



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 07/26/17

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.

06/27/17lc; 07/21/17lh

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: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0900130

CASE NAME: AURORA ROMERO

HEARING:

Accounting Review

COUNSEL:

ROSALINDA MANCHESTER (PET)...E JOAN NELMS
AURORA ROMERO (DEC)...

XREF: SCSS01960

GENERAL INFORMATION

Continued from 02/22/17 and 05/10/17.

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 Rosalinda Manchester, daughter, on 04/25/13; full authority, no bond.
2. Previous status report approved on 06/30/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400663

CASE NAME: ERWIN B. KOWALSKI

VACATED

HEARING:

Accounting Review

COUNSEL:

MICHAEL J. KOWALSKI

(PET)...PRO/PER

ERWIN B. KOWALSKI

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Michael Kowalski, son, on 11/03/14; **limited** authority, no bond.
2. Previous status report approved on 12/22/16.
3. Need accounting or status report.

RECOMMENDATION

Need to clear note 3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500220

CASE NAME: MTR OF REYES GONZALES

HEARING:

Order to Show Cause RE: Status of Sale of Property

COUNSEL:

CANDELARIO PARTIDA	(PET)...MOISES A AVILES
REYES GONZALES	(DEC)...
REYLENE GONZALES	(PET)...HARTNELL LAW GROUP
PUBLIC ADMINISTRATOR	(ADM)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Status of Sale of Real property.

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

1. Reylene Gonzalez, daughter, appointed administrator on 05/31/17, full authority \$20,000 bond. **Bond has not yet posted; therefore, letters have not yet issued.**
2. Court set matter on 05/31/17 when administrator was appointed.
3. **NOTE:** Court to inquire re Creditor's Claim allowance/rejection as ordered for Candelario Partida. However, letters have not issued yet.

RECOMMENDATION

Court's discretion re OSC. Inquire status of bond, letters and sale of property.

(lc)

Future Hearing: 06/13/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500482

CASE NAME: HENRY MORA JR.

HEARING: FIRST AND FINAL Account and Report of MARY ANN MORA and Petition for allowance of fees filed.

COUNSEL:

MARY ANN MORA (PET)...THOMAS GRAY ATTORNEY AT LAW
HENRY MORA JR. (DEC)...
THOMAS W DOMINICK (TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Mary Mora, daughter.

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

1. All heirs waive accounting.
2. Petitioner and attorney request statutory fees of \$7,750. Ok.
3. Partial Inventory and Appraisal filed 09/08/16. Petitioner attests that Inventory and Appraisal consists of all assets. Court may wish to deem as final Inventory and Appraisal.
4. Proposed Order: 05/01/17; however, need after discovered property clause. Submit order after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **08/01/18**.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500651

CASE NAME: MTR OF DANIELLE TSCHAN RICHARDSON

SEE ALSO 6

HEARING:

Hearing Re: SPOUSAL PROPERTY PETITION

COUNSEL:

CHRISTOPHER GAGE RICHARDSON (PET)...MITCHELL I ROTH
DANIELLE TCHAN RICHARDSON (DEC)...
GAVIN REED WHITLEY (MIN)...MARK J. FLORY
GAGE KEATON RICHARDSON (MIN)...MARK J. FLORY
GRANT CHRISTOPHER RICHARDSON (MIN)...MARK J. FLORY
STATE OF CALIFORNIA FRANCHISE TAX BOARD (AGN)...

See notes on matter 6.

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500651

CASE NAME: MTR OF DANIELLE TSCHAN RICHARDSON

SEE ALSO 5

HEARING:

Hearing Re: OSC RE DISMISSAL

COUNSEL:

CHRISTOPHER GAGE RICHARDSON (PET)...MITCHELL I ROTH
DANIELLE TCHAN RICHARDSON (DEC)...
GAVIN REED WHITLEY (MIN)...MARK J. FLORY
GAGE KEATON RICHARDSON (MIN)...MARK J. FLORY
GRANT CHRISTOPHER RICHARDSON (MIN)...MARK J. FLORY
STATE OF CALIFORNIA FRANCHISE TAX BOARD (AGN)...

XREF: FAMSS1407215

GENERAL INFORMATION

Continued from **9/17/15** to file objections. Mark Flory appointed GAL for three minors.
Continued from **11/19/15** Counsel reports that petitioner has no objection to the three minors having an equal distribution.

Continued from **01/27/16, 03/29/16 and 05/12/16**. Settlement reached needs to be signed.
Continued from **07/21/16** at request of all parties for settlement to be finalized and signed.
Continued from 11/22/16 and 03/07/17.

OSC set on 03/07/17 when matter was referred to mediation. On 06/21/17 Procedural requirements to be completed pending next hearing; parties agreed.

THIS CASE SET FOR HEARING ON **OSC re Dismissal of Spousal Property Petition**

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

1. Petitioner, Christopher Richardson, is seeking court confirm his half of the community property and determine decedent's half of community property, person and real, pass to petitioner.
2. Petitioner and decedent were in dissolution proceedings at the time of decedent Danielle Richardson's death. Petitioner does not set forth how the property was purchased, when decedent and petitioner were married or evidence that decedent's property should pass to petitioner when the will specifically intended to leave petitioner nothing [LFpg5]. Court to see sticky note on page 1 of petition. Need verified supplement with points and authorities.

3. Decedent left two minor issues. Need report of GAL Mark Flory.
4. Need settlement.
5. **Amended** Creditor's claim filed **08/29/16** by FTB in the amount of **\$7,729.45**.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-4.

(lc/sa//nb/lc/nb/lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500673

CASE NAME: Margaret L. Beauvais 2000 Revocable Trust

HEARING:
Hearing re Final Discharge

COUNSEL:

RICHARD ALAN BEAUVAIS (PET)...CHARLES S ALTHOUSE
MARGARET L. BEAUVAIS 2000 REVOCABLE TRUST (TRU)...
ALAN R BEAUVAIS (PET)...PRO/PER

GENERAL INFORMATION

Continued from 03/22/17 and 06/21/17.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Trust Account for Richard Beauvis approved on 11/09/16. Need order submitted with corrections.
2. Need receipts, will clarify distributees when order is submitted and approved.
3. Need Ex Parte Petition for Final Discharge and Order once note 1 is cleared.

RECOMMENDATION

Need to clear notes 1-3.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500705

CASE NAME: PEGGY JO PETERSON

SEE ALSO 9

HEARING:

Hearing Re: STATUS OF WAIVER OF ACCOUNT BY RAYMOND EDWARDS

COUNSEL:

EDWARD LEE PETERSON (PET)...PRO/PER
PEGGY JO PETERSON (DEC)...
JULIE A PETERSON (PET)...AMY YORK GARRETT
EDDIE PETERSON (PET)...JEFF GROTKE
CATHY S. PETERSON (OBJ)...PRO/PER
AMY YORK GARRETT ESQ
DEPARTMENT OF HEALTH CARE SERVICES

170.6 FILED AGAINST JUDGE LUDVIGSEN

GENERAL INFORMATION

Continued from 01/11/17 (no appearance) and 04/12/17. Raymond Edwards to be present at next hearing.

THIS CASE IS SET FOR HEARING ON Status on Waiver of accounting and report.

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

1. Matter set on 12/07/16. Raymond Edwards' resigned as administrator. Letters of **Successor** Administration WWA issued to Edward Peterson, son on 01/24/17, full authority no bond. Counsel of Eddie Peterson, son, indicated his client is waiving the final accounting of Raymond Edwards. Julie and Cathy Peterson also waive the accounting of Raymond Edwards.
2. Need waiver of account and final report of administration by Raymond Edwards per Pr. C. § 1064 and Pr. C., § 10954(c)(1) CRC§7.550.
3. **Note:** nominations to appoint Public Administrator filed 12/05/16.

RECOMMENDATION

Inquire status re waiver of account and report.

(lh/lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500705

CASE NAME: PEGGY JO PETERSON

SEE ALSO 8

HEARING:

Accounting Review

COUNSEL:

EDWARD LEE PETERSON (PET)...PRO/PER
PEGGY JO PETERSON (DEC)...
JULIE A PETERSON (PET)...AMY YORK GARRETT
EDDIE PETERSON (PET)...JEFF GROTKE
CATHY S. PETERSON (OBJ)...PRO/PER
AMY YORK GARRETT ESQ
DEPARTMENT OF HEALTH CARE SERVICES

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Successor** Administration WWA issued to Edward Peterson, son, on 01/24/17; full authority, no bond.
2. Need accounting or status report.

RECOMMENDATION

Need to clear note 2. Court may wish to continue the matter as letters recently issued.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501141

CASE NAME: MTR OF H.H. HILL

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE ON SHARON J BLINCI

COUNSEL:

SHARON J BLINCI (PET)...KAREN J LA MADRID
H H HILL (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Sanctions/Surcharge on Sharon Blinci.

