



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 06/25/18

All corrections/supplements addressing these notes should be filed by **06/18/18**

Later-filed documents might not be reviewed prior to the hearing and could result in a continuance of your case. Updates to these notes *typically* will be posted three court days prior to the hearing.

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.

(cs 06/07/18) (06/11/18 ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0700812

CASE NAME: TESSIE M RATLEY

HEARING:

Probate status report filed.

COUNSEL:

RALPH L RATLEY	(PET)...ROBBINS & HOLDAWAY
TESSIE M RATLEY	(DEC)...
RALPH L RATLEY	(PET)...DIANE E ROBBINS
CATRINA RATLEY	(TP)...MILES & HATCHER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Ralph Ratley, son, on 11/07/13; limited authority, no bond.
2. Petitioner seeks an additional year to close the estate as the Claim for Reassessment Exclusion has not yet been resolved with the County Assessor.
3. ~Proposed Order: 05/09/18

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **07/01/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500453

CASE NAME: THE ERNESTO G ONTIVEROS SPECIAL NEEDS TRUST

HEARING:

Accounting Review by ***

COUNSEL:

SYLVIA ONTIVEROS (PET)...WILLIAM L WINSLOW
LEANDRA MCCORMICK (PET)...GIFFORD, DEARING & ABERNATHY,
ERNESTO ONTIVEROS (TEE)...

XREF: CONPS1500131 *Ernesto G Ontiveros*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Sylvia Ontiveros, mother, established the SNT for Ernesto on 09/17/15.
2. 1st accounting approved on 03/27/17.
3. **Need** 2nd accounting beginning with date of 10/01/16.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501133

CASE NAME: VANDA GLORIA DIAS

HEARING:
Hearing re Final Discharge

COUNSEL:

EDAWRD G OPERINI	(PET)...SCOTT M. SHIELDS
VANDA GLORIA DIAS	(DEC)...
ALAN DIAS	(PET)...SCOTT M. SHIELDS
ALAN DIAS	(PET)...SCOTT M. SHIELDS

GENERAL INFORMATION

Continued from 01/22/18 at request of counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON Final Discharge by Public Guardian

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

1. First and Final Account was approved on 01/23/17.
2. Need receipt by Hesperia Water District and Southwest Gas.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Need to clear notes.
(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700001

CASE NAME: MTR OF KENNETH W BEARDEN SR.

HEARING:

Accounting Review by ***

COUNSEL:

KENNETH W BEARDEN JR (PET)...ANDERSON & LEBLANC, A.P.L.C.
KENNETH W BEARDEN SR (DEC)...

GENERAL INFORMATION

Continued from 05/14/18. No appearance. Matter is called at 8:30 and again at 10:05, there is no appearance or contact by counsel or petitioner. Court continues this matter to 06/25/18 at 8:30am in dept S35 and orders counsel and his client be personally present at the next hearing date.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Kenneth Bearden, Jr, son, on 03/10/17; full authority, no bond.
2. Final Inventory and Appraisal filed 09/13/17; however, **need** bank statement for HSA account # 7482 in support of date of death balance per Local Rule 20-908.
3. **Need** accounting or status report.
4. Petitioner and Counsel are to be personally present per minutes on 05/14/18.

RECOMMENDATION

Need to clear notes 2 & 3.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700512

CASE NAME: JUDY ANN BESWICK

HEARING:

First and Final Account and Report of DAVID BESWICK and Petition
for allowance of fees filed.

COUNSEL:

DAVID BESWICK (PET)...DIANA J CARLONI
JUDY ANN BESWICK (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of
Fees, by son, David Beswick, [Administrator/Petitioner]

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

1. Assets on Hand \$124,957.29 consisting of \$82,821.69 cash, real property and investment shares.
2. **Need** bank statements confirming date of death balance for US Bank account ending in xx0605 per Local Rule 20-908.
3. Petitioners seeks court approval to pay Frontier Communication claim of \$64.02 which was filed timely, but not served and discovered during accounting.
4. Statutory fees of \$10,031.38 requested by attorney and Petitioner. Calculated.
5. Attorney requests reimbursement of costs advanced of \$383.93. Itemized [LF pgs.6/7].
6. Petitioner requests reimbursement of costs advanced of \$750.00. Itemized [LF pgs6/7].
7. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
8. Notice given.
9. Reserves in the amount of \$750.00 requested for closing costs.
10. ~ Proposed Order: 05/10/18.

RECOMMENDATION

Need to clear notes 2 and 7, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **07/01/19**
(cs)

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800453

CASE NAME: BRYAN KEITH KESSLER

HEARING:

Petition for LETTERS ADMINISTRATION WITH FULL IAEA

COUNSEL:

MARSHALL T KESSLER (PET)...TODD J VIGNEUX
BRYAN KIETH KESSLER (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner appears to be a New York resident requesting \$500,000 bond. Estate value of \$500,000 in personal property. Bond appears sufficient.
2. ~Proposed Form Order: 05/09/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for 09/09/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800471

CASE NAME: MTR OF CONSTANCE L CAIN

HEARING:

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

COUNSEL:

MARK T SOLORIO (PET)...PRO/PER
CONSTANCE L CAIN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Mark Solorio, son-in-law/alternate named executor

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

1. Will waives bond. The estate consists of \$145,000.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner is not listed in section 8 of the petition; however, it is clear that petitioner is the decedent's son-in-law. **JTD**
3. **Need** Declination to act by named executor, Becky Solorio.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication.
6. ~Proposed Form Order: 05/14/18

RECOMMENDATION

Need to clear notes 3-5. Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: RPR RS02462

CASE NAME: ARUTUNIAN FAMILY TRUST

HEARING:

Accounting Review by ***

COUNSEL:

LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
ARUTUNIAN FAMILY TRUST	(TRU)...
BRYAN DEAN ARUTUNIAN	(PET)...PRO/PER
ERNEST ARUTUNIAN	(TEE)...ERNEST ARUTUNIAN
DIANE HARKISON	(MARIELLEN ROSS)
DONNASUE SMITH ORTIZ	(DONNASUE ORTIZ)

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Accounting Review

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

1. On 04/17/17, Court approved fifth and current account, \$20,000 bond; Sixth and current account now due.
2. No accounting filed.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: TRU PS1800061

CASE NAME: SHEEHAN FAMILY TRUST

HEARING:

Petition for order transferring asset to revocable trust

COUNSEL:

ANTHONY SHEEHAN (PET)...BENARI & NGUYEN LLP
SHEEHAN FAMILY TRUST (TRU)...

The petitioner indicates that the principal place of trust administration is **San Diego County**. Court may wish to transfer case to San Diego County. **JTD**

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of hearing to Timothy Sheehan, Jennifer Sheehan, Theodore Rinker, Charleen Masters and Jennifer Cordero. Notice must contain full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.

(ww)

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Page: 9A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 06/25/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

HEARING:

Fifth & Final Account and Report of PHYLLIS ANDERSON and
Petition for allowance of fees filed.

COUNSEL:

PHYLLIS ANDERSON (PET)...DAVID S HAMILTON
THE LYNN K ANDERSON SPECIAL NEEDS TRUST (TRU)...
PHYLLIS ANDERSON (TEE)...DENNIS M. SANDOVAL

X-REF CONPS1700129

GENERAL INFORMATION

Continued from **03/05/18** for supplement to be filed.

Continued from 06/04/18 at request of counsel to file supplement with explanation as to funds being spent on truck repairs. Supplement is to be filed and served by 06/18/18, 4pm. Special setting of this matter will be heard on 06/25/18.

THIS CASE SET FOR HEARING ON 5th and final account of SNT, Petition for Attorney's fees; Petition to Distribute Remaining Assets to Successor Trustee by Phyllis Anderson, Former Trustee.

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

1. Accounting period:08/01/14-05/31/17
2. Assets on hand: \$21,303.41 of which \$1,103.10 is cash and the remainder in non-cash assets.
3. Current bond amount: \$65,000.00.
 - a. The bond calculation on page 3 is incorrect as the personal property on hand is \$21,303.41 and not \$271.01. Does Court wish to require a verified supplement with corrected bond calculation? **JTD**
 - b. A request to reduce bond was not made as accounting is by the former trustee; however, bond appears to be excessive as the carry value of personal property on hand is \$21,303.41. Suggest lowering bond amount to \$30,743.00 which includes recovery. **JTD**
4. Lorraine Dotson was appointed interim successor trustee on 06/01/17.

