



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 07/24/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb0629/0719

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: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0700200

CASE NAME: MTR OF MARIA ANGELA FLORES

HEARING:

Hearing re Final Discharge

COUNSEL:

JOSE ERNESTO FLORES

(PET)...HARTNELL, LISTER & MOORE

MARIA ANGELA FLORES

(DEC)...

XREF: SPRSS05801

GENERAL INFORMATION:

Continued from 06/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Fifth and Final Account entered 06/21/16..
2. Need receipts.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0900792

CASE NAME: CHARLES L & ARLENE B REYNOLDS TRUST

HEARING:

FOURTH Account and Report of REBECCA REYNOLDS LYTLE and Petition for allowance of fees filed.

COUNSEL:

REBECCA REYNOLDS LYTLE	(PET)...	LAWRANCE A WIDDIS
CHARLES L REYNOLDS AND ARLENE REYNOLDS TRUST	(TRU)...	
JAMES MAYS	(PET)...	THOMAS W DOMINICK
CHRISTOPHER POND	(PET)...	HARTNELL, LISTER & MOORE
SHANA REILLY-POND	(PET)...	HARTNELL, LISTER & MOORE
CHARLES L REYNOLDS & ARNOLD B REYNOLDS TRUST	(TRU)...	
REBECCA REYNOLDS LYTLE	(PET/STE)...	LAWRANCE A WIDDIS
SHERRI L KASTILAHN	(PET)...	SHERRI L KASTILAHN
ASHLEY REYNOLDS	(MIN)...	SHERRI L KASTILAHN

XREF: GARSS900374

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees by Beneficiary/Successor Trustee, Rebecca Reynolds Lytle ["Petitioner"].

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

1. Account period 02/28/15 to 03/31/17.
2. Assets on hand \$190,438.76 consisting of \$25,438.76 in cash and the balance in real and personal property.
3. The Trust cannot be distributed as a life estate was granted to James Mays who remains in the property and is current on his payments.
4. Petitioner requests fees of \$750 to be deducted from fees taken but disallowed during the first account period leaving a balance owing of \$841.52 in disallowed fees. JTD.
5. Attorney requests fees of \$600 to be deducted from fees taken but disallowed during the first account period leaving a balance of \$1,639.48 in disallowed fees.
6. Need copies of bank/financial statements per Local Rule 20-908.

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.

7. No proposed order submitted with the pleadings. Submit order after hearing.

RECOMMENDATION:

Need to clear note 6 then Court's discretion. If approved, set hearing re next Accounting Review for **05/28/18**. Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500693

CASE NAME: KIM ALAN RUTLEDGE

SEE ALSO 4

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE ON EDDIE RUTLEDGE

COUNSEL:

EDDIE JOE RUTLEDGE (PET)...GAUDY LAW, INC

KIM ALAN RUTLEDGE (DEC)...

GENERAL INFORMATION:

Continued from 06/12/17. Matter is trailed to July 24, 2017 for counsel to clear probate notes on accounting. Court orders that Eddie Joe Rutledge return to court on July 24, 2017 at 8:30am in department S35 if the probate notes on the accounting are not cleared. Court notes that counsel is to also be present at next hearing if probate notes are not cleared.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions/Surcharge on Eddie Rutledge

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

1. Matter set at 05/08/17 hearing, wherein, the Court ordered Eddie Joe Rutledge to be personally present at hearing.
2. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500693

CASE NAME: KIM ALAN RUTLEDGE

SEE ALSO 3

HEARING:

APPROVING FIRST AND FINAL Account and Report of EDDIE JOE RUTLEDGE and Petition for allowance of fees filed.

COUNSEL:

EDDIE JOE RUTLEDGE (PET)...GAUDY LAW, INC
KIM ALAN RUTLEDGE (DEC)...

GENERAL INFORMATION:

Continued from **10/17/16** and **02/06/17** at request of administrator.

Continued from **04/03/17**. No appearance. Court orders Eddie Joe Rutledge to be personally present at next hearing date. Notice by Judicial Assistant.

Continued from **05/08/17**. Court orders Eddie Joe Rutledge to be personally present at next hearing date of June 12, 2017. Court requires assignments by each heir. Notice by Judicial Assistant.

Continued from 06/12/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON First & Final Account

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

1. Accounting period: 5/9/15-6/21/16. No Bond.
2. Assets on hand **\$0.00**. **Supp. (01/03/17) indicates petitioner withdrew funds in his favor as compensation.**
3. Waivers of account filed by heirs however full accounting filed with discrepancies.
4. Waiver of notice of proposed action filed by **all heirs. [see supp. filed 01/03/17, LF, pgs. 10-12].**
5. Administrator Eddie Rutledge distributed all assets. Real property appraised at \$410,000, van appraised at \$9,000 and collectibles appraised at \$20,000 distributed to CYNTHIA RUTLEDGE who is NOT AN HEIR. CYNTHIA RUTLEDGE is daughter of petitioner and sister of decedent. Heirs are parents, petnr EDDIE RUTLEDGE and mother SHERRY RUTLEDGE. Need verified supplement explaining why assets distributed to non-heir of the estate without a disclaimer or assignment on file. **Supp. (01/03/17) affixes "Deed of Variation**

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.

for Intestacy”[LF, pgs. 17-20], wherein, heirs Eddie Joe Rutledge and Sherry Ann Rutledge (decedent’s parents) “vary” their entitlement to estate assets in favor of “new beneficiary, ” Cynthia Renee Rutledge. **Need assignments by each heir.**

6. Court may wish to require copy of title deed to determine how property transferred. **Supp. (01/03/17) affixes copies of Grant Deeds (LF, pgs. 21-23] which ultimately grant title to Cynthia Renee Rutledge.**
7. Need corrected Inventory & Appraisal. I&A filed has \$27,285.62 error. **Amended inventory and appraisal filed 11/14/16.**
8. If Court requires accounting to reflect required information (waivers of account on file however full accounting filed)-the following is needed.
9. Need house maintenance disbursements of \$12,416.41 itemized at schedule B. **Supp. (01/03/17) generally categorize expenses [LF, p. 27].**
10. Need Fees itemized at schedule B-unable to determine if probate referee paid. **Supp. (01/03/17) reflects referee fees have been paid [LF, p. 27].**
11. Need storage fees itemized and explained as to purpose. **Supp. (01/03/17) indicates storage fees were for storage of book inventory for Frank and Son (Flea Market).**
12. Need calculation of statutory fees requested (Pr C 10800). **Statutory fees of \$2,577.17 requested. However statutory fees are based on the value of the estate accounted for based on the total amount of the appraisal value of the property in the inventory, plus gains, plus receipts, less losses from the appraisal value on sales. Pr. C. § 10800 (b). Need verified supplement recalculating basis for fees.**
13. Proposed Order 08/31/16 reflects assets on hand when the estate has already been distributed; incorrectly names Cynthia as an heir; and does not address proposed distribution to Cynthia by Eddie and Sherry Rutledge.
14. **Amended account filed and set for 09/13/17.**

RECOMMENDATION: **Trail to 09/13/17.**

Need to clear note 12 then Court’s discretion. If approved, set next hearing for receipts & final discharge for **07/30/18.**

(td/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 6

HEARING:

Hearing Re: PETITION TO DETERMINE HEIRSHIP

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
THE SALVATION ARMY	(LEE, HONG, DEGERMAN, KANG & WA)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

GENERAL INFORMATION:

Continued from 05/15/17 at request of counsel. Notice to be given by Harry Histen.