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

1. Matter set on 06/07/17 when there was no appearance or accounting filed. Surcharge and Sanctions of \$500 set at each for failure to file. Citation issued to Sharon Blinci.
2. Waiver of account filed on 06/01/17 and set for hearing on 08/24/17. However, it appears accounting and report may not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. and is more of a status report.
3. **Response re OSC on Sanction/Surcharge filed 07/17/17.**
4. Need return of citation.

RECOMMENDATION

Court's discretion re OSC. Need return of citation.
(lc/lh)

Future Hearing: 8/24/17: 1st & Final Report of Executor on Waiver of Account & Report

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600922

CASE NAME: MTR OF ALTON FAYETTE COREY

HEARING:

WAIVER OF Account and Report of ARTHUR T COREY and Petition for allowance of fees filed.

COUNSEL:

ARTHUR T COREY (PET)...JEANNE M FITZGERALD
ALTON FAYETTE COREY (DEC)...

GENERAL INFORMATION

Continued from 06/07/17.

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Arthur Corey, brother.

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

1. Petitioner is sole heir, waives accounting and statutory compensation.
2. Attorney seeks statutory fees of \$10,339.49. Ok. It appears that there is a loss of real property totaling \$12,500 not considered in statutory fee calculation. **Supp: 06/01/17 petitioner agrees with requested fee.**
3. Report of Waiver of Account does not address Creditor's Claim by Onemain Financial Issuance Trust for \$8,627.34 recently filed on 05/17/17. However, it appears Creditor's Claim period passed on 03/15/17. **Supp. 07/03/17 petitioner served Onemain with a Notice to Creditors and provided a Creditor's Claim form on 10/03/16 [Supp, LF,pgs15-16]. Petitioner has not received any communication from Onemain regarding their late Creditor's Claim filed 05/17/17.**
4. ~Proposed Order: 06/09/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **08/01/18.**

(lc/lh/lc/lh)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700431
CASE NAME: ANIL KUMAR TYAGI
HEARING: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

SYED SAJJAD HUSSAIN (PET)...UGO HARRIS P. EJIKE, ESQ.
ANIL KUMAR TYAGI (DEC)...

GENERAL INFORMATION

Letters of special administration issued to Michael Maddux, attorney, on 05/08/17.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Syed Sajjad Hussain creditor for Michael Maddux, attorney or Public Administrator.

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

1. Petitioner requests no bond as attorney and/or Public Administrator does not require bond.
2. Counsel Michael Maddux was appointed special administrator. Court may wish to deem as consent to serve as administrator.
3. Petitioner states there is a related case, CIVDS1502449. Decedent passed away during litigation. Need notice of related case.
4. Need proof of publication.
5. Petitioner did not date verification at signature line. Need same.
6. Section 8 does not list Michael Maddux or Public Administrator who are listed in section 2. Need verified supplement.
7. Petitioner submitted outdated 2008 form. JTD
8. No proposed order.

RECOMMENDATION

Need to clear notes 3-6, no bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/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: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700432

CASE NAME: ELIAS PADILLA

HEARING:

Petition to determine succession to Real Property

COUNSEL:

GLORIA PADILLA	(PET)...CKB VIENNA, LLP
CARLOS PADILLA	(PET)...CKB VIENNA, LLP
FRANK PADILLA	(PET)...CKB VIENNA, LLP
ELIAS PADILLA	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real property by Gloria, Carlos and Frank Padilla, children.

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

1. Petitioners seek 100% interest in decedent's 1/6th interest, 1/3rd each, in real property per the laws of intestate succession.
2. No proposed order. Submit after hearing.

RECOMMENDATION:

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700423

CASE NAME: MTR OF SUSAN HARUE FRIDLEY

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

KUNIKO TOMOYOSE ELLIOT (PET)...VICTORIA P MARTIN
SUSAN HARUE FRIDLEY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Kuniko Elliot, executor.

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

1. Will waives bond. Estate consists of \$327,261.73 in personal property. JTD
2. Petition is not dated by petitioner. **Supp 07/18/17 includes signature page.**
3. The will does **not** conditionally incorporate the trust. However, is not clear if Trust is in existence. Question if Trust is in existence? If so, need Trustee listed in section 8 and a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. **Supp. 07/18/17 Certification of Trust filed; Soka Gakkai International is the sole beneficiary that was served on 07/11/17.**
4. ~Proposed Form Order: 05/02/17.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1100071

CASE NAME: ROBERT SANCHEZ TORRES JR

VACATED

HEARING:

Hearing Re: Attorney billing claim

COUNSEL:

ERIKA R TORRES

(CP)...PRO/PER

ROBERT SANCHEZ TORRES JR

(CTP)...

No notes – JTD

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500361
CASE NAME: JOSE ALFREDO TAPIA
HEARING: Hearing Re: STATUS OF TRANSFER IN FROM LOS ANGELES
COUNTY

COUNSEL:

VICTOR TAPIA (CP)...PRO/PER
LETICIA TAPIA (CP)...PRO/PER
JOSE ALFREDO TAPIA (CTP)...SHERRI L KASTILAHN

X REF: CONPS1300234 (*Jose Alfredo Tapia old case*)

GENERAL INFORMATION:

Continued from 10/12/16. Conservator has to file their own motion in Los Angeles to request transfer to San Bernardino County.

Continued from 02/08/17. Court makes a formal request for BP162113 be transferred back to San Bernardino County. San Bernardino understands that it has no authority over Los Angeles; however, matter should be transferred back to this county as this is where conservatee and Conservator live.

Continued from 04/12/17. Conservator to file with Los Angeles request to transfer to San Bernardino County and to file with San Bernardino proof of filing in Los Angeles. If Conservator does not comply, the court will sanction Conservator. Sherri Kastilahn appointed counsel.

THIS CASE IS SET FOR HEARING ON Status on Transfer Los Angeles County

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

1. Matter set at hearing re Reports of Court Investigator and Appointed Counsel on 4/20/16. Parents appointed Limited conservator on 6/25/04 person only in Los Angeles County. Case ordered transferred on 10/13/15. Conservator to contact Los Angeles Court regarding the old case (CONPS1300234/ BP162113) to have it transferred back to San Bernardino County.
2. Court Investigator report filed 3/23/16.
3. Report of appointed counsel, Roberta Taylor, filed 3/30/16. Need report of Counsel Sherri Kastilahn.
4. Need amended Letters issued by San Bernardino County.
5. Proposed Order on Transfer File from Los Angeles re case# BP162113 submitted on 8/24/16.
6. Los Angeles County minute order filed 05/30/17 indicating case ordered transferred on 04/12/17.

7. Need proof of receipt of transfer of records.

RECOMMENDATION:

Inquire status of transfer request.

(sa/lc)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700083

CASE NAME: MTR OF OFELIA M REYES

SEE ALSO 17 18

HEARING: Hearing Re: OSC RE TERMINATING TEMPORARY & DISMISS OF PET

COUNSEL:

RONALD CHARLIE REYES (CP)...PRO/PER
OFELIA M REYES (CTP)...

GENERAL INFORMATION

Temporary orders granted on 03/21/17. Ronald Reyes appointed person only.

Continued from 05/10/17. Need amended petition re estate powers.

OSC set on 06/14/17 when there was no appearance. Court will terminate temporary conservatorship and dismiss petition if petitioner fails to appear.

THIS CASE SET FOR HEARING ON **OSC re Terminate Temporary/Dismiss** Petition for Appointment of Conservator person only by Ronald Reyes, son.

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

1. Petitioner seeks Pr.C. § 2590 powers; however, this is a petition for **person only**. Need amended petition for estate powers.
2. Petitioner seeks Pr.C.§§ 1873 or 1901 powers; however, it appears attachment indicates 1873 in regards to estate transactions. [Pet.03/07 LFPg12].
3. Certificate of Completion of the Conservatorship Training Class filed 05/08/17.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2358
5. Petitioner seeks medical powers. Capacity Declaration filed 03/07/17;
 - a. Section 3 is incomplete as to whether party is physician.
 - b. Section 4 is incomplete as to conservatee's name.
6. Need return of citation.
7. Need notice of hearing and proof of service.
8. Court Investigator report filed 05/09/17.
9. ~Proposed Form Order: 03/07/17.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 5-7. If approved, set hearing for Compliance Review for **02/28/18** 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.

(lc)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700083

CASE NAME: MTR OF OFELIA M REYES

SEE ALSO 16 18

HEARING:

Petition for EXCLUSIVE AUTHORITY TO GIVE CONSENT FOR MEDICAL
TREATMENT

COUNSEL:

RONALD CHARLIE REYES (CP)...PRO/PER
OFELIA M REYES (CTP)...

See notes on matter 16.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700083

CASE NAME: MTR OF OFELIA M REYES

SEE ALSO 16 17

HEARING: Petition for Appointment of Conservator

COUNSEL:

RONALD CHARLIE REYES (CP)...PRO/PER

OFELIA M REYES (CTP)...

See notes on matter 16.