5. Petitioner waives fees at this time.
6. Attorney is requesting fees of \$5,575.81 for 33.08 (only charging for 31.78 hours as 1.3 hours were at “no charge”) hours at \$400/300/225 for 9.28 hours’ attorney time and \$125 for 22.5 hours’ paralegal time. Itemized. [LF pgs. 22-27] **JTD**.
 - a. **Need** qualifications of paralegals that meet the requirements of CRC 7.703(e)(1)(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d) via verified supplement.
7. It appears that were various payments for a truck from 08/01/14-09/01/15 and then the 2007 Ford Edge payments replaced it; however, there is no mention in the report if it was sold or donated. Court to inquire if the truck was sold or donated as it is not listed as part of the property on hand or in alternative, need verified supplement. [LF pg. 20] **JTD**
8. All remaining funds after payment of attorney’s fees are to be distributed to interim successor trustee, Lorraine Dotson.
9. Notice given.
10. **Notice of non-payment of bond premium by American Contractors Indemnity Company filed 02/22/18.**
11. Proposed order: 11/13/17 title of order doesn’t match petition; accounting end date is incorrect in #1 & 2; distribution of remaining assets is not indicated.

RECOMMENDATION

Court’s discretion and need to clear note 6a. If approved, set Final Discharge hearing for **06/10/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/25/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701283

CASE NAME: MTR OF ESTHER SALVATIERRA TRUST

HEARING:

Petition for Modify Irrevocable Trust to Remove Current Trustee
and Appoint Successor Trustee

COUNSEL:

MARCIA MURO

ESTHER SALVATIERRA TRUST

LAURIE KOUZES

(PET)...VOORHEES LAW GROUP

(TRU)...

(OBJ)...STEVENSON LAW OFFICE

Currently under review by Legal Research.
(LR)

Notice:

Notice given.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800101

CASE NAME: THE LE ROY AND ILA I CARSON TRUST DATED 3/23/01

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

GARY M CARSON (PET)...ANTHONY G LAGOMARSINO
THE LE ROY AND ILA I. CARSON TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice of hearing as to Connie Hosch and Terry Carson filed 06/25/18; however, **Need** Notice must contain full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800103

CASE NAME: The Tierra Jones Special Needs Trust

HEARING:
Case Management Conference

COUNSEL:

ANNA GREEN (PET)...PHELPS LAW GROUP
THE TIERRA JONES SPECIAL NEEDS TRUST (TRU)...
BOND SERVICES OF CALIFORNIA (TP)...PRO/PER

X-REF CONPS1800112 (Conservatorship of Tierra Jones)

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Case Management Conference transfer in from Los Angeles County.

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

1. Anna Green is the Trustee of the Tierra Jones Special Needs Trust created 10/07/05, bond \$110,000. Copy of Trust filed.
2. Los Angeles County ordered matter transferred to San Bernardino County on 01/03/18 per minute order. Case transferred to San Bernardino County on 04/27/18.

RECOMMENDATION:

Court's discretion
(cs)

Future hearing: Accounting 06/10/19

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800110

CASE NAME: EVELYN M PERSELL TRUST

HEARING:

Petition for (VERIFIED)for order confirming terms of trust &
confirming that RP is trust asset etc

COUNSEL:

ROBERT BROTEMARKLE JR (PET)...LAW OFFICE OF ROBERT E. HALES
EVELYN M PERSELL TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Need Notice of hearing as to Marilyn Brotemarkle, Jim John Vanhulle, Burris Ray Vanhulle; and Scott Brotemarkle. Notice must contain full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 06/25/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800041

CASE NAME: JAMES BYRON PRATT

HEARING:

Accounting Review by ***

COUNSEL:

KENNETH JAMES FINUCANE (CPE)...ELISABETH KEMPE-OLINGER
LAURIE DIANNE FINUCANE (CPE)...ELISABETH KEMPE-OLINGER
JAMES BYRON PRATT (CEP)...

Waiver of Court Fees and Costs filed by KENNETH JAMES FINUCANE, LAURIE DIANNE
FINUCANE & JAMES BYRON is GRANTED

VACATE – Ex-Parte Petition to dispense with accounting and order forwarded to
department for signature.

(cs)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800151

CASE NAME: MTR OF SIRIA SANCHEZ

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JOSE SANCHEZ	(CPE)...PRO/PER
JACQUELINE SANCHEZ	(CPE)...PRO/PER
SIRIA SANCHEZ	(CEP)...JENNIFER M DANIEL

GENERAL INFORMATION

Temporary orders denied on **05/24/18** . Court dismisses the request for estate powers without prejudice.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Jose and Jacqueline Sanchez, spouse of proposed conservatee and daughter.

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

1. Petitioner requests to waive bond as petitioners are the spouse and daughter of the proposed conservatee. Estimated estate value is \$105,000.00 of which \$5,000.00 is personal property. Court may wish to inquire if property is community property as one of the proposed conservators is the spouse. **JTD**
2. **2355** powers are not requested in section 1g; however, section 9 is marked and indicates that proposed conservatee lacks capacity to give medical consent. Petitioner appears to be seeking medical powers. [LF pg. 10] Capacity Declaration filed 05/17/18; however, office telephone number is missing and GC-335A (if requested 2356.5 powers) is not attached. Court may wish to inquire if they are requesting 2355 powers. **JTD**.
3. Petitioners indicates in attachment 5c(1) that proposed conservatee has dementia; however, dementia powers **2356.5** are not requested in section 1k. Court to clarify if petitioners are seeking dementia powers. [LF pg. 10] **If yes**, then **Need** Attachment Requesting Special Orders Regarding Dementia (form GC-313) if requesting dementia powers. Jennifer Daniel appointed as counsel. **Need** report of counsel.
4. Petitioners indicated in attachment 1l re: "Other order" that they want to be awarded care, custody and control of the conservatee and be able to make all necessary medical, legal and financial decisions. It appears that they are requesting **2351-2358** and **2590** powers;

however sections 1d & 1f are not marked and attachments 1d and 1f are not attached. [LF pg. 10] **JTD**

5. Petitioner Jose Sanchez is not listed in section 11 of the petition; however, it is clear that petitioner is the proposed conservatee's spouse. **JTD**
6. List of Required Contacts (Local form SB-12224) filed; however, address for Augustine Sanchez, son, is missing but appears on the petition. **JTD**
7. Confidential Screening forms by both petitioners are missing attachment 3 re: nomination by proposed conservatee. Court may wish to clarify if they were nominated. **JTD**
8. Citation with proof of service filed 05/22/18; however, citation was mailed and the Notice of Acknowledgment of Receipt is not attached. **Need** personal service or completed citation with attached signed Receipt by proposed conservatee.
9. **Need** Certificates of Completion of the Conservatorship Training Class.
10. Notice given.
11. **Need** CI report.
12. ~Proposed Form Order: 05/17/18

RECOMMENDATION

Need Report of Counsel, CI report and to clear notes 8 & 9 then Court's discretion re: remaining notes and bond. If approved, set hearing for Compliance Review for **01/28/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

If conservatorship of the estate is granted then set hearing re Accounting Review for **09/09/19**. Any accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 06/25/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800107

CASE NAME: DWAIN GLOVER

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

DWAIN GLOVER

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Accounting Review by PG

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

1. Ex Parte Order that Conservator need not present Seventh Account approved on 07/26/17; eighth account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 06/25/18 TIME: 9:30 DEPT: S35P

CASE#: SLC SS01755

CASE NAME: MTR OF PETRA SORIA

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

PETRA SORIA

(CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 7th Account approved and forwarded to Department for signature. Next Accounting Review date to be set on **08/05/19**.