THIS CASE IS SET FOR HEARING ON Petition to Determine Heirship and Entitlement to the Estate by brother to decedent, Harold P. Bricker ["Petitioner"].

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

1. Petitioner is Harold P. Bricker, brother of decedent. Petitioner alleges that decedent died without leaving any surviving spouse, issue, or parent. Decedent's heirs-at-law appear to be 7 siblings.
2. Petition includes proportional shares; a genealogical chart showing said relationships to Decedent; and documentary proofs showing said relationships to Decedent [LF, pgs. 6-31].
3. Petitioner requests that the court determine heirship and entitlement to the estate.
4. **Objections filed on 05/02/17 by The Salvation Army.**
5. **Joinder to Objections filed on 05/09/17 by The Humane Society of the U.S.**
6. **Petition for Administration filed by the Salvation Army and The Humane Society. However, petition appears moot as letters have already issued.**

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.

7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Set for contested hearing.

(nb)

FUTURE HEARING DATES:

09/21/17 Petition for Letters of Administration w/ will annexed

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 5

HEARING:

FIRST & FINAL Account and Report of CANDYCE E BOZNER, CAROLYNN CROWE and Petition for allowance of fees filed.

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
THE SALVATION ARMY	(LEE, HONG, DEGERMAN, KANG & WA)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

GENERAL INFORMATION:

Continued from 03/20/17 and 05/15/17 at request of counsel. Court clears note 2 & 6 on the record. Court deems signature dated on 01/19/17 and that the court does not require further itemization on extraordinary fees. Notice given by Harry Histen.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Personal Representatives, Candyce E. Brozner and Carolyn Crowe.

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

1. Final Inventory and Appraisal filed 10/12/16 does not affix bank/financial statements per Local Rule 20-908; and Section 5 re Property Tax Certificate is incomplete. Need bank statements and Property Tax Certificate per Revenue and Taxation Code § 480.
2. Accounting period 08/06/15 to 12/31/16.
3. Assets on Hand \$386,754.51 consisting of cash.
4. Statutory Compensation of \$12,810.70 requested. Calculated. However statutory fees are based on the value of the estate accounted for based on the total amount of the appraisal value of the property in the inventory, plus gains, plus receipts, less losses from the appraisal value on sales. Pr. C. § 10800 (b). Need verified supplement recalculating basis for fees.

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.

5. Petitioner requests extraordinary fees of \$10,000 for services rendered in connection with the sale of real property and numerous, personal property. Billed at \$125/hour for at least 80 hours. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service provided by each person.
6. Attorney requests extraordinary fees of \$4,240 for services rendered in connection with the sale of real property and numerous, personal property. Billed at \$280-\$360/hour for 18.4 hours' attorney time and 1.9 paralegal hours.'
7. Attorney requests reimbursement of costs advanced of \$1,099.03. Itemized [LF, p. 5].
8. No Summary of Account. Need same via verified supplement.
9. No Assets on Hand at the Beginning of Account Period Schedule. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614c via verified supplement.
10. Disbursements – Schedule D [LF, p. 10] includes postage and mailing which is usually considered overhead when fees are being requested. Does Court wish to reduce reimbursement of costs in the amount of \$47.75? JTD.
11. Schedule D [LF, p. 12] does not include losses on personal property sold at auction. Need same via verified supplement.
12. Question the status of the Honda? Need verified supplement.
13. Need findings re: sole and separate property.
14. Real Property was sold during this administration. Need copy of closing escrow statement per Local Rule 20-10.
15. Need proof of service to Notice of Proposed Action re Sale of Real Property to Debra Muse of the Humane Society of the U.S. and Laura Woodward of Kemp & Assoc.
16. Need Assets on Hand at End of Account Period Schedule via verified supplement.
17. Please file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
18. Petitioner requests authority to withhold the sum of \$2,000 as a reserve. JTD.
19. Need Notice of Hearing and proof of service to include those requesting special notice and creditor for personal property taxes.
20. **Objections filed 03/09/17 by Harold P. Bricker (brother to decedent).**
21. **Petition for Administration filed by the Salvation Army and The Humane Society. However, petition appears moot as letters have already issued.**
22. Proposed Form Order 01/19/17 reflects incorrect statutory fees and does not comply with Local Rule 20-614.

RECOMMENDATION: Matter is contested.

This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. Need proper, amended account per Pr. C. § 1060 et seq. to be set on first check calendar no sooner than **09/11/17**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

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.

(nb)

FUTURE HEARING DATES:

09/21/17 Petition for Letters of Administration w/ will annexed

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

SEE ALSO 8 9 10

HEARING:

Hearing Re: STATUS RE DISCOVERY/TRIAL

COUNSEL:

REAGENE YOUNG	(PET)...IGNAZIO FICARA
WERNER LEE WEINMEISTER	(DEC)...
DAVID WEINMEISTER	(PET)...LAW OFFICE OF SUSAN E. CLARK

No notes – Status.

(nb)

Future Hearings:

8/10/17: Readiness Calendar,

8/21/17-8/25/17: Court Trial

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

SEE ALSO 7 9 10

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

REAGENE YOUNG

(PET)...IGNAZIO FICARA

WERNER LEE WEINMEISTER

(DEC)...

DAVID WEINMEISTER

(PET)...LAW OFFICE OF SUSAN E. CLARK

No notes – Status.

(nb)

Future Hearings:

8/10/17: Readiness Calendar,

8/21/17-8/25/17: Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

SEE ALSO 7 8 10

HEARING:

Hearing Re: PETITION FOR WILL AND LETTERS

COUNSEL:

REAGENE YOUNG (PET)...IGNAZIO FICARA
WERNER LEE WEINMEISTER (DEC)...
DAVID WEINMEISTER (PET)...LAW OFFICE OF SUSAN E. CLARK

GENERAL INFORMATION:

Continued from **01/12/16**. Hearing advanced from 03/02/16 and heard on 02/23/16. Ex Parte orders granted **03/16/16**. Court grants the Special Administrator, Reagene Young, the following authority: to sell vehicles with Notice of Proposed Action, marshal assets and prepare and file tax returns. Bond required \$330,000.00.

Continued from 7/19/16 court orders bond corrected to reflect for Special Administrator.

Continued from **09/26/16** at request of counsel.

Continued from **02/06/17**. There being no objection by counsel, court grants request to reduce the bond to \$210,000. Matter is set contested.

Continued from 06/12/17. Susan Clark indicates she intends to file 850 Petition-court sets deadline for the filing of the 850 petition for 4pm June 30, 2017; court Notes that if the 850 petition is not filed by the deadline that the court will order it waived permanently; counsel indicates she understands the court's order.

Attorney David Horspool indicates that he is requesting to meet with Susan Clark on the issue of the 850 petition; court notes it will consider stipulation of counsel regarding the 850 petition, if the counsel reach a stipulation regarding that issue.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executrix.

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

- 1 Proof of publication filed 12/22/15.
- 2 Bond of \$330,000 filed 03/16/16. Surety rider filed as to special Administrator.
- 3 Notice given, no objections.

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.

4 ~Proposed Form Order/Letters 11/23/15.

RECOMMENDATION:

RFA, \$330,000 bond. If approved, set future hearing for Accounting/Status Review on **10/01/18**. Any accounting to be filed 30 days' in advance. Note requirements of Local Rules.