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700131

CASE NAME: MTR OF JIMMIE V SMITH

HEARING: Petition for Appointment of Conservator

COUNSEL:

FRED SMITH (CPE)...JEANNE E KENNEDY
JIMMIE V SMITH (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

Fred Smith appointed temporary Conservator of person and estate on 04/26/17; \$120,000 bond.

Continued from 05/31/17. Mitchell Roth appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Fred Smith, grandson.

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

1. Petitioner seeks bond of \$1,149,984.00.
2. Petitioner seeks medical powers. Capacity Declaration filed 04/12/17.
3. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351-2358 JTD
5. Citation returned served.
6. Petitioner seeks dementia powers. **Need** report of Counsel M. Roth.
7. Certificate of Completion of the Conservatorship Training Class filed 05/17/17.
8. CI Report filed 05/23/17.
9. ~Proposed Form Order: 04/12/17

RECOMMENDATION

Need to clear note 6. If approved, set hearing for Compliance Review for **02/28/18** for the filing of the required documents and hearing re Accounting Review for **10/03/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700153

CASE NAME: ANABEL MARTINEZ-ZAVALA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA E ZAVALA (CP)...
ANABEL MARTINEZ-ZAVALA (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 06/07/17. Jeanne Kennedy appointed counsel.

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

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

1. Petitioner seeks medical powers. Capacity Declaration filed 05/03/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Proposed conservatee is developmentally disabled. Report of Counsel filed 07/11/17.
4. Proposed conservatee is developmentally disabled. Confidential Letter from IRC filed on 06/15/17.
5. Petitioner seeks civil rights not be limited without court order. JTD
6. Certificate of Completion of Conservator Education filed 05/25/17.
7. CI Report filed 05/25/17
8. Return of Citation filed 05/18/17.
9. ~Proposed Form Order: 04/26/17.

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **02/28/18** 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 and Inventory & Appraisal with notice.

(lc/lh/lc/lh)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700200
CASE NAME: MTR OF DONNA MACIAS
HEARING: Petition for Appointment of Conservator

COUNSEL:

CONNIE G MACIAS (CPE)...PRO/PER
ANNEMARIE AYALA (CPE)...PRO/PER
DONNA MACIAS (CEP)...

GENERAL INFORMATION

Temporary orders denied on 06/05/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Connie Macias and AnneMarie Ayala, mother and sister.

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

1. As it appears the proposed conservatee's only assets are Social Security income no bond would be required. Pr.C. §§ 2323 and 2628.
2. Petitioners did check any sections re medical powers etc; However, provide attachment with powers sought. Need amended petition or verified supplement indications what sections should be marked and supporting probate code sections.
3. Petitioners do not seek medical powers; however, section 9 indicates that proposed conservatee lacks the capacity to give medical consent. Need Capacity Declaration.
4. Proof of Completion of Conservator Training Course filed 07/06/17 as to AnneMarie Ayala. **Need Certificate of Completion from Connie Macias.**
5. Need return of citation.
6. Section 5 is incomplete as to whether proposed conservatee is developmentally disabled. Need verified supplement.
7. Need notice of hearing and proof of service.
8. IF proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
9. IF proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). JTD
10. Only siblings listed of required contacts (Local form SB-12224). **Court to inquire** if there are further second degree relatives, if so, need updated form.
11. CI Report filed 07/19/17.

12. ~Proposed Form Order: 05/26/17.

RECOMMENDATION

Need to clear notes 2-7, then Court's discretion. If approved, set hearing for Compliance Review for **02/28/18** for the filing of the required documents and hearing re Accounting Review for **10/03/18**. Any accounting to be filed 30 days in advance.

(lc/lh)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700202

CASE NAME: RENIEL FRANCO S. REYES

VACATED

HEARING:

Petition for Appointment of Conservator

COUNSEL:

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

CONPS1700217(*Rina Fe S Reyes*)**CONPS1700218** (*Ral Francis Reyes*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Renan, Felicitas and Rea Reyes, parents and sister.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights and social/sexual contact not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 05/31/17; however, section 7b is not initialed by physician re proposed conservatee's lack of capacity. Need completed form.
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Proof of service for citation indicates mailed service. Need personal service of citation.
7. Need list of required contacts (Local form SB-12224).
8. Petition lists one grandparent is listed, court to inquire if the other 3 grandparents are surviving, if so, need verified supplement.
9. Need 30 days' notice and proof of service to IRC per Pr.C. § 1822(e).

10. Certificates of Completion of the Conservatorship Training Class filed; Rea's is filed in related case CONPS17002017.
11. CI report filed 07/13/17.
12. ~Proposed Form Order: 05/31/17.

RECOMMENDATION

Need to clear notes 3-9. If approved, set hearing for Compliance Review for **02/28/18** 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.
(lc/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: 07/26/17 TIME: 9:30 DEPT: S35P

CASE#: VC VS00200

CASE NAME: MTR OF DANIELLE LADA

VACATED

HEARING:

Accounting Review

COUNSEL:

ROSWITHA G LADA

(CPE)...JEANNE E KENNEDY

ULRICH F LADA

(CPE)...PRO/PER

DANIELLE LADA

(CEP)...

MICHELLE R LADA

(SC/CPE)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 11th Account for Roswitha and Michelle Lada, mother and sister, approved on 09/23/15.
2. Need 12th Account beginning with 05/01/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401104

CASE NAME: The Anthony Brusca Revocable Living Trust

HEARING:

Hearing Re: ACCOUNT/STATUS REPORT

COUNSEL:

BRANDON BRUSCA (PET)...STEVEN F CARVEL

THE ANTHONY BRUSCA REVOCABLE LIVING TRUST (TRU)...

BRIAN BRUSCA (PET/TP)...LAW OFFICES OF SIDNEY L ALEGRE

XREF: PROPS1300095

GENERAL INFORMATION

Continued from 12/14/16. 02/22/17 and 05/10/17. Court ordered the CPA to be present at next hearing..

THIS CASE SET FOR HEARING ON Account Review

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

1. Court set hearing on 09/21/16 for an abbreviated accounting for the \$50,000 reserve by Brian Brusca, Trustee.
2. Need a copy of the Stipulation and Order that was signed on 09/21/2016 in regards to this case and PROPS1300095 filed within this case.
3. Need abbreviated accounting.

RECOMMENDATION

Need to clear notes 2 & 3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500064

CASE NAME: Carolina Gutierrez Gonzales

HEARING:
Hearing re Final Discharge

COUNSEL:
PATRICK HERMAN GONZALES (PET)...PRO/PER
CAROLINA GUTIERREZ GONZALES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge.

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

3. Final account/distribution of Patrick Gonzales, son, approved on 07/20/16.
4. No receipt required, petitioner is sole heir.
5. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION:
Inquire status or order.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500764

CASE NAME: JASON DAVIS SPECIAL NEEDS TRUST

HEARING: First/Current Account and Report of CAROL ROBERTS and Petition
for allowance of fees filed.

COUNSEL:

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

XREF: CONPS1600318

GENERAL INFORMATION

Continued from 05/10/17.

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

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

1. Accounting period 03/29/16 – 02/14/17. It appears order was signed on 12/07/15. Accounting period should begin at date of order.
2. Need proof of funding of trust.
3. There appear to be no disbursements. However, there is no report per Pr.C.§16063. Need same.
4. Need schedule of assets on hand at beginning of account.
5. Need schedule of assets at end of accounting.
6. Need notice of hearing and proof of service for Sabrina Worth and Director of Developmental Services per Pr.C. §§ 17203, 2621, 1461.
7. Need bank statement per local rule 20-908.
8. Current bond is \$59,000.

RECOMMENDATION

Need to clear notes. If approved, set Accounting/Status Review for **05/16/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500840

CASE NAME: MUSGROVE FAMILY TRUST

HEARING:
Accounting Review

COUNSEL:
BEVERLY RANDOLPH (PET)...LIONHEART LEGAL
THE MUSGROVE FAMILY TRUST (TRU)...PRO/PER
HERBERT MUSGROVE JR (OBJ)...FRANK J PRAINITO

GENERAL INFORMATION
Continued from 03/01/17 and 04/19/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Matter set at 10/28/16 trial. Settlement was read on the record and Attorney Luella Hairston to submit order after hearing. **Need order from trial. Returned for corrections.**
2. It appears need accounting of Co-Trustee Herbert Musgrove; however, is not clear and there is no settlement or order after trial.
3. **Objections to Proposed Findings and Order by Herbert Musgrove filed 04/06/17.**

RECOMMENDATION
Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700400

CASE NAME: HELEN B DIACO

HEARING:

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

COUNSEL:

LINDA STRACHEN (PET)...WILLIAM K SWEENEY
HELEN BEATRICE DIACO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Linda Strachen, daughter/Trustee.