(ww)

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: BC BS00032

CASE NAME: IN THE CONSERVATORSHIP OF MARK STOTT

HEARING: Petition for APPROVAL AND PAYMENT OF ATTORNEY'S FEES AND COSTS TO COURT APPOINTED COUNSEL FOR CONSERVATEE

COUNSEL:

MARK DAVIDS STOTT	(CEP/CEE)...MITCHELL I ROTH
LINDA M LINGREN	(PLA/CPE)...CALDWELL, KENNEDY & PORTER, A.
LAWRENCE ALF	(PET)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
DAVID SPASOJEVICH	(SC/CPE)...ROBERTA L. TAYLOR & ASSOCIATES
CARMELA SPASOJEVICH	(SC/CPE)...ROBERTA L. TAYLOR & ASSOCIATES
JAMES M. OWEN	(SC)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation
THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Petitioner, Mitchell Roth, was appointed on 03/21/14. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 12/15 to .
- 2 Petitioner alleges period exceeds the 2 year rule due to the fact that the estate had not assets; however, an order for the sale of the real property was granted on 01/29/18.
- 3 Attorney requests fees of \$23,336.00. Billed at \$375/hour for attorney time and reimbursement of \$86. Itemized
- 4 Need Notice of Hearing and proof of service.
- 5 Petitioner requests a Court order directing and ordering Conservator to pay requested sum.
- 6 ~Proposed Order:05/24/18.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 2/04/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700119

CASE NAME: MTR OF ALEXANDER SCHERT

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ALEXANDER SCHERT (CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 3rd Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **08/05/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800256

CASE NAME: LORA JENNINGS

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LORA JENNINGS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Conservatee passed away on 11/24/16.

THIS CASE SET FOR HEARING ON Accounting review.

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

2. Fourth Account for Public Guardian approved on 06/20/16.
3. **Need** Fifth and Final Account for pre and post death periods.
4. No accounting filed. **Need** same.

RECOMMENDATION

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800301

CASE NAME: CHRISTOPHER POSADAS

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CHRISTOPHER POSADAS (CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 4th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **08/05/19**.

(ww)

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100297
CASE NAME: MARILYN RACHAEL BOYINGTON
HEARING: Second and final Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE/STE)...COUNTY COUNSEL
MARILYN RACHAEL BOYINGTON	(CEP)...HARTNELL LAW GROUP
MARLYN BOYINGTON TRUST	(TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 2nd and Final **Trust** account and Petition for Fees by **Successor Trustee**, Public Guardian ["Petitioner"].

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

- Accounting period: **07/03/14-08/15/16**
 - Conservatee died on 03/27/15.** Does Court wish to require pre-death and post-death accounting periods per Pr.C. § 2620? **JTD**
- Assets on Hand: \$9,764.95 in cash
- Public Guardian requests fee of \$783.38 for the period of 08/01/15-11/30/15. Generally itemized **JTD**
- Public Guardian requests fees totaling **\$7,576.25** at \$60/hour for 79.75 hours; however, calculation only amounts to **\$4,785.00**. Generally itemized. **Need** corrected calculation.
 - Petitioner does not request for approval and confirmation for fees previously collected in the amount of \$2,033.38. [LF pg. 14] **JTD**
- County Counsel request fees in the amount of \$391.71 for the period of 08/01/15-11/30/15. **JTD**
 - Counsel does not request for approval and confirmation of fees previously collected in the amount of \$1,641.71. [LF pg. 14] **JTD**
- Petitioner and Counsel failed to date at signature line. [LF pg. 8] **JTD**
- Proposed Order: 09/18/17 Public Guardian fee total is incorrect and is missing approval/confirmation of fees already taken by Public Guardian and Counsel.
See notes 4 & 5.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set for Final Discharge on **07/01/19**.
(ww)

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 24, 25, 26

HEARING:

Hearing Re: STATUS OF CONSERVATEE

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL
SURETEC INSURANCE	(PET)...PRO/PER
JANETTE LUCAS	(CPE/SC)...

GENERAL INFORMATION:

Continued from 05/07/18 Court confirms Order that Public Guardian is successor conservator of person and estate and That Janette Lucas was removed as conservator of person and estate. Court imposes sanctions Of \$500.00 On Janette Lucas For Failure To Cooperate With Court Order-payable to the Court forthwith. Janette Lucas states she understands this order. Court Orders That Janette Lucas is not to contact Virginia Kuchta in anyway whatsoever- not to contact the location(s) that Virginia Kuchta is located- and that any failure to cooperate with this order will result in the court setting hearing re criminal contempt of court order. Jeanette Lucas states she understands this order. Court orders Janette Lucas to be personally present on 06/25/18 at 10:am

THIS CASE SET FOR HEARING ON Status of Conservatee

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

1. Matter set on 04/26/18 during OSC re Referral to Public Guardian, wherein, Court suspended Janette Lucas as conservator of the person and estate and appointed Public Guardian as successor conservator, with medication powers and secured perimeter facility power.
2. Court ordered County Counsel to file status report as to condition of conservatee by 05/07/18 hearing.

RECOMMENDATION:

Court's discretion.

(CS)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 23, 25, 26

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,500.00 FOR FAILURE TO FILE

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL
SURETEC INSURANCE	(PET)...PRO/PER
JANETTE LUCAS	(CPE/SC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions Of \$1,500.00 For Failure to file

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

1. Matter set on 05/07/18, wherein, Court ordered Sanctions re Failure to comply with filing of account and ordered Janette Lucas to be personally present.

RECOMMENDATION:

Court's discretion re OSC.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 23, 24, 26

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,500.00 FAILURE AS CAREGIVER

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL
SURETEC INSURANCE	(PET)...PRO/PER
JANETTE LUCAS	(CPE/SC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions of \$1,500.00 for Failure as Caregiver.

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

2. Matter set on 05/07/18, wherein, Court ordered Sanctions re failure to care for the conservatee and ordered Janette Lucas to be personally present.

RECOMMENDATION:

Court's discretion re OSC.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300223

CASE NAME: Virginia Kuchta

SEE ALSO 23, 24, 25

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
VIRGINIA KUCHTA	(CEP)...JENNIFER DANIEL
SURETEC INSURANCE	(PET)...PRO/PER
JANETTE LUCAS	(CPE/SC)...

GENERAL INFORMATION

Continued from **09/26/17** at request of counsel. Notice to be given by Attorney Jennifer Daniel.

Matter set at **12/12/17**. There being no appearance by Janette Lucas, the Court sets an OSC Re: Sanctions in the amount of \$500.00 for failure to appear at today's hearing and Failure to File Accounting. The Court orders Janette Lucas to appear at the next hearing.

Continued from **02/27/18**. Court vacates osc re sanctions set for 02/27/18; Court orders Janette Lucas to be personally present in court at 10:00am – Dept. S35 on 03/26/18. Court refers this case to the public guardian for possible appointment as successor conservator of person and estate.

Continued from **03/26/18**. Matter called without all counsel present-matter is continued to April 16, 2018.

Continued from 04/16/18 Court sets osc re surcharge of \$1,500.00 on 05/07/18, 10:00am Department S35- OSC re Surcharge of \$1,500.00 on Janette Lucas. Court orders Janette Lucas to be personally in court.

Continued from 05/07/18 Court imposes sanction of \$500 on Janette Lucas. Court confirms Order that Public Guardian is successor conservator of person and estate and that Janette Lucas was removed as conservator of person and estate. OSC set as to Janette Lucas \$1,500 each for failure to file accounting and for failure to care for conservatee.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Janette Lucas.

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

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.

1. 1st and current account by Janette Lucas, conservator of person and estate approved on 03/28/17 for period ending 09/04/15.
2. **Need** 2nd Account current beginning with date of 09/05/15.

RECOMMENDATION

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

(lh/nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400244

CASE NAME: MTR OF ELAINE BEAUCLAIR

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CALDWELL KENNEDY & PORTER (PET)...CALDWELL, KENNEDY & PORTER
ELAINE BEAUCLAIR (CEP)...ROSE C ROSADO

GENERAL INFORMATION

Continued from 01/04/16, 05/23/16, 11/14/16 and 04/03/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. PG appointed as temporary conservator of the person and estate on 09/08/14 and then general conservator of the person and estate on 10/20/14.'Final Inventory and Appraisal filed 01/29/15.
2. Notice of the Conservatee's Death filed 05/11/17 indicating that conservatee died on 05/10/17.
3. **Need** 1st and final account including pre and post death accounting periods per Pr.C. § 2620 beginning with date of 09/08/14.