(nb/sa/lh/nb)

Future Hearings:

8/10/17: Readiness Calendar,

8/21/17-8/25/17: Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

SEE ALSO 7 8 9

HEARING:

Petition for CONTEST OF WILL

COUNSEL:

REAGENE YOUNG

(PET)...IGNAZIO FICARA

WERNER LEE WEINMEISTER

(DEC)...

DAVID WEINMEISTER

(PET)...LAW OFFICE OF SUSAN E. CLARK

GENERAL INFORMATION:

Continued from 7/19/16 counsel request hearing re Status of Will Contest. Court clears probate note 1 regarding the notice of hearing counsel state all notice is complete.

Continued from 09/26/16 and 06/12/17.

THIS CASE IS SET FOR HEARING ON Will Contest

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

1. Will contest filed by David Weinmester, Decedent' son and purported only heir. Objector alleges that purported Will should be denied as the Will was made at a time that Decedent lacked capacity to make such Will as Decedent had been suffering from Alzheimer's for at least 2 years prior to his death, and as such, lacked sufficient capacity to sign a Will.
2. Petitioner further alleges purported Will was made as a direct result of undue influence exercised by Respondent, Reagene Young, over Decedent, and is not, and never was, the Will of Decedent.
3. Objection and Answer to Will Contest, by Raegene Young, filed 02/24/16.

RECOMMENDATION:

Matter is contested.

(nb/sa/lh)

Future Hearings:

8/10/17: Readiness Calendar

8/21/17-8/25/17: Court Trial

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600103

CASE NAME: ROBERT SHOWER

VACATED

HEARING:

Accounting Review

COUNSEL:

DAVID P LENHARDT

(PET)...KRISTA DAWKINS

ROBERT SHOWER

(DEC)...

DAVID P LENHARDT

(PET)...PYKA LENHARDT SCHNAIDER ZELL

VACATE – First and final account filed.

(nb)

FUTURE HEARING DATES:

10/16/17 First and Final Account

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700413

CASE NAME: MTR OF DELMER EDWIN SILLS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

KATHY LYNN MCCARTNEY (PET)...PRO/PER

DELMER EDWIN SILLS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Kathy McCartney, daughter

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

1. All heirs waive bond. The estate consists of \$271,000 in personal property. Petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b). Does court wish to require minimum bond of \$20,000.00 or alternatively based on assets of \$271,000?
JTD
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication
4. ~Proposed Form Order/Letters: 04/25/17 & 05/12/17

RECOMMENDATION

Need to clear notes 2 & 3. Court's discretion re bond. If approved, set Accounting/Status Review for **10/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700420

CASE NAME: MTR OF VELMA LEE SMITH

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

TROY PARKER (PET)...PRO/PER

VELMA LEE SMITH (DEC)...

GENERAL INFORMATION

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

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

1. All heirs waive bond; however, need bond waivers by Yvonne Mosley and Vicki Hendrix. No approximate estate estimate was given.
2. Section 3c states that the decedent's residence was in Washington. Court to inquire if this is the proper venue.
3. Section 3d is blank as to the estimated value of the property. Court to clarify on record if the value of property is unknown.
4. Section 7b is incomplete as to the date of death of the predeceased spouse. Need verified supplement.
5. Need Notice to Petition to Administer Estate and proof of service.
6. Need proof of publication
7. ~Proposed Form Order: 05/01/17

RECOMMENDATION

Need to clear notes 4-6. Court's discretion re bond and jurisdiction. If approved, set Accounting/Status Review for **10/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700422

CASE NAME: MTR OF CLYDE GERALD BALLIER

HEARING:

Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/FULL IAEA

COUNSEL:

RANDALL M BALLIER (PET)...PRO/PER

CLYDE GERALD BALLIER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA

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

1. Will waives bond and all beneficiaries waive bond. The estate consists of \$760,364 of which \$5,564 is personal property.
2. ~Proposed Form Order: 05/02/17

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **10/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb)

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

DATE: 07/24/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06633

CASE NAME: JAVIER DIAZ FAMILY TRUST DATED 06032005

VACATED

HEARING:
Accounting Review

COUNSEL:

MINOR CHILDREN	(MIN)...WALTER T MOORE
JAVIER DIAZ FAMILY TRUST	(TRU)...
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JACK B OSBORN	(PET)...BROWN WHITE & OSBORN
ELISEO RODRIGUEZ	(TEE)...PECCORINI & PECCORINI
IRMA D. GUTIERREZ	(NATALIE A ALVARADO)
F MICHAEL JELLEY	(JAMES B CHURCH)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Order Settling Sixth Account entered 11/14/16; accounting now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 07/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500320

CASE NAME: MARIEL BUSTAMANTE HERRERA

SEE ALSO 17

HEARING:

Hearing Re: WHY SERVICES ARE NOT BEING PROVIDED BY IRC

COUNSEL:

ALVARO BUSTAMANTE (PET)...PRO/PER

LUZ MARIA HERRERA (PET)...PRO/PER

MARIEL BUSTAMANTE HERRERA (CEE)...CANDICE A GARCIA-RODRIGO

Waiver of Court Fees and Costs filed by MARIEL BUSTAMANTE HERRERA is GRANTED

GENERAL INFORMATION:

Continued from 05/22/17. Oral report given by Steven Beckett.

THIS CASE IS SET FOR HEARING ON OSC re Service from IRC

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

1. Matter set at 05/01/17 hearing, wherein, the court ordered that either Robert Britton or another IRC designee to explain to the court why IRC is not providing services to the conservatee and provide a report to the court.
2. Notice given by Candice Garcia-Rodrigo
3. **Report of court-appointed counsel, Candice Garcia-Rodrigo filed.**
4. **Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).**

RECOMMENDATION:

Need to clear note 4.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500320

CASE NAME: MARIEL BUSTAMANTE HERRERA

SEE ALSO 16

HEARING:

Hearing Re: OSC RE CONTEMPT ON TRANSFER COORDINATOR

COUNSEL:

ALVARO BUSTAMANTE (PET)...PRO/PER

LUZ MARIA HERRERA (PET)...PRO/PER

MARIEL BUSTAMANTE HERRERA (CEE)...CANDICE A GARCIA-RODRIGO

Waiver of Court Fees and Costs filed by MARIEL BUSTAMANTE HERRERA is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Contempt on Transfer Coordinator.

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

1. Matter set at 05/22/17 hearing, wherein, Court set this OSC re Contempt on the Transfer Coordinator – Lucy Meza, for her failure to transfer case from San Gabriel to San Bernardino County. Lucy Meza is to be present in court at next hearing if the transfer process has not been initiated. Court notes that it will take off the OSC re contempt upon confirmation by counsel that the transfer process has been initiated from San Gabriel Regional Center to Inland Counties Regional Center.
2. Notice to be given by Candice Garcia-Rodrigo to Lucy Meza.
3. **Report by court-appointed counsel, Candice Garcia-Rodrigo, indicates process has been initiated.**

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600031

CASE NAME: BEVERLEY DAWN HEBERT

HEARING:

Accounting Review

COUNSEL:

NICOLE MARIE HEBERT (CPE)...LAYNE A BARTHOLOMEW
BEVERLEY DAWN HEBERT (CEP)...JENNIFER DANIEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order appointing conservator of the person and estate entered 05/16/16,
 \$131,000 bond.
- 2 No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700130

CASE NAME: VICTORIA ROSALEE MAREZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

VANESSA MORENO (PET)...PRO/PER
VICTORIA ROSALEE MAREZ (CEE)...MARK J. FLORY

Waiver of Court Fees and Costs filed by VICTORIA ROSALEE MAREZ is GRANTED

GENERAL INFORMATION

Continued from 06/12/17. Attorney Mark J. Flory appointed. Court clears note 3 re conservatorship class. Daniel Marez, II state that he objects; proposed conservatee objects to petition on the record. Any competing petitions for conservatorship are to be filed by 4pm July 3, 2017; if not filed by that deadline they will be deemed waived. Notice by Judicial Assistant

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Vanessa Moreno ["Petitioner"].