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

1. Will waives bond. Estate consists of \$663,000 in personal property. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. JTD
2. The will conditionally incorporates decedent's Trust. Copy of Trust Filed 04/27/17.
3. ~Proposed Form Order: 04/27/17.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700294

VACATED

CASE NAME: MTR OF ROBERT W ELLIS

HEARING:
Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:
JANICE WINEKE (PET)...EUGENE S ALKANA
ROBERT W ELLIS (DEC)...

Future Hearing: 9/10/18: Accounting Review

Proof of bond \$205,000 filed 07/18/17.
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700405

CASE NAME: MTR OF RUTH E DENISON

HEARING:

Petition for PROBATE OF WILL AND LETTERS OF TESTAMENTARY W/FULL
IAEA

COUNSEL:

ROBERT BEATTY
RUTH E DENISON

(PET)...SLOVAK BARON EMPEY MURPHY & PI
(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Robert Beatty, friend.

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

1. Will waives bond. 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 \$173,000; of which \$138,000 is real property? JTD
2. ~Proposed Form Order: 04/25/17

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(ww/lc/lh)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700040

CASE NAME: CHARLES EDWARD GIANNOTTI

HEARING:
Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:
WILLIAM CHARLES WATKINS (PET)...LINDA ROBERTS ROSS
CHARLES EDWARD GIANNOTTI (DEC)...

GENERAL INFORMATION

Continued from 07/12/17 at request of Counsel.

THIS CASE SET FOR HEARING ON Proof of Bond/Issuance of Letters.

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

1. William Watkins, grandson, appointed executor on 06/14/17, full authority \$104,000 bond.
2. Need bond in order to issue letters.

RECOMMENDATION

Inquire status.

(lc/lh)

Future Hearing: 08/22/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700449

CASE NAME: MTR OF RITA J JACKSON

HEARING:

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

COUNSEL:

RITA L JACKSON (PET)...DAVID E JACOBS
RITA J JACKSON (DEC)...

CCP170.6 filed as to Judge TARA REILLY

GENERAL INFORMATION

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

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

1. Will waives bond. The estate consists of \$200,000 in personal property.
2. First named executor declined to act.
3. The will conditionally incorporates decedent's Trust. Copy of trust attached to petition.
4. The original will is apparently lost. Petitioner has attached [3f(3)] with information alleging the will was unlikely destroyed and petitioner is still searching for the will [LFpgs64] When a will is lost, and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it. Pr.C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. **Supp. 07/14/17, Will was located and lodged with the Court on 7/14/17. Does Court wish to deem this petition a petition for Probate of Will, or require amended petition?**
5. **Receipt for Will Lodged 07/14/17.**
6. ~Proposed Form Order: 05/11/17

RECOMMENDATION

Court's discretion re note 4 and bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc/lh)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0701036

CASE NAME: MARIA ANNA SCHULTZE

HEARING:

Hearing Re: DECISION REGARDING THE STIP AND ORDER (NON APPEAR)

COUNSEL:

LUCIEN SCHULTZE	(PET)...GREGORY L ZUMBRUNN
MARIA ANNA SCHULTZE	(DEC)...
RICHARD SCHULTZE	(OBJ)...DIANA J CARLONI
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER

Future Hearing: 9/05/17: Accounting Review

No notes- JTD

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

DATE: 07/26/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400376
CASE NAME: THE LUCILLE SABBATH GRIFFIN REVOCABLE TRUST
HEARING: Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:
THE LUCILLE SABBATH GRIFFIN RE (TRU)...
YOLANDA QUAM (PET)...MATTHEW E SHEASBY
YOLANDA QUAM (TEE)...

XREF: CONPS1500124

Continued from 07/20/17. Court finds good notice to allow 5 day notice. Court's Clerk's office to post notice forthwith.

Address	6009 Maycrest Ave, Corona, CA 92880 APN 164-261-004-8
Appraised value	\$425,000.00 Need updated reappraisal for sale within year of sale.
Sale price	\$485,000.00
First overbid	\$509,750.00
Deposit	\$15,000, with \$80,000 to be placed into escrow.
Commission	5%; 2.5% each to Whit Prouty and Rosalie Felix.
Additional bond	Current bond is \$390,000. However, as real property is being liquidated, does Court wish to require additional bond in the amount of net proceeds?
Reason for sale	Debts and best interest of the interested persons.
Exposure to market	MLS (Multiple listing service), marketing and advertising.
Notice	Need notice to buyer Joseph Linares and agent Rosalie Felix. Need proof of clerk's office posting.

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.

~Proposed Form Order: 06/19/17.

(lc/lh)

Future Hearing: 08/08/17 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

HEARING:

Motion Re: RECONSIDERATION; MEMO OF POINTS AND AUTH IN SUPPORT
OF;DECL OF NOREEN T FONTAINE

COUNSEL:

KIMBERLEY A CAMPBELL (PET)...THOMAS W DOMINICK
SHROPSHALL FAMILY TRUST (TRU)...
DARRELL J SHROPSHALL (PET)...THOMPSON & COLEGATE
NOREEN T FONTAINE (PET)...PRO/PER
DAVID R SHROPSHALL(PET/PLA/OBJ)...LAW OFFICE OF NOREEN T FONTAIN
RYAN SHROPSHALL (PET)...GRESHAM SAVAGE NOLAN & TILDEN
CHRISTOPHER CAMPBELL
DEPENDABLE STORAGE, LLC

XREF: CIVDS1615271 CIVDS1619135

No notes JTD

(LR)

Future Hearings: 8/14/17: Petition to Determine Validity of Trusts & Amendment to Confirm Appt of Trustee, Petition to Determine Validity of Trust, Petition for Settle of First Account and Report of Suspended Trustee of the Shropshall Family Trust, Petition for Settlement of 1st Account and Report of Suspended Attorney-in-Fact. 1st Account and Report of Kimberley Campbell

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

DATE: 07/26/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1601060

CASE NAME: THANIA BELEN CONTRERAS SPECIAL NEEDS TRUST

HEARING:

Hearing Re: Proof of Amended Trust

COUNSEL:

WESTAMERICA BANK (PET)...RANDOLPH M SHARON
THANIA BELEN CONTRERAS SPECIAL NEEDS TRUST(TRU)...MARK J. FLORY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Amended Trust

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

1. On 05/10/17 the Petition to Amend Special Needs Trust to Correct Error in Named Beneficiary was granted and the court set this hearing to receive proof that the trust was amended.
2. Need proof of amended trust.

RECOMMENDATION

Inquire status.

(ww)

Future Hearing: 10/31/17: Accounting Review

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS0800214

CASE NAME: MTR OF MARIA DEL ROSARIO IBARRA

HEARING:

Hearing Re: Proof of issuance of new letters

COUNSEL:

MARIA AGNELES BLUE	(CP)...CHRISTOPHER A POULOS
MARIA DEL ROSARIO IBARRA	(CTP/CEP)...MITCHELL I ROTH
MARIA DEL CARMEN FREYRE	(CPE)...
JOSE IBARRA	(CPE/OBJ)...EDWARD B FISCHEL
MATIANA IBARRA	(CPE)...EDWARD B FISCHEL
CONCEPCION M POWELL	(PRO/PER)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Issuance of New Letters

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

1. Amended order approved as to Matiana & Nicolas Ibarra, Carmen Freyre and Concepcion Powell on 01/23/15; Limited **person and estate**. Court terminated conservatorship of estate on 05/17/17 and suspended Matiana Ibarra and Concepcion Powell.
2. Court requested amended letters just naming Maria Del Carmen Freyre as sole conservator of the person only.

RECOMMENDATION

Inquire status.

(ww/lc)

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

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300058

CASE NAME: ***MF MTR OF ANTHONY GALINDO***.

HEARING:

SECOND AND FINAL Account and Report of ISMARY DIAZ-GALINDO and
Petition for allowance of fees filed.

COUNSEL:

ANTHONY GALINDO	(CEP/OBJ)...WALTER T. MOORE
ISMARY DIAZ-GALINDO	(CPE)...HORSPOOL & HORSPOOL
TAMORA SUE GALINDO	(PET)...JACK B. OSBORN

XREF: FAMSS1609991, CIVDS1405052

GENERAL INFORMATION

Continued from 05/17/17.

THIS CASE SET FOR HEARING ON 2nd and Final Account and Petition for Allowance of Fees by ***Ismary Diaz-Galindo, former conservator/spouse.***

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

1. Accounting period 05/01/14 – 09/30/16.
2. Assets on hand \$25,375.19 of which \$20,603.17 is cash and remainder in furniture.
3. Petitioner seeks fees of \$27,600 for 1,160 hours at \$15 per hour. Summarized and averaged [Acct. 04/03LFpg40-42]. JTD
4. Attorney requests fees of \$31,120 for 81.6 hours at \$250/395 per hour Itemized. [Acct. 04/03LFpg43-52]. JTD
5. **Objections filed by Tamora Galindo, Conservator, on 05/16/17.**
6. **Objection filed by Anthony Galindo on 05/30/17.**
7. ~Proposed Order: 04/03/17.