RECOMMENDATION:

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

(sa/dl/nb/cs/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400302

CASE NAME: MTR MARY MATTHEWS

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARY MATTHEWS (CEP/OBJ)...JENNIFER DANIEL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. First Account for Public Guardian approved on 11/06/17
2. **Need** Second Account beginning with 04/01/16.

RECOMMENDATION

Inquire status of accounting.
(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400310

CASE NAME: Hassan Aburraheem

HEARING:

Accounting Review by ***

COUNSEL:

HASSAN ABURRAHEEM (CEP)...HARTNELL LAW GROUP
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

Ex Parte Order that Conservator need not present 2nd Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **08/05/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600061

CASE NAME: MTR OF GENERAL BERNNARD WHITLOW

HEARING:

Hearing Re: REFERRAL TO PUBLIC GUARDIAN

COUNSEL:

KALANI HOGGATT (CPE)...PRO/PER
GENERAL BERNNARD WHITLOW (CTP)...JEANNE E KENNEDY

Waiver of Court Fees and Costs filed by GENERAL BERNNARD WHITLOW is GRANTED

GENERAL INFORMATION

Continued from 05/07/18 Court orders Kalani Hoggatt to be personally present in court on 06/25/18, 10:00 am. Court further orders Kalani Hoggatt to meet with Edwin Lemus immediately after this hearing and is to cooperate with the investigation of Public Guardian.

THIS CASE SET FOR HEARING ON Referral to Public Guardian

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

1. Hearing set by Court on 04/24/18 after review of Report by Court Investigator.
2. Conservator Kalani Hoggatt is to be present.
3. Court has discretion to appoint the Public Guardian if needed.

RECOMMENDATION

Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600240

CASE NAME: LOUISE ABRIEL

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LOUISE ABRIEL (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 09/15/18

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Public Guardian appointed conservator of the person and estate on 09/16/16, no bond.
2. Final Inventory and Appraisal filed 06/29/17.
3. Need 1st Account beginning with 09/16/16.

RECOMMENDATION

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700434

CASE NAME: Sue Han

HEARING:

Hearing Re: CONDITION/PROCEDURE FOR SALE OF HOUSE

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

SUE HAN

(CEP)...SANDRA TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Condition/Procedure for Sale of House

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

1. Matter set by Court on 05/10/18 at Hearing re: Court Trial (Second Session).
2. PG appointed as conservator of the person and estate on 05/08/18.
3. Court indicated in respect to code enforcement problem that a written report is required.

RECOMMENDATION

Inquire status.

(ww)

Future Hearing: 12/10/18 Conservatorship Compliance Review Hearing

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS7040

CASE NAME: IN THE MATTER OF EDSON MILLER

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
EDSON MILLER (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **02/01/16** and **08/01/16**. Court states no further continuances on this accounting.

Continued from 02/27/17,11/07/17 and 02/26/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 23rd Accounting by PG approved on 02/03/14.
2. **Need** 24th accounting beginning with date of 08/07/13.

RECOMMENDATION

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

(dl/nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01574

CASE NAME: MATTER OF JOHN FINLEY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JOHN C FINLEY (CEP)...HARTNELL LAW GROUP

Ex Parte Order that Conservator need not present 6th Account by PG approved on 05/08/18 and forwarded to Department for signature. Next Accounting Review date to be set on **07/29/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS8446

CASE NAME: IN THE MTTR OF DOUGLAS MOORE

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
DOUGLAS MOORE

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

Ex Parte Order that Conservator need not present 25th Account by PG approved and forwarded to Department for signature. Next Accounting Review date to be set on **08/05/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000636

CASE NAME: MICHAEL WARREN WATKINS

HEARING:

Hearing re Final Discharge

COUNSEL:

KATHY WATKINS (PET)...BROWN WHITE & NEWHOUSE LLP
MICHAEL WARREN WATKINS (DEC)...
AMERICAN CONTRACTORS INDEMNITY (TP)...PRO/PER
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)
BERNARD M BIDART

GENERAL INFORMATION

Continued from 03/12/18 at request of counsel for receipts.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

4. First and Final Account approved on 03/06/17.
5. **Need** receipt by Kathy Watkins.
6. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500166

CASE NAME: ESTATE OF ARTURO GUTIERREZ

HEARING:

Hearing re Final Discharge

COUNSEL:

PAMELA GUTIERREZ (PET)...HOWARD R HAWKINS
ARTURO GUTIERREZ (DEC)...

VACATED: Ex Parte Petition for Final Discharge and Order approved on 06/04/18.
(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600124

CASE NAME: MTR OF HELGA MARIE HARDERS

HEARING:

Accounting Review by ***

COUNSEL:

CAESAR A ORTIZ (PET)...PRO/PER
HELGA MARIE HARDERS (DEC)...

GENERAL INFORMATION

Continued from **10/23/17**. Administrator states the property was lost to foreclosure. Matter is continued for a status report to be filed.

Continued from **01/08/18**. A letter filed by the administrator regarding the status.

Administrator needs to file a petition to terminate the estate for lack of assets.

Continued from **03/19/18**. No appearance. Court orders Caesar Ortiz to personally be present at the next hearing.

Continued from 04/30/18 at request of Court due to no appearance, no accounting filed. At previous hearing, Cesar Ortiz was ordered to be personally present at today's hearing and there is no appearance and no contact from Mr. Ortiz. Citation issued to: Caesar Ortiz who is cited and required to appear on 06/25/18 at 8:30 in Department S36P and show cause why failure to appear..

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Caesar Ortiz, son, on 08/16/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600776

CASE NAME: MTR OF EUGENE ALLEN RANSOM

HEARING:

Probate status report filed.

COUNSEL:

ERICKA RANSOM (PET)...DAVID SARAZEN
EUGENE ALLEN RANSOM (DEC)...
TERESA RANSOM (PET/OBJ)...MILES & HATCHER,

GENERAL INFORMATION:

Continued from 03/26/18 for Petition to Vacate Sale to be heard.

THIS CASE IS SET FOR HEARING ON Status Report filed 03/26/18 by Teresa Ransom, Co-Administrator/Petitioner.

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

1. **Note: Petition to Confirm Sale of Real property to a new bidder granted on 04/16/18.**
2. Petitioner alleges the estate is not in a condition to be closed as hearing to confirm sale of real property is pending. Also there are several vehicles and motorcycles belonging to decedent which still need to be sold.
3. Petitioner requests a continuance to July 2018.
4. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. This form of notice is mandatory.
5. No proposed order. Submit after hearing.

RECOMMENDATION:

Need to clear required notice. If approved, set next Accounting/Status Review for **08/27/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(cs)

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

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800486

CASE NAME: EUGENE ALLEN CARTER

HEARING:

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

COUNSEL:

CINDY J PAQUIN (PET)...CHRISTINA FERRANTE
EUGENE ALLEN CARTER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Cindy Paquin, Caretaker, [Executor/Petitioner]

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

1. Will waives bond. Net estate value (\$35,000). The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b).
2. Petition section 5b is incomplete re whether decedent was survived by stepchild or foster child(ren) etc. **Need** verified supplement.
3. Section 8 of Petition does not mentioned Martin Buschbacher Butler Deville are mentioned in will. **Need** verified supplement.
4. **Need** Notice to Petition to Administer Estate and proof of service to Butler Deville, Martin D. Buschbacher, AZ Biazar (Assignees) and John Biazar (Assignees)
5. **Need** proof of publication
6. ~Proposed Form Order: 05/17/18

RECOMMENDATION

Need to clear notes 2-5, Court's discretion re bond. If approved, set Accounting/Status Review for 09/09/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS**

DATE: 06/25/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800065

CASE NAME: MTR OF WING H LEE REVOCABLE LIVING TRUST

HEARING:

Petition for TO COMPEL TRUSTEE ACCOUNTING ,REDRESS BREACH OF TRUST

COUNSEL:

MALENE LEE (PET)...CHANDLER LAW FIRM
THE REVOCABLE LIVING TRUST OF WING H LEE (TRU)...