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

- 1 Court to review Confidential Supplemental Information form filed 04/12/17.
- 2 Petitioner requests that bond not be required. It appears the estate consists of Social Security, only. Question if petitioner is the "representative payee" and if so, the need for estate powers?
- 3 **Court Investigator's Report filed.**
- 4 **Need report by court-appointed counsel, Mark J. Flory.**
- 5 Citation returned served.
- 6 **No written objections or competing petition filed as of the review of this matter.**
- 7 ~Proposed Form Order/Letters 04/12/17

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set hearing for Compliance Review for **02/26/18** for the filing of the following: proof of service of Order with

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

Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/01/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0600062

CASE NAME: MTR OF DEAN DURHAM

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DEAN DURHAM

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

Letters expire 04/21/18.

Continued from 05/15/17 and 06/19/17 at request of county counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 8th Account entered 07/15/16; account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700161

CASE NAME: MTR OF MILDRED OPAL JENSEN

HEARING:

FIFTH AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MILDRED OPAL JENSEN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Conservatee died on 02/06/15.

THIS CASE IS SET FOR HEARING ON Fifth and Final Account and Petition for Fees
by Conservator of the person and estate, Public Administrator,

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

1. Accounting period 07/12/14 to 10/13/15.
2. Assets on hand \$6,493.44 consisting of personal property.
3. Petitioner requests compensation in the amount of \$1,600 pursuant to court-
approved fee schedule effective 07/01/14.
4. County Counsel requests compensation in the amount of \$800 pursuant to
court-approved fee schedule effective 07/01/14.
5. Proposed Order 02/02/17 discharges upon filing of documents instead of upon
entry of final discharge order.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
07/30/18.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800236

CASE NAME: DIRUL LEWIS

HEARING:

Accounting Review

COUNSEL:

MARVIN SOUTHARD	(PCR)...LLOYD W. PELLMAN
ENNE CURRIE	(PCR/CPE/APP)...
DIRUL LEWIS	(PCE/CEP)...HARTNELL LAW GROUP
ENNE CURRIE	(APP)...PRO/PER
PUBLIC GUARDIAN	(CPE/OBJ)...COUNTY COUNSEL

XREF: SLCSS00709 CONPS0800215

GENERAL INFORMATION

Letters expire 01/06/18.

Continued from 01/11/16, 06/27/16 and 01/23/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 02/04/15 Court approved the 6th account; 7th accounting now due
2. No accounting filed.

RECOMMENDATION:

Inquire status.

(lc/dl/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

SEE ALSO 24 25 26

HEARING:

Hearing Re: OSC RE WHY BILLS HAVE NOT BEEN TURNED OVER

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP)...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE)...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

Waiver of Court Fees and Costs filed by ANITA PETTI is GRANTED

GENERAL INFORMATION:

Continued from 04/10/17. Court will leave all order in effect until 06/19/17. Mother, Shirley Jefferson is to continue to pay all bills but will be reimbursed pending hearing on 6/19/17. Counsel is to file a declaration for Shirley Jefferson regarding what bills she has paid and what money she has advanced. Court states that on 6/19/17 it will consider additional orders regarding the release of any funds by the Public Guardian.

THIS CASE IS SET FOR HEARING ON OSC re Why Bills have not been Turned Over.

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

- 1. Itemization and request for reimbursement filed 06/20/17 requests reimbursement in the sum of \$18,643.27 for the period 12/01/16 to 05/30/17. JTD.**
- 2. Supplemental report by GAL, Mitchell I. Roth.**

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

RECOMMENDATION:
Court's discretion
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

SEE ALSO 23 25 26

HEARING:

Hearing Re: STATUS OF WORKER'S COMPENSATION CASE

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP)...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE)...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

Waiver of Court Fees and Costs filed by ANITA PETTI is GRANTED

No notes – Status.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

SEE ALSO 23 24 26

HEARING:

Hearing Re: Petition for TERMINATION OF CONSERVATORSHIP

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP)...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE)...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

Waiver of Court Fees and Costs filed by ANITA PETTI is GRANTED

GENERAL INFORMATION:

Order Appointing Public Guardian as Successor Conservator of the Person and Estate entered 04/19/16.

THIS CASE IS SET FOR HEARING ON Petition for Termination of Successor Conservatorship of the Person and Estate by Conservatee, Paul L. Jefferson ["Petitioner"].

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

1. Petitioner alleges a conservatorship of the person and estate is no longer necessary as he was misdiagnosed and is no longer taking psychotropic medication; now has some mental clarity; and is able to function at a higher level to his best ability.
2. Petitioner alleges the best interest of the conservatee require termination of the conservatorship of the person and estate.
3. Petitioner requests an order of this court terminating the conservatorship of the person and estate.

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.

4. Need Notice of Hearing with proof of service.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require notice then Court's discretion.

(nb)

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100252

CASE NAME: PAUL JEFFERSON

SEE ALSO 23 24 25

HEARING:

Petition for APPOINTMENT OF SUCCESSOR PROBATE CONSERVATOR OF
THE PERSON AND ESTATE

COUNSEL:

SONDRA JEFFERSON	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO
PAUL JEFFERSON	(CEP)...SANDY TURNER
MATTHEW E SHAESBY	(PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ANITA PETTI	(CPE)...LAW OFFICE OF MARY M. BADER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SHIRLEY M JEFFERSON	(CP)...CHRISTINA FERRANTE
DEMETRIUS JEFFERSON	(CE)...CHRISTINA FERRANTE
UTILITY MANUFATURING	(OBJ)...
ROBERT R. SHIRI	(ROBERT R SHIRI)

Waiver of Court Fees and Costs filed by ANITA PETTI is GRANTED

GENERAL INFORMATION

Order Appointing Public Guardian Successor Conservator of the person and estate entered 04/19/16. **No vacancy in the office of conservator exists.**

Continued from 06/19/17 at request of parties.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Successor Conservatorship of person by Shirley M. Jefferson (mother) and estate by Demetrius Jefferson (son) ["Petitioners"].

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

- 1 Petitioners allege Conservatee prefers they are appointed as the conservators of his person and estate rather than having the PG server in that capacity [LF, p.10].
- 2 Petition does not specify the type of powers sought. Need verified supplement.
- 3 Petitioners request bond be set at \$20,000. Appears sufficient.

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.

- 4 Question if Demetrius has a power of attorney? Need verified supplement.
- 5 Petitioners appear to seek medical powers. Need Medical Capacity Declaration.
- 6 **Court Investigator's Special Report filed.**
- 7 **Report by GAL, Mitchell I. Roth filed.**
- 8 Proofs of Completion re Conservatorship Class filed.
- 9 Need Notice of Hearing with proof of service.
- 10 ~Proposed Form Order 04/10/17

RECOMMENDATION:

Need to clear notes then Court's discretion re bond. If approved, set hearing for Compliance Review for **01/22/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **08/27/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200104

CASE NAME: IN MATTER RE CAROLIN A LEWIS

HEARING:

Accounting Review

COUNSEL:

CAROLIN A LEWIS
PUBLIC GUARDIAN

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

GENERAL INFORMATION:

Letters expire 06/02/18

Continued from 5/9/16, 09/12/16 and 02/27/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 6/22/15 Court approved a Waiver of account for the period ending 4/30/15.
2. Need an accounting.