RECOMMENDATION

Court's discretion re fees; matter is contested. If approved, set hearing on the filing of receipts and final discharge for **05/23/18**.

(lc)

Future Hearing: 11/30/17: Accounting Review re Tamora

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

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700235

CASE NAME: MARICA KAY BISSONNETTE

HEARING:
Petition for Appointment of Temporary Conservator

COUNSEL:
KRISTIN COX (CPE)...LAW OFFICE OF BRADLEY J HAGUE
MARCIA KAY BISSONNETTE (CEP)...MITCHELL I ROTH

Future Hearing: 8/10/17: Petition for Appointment of Conservator

Petition for Temporary Conservator –no notes—JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500040

VACATED

CASE NAME: VIOLETTE K. GRAVES AKA VIOLET GRAVES

SEE ALSO 13

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of VERONICA MARKS

COUNSEL:

VERONICA MARKS

(CPE)...SHERRI L KASTILAHN

VIOLETTE K. GRAVES

(CEP)...JEANNE E KENNEDY

See notes on matter 13.

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

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500040

CASE NAME: VIOLETTE K. GRAVES AKA VIOLET GRAVES

SEE ALSO 12

HEARING: FIRST AND FINAL Account and Report of VERONICA MARKS and
Petition for allowance of fees filed.

COUNSEL:

VERONICA MARKS (CPE)...SHERRI L KASTILAHN
VIOLETTE K. GRAVES (CEP)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st and Final Account, Termination of
Conservatorship and Petition for Allowance of Fees by Veronica Marks, daughter.

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

1. Accounting period 02/26/15 – 04/30/17.
2. Assets on hand \$105,541.19; cash and real property valued at \$30,000.
3. Petitioner waives compensation.
4. Attorney requests fees of \$7,848.75 for 24.15 hours at \$325 per hour. Itemized [Acct. 06/19/17 LFpg 55-58].
5. Petitioner seeks termination of the conservatorship as the threat of undue influence from Janice Jones is no longer apparent. Petitioner states the Capacity Declaration was insufficient to establish the need for conservatorship of person. Counsel Kennedy was noticed. **Report of Counsel filed 07/12/17.**
6. Need Rock Springs facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
7. Need notice of hearing and proof of service to Veteran's Administration.
8. Petitioner seeks bond of \$100,000 to be reduced to \$65,000 if matter not terminated in its entirety. Need bond calculation as it appears after attorney's fees bond would be \$74,000.
9. Proposed order 06/19/17; however, bond calculation does not appear in petition.

RECOMMENDATION

Need to clear notes 6-8. If termination approved set for filing of receipts and final discharge for **08/01/18**, if termination not approved, set hearing on the next accounting review for **06/27/18** (if one year) or **06/26/19** (if two years). Accounting to be filed 30 days in advance.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600154

CASE NAME: SANDY CIRA RODRIGUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETIITON FOR
CONSERVATORSHIP of LILIA DE PABLO

COUNSEL:

LILIA DE PABLO (CP)...PRO/PER
SANDY CIRA RODRIGUEZ (CTP)...WALTER T. MOORE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Lilia De Pablo, mother, appointed limited conservator of the person only on 12/21/2016. However, the Court may wish to require amended order and letters as both have sections that are incomplete or are missing the limited box.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION:

Need to clear notes 2-4. Court's discretion re note 1.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 14A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600244

CASE NAME: BARBARA PRAMSCHUFER

HEARING:
Hearing Re: Closed Hearing (Re: Counsel)

COUNSEL:

ANDREW PRAMSCHUFER	(CE)...ROSA M MARQUEZ
BARBARA PRAMSCHUFER	(CE)...MITCHELL I ROTH
BARBARA PRAMSCHUFER	(PP)...JOHN D LUECK
JANICE PRAMSCHUFER	(TP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER	(CE)...RONALD W ASK

XREF: CONPS1600284

No notes—JTD

Future Hearings: 7/26/17: Status of Settlement, Trial Setting Conference, 8/22/17: Petition for Transfer of Interest in Personal Property to the Estate , 11/29/17: Accounting Review

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

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600318
CASE NAME: MTR OF JASON DEAN DAVIS
HEARING: Hearing Re: Status/CI Report/Amended Letters

COUNSEL:

JOHN D DAVIS	(CP)...J. DAVID HORSPOOL
CAROL J DAVIS	(CP)...PRO/PER
SABRINA WORTH	(CP)...PRO/PER
JASON DEAN DAVIS	(CTP)...J. DAVID HORSPOOL

XREF: PROPS1500764 (Jason Davis SNT)

GENERAL INFORMATION

Continued from **12/21/16**. Counsel reports that Judge Ludvigsen requested that this matter be heard with PROPS1500764 which is assigned to Judge Ludvigsen.

Continued from **01/09/17**. No appearance. Notice by Judicial Assistant.

Continued from **03/27/17**. Counsel to file notice of related case and amended letters. Referred to Court Investigator.

Continued from 05/10/17. Court orders Carol Davis and Sabrina Worth to be present if the order and letters have not been filed/issued. John Davis is deceased.

THIS CASE SET FOR HEARING ON Status/ CI Report/Amended Letters

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

1. John & Carol Davis, Sabrina Worth; parents and sister, appointed limited co-Conservators on 11/08/90 in Orange County.
2. Case ordered transferred from Orange County on 10/17/16.
3. CI report filed 04/25/17.
4. Need report of court-appointed counsel, J. David Horspool.
5. Need amended order due to name change as to Carol J. Roberts (previously Carol Davis).
6. Need amended letters to reflect this county. **Amended Letters returned for corrections on 05/03/17.**

RECOMMENDATION

Need to clear notes.

(lc/lh/nb/lc/lh/ww)

Superior Court of Calif, County of San Bernardino
Page: 15A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 07/26/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500356

CASE NAME: MTR OF AMANDA J NEWMAN

HEARING:

PTN FOR PROPOSED ACTN TO ESTABLISH SNT, FIRST Account and Report of
CLAUDIA J NEWMAN and Petition for allowance of fees filed.

COUNSEL:

CLAUDIA J NEWMAN (CEP)...ROBERTA L. TAYLOR & ASSOCIATES
AMANDA J NEWMAN (DEC)...ROSE C ROSADO

GENERAL INFORMATION

Continued from 06/21/17 to clear probate notes. Judge requests legal research review SNT petition.

THIS CASE SET FOR HEARING ON Petition for Proposed Action to Create SNT, 1st
Account Current and Petition for Reimbursement of Costs Pr.C. §§ 2580, 2640 by Claudia
Newman, Mother.

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

1. Claudia Newman appointed Conservator of person and estate on 12/05/16, no bond.
2. Accounting period 11/08/10 – 12/08/11 [stated in summary pg34]. However, report states 11/30/10 – 12/16/11. Need corrected accounting.
3. Assets on hand \$1,245.44 and remainder of assets TBD.
4. Need final Inventory and Appraisal.
5. It is unclear why the accounting period starts prior to appointment. Need accounting beginning at appointment.
6. Summary of account and schedules are not on mandatory Judicial Council forms GC-400/SUM/GC-400/405. Need to file amended accounting.
7. Attorney requests fees of \$9,320 for 37.5 hours at \$120/300 per hour, less retainer of \$2,500, leaving a balance due of \$6,730. Itemized [Acct. 04/14LFpg56-64]. Need qualifications of paralegals per requirements of CRC 7.703(e)(1)(c) which show the completion of mandatory continuing education per Business & Professions Code 6450(d). Need verified supplement.
8. Petitioner requests reimbursement of costs advanced totaling \$3,375 for retainer and \$875 for paralegal fees for initial pleadings. JTD

9. Attorney requests reimbursement of costs totaling \$491. Itemized [Acct. 04/14LFpg64]. JTD
10. Petition to create SNT shall be filed separately.
11. Need notice of hearing and proof of service for Department of Health Services, Director of State Hospitals and Director of Developmental Services per Pr.C. §§ 3604(a)(2), 3602(f), and 3611(c); and relatives per Pr.C. § 2621.
- 12. Objections filed by conservatee's GAL Rose Rosado on 05/24/17.**

RECOMMENDATION

Need to file amended accounting and petition for SNT; clear notes 2-7 and notice. If approved, set Accounting/Status Review for **06/27/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(lc)

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

DATE: 07/26/17 TIME: 9:35 DEPT: S36P

CASE#: CON PS1400236

CASE NAME: Robert R Lara

HEARING:

Motion Re: VACATE ORDER OF FEB.01,2017 ON PETITION FOR FEES

Filed by Petitioner ROBERT R LARA

COUNSEL:

VICTORIA A CARR	(CPE)...JAMIE P GELBER
ROBERT R LARA	(CEP)...
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY

XREF: FAMVS1003497

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to Vacate Order of 02/01/17 for Petition for Fees by Jeanne Kennedy.