Currently under review by Legal Research.

(LR)

Notice:

Notice given. Notice not re-reviewed.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800114

CASE NAME: THE WOODRUFF FAMILY REVOCABLE TRUST DATED 4/15/12

HEARING:

Petition for An order to confirm validity of a trust; confirm trustee; and confirm assets to etc

COUNSEL:

LATASHA QUINIECE STIGER-SIMMONS (PET)...PRO/PER
THE WOODRUFF FAMILY REVOCABLE TRUST (TRU)...

Waiver of Court Fees and Costs filed by LATASHA QUINIECE STIGER-SIMMONS is GRANTED

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing and proof of service. Per Pr.C. §851.
(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800116

CASE NAME: Logan Tappen Special Needs Trust

HEARING:

Petition for to establish special needs trusts

COUNSEL:

ANGELINA TAPPEN (PET)...LAW OFFICES OF MICHELS & LEW
LOGAN TAPPEN SPECIAL NEEDS TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice of Hearing and proof of service filed 05/25/18; however, per C.R.C. 7.51(a). **Need**
corrected Notice of Hearing.

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

SEE ALSO 10

HEARING: Hearing Re: PETITION TO TERMINATE CONSERVATORSHIP ETC

COUNSEL:

ANDREW PRAMSCHUFER	(CPE)...ROSA M MARQUEZ
SUSAN PRAMSCHUFER	(CPE)...PRO/PER
JANICE ANNE PRAMSCHUFER	(CEP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER	(PET)...ROSA M MARQUEZ
LIBERTY MUTUAL INSURANCE	(TP)...
BARBARA PRAMSCHUFER	(MITCHELL I ROTH)

XREF: CONPS1600244 (Barbara Pramschufer)

FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)

CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION

Continued from **11/02/17 and 11/13/17.**

Continued from 04/16/18 to clear probate notes.

THIS CASE SET FOR HEARING ON Petition to Terminate Conservatorship of Estate, Waiver of Accounting Pr.C. §§ 1860, 2628 by Susan and Andrew Pramschufer, co-Conservators.

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

1. Co-Conservators, Susan and Andrew Pramschufer [siblings], seek termination of estate. Conservatee's mother Barbara Pramschufer allegedly misappropriated conservatee's assets. Co-Conservators wish to retain conservatorship of person only.
2. Assets on hand \$8,074, cash.
3. Estate appears to qualify for a waiver under Pr.C. § 2628. Assets consist of public benefits.
4. **Need** amended letters if approved.
5. Notice given.
6. No proposed order. Submit after hearing.

RECOMMENDATION

If approved, set Accounting/Status Review for **final accounting for 11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

SEE ALSO 9

HEARING:

First & Final Account and Report of ANDREW PRAMSCHUFER, SUSAN PRAMSCHUFER and Petition for allowance of fees filed.

COUNSEL:

ANDREW PRAMSCHUFER	(CPE)...ROSA M MARQUEZ
SUSAN PRAMSCHUFER	(CPE)...PRO/PER
JANICE ANNE PRAMSCHUFER	(CEP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER	(PET)...ROSA M MARQUEZ
LIBERTY MUTUAL INSURANCE	(TP)...
BARBARA PRAMSCHUFER	(MITCHELL I ROTH)

Waiver of Court Fees and Costs filed by JANICE ANNE PRAMSCHUFER is GRANTED
TOTAL FEES WAIVED TO DATE: \$961.00

XREF: CONPS1600244 (Barbara Pramschufer)

\$465.00 for petition for conservatorship on 09/21/16

\$465.00 for first account and report on 03/15/17

\$31.00 for fax fees

XREF: CONPS1600244 (Barbara Pramschufer)

FAMSS1706884 (Barbara Pramschufer-n-Tony Hameed Ullah)

CIFDS1700057 (Pramschufer vs Ullah)

GENERAL INFORMATION:

Continued from 04/03/18. To trail matter with 04/16/18 hearing.

Continued from 04/16/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Conservators of the Person and Estate, Andrew Pramschufer and Susan Pramschufer ["Petitioners"-siblings].

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

1. Accounting period 02/13/17 to **03/21/18**.
2. Assets on Hand **\$6,474.61** consisting of cash.

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.

3. Petitioners do not request compensation.
4. Petitioners request reimbursement in the sum of **\$3,770.56** for payments to attorney for services to the estate. Billed at \$150-\$250 for attorney time. Itemized [Acct., LF, pgs. 7-15]. **JTD.**
 - a. Fees have been paid prior to obtaining court authority.
 - b. Fees include costs that are normally considered overhead.
5. Accounting does not include proposed distribution. **Supp. (03/27/18) alleges if the court approves the Conservator's petition for reimbursement, the estate will have expended all Conservatee's assets and the estate will be ready to be terminated.**
6. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5). **Supp. 02/06/18 indicates Salem Christian Homes fee for 01/01/18 in the amount of \$1,039.37 not \$1,026.**
7. **Need** copies of investment/bank statements to support cash balances on hand per Local Rule 20-908. **Supp. 05/21/18 provides financial statement; however, statements do not reflect assets on hand [LF p. 18-.**
8. **Need** Notice of Hearing with proof of service to include Donnasue Ortiz and Mitchell Roth.
9. **Supp. (03/27/18) does not affix Exhibit A consisting of updated bank statement and receipt as alleged. Need same via verified supplement.**
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge on **09/09/19.**

(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700174

CASE NAME: MTR OF AARON DOUGLAS SASS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of STACEY SASS

COUNSEL:

STACEY SASS (CP)...DUANE P BOOTH
AARON DOUGLAS SASS (CTP)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from 04/16/18 Matter is continued - required documents have not been filed nor is counsel for the conservator present.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Stacey Sass, mother, appointed conservator of the person only on 09/11/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C. §1830(c) filed 04/23/18.
3. Determination of Conservatee's Appropriate Level of Care filed 05/09/18.
4. Care Plan in accord with Pr.C.§2352.5 filed 05/09/18.

RECOMMENDATION

None.
(ww/cs)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700375

CASE NAME: MTR OF ZOLA CHEYENNE JACKSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of NICKI E LUTES

COUNSEL:

NICKI E LUTES (CP)...PRO/PER
ZOLA CHEYENNE JACKSON (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Nicki Lutes, appointed limited conservator of the person on 11/20/18.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 12/14/17; however, section 4 is incomplete. **Need** completed form.
4. Care Plan filed 12/14/17; however, page 3 is incomplete. **Need** completed form.

RECOMMENDATION

Need to clear notes 2-4. Inquire Status
(cs)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700416

CASE NAME: MTR OF LESLIE ONTIVEROS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)... COUNTY COUNSEL
LESLIE ONTIVEROS (CEP)... DAVID J HORSPPOOL

GENERAL INFORMATION

PG appointed temporary conservator of the person and estate on 12/04/17.

Continued from **02/26/18**. Leslie Ontiveros objects to conservatorship. Court appoints Donnasue Ortiz as guardian ad litem for proposed conservatee.

Continued from 04/16/18

THIS CASE SET FOR HEARING ON [**Amended filed 01/11/18**] Petition for Appointment of Conservator person and estate by PG.

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

1. No bond- PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks medical and dementia powers; however, dementia attachment to petition and Capacity Declaration is missing and proposed conservatee doesn't appear to have dementia. Court to inquire if conservatee has dementia.
 - a. Court to see Capacity Declaration filed 11/13/17.
 - b. David Horspool appointed as counsel. Report of counsel filed 11/20/17.
4. Petitioner seeks authority to deposit up to \$5,000.00 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300.00 or less; storage or a sale would be a burden on the estate.
5. Citation and proof of service filed on 01/16/18.
6. **Need** Notice of Hearing and Proof of service of Amended petition as to Madison Ontiveros, daughter.
7. **Need** Report of GAL Donnasue Ortiz.
8. CI report filed 01/19/18.
9. ~Proposed Form Order: 11/13/17

RECOMMENDATION

Need GAL report and to clear note 6 then Court's discretion. If approved, set hearing for Compliance Review for **01/28/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

Set hearing re Accounting Review for **09/09/19**. Any accounting to be filed 30 days in advance.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800064

CASE NAME: MTR OF GREGORIO LOPEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARGARITA LOPEZ	(CPE)...PRO/PER
GREGORIO LOPEZ JR.	(PET)...PRO/PER
GREGORIO LOPEZ	(CEE)...JEANNE E KENNEDY
YESENIA LOPEZ	(PRO/PER)

Due to time constraints, matter under review by examiner.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800154

CASE NAME: MTR OF YESCENIA GUZMAN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA TERESA GUZMAN (CP)...PRO/PER
YARITZA APARICIO (CP)...PRO/PER
YESCENIA GUZMAN (CTP)...