RECOMMENDATION:

Inquire status.

(sa/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200227

CASE NAME: JOHN JAIME

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JOHN JAIME

(CEP)...

GENERAL INFORMATION:

Continued from 03/21/16 and 12/12/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account granted 03/24/14 for period ending 12/02/13.
2. Second Account/Waiver now due for the period 12/03/13 – current date.

RECOMMENDATION

Court's discretion.

(dl/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300087

CASE NAME: CLOTHILDE MCCORD

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CLOTHILDE MCCORD (CEP)...PRO/PER

GENERAL INFORMATION

Continued from 12/12/16 at request of counsel. Conservatee passed away on 01/06/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

- 1 Order Settling First Account entered 12/15/14; second and final account now due to include pre and post death periods.
- 2 No accounting. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300130

CASE NAME: (MF) MILDRED CONSTANCE LOYA

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MILDRED CONSTANCE LOYA	(CEP)...HARTNELL LAW GROUP
RECONTRUST COMPANY	(PET)...MCCARTHY & HOLTHUS, LLP
MILDRED C LOYA	(RPI)...
TOWN OF APPLE VALLEY	
SANDRA L BENDON	
CAPITAL ONE BANK (USA), NA	

GENERAL INFORMATION

Continued from 03/20/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present First Account entered 03/23/15; account or waiver of account now due beginning 07/08/14.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

HEARING:

Petition for ORDER REFERRING CONSERVATEE FOR AN ASSESSMENT BY
THE MENTAL HEALTH INVESTIGATOR OF SB

COUNSEL:

ARTHUR A CAPPILLA	(CPE)...J. DAVID HORSPOOL
SHAWN P HUGHES	(CEP)...EDWARD B FISCHER
ARTHUR A CAPPILLA	(CP)...HORSPOOL & HORSPOOL
BARBARA E BOWERSOCK	(TP)...BARBARA E BOWERSOCK

X-REF: FSB 1302655

GENERAL INFORMATION:

Continued from 04/04/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Order Referring Conservatee for an Assessment by the Mental Health Investigator of San Bernardino County [Welfare & Inst. Code § 5650.5].

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

1. Petitioner, Arthur A. Capilla, is the conservator of the person and estate of Shawn Hughes. Petitioner was subsequently appointed as the LPS Conservator of the person, but that conservatorship proceeding was terminated. Both the probate conservatorship and the LPS conservatorship proceedings were pending in Riverside County, when, on 02/7/14, the probate conservatorship was transferred to San Bernardino County.
2. Petitioner alleges the LPS conservatorship was to have been transferred at the same time, but, due to a clerical error, it was not transferred to San Bernardino County until 03/10/14, after it was terminated by operation of law. Petition indicates there is currently no pending LPS proceeding for Shawn Hughes.
3. Petition indicates that on 06/22/13, Shawn Hughes was arrested in the related case and on 11/14/13, Shawn was found mentally incompetent. On 03/20/15, Shawn was found mentally competent to stand trial and the criminal proceedings were reinstated.

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.**

4. Petitioner states that on 02/07/17, Petitioner was informed that Shawn was going to be readmitted to Patton State Hospital for further treatment for his mental capacity.
5. Petitioner proffers Welfare & Inst. Code § 5650.5 as authority for this Court to re-establish the LPS Conservatorship and requests this matter be referred to the Mental Health Investigator of the County of San Bernardino, or to such other person or entity that has been designated by the Director of the San Bernardino County Department of Behavioral Health, for an assessment by the local mental health system to determine if the conservatee has a treatable mental illness, including whether the conservatee is gravely disabled as result of a mental disorder and is unwilling to accept, or is incapable of accepting, treatment voluntarily; and directing that the assessment be filed with this Court within 30 days from the date of the referral.
6. **Confidential Assessment filed 04/04/17.**
7. **Report of Court-Appointed Attorney, Edward B. Fischel, filed 06/20/17.**
8. Notice given.
9. ~Proposed Order 02/22/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

10/04/17: 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: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500143

CASE NAME: ROBERT DARYL WHARTON

SEE ALSO 33 34

HEARING:

Hearing Re: Accounting by PG for temporary conservatorship

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT DARYL WHARTON	(CEP/CEE)...JEANNE E KENNEDY
DAVA DENISE LEAVITT	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by ROBERT WHARTON is GRANTED

*****CI FEE DEFERRED/PAYABLE UPON COMPLETION OF ASSET
INVESTIGATION (FINAL I& A HAS BEEN FILED) *****

GENERAL INFORMATION

Continued from 10/17/16 and 03/06/17 for PG to file account.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. PG appointed temporary conservator of the person and estate on 06/08/15; first account now due.
2. Need final inventory and appraisal.
3. No accounting. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500143

CASE NAME: ROBERT DARYL WHARTON

SEE ALSO 32 34

HEARING:

Hearing Re: OSC RE TERMINATION OF CONSERVATORSHIP

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT DARYL WHARTON	(CEP/CEE)...JEANNE E KENNEDY
DAVA DENISE LEAVITT	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by ROBERT WHARTON is GRANTED

GENERAL INFORMATION

Continued from **02/23/17**. Counsel states that she objects to this petition; matter is trailed to date of hearing re: accounting by public guardian for temporary conservatorship which is set for March 6, 2017. Public Guardian to file accounting or file report as to why they cannot file the accounting by March 6, 2017. Notice to be given by Jeanne Kennedy to County Counsel for P.G.

Jeanne Kennedy to prepare notice of ruling.

Continued from 03/06/17. Jeanne Kennedy states she objects to request. Matter is continued for public guardian to file accounting.

THIS CASE SET FOR HEARING ON OSC re Termination of Conservatorship.

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

1. OSC set on 12/09/16 when it was brought to Court's attention that a conservatorship has been established in Idaho.
2. Copy of Idaho order filed 11/29/16, case CV-2016-3168-IB.
3. **Objections filed by Counsel Jeanne Kennedy on 01/11/17.**

RECOMMENDATION

Court's discretion re OSC.

(lc/nb)

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500143

CASE NAME: ROBERT DARYL WHARTON

SEE ALSO 32 33

HEARING:

Hearing Re: OSC WHY ACCOUNTING HAS NOT BEEN FILED

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT DARYL WHARTON	(CEP/CEE)...JEANNE E KENNEDY
DAVA DENISE LEAVITT	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by ROBERT WHARTON is GRANTED

GENERAL INFORMATION:

Continued from 03/06/17.

THIS CASE IS SET FOR HEARING ON OSC Why Accounting had not been Filed.