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

1. Petitioner, Jeanne Kennedy, requests Court vacate order approving attorney's fees filed 02/01/17. Petitioner alleges that there was not proper notice to Conservator Vicky Carr and Conservator refuses to pay fees due to improper service.
2. Petitioner requests that the petition for fees be placed back on calendar for property notice.
3. Notice sufficient.
4. **NOTE:** pre-move notice filed 05/17/17 indicating conservatee is moving to **Kern County**.
5. ~Proposed Order: 06/07/17.

RECOMMENDATION

Court's discretion. If approved, Court to set matter for Petition for Attorney's Fees on **09/06/17**.

(lc)

Future Hearing: 08/08/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

VACATED

HEARING:

Petition for ORDER DETERMINING VIABILITY OF THE CREDITOR'S CLAIM
OF PAMELA ANN WILLIAMS CHUNCHICK; ATTY FEES

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...COTTLE KEEN LOPICCOLO & HEYDE,
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)...ROGERS & HARRIS
DARINA WILLIAMS	(ROGERS & HARRIS)

Currently under review by legal research

(LR)

Future Hearings:07/27/17 Accounting, 10/12/17: Readiness Calendar, Petition to Enforce Judgment

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300598

CASE NAME: Loretta Ruth Gire

HEARING:

FIRST AND FINAL Report and Waiver of LAVADA FOSTER and Petition
for allowance of fees filed.

COUNSEL:

LAVADA FOSTER (PET)...HORSPPOOL & HORSPPOOL
LORETTA RUTH GIRE (DEC)...
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Lavada Foster, daughter.

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

1. Petitioner waives statutory compensation.
2. Attorney requests statutory fees of \$13,164.86.
3. Attorney requests extraordinary fees of \$28,138.50 for 107.9 hours at \$250/315 per hour for attorney services. Itemized [Acct. 05/08 LFpg 11-27]. JTD
4. All heirs waive accounting; however, need waiver from Casilean Schaffer.
5. ~Proposed Order: 05/08/17.

RECOMMENDATION

Need to clear note 4. If approved, set hearing on the filing of receipts and final discharge for **08/01/18**.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400008

CASE NAME: George Contreras, Sr.

HEARING:
Hearing re Final Discharge

COUNSEL:
JESS CONTRERAS (PET)...KELLY L PEXTON
GEORGE CONTRERAS Sr. (DEC)...

X REF: PROPS1100601 PROPS1300500

GENERAL INFORMATION

Continued from 10/19/16. No appearance. Jess Contreras ordered to be present if notes not cleared.

Continued from 12/21/16. Jess Contreras order to be present if notes are not cleared.

Continued from 03/15/17 and 05/24/17.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Jess Contreras approved on 10/27/15.
2. Need receipts for Clara, George and Georgette.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500028

CASE NAME: ANGELA GAIL MATTHEWS

HEARING:
Accounting Review

COUNSEL:
CHRISTOPHER K MATTHEWS (PET)...JOHN M WOODBURN
ANGELA GAIL MATTHEWS (DEC)...

GENERAL INFORMATION

Continued from 5/3/16 Court is informed that the Civil Case has been settled and a Minor's Compromise case filed.

Continued from 08/15/16, 10/26/16, 01/04/17, 03/15/17 and 05/24/17. Waiver to be filed.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration with Limited IAEA issued to Christopher Matthews, spouse on 3/10/15, \$20,000 bond.
2. Need an accounting or status report.

RECOMMENDATION:

Inquire status.
(sa/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500538

CASE NAME: CATHERINE B SHANEMAN

HEARING:
Hearing re Final Discharge

COUNSEL:

DARLEEN FELTGES (PET)...IGNAZIO FICARA
CATHERINE B SHANEMAN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Darleen Feltges approved on 07/20/16.
2. Need receipt from Gregory Shaneman for \$1,000 reimbursement.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500987

CASE NAME: ELISEO G GARCIA

SEE ALSO 7

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

MARICELLA GARCIA	(PET)...RICHARD A. LEPORE
ELISEO G GARCIA	(DEC)...
IMELDA AVILES	(PET)...THOMAS W DOMINICK

See next matter.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500987

CASE NAME: ELISEO G GARCIA

SEE ALSO 6

HEARING: Petition for PROBATE OF WILL & FOR LETTERS OF ADMINISTRATION
W/WILL ANNEXED

COUNSEL:

MARICELLA GARCIA	(PET)...RICHARD A. LEPORE
ELISEO G GARCIA	(DEC)...
IMELDA AVILES	(PET)...THOMAS W DOMINICK

GENERAL INFORMATION:

Continued from **1/20/16** for objections to be filed.

On **2/23/16** *Imelda Aviles appointed Special Administrator.*

Continued from **3/16/16** and **3/24/16** Court found the sale is confirmed over the objections of the heirs.

Continued from 6/27/16, 09/07/16 and 11/30/16. Maricella's claim has priority and will require \$200,000 bond. Petition/objections to be filed by 12/16/16. Maricella to publish.

Continued from 02/22/17. Imelda Aviles petition is withdrawn. Maricella's petition to be re-published, \$75,000 bond to be posted.

Continued from 05/03/17. Discovery underway.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA daughter, Maricella Garcia.

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

1. Estimated value of estate is \$200,000. Need bond of \$75,000 per court.
2. Declaration of Maricella Garcia in support of petition filed 04/27/17.
3. ~Proposed Form Order/Letters 10/27/15.

RECOMMENDATION:

RFA, need \$75,000 bond. If approved, set future hearing for Accounting/Status Review on **10/03/18**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.
(nb/sa/lc/dl/sa/lc/lh/lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600949

CASE NAME: MTR OF HELEN V CANNON

HEARING:

FINAL DISTRIBUTION ON WAIVER Account and Report of BOBBY GLENN
CANNON JR and Petition for allowance of fees filed.

COUNSEL:

BOBBY GLENN CANNON JR (PET)...IGNAZIO FICARA
HELEN V CANNON (DEC)...
SURETEC INSURANCE COMPANY (TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Bobby Cannon, Jr., son

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

1. Both beneficiaries waive accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$4,578.70. Petitioner agrees to pay fees outside of estate as there are no liquid assets.
4. ~Proposed Order: 05/01/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **08/01/18**.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 10

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...
KURT BECKSTROM	(PET)...ROBERT J SPITZ

GENERAL INFORMATION:

Continued from 03/20/17 and 05/24/17. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with full authority under IAEA by named executor, **James F. Baker, friend.**
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker.**

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

Petitioner 1 – James Baker, friend.

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Need proof of publication.
- 3 Need Proof of Subscribing Witness.
- 4 Proof of Publication filed 01/23/17 does not include full IAEA language per Pr. C. § 8100. Need proper publication.
- 5 **Objections by Kurt Beckstrom filed 03/03/17.**
- 6 ~Proposed Form Order 01/10/17.

Petitioner 2 – Kurt Beckstrom, brother/caretaker.

7. Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
8. ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Need to clear notes 2-4; matter is contested. If approved, set future hearing for Accounting/Status Review on **10/03/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 9

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...
KURT BECKSTROM	(PET)...ROBERT J SPITZ

See notes on matter 9.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700237

CASE NAME: THE LUCIANO MAGALLANEZ TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

MARIA ESTHER COON (PET)...ROBERT E PEARSON
THE LUCIANO AND SOLEDAD SHIRLEY MAGALLANEZ (TRU)...

Currently under review by legal research.

(LR)

NOTICE:

1. Notice filed; court to inquire if there is a mortgage company to notice as title to property will change.
2. Son Luciano personally served on 06/06/17.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700399

CASE NAME: EDUMENIO A MARTINEZ

SEE ALSO 13

HEARING:

Hearing Re: REQUEST FOR PERMANENT INJUNCTION

COUNSEL:

SUZETTE L HOLT	(PET)...PAUL HORN
EDUMENIO A MARTINEZ	(DEC)...
ANTHONY LEE MARTINEZ	(PET)...PRO/PER
NATIONSTAR MORTGAGE LLC	(RES)...BARRETT, DAFFIN, FRAPPIER...

No notes – JTD

(LR)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700399

CASE NAME: EDUMENIO A MARTINEZ

SEE ALSO 12

HEARING:

Hearing Re: PTN TO DET SUCC TO REAL PROPERTY (COMPETING PTN)

COUNSEL:

SUZETTE L HOLT	(PET)...PAUL HORN
EDUMENIO A MARTINEZ	(DEC)...
ANTHONY LEE MARTINEZ	(PET)...PRO/PER
NATIONSTAR MORTGAGE LLC	(RES)...BARRETT, DAFFIN, FRAPPIER...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property by Anthony Martinez, son.

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

1. Petitioner seeks 100% of decedent's 100% interest in real property per intestate succession; however, Property in question was ordered to Suzette Holt, significant other on 05/24/17 per terms of will. However, order has not been filed at time of review.
2. Petition does not include Inventory and Appraisal.
3. Petition does not include legal description of real property or personal property.
4. Section 1 does not match caption re personal property sought.
5. Petition does not include attachment 14 re parties to notice.
6. Notice of pendency of action filed 06/13/17 (post court order).