Waiver of Court Fees and Costs filed by MARIA TERESA GUZMAN is GRANTED

Waiver of Court Fees and Costs filed by YARITZA APARICIO is GRANTED

Due to time constraints, matter under review by examiner.

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02906

CASE NAME: MTR OF ROBERT A EDGELL

HEARING:

Seventh and final Account and Report of DONALD L EDGELL and
Petition for allowance of fees filed.

COUNSEL:

ROBERT A EDGELL (CEP)...
DONALD L EDGELL (CPE)...HORSPOOL & PARKER

Due to time constraints, matter under review by examiner.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH TRIAL

DATE: 06/25/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

SEE ALSO 18, 19, 20

HEARING:

Court Trial set for PETITION FOR PROBATE of YOLANDA BRISCOE

COUNSEL:

YOLANDA BRISCOE

(PET)...CARMEN QUALLS & ASSOCIATES

TAKISHA BROWN

(PET)...CARMEN QUALLS & ASSOCIATES

RICHARD BRISCOE

(DEC)...

JUSTIN BRISCOE

(PET)...DEBORAH S WHITE

VACATED: Per register of actions.

(cs)

Future hearing: Accounting review 08/07/19

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

SEE ALSO 17, 19, 20

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

VACATED: Per register of actions.

(cs)

Future hearing: Accounting review 08/07/19

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

SEE ALSO 17, 18, 20

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

VACATED: Per register of actions.

(cs)

Future hearing: Accounting review 08/07/19

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1701276

CASE NAME: ESTATE OF RICHARD BRISCOE

SEE ALSO 17, 18, 19

HEARING:

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

COUNSEL:

YOLANDA BRISCOE	(PET)...CARMEN QUALLS & ASSOCIATES
TAKISHA BROWN	(PET)...CARMEN QUALLS & ASSOCIATES
RICHARD BRISCOE	(DEC)...
JUSTIN BRISCOE	(PET)...DEBORAH S WHITE

VACATED: Per register of actions.

(cs)

Future hearing: Accounting review 08/07/19

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000567

CASE NAME: MARTIN R SINGLETON

HEARING:

First and Final Account and Report of DENNIS SHOGREN and
Petition for allowance of fees filed.

COUNSEL:

JOHN MACLACHLAN	(PET)...JACK B OSBORN
MARTIN R SINGLETON	(DEC)...
JOHN LEE SINGLETON	(PET)...PRO/PER
PATRICIA SINGLETON	(PET)...JAMES B CHURCH & ASSOCIATES
DENNIS SHOGREN	(SA)...JAMES B CHURCH
JOHN MAC LACHLAN	(PET)...ZIPRICK & CRAMER
JOHN SINGLETON	(PLA)...ARMAND D THRUSTON
COLDWELL BANKER KIVETT-TEETERS (RES)...	SCOTT SHOWLER
AMERICAN CONTRACTORS INDEMNITY (TRACY A STEVENSON)	
CITIMORTGAGE,INC.	(PITE DUNCAN, LLP)

XREF: FAMSS905370 *MARTIN R SINGLETON-N-PATRICIA M SINGLETON*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account, Petition for Fees and for
Final Distribution by Dennis Shogren, successor administrator

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

- 1 Accounting period: 03/07/14-04/28/17; however, Summary of Account reflect the
period of 03/07/14-**03/30/18**. [LF pg. 14] Court may wish to inquire what the correct
accounting period is. **JTD**
- 2 Assets on hand: \$52,095.29 in cash.
- 3 Petitioner and Attorney request statutory fees of \$7,267.54. Calculated.
- 4 Petitioner requests reimbursement for advanced costs in the amount of \$1,175.00.
Itemized. [LF pg. 27] **JTD**
- 5 The petitioner and Attorney are both asking for extraordinary fees dealing with the
sale of the real property as follows:

- a. Petitioner request extraordinary fees of **\$3,937.50** in regards to the removal of tenants and sale of the real property for 15.75 hours at **\$250/hour**. Itemized. [LF pgs. 30-33] **JTD**
 - b. Attorney requests extraordinary fees of **\$54,727.25** in regards to litigation, locating vehicles, and sale of the real property for 169.10 hours at \$323.64 combined rate of paralegal and attorney services. . Itemized. [LF pgs. 35-50)
 - i. Court may wish to question how extraordinary fees are to be paid as they are greater than the assets on hand. **JTD**
 - ii. 6.7 hours of paralegal work by Cindy Lewis was charged at a rate of \$180.00 per hour. Does Court wish to allow or reduce rate to community standard of \$150/hour? **JTD**
- 6 Summary of Account [LF pg. 14]- does not match the Receipts and Losses on sale in the report [LF pg. 7]. Amount of losses differs by \$500.00. **Need** corrected Summary and affected schedules.
 - 7 Schedule C Disbursements has the following issues:
 - a. **Need** explanation via verified supplement of payment of \$380.00 to Don Bently on 09/02/14, and payments to the Eviction Center for total of \$725.00 on 09/05/14
 - 8 Notice is complete.
 - 9 Proposed Order: 05/14/18 need accounting period as accounting is by the successor administrator.

RECOMMENDATION:

Need to clear notes 6 & 7 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **07/01/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600209

CASE NAME: JAMES GILBERT FUROIS

SEE ALSO 3

HEARING:

Hearing Re: PTN TO DISTRIBUTE ON WVR OF ACCTG AND RPT

COUNSEL:

SHARON M ROSENBERG	(PET)...JEFF W. LEBLANC
JAMES GILBERT FUROIS	(DEC)...
ONEWEST BANK N.A	(TP)...ANDERSON, MCPHARLIN & CONNE
SUZANNE M GRAVES	(SUZANNE M GRAVES)

GENERAL INFORMATION:

Continued from 03/26/18. To clear probate notes.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Sharon Rosenberg, step-daughter/executor

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

1. Assets on Hand: \$0 only asset of estate was real property that was sold to satisfy the settlement agreement in CIVDS141088. [LF pg. 6]
2. Petitioner and Attorney waive statutory compensation, right to reimbursement and right to attorney's fees and costs.
3. Notice is complete.
4. No proposed order.

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **07/01/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600209

CASE NAME: JAMES GILBERT FUROIS

SEE ALSO 2

HEARING:

Motion Re: MOTION TO BE RELIEVED AS COUNSEL Filed by Petitioner
SHARON M ROSENBERG

COUNSEL:

SHARON M ROSENBERG	(PET)...JEFF W. LEBLANC
JAMES GILBERT FUROIS	(DEC)...
ONEWEST BANK N.A	(TP)...ANDERSON, MCPHARLIN & CONNE
SUZANNE M GRAVES	(SUZANNE M GRAVES)

GENERAL INFORMATION

Continued from **12/18/17**.

Continued from 03/26/18. Court admonishes petitioner to fully cooperate with her attorney. Petition is deemed served by her presence today and at the 12/18/17 hearing.

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Petitioner,
Sharon M. Rosenberg

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

1. Petitioner, Jeff W. Leblanc, seeks to be removed as counsel for Sharon M. Rosenberg, Executor. Petitioner alleges that he has repeatedly requested documentation and information to complete the accounting in this matter, but the client has been unwilling or unable to comply with requests and has been non-responsive to counsel's attempt to communicate.
2. Notice is complete per 03/26/18 minutes.
3. ~Proposed Form Order: 08/31/17.

RECOMMENDATION

Court's discretion.