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

1. Matter set at 02/23/17 hearing, wherein, Public Guardian was to file accounting or file a report as to why they cannot file the accounting by March 6, 2017.
Need same.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

HEARING:

Petition for ALLOWANCE OF COMPENSATION TO CONSERVATOR AND HIS
ATTORNEY

COUNSEL:

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

GENERAL INFORMATION:

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

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

- 1 Petitioner alleges that petitioner and County Counsel have rendered services prior to the appointment and for a period of 90 days after appointment for which petitioner and counsel have not been compensated.
- 2 Petitioner requests compensation of \$495.00 and County Counsel request fees of \$495.00.
- 3 ~Proposed Form Order 05/09/17.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700190

CASE NAME: MTR OF SISSEL UTSTUMO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

SISSEL UTSTUMO

(CEP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of person and estate by PG

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

1. Notice of Conservatee's death filed 07/05/17. Proposed conservatee passed away on 06/17/17.

RECOMMENDATION:

None. It appears petition is moot.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01149

CASE NAME: IN THE MATTER OF PEYTON SAUNDERS

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

PEYTON SAUNDERS

(CEP)...HARTNELL LAW GROUP

VACATE – Fifth and Final Account filed and set for 09/25/17.

(nb)

Future Hearing:

9/25/17: 5th & Final Account & Receipt of the Public Guardian

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02361

CASE NAME: MTR OF DAVID SNYDER

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID CHARLES SNYDER (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 07/29/17

Continued from 03/23/15, 07/27/15, 01/25/16, 07/18/16, 09/19/16 and 02/27/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 04/09/14 Court approved a Waiver of the Fourth Account for period of 12/27/12 – 12/19/13.
2. Accounting/Waiver is due for the period of 12/20/13 – current date.
3. Need to file accounting/waiver.

RECOMMENDATION

Need accounting or waiver of account.

(kra/gls/dl/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03025

CASE NAME: MTR RE BRUCE PARK

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
BRUCE PARK (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 01/06/18.

Continued from 01/23/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Eighth Account entered 02/18/15; ninth account now due.
2. No account or waiver of account. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03052

CASE NAME: MTR RE MARK MAYNARD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MARK MAYNARD

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 10/07/17.

Continued from 01/11/16, 10/17/16 and 02/27/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 10/20/14, Court approved the 5th and final account; 1st accounting for reappointment now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3263

CASE NAME: IN THE MATTER OF NORMAN RILEY

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

NORMAN FREDERICK RILEY

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

VACATE – order re 22nd waiver of account sent to dept. for signature.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5600

CASE NAME: IN THE MATTER OF DANIEL PORTER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

DANIEL PORTER

(CEP)...HARTNELL LAW GROUP

JOHN M PORTER

(TP)...LEWIS BRISBOIS BISGAARD & SMIT

GENERAL INFORMATION

Letters expire 12/18/17.

Continued from 01/09/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. ~Ex Parte Order that Conservator need not present Twenty-Sixth Account received on 06/29/17.

RECOMMENDATION:

Set next hearing on Accounting Review for 11/27/17.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/24/17 TIME: 10:00 DEPT: S35P

CASE#: VC VS353

CASE NAME: IN THE MTR OF COOKY JOY VICE

HEARING:

Accounting Review

COUNSEL:

COOKY JOY VICE	(PLA/CEP/CPE)...PRO/PER
FRED CRAIG VICE	(PLA)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
JOY TIPPITT	(OBJ)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Seventh Account entered 08/31/15; eighth account now due.
2. Need account or waiver of account.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 07/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0800595

CASE NAME: MTR OF BRANDON CARROLL SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

MERRY CARROLL (PET)...BANDY & BANDY

DAVID DANIEL (PET)...

JENNIFER M. DANIEL (PET)...

THE BRANDON CARROLL SPECIAL NEEDS TRUST (TRU)...

AMERICAN CONTRACTORS INDEMNITY (TP)...TRACY A STEVENSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing Public Guardian as Interim Successor Trustee entered 03/16/16; first account due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401135

CASE NAME: the Dorothy J. Maloney Living Trust

HEARING:
Accounting Review

COUNSEL:
EUGENE K. MALONEY (PET)...WM ERDMIER
THE DOROTHY J. MALONEY LIVING TRUST (TRU)...

GENERAL INFORMATION:

Per minute order dated 02/27/17, Petitioner withdrew the first and final and amended first and final account. Counsel to submit a complete new accounting. Petition on Accounting Review of Eugene K. Maloney Is withdrawn per agreement of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing Eugene K. Maloney Successor Trustee, no bond, entered 02/05/15; first account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600096

CASE NAME: JANE LIEBERG CRASE

HEARING:
Accounting Review

COUNSEL:
SIMON A HOUSMAN (PET)...SCHLECHT, SHEVLIN & SHOENBERGE
JANE LIEBERG CRASE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Special Administration issued 02/26/16; general letters issued 05/27/16, full authority \$250,000 bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 3A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/24/17 TIME: 8:30 DEPT: S36P

CASE#: CIP DS1700115

CASE NAME: IN RE JOHN DOE 58-11

HEARING:

Hearing Re: TO ESTABLISH FACT TIME AND PLACE OF DEATH

COUNSEL:

JOHN DOE 58-11

(PET)...SAN BERNARDINO COUNTY COUNSEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Establish Fact, Time and Place of Death by Captain Kevin Lacy of the Coroner's Division.

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

1. Petitioner, Captain Kevin Lacy, requests the court to establish the fact, time, and place of death of John Doe 58-11 on 09/04/11 at 0823 a.m., ¼ mile N/E of Glen Helen Raceway in the County of San Bernardino, CA, as there is no official record of the fact, time, and place of the person named John Doe 58-11.
2. Declaration in support of petition includes a Report of Death Worksheet describing the circumstances which led to the discovery of a human body.
3. Petitioner requests that the court make an order determining the death of the John Doe 58-11 did in fact occur on the time and at the place as stated, and by other proofs as adduced at the hearing.
4. ~Proposed Form Orders reflect John McMahon, Sheriff-Coroner's name.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 3B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/24/17 TIME: 8:30 DEPT: S36P

CASE#: CIP DS1700116

CASE NAME: IN RE JOHN DOE 50-11

HEARING:

Hearing Re: TO ESTABLISH FACT TIME AND PLACE OF DEATH

COUNSEL:

CAPTAIN KEVIN LACY, CORONER'S DIVISION (PET)...MILES A KOWALSKI

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Establish Fact, Time and Place of Death by Captain Kevin Lacy of the Coroner's Division.

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

1. Petitioner, Captain Kevin Lacy, requests the court to establish the fact, time, and place of death of John Doe 50-11 on 07/27/2011 at 1058 a.m., 500ft. E. of Alabama St., 954 ft. N. of Pioneer Ave. in the County of San Bernardino, CA, as there is no official record of the fact, time, and place of the person named John Doe 50-11.
2. Declaration in support of petition includes a Report of Death Worksheet describing the circumstances which led to the discovery of a human body.
3. Petitioner requests that the court make an order determining the death of the John Doe 50-11 did in fact occur on the time and at the place as stated, and by other proofs as adduced at the hearing.
4. ~Proposed Form Orders reflect John McMahon, Sheriff-Coroner's name.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 07/24/17

TIME: 9:30

DEPT: S36P

CASE#: CON PS1600037

CASE NAME: MTR OF CHRIS CLAYTON JACKSON JR.

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHRISTINA JACKSON

COUNSEL:

CHRISTINA JACKSON

(PET)...PRO/PER

CHRIS CLAYTON JACKSON JR

(PCE)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Referred to Court Investigator for investigation and report on 04/12/16.

Continued from **07/12/16**. No appearance.

Continued from **09/20/16** by stipulation. Counsel's report will report that notice of conservatee's right was sent.