RECOMMENDATION

Petition appears moot. If court vacates previous order, need amended petition.

(lc)

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

DATE: 07/26/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700423

CASE NAME: MTR OF SUSAN HARUE FRIDLEY

VACATED-MOVED TO S35

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY W/FULL
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

KUNIKO TOMOYOSE ELLIOT (PET)...VICTORIA P MARTIN
SUSAN HARUE FRIDLEY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Kuniko Elliot, executor.

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

5. Will waives bond. Estate consists of \$327,261.73 in personal property. JTD
6. Need Notice to Petition to Administer Estate and proof of service for Soka Gakkai International and consulate of Japan per Pr.C. §8113.
7. Petition is not dated by petitioner. Need same.
8. Petitioner and named co-executor Yoshiko Jefferson are not listed in section 8. Need verified supplement.
9. Need declination to act by Yoshiko Jefferson.
10. The will does **not** conditionally incorporate the trust. However, is not clear if Trust is in existence. Question if Trust is in existence? If so, need Trustee listed in section 8 and a certification of trust that meets the requirements in Pr.C. §18100.5 and additionally includes a list of Trust beneficiaries for notice purposes.
11. ~Proposed Form Order: 05/02/17.

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 14A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/26/17 TIME: 8:35 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

SEE ALSO 18 19 20

HEARING:

Hearing Re: DATE TO PROVIDE ANSWERS

COUNSEL:

MARIA DE CASAS

(CPE)...MATTHEW E SHEASBY

TOMASA DE CASAS

(CEP)...EDWARD B FISCHER & ASSOCIATES

MIGUELITO DECASAS

(PET)...DUANE P BOOTH

No notes – JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: BC BS00032

CASE NAME: IN THE CONSERVATORSHIP OF MARK STOTT

HEARING:

Hearing Re: SECOND AND FINAL ACCTG OF SPASOJEVICH

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd and Final Account and Report of **Former Successor Co-Conservators, David and Carmela Spasojevich**, and Petition for Allowance of Fees.

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

1. Public Guardian was appointed successor, person and estate, on 01/23/17. Accounting is for prior Conservators.
2. Accounting period 07/01/16 – 03/24/17. Accounting period appears to extend 2 months beyond resignation. However, appears any funds were given to Public Guardian [Acct. 06/14/17LFpg27].
3. Assets on hand \$123,000 of which is real property and household furnishings.
4. Petitioners seek fees of \$3,250 for an average of 10 hours per month at \$25 per hour. Does court wish to require an itemization? JTD
5. Petitioners request reimbursement of costs advanced totaling \$1,148.49. Itemized [Acct. 06/14/17LFpg32].
6. Petitioner seeks reimbursement of costs for Richard Leyerly for costs totaling \$1,740.07. Itemized [Acct. 06/14/17LFpg50-51].
7. Attorney requests fees of \$17,295.00 for 14.32 hours at \$120/300 per hour for paralegal and attorney services. Itemized [Acct. 06/14/17LFpg38-46].

8. Attorney requests reimbursement of costs totaling \$2,569.50. Itemized [Acct. 06/14/17LFpg48].
9. Attorney requests fees not paid from prior accounting of \$14,142.20. [total fees this period, previous period and current costs is \$34,006.70].
10. ~Proposed Order: 06/14/17.

RECOMMENDATION

Court's discretion re fees and costs. If approved, set hearing on the filing of receipts and final discharge for **07/25/18**.

(lc)

Future Hearing: 04/16/18: Accounting Review *re Public Guardian*

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600280
CASE NAME: DION BENTLEY

SEE ALSO 17

HEARING: Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

DEPARTMENT OF DEVELOPMENTAL SERVICES (PET)
DAISY BENTLEY (CP)...PRO/PER
DION BENTLEY (CEE)...E JOAN NELMS

GENERAL INFORMATION

Continued from 11/23/16. Joan Nelms appointed counsel.

Continued from 01/25/17. Daisy Bentley, mother, present. Mother to file written objections by 02/28/17. Mother wants to move conservatee out of the state in the future.

Conservatee to remain in current placement unless IRC moves conservatee.

Continued from 04/19/17. Conservatee is doing well and attending day programs.

Confidential Information in lieu of confidential supplemental information has been filed.

Continued from 06/21/17. Court accepted no other relatives were found. Matter referred to Court Investigator for report as to Daisy Bentley's petition. Sandy Turner appointed as GAL for Dion Bentley.

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Appointment of **Limited** Conservator person only by Department of Developmental Services.
- Petition 2 - Petition for Appointment of Conservator person only by Daisy Bentley, mother.

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

Petitioner 1 –DDS.

1. Petitioner does not seek medical powers. However, Capacity Declaration filed on 09/06/16.
2. Petitioner is nominated by Counsel for IRC.
3. Proposed conservatee is developmentally disabled. IRC report filed 09/06/16 and 11/217/16.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
5. Petitioner seeks civil rights not be limited without court order. JTD

6. Proposed conservatee is developmentally disabled. Report of Counsel Nelms filed 01/24/17.
7. Return of Citation filed 11/16/16.
8. Court Investigator report filed 10/3/16.
9. **Objections filed by Daisy Bentley, mother, on 04/19/17. No verification. Court may wish to verify on record.**
10. Need report of GAL Sandy Turner.
11. ~Proposed Form Order: 02/07/17.

Petitioner 2 – Daisy Bentley, mother.

12. Petitioner appears to have initially petitioned for herself and proposed conservatee's sister. However, crossed out co-petitioner Latonya's name.
13. Proposed conservatee is developmentally disabled; however, petitioner does not seek **limited** conservatorship. Does court wish to require updated report by Counsel Nelms? JTD
14. Petitioner attached brief summary in support of conservatorship [Pet. 06/15/17 LFpg11-12].
15. Petitioner does not indicate whether conservatee has ability to attend hearing. Need verified supplement.
16. Petitioner does not seek medical powers; however, section 9 indicates that proposed conservatee lacks the capacity to give medical consent. Need Capacity Declaration.
17. Section 11 of petition does not list relationships of relatives. Need verified supplement.
18. Need return of citation.
19. Need Certificate of Completion of the Conservatorship Training Class.
20. Need notice of hearing and proof of service.
21. Need Court Investigator report.
22. Need report of GAL Sandy Turner.
23. ~Proposed Form Order: 06/15/17.

RECOMMENDATION

Need to clear notes 10 & 15-22. If approved, set hearing for Compliance Review for **02/28/18** 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. (lc/lh/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600280

CASE NAME: DION BENTLEY

SEE ALSO 16

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DEPARTMENT OF DEVELOPMENTAL SERVICES (PET)

DAISY BENTLEY (CP)...PRO/PER

DION BENTLEY (CEE)...E JOAN NELMS

See notes on matter 16.

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

SEE ALSO 14A 19 20

HEARING:

Hearing Re: Petition for Appointment of Conservator

COUNSEL:

MARIA DE CASAS (CPE)...MATTHEW E SHEASBY
TOMASA DE CASAS (CEP)...EDWARD B FISCHEL & ASSOCIATES
MIGUELITO DECASAS (PET)...DUANE P BOOTH

GENERAL INFORMATION

Maria De Casas appointed temporary conservator of person/estate on 02/08/16; No bond. Ed Fischel appointed counsel on 02/17/17. Jeanne Kennedy appointed GAL. On 03/08/17 Visitation orders made as to Miguelito De Casas. Hearings 03/14/17 and 04/11/17 advanced to this hearing.

Continued from 05/17/17 Amended capacity declaration to be filed. Miguelito De Casas appointed as temporary conservator of the person only. Maria De Casas remains as temporary conservator of estate only. The Court orders that both Maria and Migeultio post bonds in the amount of \$20,000. Need Amended order and letters. Miguelito to turn over all bank records and accounting to Maria immediately. The court takes jurisdiction over the trust and ordered that the trustee post bond of \$200,000. Copy of the trust's taxes be sent to all siblings by 05/30/17. Mr. Fischel ordered to prepare the order after hearing. \$20,000 bonds posted.

THIS CASE SET FOR HEARING ON

- Petition #1 for Appointment of Conservator person and estate by Maria De Casas (daughter)
- Petition #2 for Appointment of Conservator person and estate by Miguelito De Casas (son/Trustee)

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

Petitioner -1 by Maria De Casas (daughter)

1. Petitioner seeks \$0 bond as proposed conservatee has \$1,200/month in retirement income and \$1,000/month in social security benefits. Court may wish to require minimum bond of \$20,000 to cover the retirement income with 10% recovery fee.