(cs/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601270

CASE NAME: HELENE MC COY

HEARING:

Petition for final distribution on wvr of Account and Report of
KENNETH WENZSELL and Petition for allowance of fees filed.

COUNSEL:

KENNETH WENZSELL (PET)...PRO/PER
HELENE MCCOY (DEC)...

GENERAL INFORMATION:

Continued from 03/26/18. The Court would approve appropriate statutory fees but would neither approve or disapprove arrangements between petitioner and heirs. Hearing continued at request of Court.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Kenneth Wenzzell, son

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

1. All heirs waive accounting and approve of Petitioner being awarded \$7,400.00 from sale of house plus expenses. **See note 3.**
2. Amount of assets on Hand not provided; however, Real property at 2357 Cedar Street, San Bernardino, CA 92404 is \$185,000.00 per Final Inventory and Appraisal. Does Court wish for a verified supplement? **JTD**
3. Petitioner waives statutory compensation but indicates that he will receive \$7,400 out of the sale of the real property plus expenses. [LF pg. 6.] **JTD**
4. **Need** proposed distribution to indicate percentages/amount of the real property that each heir will receive in report of administrator and prayer per Pr.C.§1064.
5. Notice is complete.
6. No proposed order.

RECOMMENDATION

Need to clear note 4 then Court's discretion. If approved, set hearing re receipts and final discharge for **07/01/19**.

(ww)

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700039

CASE NAME: ARTURO BARRIOS

HEARING:

FIRST AND FINAL Account and Report of CHRISTOPHER LEE BARRIOS
and Petition for allowance of fees filed.

COUNSEL:

CHRISTOPHER LEE BARRIOS	(PET)...PAUL HORN
ARTURO BARRIOS	(DEC)...
SURETEC INSURANCE COMPANY	(TP)...

GENERAL INFORMATION:

Continued from 03/26/18 for Court to review the supplement filed 03/20/18.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Christopher Lee, son.

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

- 1 Assets on hand: **\$91,600.60** in cash; per supplement filed 03/20/18.
- 2 Petitioner waives statutory commissions.
- 3 Attorney requests statutory fees of \$8,606.35. Calculated.
- 4 Petitioner requests reimbursement for advanced costs in the amount of **\$1,478.99** as follows: Itemized [LF pgs. 8-9]
 - a. \$1,219.65 to petitioner for costs advanced and tools/supplies purchased for real property.
 - b. \$128.48 to Avelina Padilla for tools for repairs to real property.
 - c. \$130.86 to Martin Virgen for payment to Waste Management Services.
 - d. Provided itemization only amounts to \$1,478.99. Need verified supplement as to what the balance of \$847.01 is being requested for? (**Supp. 03/20/18 indicates that amount requested was incorrect and correct amount is \$1,478.99**).
- 5 Notice given.
- 6 No proposed order.

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **07/01/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700398

CASE NAME: MALCOLM VICTOR SMITH

HEARING:

First and Final Account and Report of JENNIFER SMITH and
Petition for allowance of fees filed.

COUNSEL:

JENNIFER SMITH (PET)...FULLERTON LEMANN SCHAEFER & DO
MALCOLM VICTOR SMITH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account, Petition for Fees and
Petition for Final Distribution by Jennifer Smith, spouse

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

- 1 Assets on hand: \$208,522.11 in cash.
- 2 Petitioner waives statutory commissions.
- 3 Attorney requests statutory fees of \$7,170.21. Calculated.
- 4 Notice is complete.
- 5 Proposed Order: 05/10/18 need statement re notice to Franchise Tax Board and
Victim's Compensation Board, need proposed distribution, item 17 re: Attorney's
statutory fees indicates that fee be paid to petitioner instead of Attorney.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge
for **07/01/19**.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS06898

CASE NAME: EST OF ROYCE IRVIN PERKINS

HEARING:

Probate status report filed.

COUNSEL:

MELISSA HANSON (PET)...HARTNELL LAW GROUP
ROYCE IRVIN PERKINS (DEC)...

GENERAL INFORMATION:

Continued from 10/16/17.

THIS CASE IS SET FOR HEARING ON 8th Status Report of Administration

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

1. Letters of Administration issued to Melissa A. Hanson, daughter, limited IAEA, no bond, on 03/17/06.
2. Petitioner alleges the estate is not in a condition to be closed. Counsel is working on recovering estate's only assets consisting of past due receivables from the accountancy corporation with a face value of \$305,110.00 and \$115,732.64.
3. Petitioner requests an additional 12 months to close the estate.
4. Notice given.
5. ~Proposed Order: 07/24/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **09/17/18**.

(lh/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS

DATE: 06/25/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 9, 10, 11

HEARING:

Hearing Re: PRETRIAL ON CONTEMPT

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO	(TRU)...
NORA J MORALES	(PET)...PRO/PER
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

Pretrial on contempt – No notes – JTD

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 8, 10, 11

HEARING:

Hearing Re: PTN TO INTERVENE AND FOR DEC RELIEF

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO	(TRU)...
NORA J MORALES	(PET)...PRO/PER
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

No notes – JTD

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 8, 9, 11

HEARING:

Motion Re: Notice of motion to request orders to compel
responses Filed by Petitioner HELLEN BUSH

COUNSEL:

JOHN LAMBRECHT	(PET)...	MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO	(TRU)...	
NORA J MORALES	(PET)...	PRO/PER
MICHAEL C. MADDUX	(PET)...	MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...	PRO/PER

Currently under review by Legal Research

LR

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 8, 9, 10

HEARING:

Ex parte hearing re: application for orders to shorten/extend time

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO	(TRU)...
NORA J MORALES	(PET)...PRO/PER
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

No notes- continued ex parte matter- JTD.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800109

CASE NAME: MTR OF THEKENNETH BANKS LIVING TRUST

HEARING:

Petition for TO CONFIRM REAL PROPERTY BELONGS TO TRUST AT
SETTLOR'S DEATH

COUNSEL:

DANIELLE TAYLOR (PET)...GAUDY LAW, INC
THE KENNETH BANKS LIVING TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice of hearing as to Mr. Cooper Mortgage Company and Kilowatt Systems, LLC filed on 05/18/18; however, also **Need** Notice of hearing to Howard Taylor, Harvey Banks, Arlene Banks, Erica Banks, Anthony Johnson.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800089

CASE NAME: MARCIA F HAMMOND

HEARING:

Final Account and Report of BARRY HAMMOND and Petition for allowance of fees filed.

COUNSEL:

BARRY HAMMOND (CPE)...PRO/PER

MARCIA F HAMMOND (CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **3rd** and Final Account and Petition for Fees by THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 2nd and current accounting by Barry Hammond, son, approved on 03/21/17.
 - a. **Need** Order on 2nd account.
2. **Need** Amended accounting that is in compliance with Pr.C. § 2620(b). Accounting must be for the period that ended on the date of death and separate accounting for the period subsequent to the date of death.
 - a. **Need** a separate summary of accounting for each period. Pr.C. §2620(b).
3. Report by conservator is incomplete. **Need** complete report in compliance with Pr.C. §1064(a).
4. Accounting period: 05/01/15-01/31/18
5. Assets on hand: \$275,784.66 of which \$193, 784.66 in cash and \$82,000.00 in real property.
6. Conservator waives compensation.
7. Schedule of Disbursements is incomplete. **Need** full descriptions including date, source of payment, purpose and the amount per Pr.C. § 1062(a).
8. Schedule C Disbursements has the following issues that need clarification:
 - a. Entry re: "Barry Hammond Cashier's Check Reimbursements" in the amount of \$25,000.00 and all other checks and ATM withdrawals. **Need** verified supplement to clarify what checks were used to pay and on what dates as they cannot be grouped into one statement.
 - b. **Need** clarification to all entries dealing with car parts, car insurance, fuel charges and possible car repairs and maintenance as a vehicle is not listed

in the report or in the assets on hand. Court may wish to inquire if the conservatee owns a vehicle. **JTD**

- c. Court may wish to inquire, or in alternative, need verified supplement as to all purchases made after conservatee's date of death on 09/12/16 with exception of funeral costs as total is \$19,638.96. **JTD**
 - d. Schedule C Disbursements indicates payments made for attorney and paralegal services in the total amount of \$5,437.00. As advance payments of fees without prior Court approval is not allowed, question why conservator should not be surcharges per CRC 7.755. **JTD**
 - i. Payments made in the amount of \$1,837.00 made to "H & H Paralegal Services"
 - ii. Payments to the "Law Offices of Gilbert M. Gutierrez" in the amount of \$3,600.
9. **Need** to indicate conservatee's address per Local Rule 20-1406(a) via verified supplement.
 10. Schedule of receipts is incomplete. **Need** full description of receipts including date, source of payment, purpose and the amount per Pr.C. § 1062(a).
 11. **Need** Notice of hearing to Eon Hammond, Andre Hammond and Reggie Hammond and to Veteran's Administration.
 12. **Need** proposed distribution to personal representative as conservatee has passed.
 13. Proposed Order: 05/09/18 need names, addresses and amounts of distribution to personal representative, need legal description of real property including common address and APN.