Continued from 12/05/16, 02/03/17 and 04/17/17. Counsel states that he has not been able to locate his client. There is a possibility the Conservator and conservatee are now in the state of Washington. The last known address Attorney Flory has is 1356 Watson Ave Costa Mesa, CA 92626. Referred to Court Investigator for investigation and report. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Christina Jackson appointed Conservator of the person on 04/15/15 in Riverside County.
2. Statement of Care Plan in accord with Pr.C.§2352.5 was not required by Riverside. Does Court wish to require? JTD
3. Determination of Conservatee's Appropriate Level of Care filed 12/22/15.
4. **Court Investigator Special Report filed 04/19/17.**
5. Need report of court-appointed counsel, Mark Flory.
6. **Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).**

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.

7. **Conservatee now resides in Orange, CA. Suggest transfer to Orange County. If so, Court to set control date.**
8. ~Proposed letters 12/05/16.

RECOMMENDATION:

Need to clear notes 5 & 6 then Court's discretion.

(lc/nb)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/24/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600245

CASE NAME: ERIK GUTIERREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MIRIAM SANTANA

COUNSEL:

MIRIAM SANTANA	(CP)...PRO/PER
ANGEL GUTIERREZ	(CP)...PRO/PER
ERIK GUTIERREZ	(CPE)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Angel Gutierrez (father); Miriam Santana(mother); and Angel Alejandro Gutierrez (brother); appointed limited co-conservators of the person only pm 12/19/16.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care form, Care Plan filed on 01/06/17.

RECOMMENDATION

None.

(ww)

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000187

CASE NAME: ETHEL JUNE LYNCH

HEARING:
Hearing re Final Discharge

COUNSEL:

ROSALIE PERRYMAN	(PET)...E JOAN NELMS
ETHEL JUNE LYNCH	(DEC)...
JAMES B. CHURCH	(SPA)...JAMES B CHURCH & ASSOCIATES
MARJORIE MERCER	(MIN)...
ALEX R BORDEN	(PET)...BORDEN LAW OFFICE
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
DEBRA RICHTER	(PET/OBJ)...BORDEN LAW OFFICE
JAMES B CHURCH	(PET)...JAMES B CHURCH
DAVID YANCY	(LELAND C. BUSSELL)
BENNY MOORE	(LELAND C. BUSSELL)

XREF: CONDS1000033

GENERAL INFORMATION:

Continued from **11/28/16** and **02/27/17**. No appearances. Court orders Rosalie Perryman to appear in court at next hearing (5/15/17). Notice by Judicial Assistant.
Continued from 05/15/17. No appearance. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON final discharge

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

1. Order Settling First and Final Account entered 11/23/15.
2. All receipts filed.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300758

CASE NAME: MTR OF LOUISE MERCEDES BORQUEZ

HEARING:

Hearing re Final Discharge

COUNSEL:

DARLENE L PARRIS (PET)...PRO/PER
LOUISE MERCEDES BORQUEZ (DEC)...

Waiver of Court Fees and Costs filed by DARLENE L PARRIS is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on Final Distribution on Waiver of Account returned for corrections. Need same.
2. Need receipts.
3. Need Ex Parte Petition for Final Discharge/Order.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400128

CASE NAME: Walter McKibben

HEARING:

FIRST AND FINAL Account and Report of JANICE WINEKE and Petition
for allowance of fees filed.

COUNSEL:

MICHAEL T CHAMBERS (PET)...JAMES D PETERSON
WALTER MCKIBBEN (DEC)...
JANICE WINEKE (PET)...JAMES D PETERSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Successor Administrator, Janice Wineke ["Petitioner"].

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

1. Need final inventory and appraisal with supporting bank/financial statements per Local Rule 20-908. **Supp. (07/17/17) alleges an inventory is not required as the tax refund constitutes 'Income' to the Estate as it is not a date of death asset. However, Pr. C. §8800 requires an inventory and The Probate Referee Guide, Rev. 04/2015 specifically states, "checks issued after the date of the decedent' death (or date of appointment)", such as tax refunds, go on Attachment 1 to the Inventory and Appraisal. Need same.**
2. Accounting period 05/11/16 to 04/30/17.
3. Assets on Hand \$66,449.93 consisting of cash.
4. Statutory fees of \$1,370.42 requested. Calculated.
5. Petitioner requests authority to withhold \$1,000 as a reserve.
6. ~Proposed Order 05/01/17.

RECOMMENDATION:

Need to clear notes 1 then Court's discretion
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500047

CASE NAME: Peter Fredric Williams

HEARING:

Probate status report filed.

COUNSEL:

SUSAN WILLIAMS

(PET)...DINA I FARHAT, ESQ

PETER FREDRIC WILLIAMS

(DEC)...

GENERAL INFORMATION:

Continued from 05/15/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Status Report by Personal Representative, Susan Williams.

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

1. Petitioner alleges the estate is not in a condition to be closed as the First and Final Account needs to be completed.
2. Petitioner requests an additional 3 months to close the estate.
3. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next Accounting Review for **08/14/17**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500889

CASE NAME: RICHARD I PIERCE

HEARING:

Probate status report filed.

COUNSEL:

DAWN PIERCE (PET)...PECCORINI & PECCORINI
RICHARD I PIERCE (DEC)...

X-REF: PROPS 1600259

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Petitioner alleges the estate is not in a condition to be closed as decedent's assets consist of a 50% interest in two real properties that remain to be sold in decedent's mother's estate.
2. Petitioner requests an additional 12 months to close the estate.
3. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for Accounting Review on **07/30/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501029

CASE NAME: BRETT S TASHMAN

VACATED

HEARING:

Accounting Review

COUNSEL:

BURTON TASHMAN (PET)...GRIEPP & MCREE

LINDA TASHMAN (PET)...GRIEPP & MCREE

BRETT S TASHMAN (DEC)...

VACATE – First and Final Account filed and set for 10/05/17.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600157

CASE NAME: MTR OF ROBERTA M RICHEY

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

RACHELLE WILLIAMS (PET)...PRO/PER
ROBERTA M RICHEY (DEC)...

GENERAL INFORMATION

Petitioner appointed Special Administrator on 02/25/16. Letters issued 02/25/16.

Continued from **04/11/16**. Court was advised the home had been sold.

OSC set on 07/18/16 as there was no appearance.

Continued from 09/26/16, 11/28/16, 02/27/17 and 05/15/17.

THIS CASE IS SET FOR HEARING ON Letters of Administration W/Full IAEA by daughter

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

1. Petitioner alleges she is daughter and sole heir who waives bond, however, petition indicates there is a registered domestic partner who would also be an heir. Need verified supplement.
2. Item 5.2.b. states decedent's spouse is deceased. Item 7.a. states decedent had no predeceased spouse. Need verified supplement. Item 5b not completed.
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate and proof of service.
5. ~Proposed form Order filed 02/22/16.

RECOMMENDATION:

Need to clear notes. If approved, set Accounting/Status Review for **010/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rules.

(dl/lc/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600907

CASE NAME: MTR OF YOUNG SOOK HAN

SEE ALSO 9

HEARING:

OSC re: Dismissal

COUNSEL:

AE SOOK HAN	(PET)...RYAN A ELLIS
YOUNG SOOK HAN	(DEC)...
YOUNG SOO KO	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from **11/21/16** at request of counsel.

Continued from 02/27/17 and 05/15/17 (no appearances), Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Letters of Administration with full authority under IAEA sister.