2. Petitioner requests order to relocate proposed conservatee to conservator's residence under §2351. JTD.
3. Petitioner seeks medical powers. Capacity Declaration filed 04/24/17.
4. **Need** Confidential Supplemental form.
5. Petitioner seeks dementia powers. Report of Counsel Ed Fischel filed 05/15/17.
6. Report of GAL J. Kennedy filed 05/12/17 and 06/19/17.
7. Citation returned served.
8. Certificate of Completion of the Conservatorship Training Class filed 03/02/17.
9. CI Report filed 02/22/17 and Amended on 03/30/17.
10. ~Proposed Form Order: 02/01/17

Petitioner - 2 by Miguelito De Casas (son/trustee)

11. Petitioner requests no bond as proposed conservatee's assets are held in trust in which petitioner is the acting trustee. Petitioner alleges proposed conservatee receives a retirement income of \$1,575/month and \$1,000/month in social security benefits.
12. Court took jurisdiction over trust, \$200,000 bond posted 06/27/17; however, bond does not state Miguelito as Trustee. ***Court may wish to require corrected bond.***
13. Petitioner seeks medical powers. **Need** Capacity Declaration.
14. Notice of Hearing filed 03/07/17; however, attached proof of service, item #5 does not indicate a copy of petition was served with notice Pr.C. § 1822. **Need** same.
15. Petitioner seeks dementia powers. Report of Counsel Ed Fischel filed 05/15/17.
16. Return of Acknowledgment of Receipt of Citation signed by Jeanne Kennedy, GAL, filed 05/10/17.
17. Certificate of Completion of the Conservatorship Training Class filed 05/15/17.
18. CI special report filed 04/26/17.
19. Report of GAL J. Kennedy filed 05/12/17 and 06/19/17.
20. ~Proposed Form Order: 02/28/17

RECOMMENDATION

Need to clear notes 4 & 13-14 and Court's discretion re bond. If approved, set hearing for Compliance Review for **02/28/18** for the filing of the required documents and hearing re Accounting Review for **10/03/18**. Any accounting to be filed 30 days in advance.
(lh/lc/lh)

Future hearing dates: 07/18/17 Motion to Compel

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

SEE ALSO 14A 18 20

HEARING:

Hearing Re: RECIEPT OF BONDS

COUNSEL:

MARIA DE CASAS	(CPE)...MATTHEW E SHEASBY
TOMASA DE CASAS	(CEP)...EDWARD B FISCHER & ASSOCIATES
MIGUELITO DECASAS	(PET)...DUANE P BOOTH

Bonds posted; see matter 18.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700039

CASE NAME: MTR OF TOMASA DE CASAS

SEE ALSO 14A 18 19

HEARING:

Hearing Re: Petition for Appointment of Conservator

COUNSEL:

MARIA DE CASAS	(CPE)...MATTHEW E SHEASBY
TOMASA DE CASAS	(CEP)...EDWARD B FISCHER & ASSOCIATES
MIGUELITO DECASAS	(PET)...DUANE P BOOTH

See notes on matter 18.

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700128

CASE NAME: WOODROW WILSON RILEY

HEARING: Petition for Appointment of Conservator
COUNSEL:

HELEN A RILEY (PET)...PRO/PER
WOODROW WILSON RILEY (CTP)...MITCHELL I ROTH

XREF: CONPS1300020

GENERAL INFORMATION

Mitchell Roth appointed counsel on 04/18/17.

Continued from 05/17/17. Mitchell Roth stated he has not received a copy of the file. Clerk's office to provide copy. The Court requested that Counsel Roth contact Wayne Henckleman in an attempt to refer this matter for LPS conservatorship.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Helen Riley, sister.

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

1. Court to see confidential screening form, page 3.
2. Petitioner seeks medical powers. Need Capacity Declaration.
3. Need report of Counsel Roth.
4. List of required contacts does not appear to list all relatives in second degree. Court to inquire.
5. Citation returned served.
6. Certificate of Completion of the Conservatorship Training Class filed 05/17/17.
7. CI report filed 05/11/17 and addendum on 05/16/17.
8. ~Proposed Form Order:04/10/17.

RECOMMENDATION

Need report of counsel. If approved, set hearing for Compliance Review for **02/28/18** 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.
(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS01938

CASE NAME: MTR RE JENNIFER LISA REECE

HEARING:

Hearing Re: COURT INTVESTIGATOR MEMO FILED 5/10/17

COUNSEL:

DEBORAH A HAYNES (CPE)...JOHN M HUGHES
SUSAN CRAMTON JOHNSON (CPE)...JOHN M HUGHES
JENNIFER LISA REECE (CEP/CTP)...ROBERT S WORLEY
INLAND COUNTIES REGIONAL CENTER (CPE/TEE)...STEVEN K BECKETT

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Court Investigator Memo Filed 05/10/17.

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

1. Matter set on 05/17/17 after review of Court Investigator memo. Sherri Kastilahn appointed counsel. Jeanne Kennedy appointed GAL.
2. Need report of Counsel Sherri Kastilahn.
3. Report of GAL J. Kennedy filed 07/19/17.

RECOMMENDATION

Need report from counsel.

(lc/lh)

Superior Court of Calif, County of San Bernardino
Page: 22A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 07/26/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700272

CASE NAME: MTR OF LLOYD H DODD, JR

SEE ALSO 25

HEARING:
Mediation Settlement Conference

COUNSEL:

LLOYD H DODD III	(CPE)...(PRO/PER)
CONSUELO C DODD	(CPE)...PRO/PER
LLOYD H DODD JR	(CEP)...MITCHELL I ROTH

XREF: CIFDS1700018

Future Hearings: 8/30/17: Petition for Appointment of Conservatorship

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC.

DATE: 07/26/17 TIME: 1:30 DEPT: S37P

CASE#: CON PS1600244

CASE NAME: BARBARA PRAMSCHUFER

SEE ALSO 24

HEARING:

Hearing Re: Status on Settlement

COUNSEL:

ANDREW PRAMSCHUFER	(CE)...ROSA M MARQUEZ
BARBARA PRAMSCHUFER	(CE)...MITCHELL I ROTH
BARBARA PRAMSCHUFER	(PP)...JOHN D LUECK
JANICE PRAMSCHUFER	(TP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER	(CE)...RONALD W ASK

XREF: CONPS1600284

GENERAL INFORMATION

Continued from 03/17/17. Dr. Leeb to report if Barbara Pramschufer has ability to retain counsel. Susan and Andrew to find appropriate driving lessons for her to be able to try to obtain a CDL. Parties agreed to change hearing from 06/07/17 to 06/27/17.

Continued from 06/27/17. Matter transferred to Judge Reilly in S37.

Continued from 07/12/17. Matter continued for Barbara Pramschufer to be released from hospital. Ex Parte Petition for Conservatorship may be filed.

THIS CASE SET FOR HEARING ON Status of Settlement Agreement.

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

1. Matter set on 12/14/16 when parties indicated there was a settlement. Andrew and Susan Pramschufer appointed co-Conservators of the Estate of **Barbara Pramschufer**, \$450,000 bond; posted 04/05/17. Part of the agreement refers to case **CONPS1600284** [Janice Pramschufer].
2. Andrew & Susan Pramschufer appointed Conservators of person and estate for **Janice Pramschufer CONPS1600284** on 02/01/17, no bond.

RECOMMENDATION

Inquire status.

(lc/nb/lc/lh)

Future Hearings: 08/22/17: Petition for Transfer of Interest in Personal Property to the Estate of Barbara Pramschufer, 11/29/17: Accounting Review

Future Hearings: 8/22/17: Petition for Transfer of Interest in Personal Property to the Estate , 11/29/17: Accounting Review

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

DATE: 07/26/17 TIME: 1:30 DEPT: S37P

CASE#: CON PS1600244

CASE NAME: BARBARA PRAMSCHUFER

SEE ALSO 23

HEARING:
Trial Setting Conference

COUNSEL:

ANDREW PRAMSCHUFER	(CE)...ROSA M MARQUEZ
BARBARA PRAMSCHUFER	(CE)...MITCHELL I ROTH
BARBARA PRAMSCHUFER	(PP)...JOHN D LUECK
JANICE PRAMSCHUFER	(TP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER	(CE)...RONALD W ASK

XREF: CONPS1600284

Future Hearings: 8/22/17: Petition for Transfer of Interest in Personal Property to the Estate , 11/29/17:
Accounting Review

TSC -no notes—JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 07/26/17 TIME: 1:30 DEPT: S37P

CASE#: CIF DS1700018

CASE NAME: DODD V. RICHARDSON

SEE ALSO 22A

HEARING:

Mediation Settlement Conference

COUNSEL:

LLOYD H DODD JR

(PP)...PRO/PER

KATHERYN L RICHARDSON

(RP)...

XREF: CONPS1700272

MSC—no notes—JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/26/17 TIME: 1:30 DEPT: S37P

CASE#: CIF DS1700057

CASE NAME: PRAMSCHUFER VS ULLAH

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

ANDREW PRAMSCHUFER

(PET)...ROSA M MARQUEZ

BARBARA A PRAMSCHUFER

(PP)...PRO/PER

HAMMED "TONY" ULLAH

(RP)...

No notes—JTD