RECOMMENDATION:

Need Amended accounting in compliance with Pr.C. §1064 and Pr.C. § 2620 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **07/01/19**

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900139

CASE NAME: JOURDAN ASHLEY ONTAL

HEARING:

Petition for (Fourth) for attorney fees

COUNSEL:

YASMIN M WILLIAMS	(CPE)...WILLIAM W HOLCOMB
JOURDAN ASHLEY ONTAL	(CEP)...HARTNELL LAW GROUP
JASMIN WILLIAMS	(CPE)...SILVER & FREEDMAN
BRYAN C HARTNELL	(PET)...HARTNELL LAW GROUP

XREF: PROPS1300806 *Jourdan Ashley Ontal Trust*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Bryan Hartnell.

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

1. Petitioner, Bryan Hartnell, was appointed counsel on 08/26/11 and relieved on 05/26/17.
2. Petitioner requests fees for the period of 04/04/16-05/26/16 of \$4,177.50 for 13 hours at \$75/125/250/325/375 per hour for paralegal and attorney services respectively. Itemized. [Pet. LF pgs. 5-7].
3. Notice is complete.
4. ~Proposed Order: 05/26/18

RECOMMENDATION

Court's discretion.

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100128

CASE NAME: ANDREA RENEE MATHIS

HEARING:
Hearing Re: SPECIAL REPORT

COUNSEL:
DIEDRA MATHIS (CP)...PRO/PER
ANDREA RENEE MATHIS (CTP)...

GENERAL INFORMATION

Continued from 03/26/18. Oral report given by Jacqueline Carey-Wilson. Counsel informs the Court that IRC has closed it's case. The Court orders Court Investigator to contact IRC to see if they have opened a new case in another regional center. Referred to Court Investigator for investigation and report. The Court orders Diedra Mathis to be personally present at next hearing.

THIS CASE SET FOR HEARING ON Special Report

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

1. Hearing set by Court on 01/11/18 after review of the Special Report by the Court Investigator that was filed on 01/04/18.
2. Matter referred to the Public Guardian to attempt to locate conservatee/conservator.
3. Diedra Mathis, conservator, is to be personally present.
4. **Need** Report by Public Guardian.
5. **Need** CI Report.

RECOMMENDATION

Inquire status.

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300057

CASE NAME: JANE M DANA

HEARING:

Accounting Review by ***

COUNSEL:

JANE DANA-RAMIREZ	(CPE)...J. DAVID HORSPOOL
JANE M DANA	(CEP)...
JENNIFER M. DANIEL	(PET)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 3rd Account for Jane Dana-Ramirez, daughter, approved on 12/05/16.
2. **Need** 4th Account beginning with 05/01/16.

RECOMMENDATION

Inquire status of accounting.

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK

HEARING:

Hearing Re: ACCOUNTING REVIEW (TEMPORARY CONSERVATOR)

COUNSEL:

JANICE L PARK

(CP)...PRO/PER

PATRICIA MAE LAWRENCE PARK

(CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Janice Park, daughter, appointed as temporary conservator of the person and estate, no bond required, on 02/28/17.
2. **Need** Final Inventory and Appraisal.
3. **Need** 1st Accounting beginning with date of 02/28/17 per minutes on 03/05/18..

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal. .

(ww)

Future hearing dates:

06/28/18 Readiness Calendar

06/28/18 Hearing re: Ptn for Conservatorship

Superior Court of Calif, County of San Bernardino

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700379

CASE NAME: MTR OF MARIA FERNANDA MANCILLA OROPEZA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LETICIA MANCILLA

COUNSEL:

LETICIA MANCILLA (CP)...PRO/PER
MARIA FERNANDA MANCILLA OPOPEZA (CTP)...SANDRA TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Leticia Macilla, mother, appointed limited conservator of the person only on 11/20/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800148

CASE NAME: MTR OF VIRGINIA RODARTE YEPEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ROSALIA RIOS (CPE)...PRO/PER
VIRGINIA RODARTE YEPEZ (CEP)...

GENERAL INFORMATION

Rosalia Rios appointed as temporary conservator of the person only on 05/23/18, no bond. Jennifer Daniel appointed as GAL. The Court is informed that although conservatee has lived alone for 15 years neither dissolution nor legal separation was ever filed. The case is referred to Legal Aid for legal assistance.

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

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

1. Petitioner seeks that bond is to be determined as estimated estate value is to be determined. **JTD**
2. Petitioner appears to be seeking medical powers in section 9; however, section 1g as to Pr.C. § 2355 powers is not marked. Court to inquire. Capacity Declaration filed 05/16/18; however, office telephone number is missing. **JTD**.
3. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
4. **Need** return of citation.
5. **Need** Notice of Hearing and proof of service.
6. **Need** CI report.
7. **Need** Report of GAL Jennifer Daniel.
8. Certificate of Completion of the Conservatorship Training Class filed 06/07/18.
9. ~Proposed Form Order: 05/16/18

RECOMMENDATION

Need appointment of counsel, CI report, GAL report and to clear notes 4 & 5. Court's discretion re: bond. If approved, set hearing for Compliance Review for **01/28/19** for the

filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

Set hearing re Accounting Review for **09/09/19**. Any accounting to be filed 30 days in advance.

(ww)

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

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02217

CASE NAME: MTR OF MICHAEL BUTLER

HEARING:

Ninth Account and Report of INLAND COUNTIES REGIONAL CENTR INC
and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REG CNTR (CE)...STEVEN K BECKETT
MICHAEL BUTLER (CTE)...
MICHAEL BUTLER (CEP)...ROBERT S WORLEY

GENERAL INFORMATION

Continued from 03/26/18. Notice is untimely.

THIS CASE IS SET FOR HEARING ON 9th Account and Report of IRC and Petition for
Approval of Trustee's Fees and for Attorney's Fees

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

1. Accounting covers period: **01/01/17-12/31/17**
2. Assets on hand: \$144,835.13 in cash.
3. Current bond is \$163,000.00. Sufficient. **JTD**
4. Report of beneficiary filed separately on 02/06/18.
5. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$2,210.72. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000, 1.50% of the next \$250,000 and 1.25% on the balance over \$1,000,000. Services generally itemized. **JTD**
6. Petitioner requests authority to allow Master Trust to continue taking its annual fee according to its' 2017 fee schedule in quarterly payments. **JTD**
7. Attorney requests fees of \$1,120.00 for 5.70 hours of paralegal and 2.20 hours of attorney services at \$100/250 respectively per hour. Itemization in Declaration separately filed on 02/06/18. **JTD**
8. Notice of Hearing and proof of service filed on 04/09/18; however, the Court zip code incorrectly reflects **92423. JTD.**
9. Proposed Order: 02/06/18; however accounting period of 01/17/17-12/31/18 is incorrect. **JTD**

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **07/07/19** (if one year) or **06/29/20** (if two years). Accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 06/25/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800007

CASE NAME: LUCERO -V- LUCERO

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

CYNTHIA GONZALEZ (PET)...PRO/PER

JUDITH LUCERO (PP)...PRO/PER

LILIAN LUCERO (RP)...

Notice to Lilian Lucero, respondent, filed on 01/17/18.

(ww)