof of Completion of** Certificate of Completion of the Conservatorship Training Class of William McCreary.
11. **Need** return of Citation.
12. **Need** notice of hearing and proof of service.
13. ~Proposed Form Order: 05/09/18

RECOMMENDATION

Need to clear notes #3-12. If approved, set hearing for Compliance Review for **01/23/19** 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)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500328

CASE NAME: NORMA PIMENTEL

SEE ALSO 21

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THE NORMA L PIMENTEL LIVING TRUST

COUNSEL:

THE NORMA L PIMENTEL LIVING TRUST (PET)...	JONATHAN LACOUR
SYLVIA PIMENTEL	(PET)...GREGORY T ANNIGIAN
NORMA PIMENTEL	(CEE)...DONNASUE ORTIZ
VERONICA TREJO	(BANKS GARCIA & JANIS)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

XREF: PROPS1501107 *THE NORMA L PIMENTEL LIVING TRUST*

GENERAL INFORMATION

Continued from 04/27/17. Counsel's report filed in court. Court is advised counsel have been served with the informal accounting in court this morning.

Continued from 05/10/17, 07/12/17, 09/14/17, 11/09/17 and 01/11/18 to clear notes.

THIS CASE SET FOR HEARING ON Compliance Review/ Accounting Review

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

1. On 09/20/16, Stip filed that **Veronica Trejo** will be **successor Trustee**; \$180,000 bond. **Sylvia Pimentel** was appointed **Conservator of person only** and **Veronica** was also appointed Conservator of **estate only** \$20,000 bond, posted 11/28/16.
2. Determination of Level of Care filed 07/12/17.
3. Notification of Conservatee's rights filed 07/12/17.
4. Care plan filed 11/09/17.
5. Final Inventory and Appraisal filed 01/10/18 indicating assets held in trust.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
7. First Account Current now due.

RECOMMENDATION

Need to clear note 6. Inquire status.

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

Superior Court of Calif, County of San Bernardino

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500328

CASE NAME: NORMA PIMENTEL

SEE ALSO 20

HEARING:

Accounting Review by ***

COUNSEL:

THE NORMA L PIMENTEL LIVING TRUST (PET)...	JONATHAN LACOUR
SYLVIA PIMENTEL	(PET)...GREGORY T ANNIGIAN
NORMA PIMENTEL	(CEE)...DONNASUE ORTIZ
VERONICA TREJO	(BANKS GARCIA & JANIS)

Waiver of Court Fees and Costs filed by NORMA PIMENTEL is GRANTED

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

XREF: PROPS1501107 *THE NORMA L PIMENTEL LIVING TRUST*

See notes on prior matter #20.

(lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700090

CASE NAME: CAROLINA MEJIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of YOLANDA R MEJIA

COUNSEL:

YOLANDA R MEJIA (CP)...PRO/PER
CAROLINA MEJIA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 03/28/18 to file documents.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Yolanda R. Mejia (mother) appointed limited conservator of the person on 08/23/17.
2. Care Plan filed 03/28/18.
3. Notification of Conservatee's rights filed 04/12/18; however, Proof of Service does not indicate a copy of Order dated 08/23/17 was served with notice. **Need** proper service.
4. Determination of Conservatee's Appropriate Level of Care filed 03/28/18; however, item #4b incomplete as to limitations or restrictions on conservatee's return to her personal residence. **Need same.**

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS00511

CASE NAME: DEBRA SUE CARLSON

HEARING:

Accounting Review

COUNSEL:

MICHAEL CARLSON	(PET)...LINDA J GLADSON
DEBRA SUE CARLSON	(PCE)...DONNASUE ORTIZ
INLAND COUNTIES REG CNTR	(AGN)...PRO/PER
DEBRA SUE CARLSON	(CEP)...DONNASUE ORTIZ
DEBRA SUE CARLSON SPECIAL NEEDS TRUST (TRU)...	
MICHAEL CARLSON	(PET/TEE)...VARNER & BRANDT, LLP
MICHAEL CARLSON	(PET)...R ERIC SIEGFRIED

XREF: RFLRS037448 *CONNIE EISENBACH -N- EDDIE EISENBA*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Dispense with Accounting, by former spouse, Michael Carlson [Trustee/conservator/Petitioner].

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

1. SNT resulting from a civil settlement was approved by the court on 01/15/08.
2. Account period: 12/01/15-11/30/17
3. Estate asset consists of a one-half interest in real property located in Ontario, CA, and approximately \$10,748.64 in social security benefits.
4. Petitioner requests an order dispensing with accounting on the basis that the only SNT asset is the real property and there are no funds to account for.
5. Trustee owns the other half-interest. Trustee is also the conservator of beneficiary.
6. Petitioner requests that the court allow him to seek reimbursement of expenses at a future date as the trust has no income and petitioner pays all expenses for the trust property, including property taxes, insurance, maintenance and upkeep. JTD
7. Attorney seeks fees of \$6,375.00. Billed at \$375-\$400/hour for 15.8 hours attorney time and \$125/hour for .08 hours paralegal time. Itemized [LFp9-12].

Since there is no cash in the estate, Petitioner has agreed to pay the attorney fees from his personal funds and requests that the court approve a credit to him for the fees to be paid at a later time. JTD

8. Notice given.
9. ~Proposed Order submitted: 05/04/18

RECOMMENDATION

Court's discretion. If approved, Court may wish to set the next hearing re Accounting Review for **03/12/19**. Any accounting to be filed 30 days' in advance.

(cs/lh)

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

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: VC VS00251

CASE NAME: MTR OF LORENA SARAI BENITEZ

HEARING:

Petition for approval and payment of attorney's fees and costs
to court appointed GAL

COUNSEL:

ANGEL L BENITEZ	(PET)...BEATRICE L LAWSON
BERTHA A BENITEZ	(PET)...BEATRICE L LAWSON
LORENA SARAI BENITEZ	(CEP)...DONNASUE ORTIZ
PUBLIC GUARDIAN	(TC/CPE)...COUNTY COUNSEL
GWENDOLYN BENITEZ	(MIN)...CALDWELL, KENNEDY & PORTER, A.
ROBERT C. BENITEZ JR	(SC/OBJ)...PRO/PER
ROBERT C. BENITEZ	(CPE)...PRO/PER
VIOLETA TOPETE	(CPE)...LAMB MORRIS & LOBELLO
ROBERTA L TAYLOR	(PET)...ROBERTA L TAYLOR
JEANNE KENNEDY	(PET)...JEANNE E KENNEDY
ROBERT BENITEZ IRREVOCABLE TRUST (TRU)	...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mitchell I Roth

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

1. Petitioner, Mitchell I Roth, was appointed GAL for Lorena Sarai Benitez on 12/18/13.
2. Petitioner requests fees of \$71,802.75 for period *December 2013 through May 8, 2018* billed for 194.95 hours at \$350-375 per hours for attorney services, plus costs totaling \$1,141.50 for filing fees, transcript fees, and parking. Itemized. [Petition, 5/11/18, LFpgs 6; 9-59]. **JTD**
3. ~Proposed Order: 05/11/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearings: 7/30/18 Petition to Dispense with Accounting

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 06/20/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02867

CASE NAME: MTR OF BETH ANN MAZZA

HEARING:

Petition for APPROVAL TO AMEND THE TRUST

COUNSEL:

BETH ANN MAZZA

(CEP)...

INLAND COUNTIES REGIONAL CENTE

(CE)...BRUNICK MCELHANEY &

INLAND COUNTIES REGIONAL CENTE

(CPE)...STEVEN K BECKETT

Currently under review by legal research.

(LR)