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

1. Heirs appear to be citizens of Korea. Need Notice of Hearing and proof of service for diplomatic or consular office per Pr.C. 8113.
2. Petition does not include estimated value of property and Section 5 (7) or (8) does not indicate if there is issue of a predeceased child. Need verified supplement.
3. All heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by each heir.
4. Need proof of publication.
5. **Amended petition that nominates brother-in-law, calendared for 08/29/17.**
6. ~Proposed Form Order/Letters 09/09/16.

RECOMMENDATION:

Petitioner is a non-resident of the United States and is ineligible for appointment per Pr. C. 8402(a)(4).

(nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600907

CASE NAME: MTR OF YOUNG SOOK HAN

SEE ALSO 8

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

AE SOOK HAN

(PET)...RYAN A ELLIS

YOUNG SOOK HAN

(DEC)...

YOUNG SOO KO

(PET)...PRO/PER

See prior matter #8.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600988

CASE NAME: MTR OF ANTONIO F FRIAS

HEARING:

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

COUNSEL:

SILVIA FRIAS (PET)...LAW OFFICES OF JOHN R RAMOS
ANTONIO F FRIAS (DEC)...

Waiver of Court Fees and Costs filed by SILVIA FRIAS is GRANTED

Address: 2127 South Pine Court, Ontario, CA 91762

Appraised Value: \$420,000

Sale price: \$400,000

First overbid: \$420,500

Deposit: **\$14,000 – Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 5% = \$20,000

Additional bond: No current bond. Petitioner requests monies to be deposited into a blocked account at Manufactures Bank in Los Angeles, CA.

Reason for Sale: Necessary to pay debts, devise and expenses.

Exposure to Market: Listed with broker and MLS; signage/ads; open houses.

Notice: Given and published. **Need proof of clerks' posting.**

Future Hearing: 02/14/18: Accounting Review

No proposed order. Submit Order after Hearing.

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700429

CASE NAME: MTR OF WENXIANG TIAN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

HONGYOU ZHAO
WENXIANG TIAN

(PET)...THE LAW OFFICE OF HUNG BAN TRA
(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition

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

1. Petitioner requests a determination and confirmation of the community property interest in real property located at Highland, CA. However, decedent died intestate with two issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is the separate property of decedent.
2. Need copy of vesting document.
3. ~Proposed Form Order 04/25/17.
4. Court to review sticky note at LF, page 5.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS06898

CASE NAME: EST OF ROYCE IRVIN PERKINS

HEARING:

Accounting Review

COUNSEL:

MELISSA HANSON

(PET)...HARTNELL LAW GROUP

ROYCE IRVIN PERKINS

(DEC)...

GENERAL INFORMATION

Continued from **11/07/16** at request of counsel. Notice to be given by Mr. Hartnell.

Continued from **01/23/17** at request of counsel to obtain supplemental information from Melissa Hanson.

Continued from 05/15/17 at request of counsel.

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 Melissa Hanson on 12/31/06, limited authority no bond.
2. Previous status report approved on 02/17/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lc/nb)

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

DATE: 07/24/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS0800148

CASE NAME: DEBORAH LYNNE PICKETT

HEARING:

FINAL (13TH) Account and Report of FRANK D. PICKETT III, DALE NOEL and
Petition for allowance of fees filed.

COUNSEL:

FRANK D. PICKETT III	(PCR/CPE)...LINDA M BATTRAM
DALE NOEL	(PCR/CPE)...LINDA M BATTRAM
DEBORAH LYNNE PICKETT	(PCE/CEP)...SHERRI L KASTILAHN

///

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 07/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000221

CASE NAME: DWIGHT G BANKS

HEARING:

Accounting Review

COUNSEL:

JACQUELINE M BANKS (CP)...JENNIFER M DANIEL

DWIGHT G BANKS (CTP/INC)...NOREEN T FONTAINE

Waiver of Court Fees and Costs filed by JACQUELINE M BANKS is GRANTED

XREF: CONPS1300213

GENERAL INFORMATION

Continued from 04/17/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Petition to Dispense with Accounting Order entered 07/14/15;
accounting now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300029

CASE NAME: MTR OF MATTHEW SHEA UPTON

HEARING:

Hearing Re: COURT INVESTIGATOR MEMO FILED 5/11/17

COUNSEL:

JACK L UPTON (CP)...PRO/PER
JULIA L UPTON (CP)...PRO/PER
MATTHEW SHEA UPTON (CTP)...JAMES B CHURCH
INLAND COUNTIES REGIONAL CENTER (TP)...STEVEN K BECKETT
FAIRVIEW DEVELOPMENTAL CENTER (PRO/PER)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CI Memo filed 05/11/17

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

1. Matter set upon receipt and review of CI memo, wherein, the Court appointed James B. Church.
2. Notice by Judicial Assistant.
3. Need report by court-appointed counsel, James B. Church.

RECOMMENDATION:

Need report then Court's discretion.

(nb)

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

DATE: 07/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600348

CASE NAME: RAMON LOREDO III

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:
BONNIE LOREDO (PET)...PRO/PER
RAMON LOREDO III (CTP)...LISA FISHER

GENERAL INFORMATION

Continued from **01/30/17**. Referred to Court Investigator for investigation and report.
Walter Moore appointed.

Continued from 05/15/17. Mr. Moore reports he will be filing a petition to terminate conservatorship.

THIS CASE IS SET FOR HEARING ON Conservatorship Management Conference re Transfer from Los Angeles County.

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

1. Bonnie Loredo aka Bonnie Rodriguez (mother) was appointed Conservator of person only and Letters were issued 02/10/10 in Los Angeles County Court.
2. This matter was transferred from Los Angeles County Superior on 06/30/16 as the Conservator resides and intends to continue to reside in San Bernardino County.
3. **Court Investigator Report filed.**
4. Need Post Move Change of Address
5. Need amended Letters to reflect San Bernardino County.
6. Conservatee is developmentally disabled. Court may wish to request IRC report. JTD
7. Last PVP Report filed 02/10/10 by attorney Christina M. Stone. Court may wish to appoint counsel and require a report. **Need report by court-appointed counsel, Walter Moore.**

RECOMMENDATION:

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

(lh/nb)

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

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

DATE: 07/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700219

CASE NAME: MTR OF RAMON IGNACIO MARQUEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

RAMON MARQUEZ-RODRIGUEZ (CP)...PRO/PER

HILARIA MARQUEZ (CP)...PRO/PER

RAMON IGNACIO MARQUEZ (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Ramon and Hilaria Maquez-Rodriguez (father and grandmother)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 06/12/17.
2. Petitioner requests orders limiting civil rights and granting powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, consent/withhold consent to marriage, decisions regarding education.
3. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. Need IRC report.
5. Petition is incomplete at item 8 as to whether proposed conservatee will attend hearing, and item 9 medical treatment.
6. **Court Investigator report filed.**
7. Need Certificate of Completion of the Conservatorship Training Class.
8. **Citation returned served.**
9. ~Proposed Form Order: 06/12/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **03/05/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/24/17 TIME: 9:30 DEPT: S37P

CASE#: VC VS00310

CASE NAME: MATTER OF WILLIAM JOSEPH PRUSINSKI

HEARING:

Hearing Re: STATUS

COUNSEL:

LINDA PRUSINSKI

(PET)...LUTHI, GARY & APPEL

WILLIAM JOSEPH PRUSINSKI

(CEP)...WALTER T. MOORE

No notes – status.

(nb)