



Second/Final Check

Superior Court of California

County of San Bernardino



Probate Department

Probate Notes for Calendar Date: 08/01/17

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.

07/14/17lh-nb0717/0727

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: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400091

CASE NAME: Faye I. Cox

HEARING:

SECOND Account and Report of LINDSAY A. COX and Petition for allowance of fees filed.

COUNSEL:

FAYE I. COX (DEC)...
FRANCHISE TAX BOARD ()...
INHERITANCE FUNDING COMPANY, I (TP)...STEVEN D SCHROEDER
LINDSAY A. COX (PET)...SAMUEL CROWE &

GENERAL INFORMATION

Continued from 05/02/17 at request of counsel.

THIS CASE SET FOR HEARING ON Second and Final Account and Petition for Fees.

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

1. Accounting period 09/17/15 to 01/10/17.
2. Assets on hand **\$330,508.49** consisting of cash.
3. Statutory fees of \$15,601.93 requested. Calculated.
4. Petitioner requests reimbursement of costs advanced of \$435.00. Itemized [LF, p. 6].
5. Attorney requests reimbursement of costs advanced of \$2,098.88. Itemized [LF, p. 6].
6. **Notice filed on 05/30/17 does not indicate this account is also a final account. Need proper notice.**
7. Proposed order 07/24/17 is substantially blank at page 3 [LF, p.4].

RECOMMENDATION

Need to clear note 6 then Court's discretion. If approved, set hearing for receipts and final discharge for **08/07/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500312

CASE NAME: TRINIDAD & ELVIRA D. PEREZ FAMILY TRUST

HEARING:

Hearing Re: TRUST ACCOUNTING FILED AUGUST 23, 2016

COUNSEL:

CLARA JEAN MURILLO	(PET)...BANKS GARCIA & JANIS
LIZ CHACON	(TP)...L.DOMINIC CHACON
MICHAEL PEREZ	(PET)...BANKS GARCIA & JANIS
TRINIDAD AND ELVIRA D. PEREZ F	(TRU)...

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION

Continued from 05/03/17. On Court's motion, proceedings are stayed.

THIS CASE SET FOR HEARING ON Trust Accounting by Charles Copeland, prior Trustee.

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

1. Accounting period 08/14/06 – 12/31/09.
2. Assets on hand \$1,347,376.91; of which real property is \$469,000.
 - a. Trust A \$1,285,385.59.
 - b. Trust B \$61,991.32.
3. Accounting period 01/01/10 – 06/30/10.
4. Assets on hand \$1,149,971.50 [Acct.08/23/16 LFpg5]. It is unclear if the assets reflect this accounting period or the next.
 - a. Trust A \$1,108,029.80.
 - b. Trust B \$41,941.70.
5. Additional accounting period 07/01/10 – “Final Distribution”. Not end date listed. Need same.
6. Distributions appear to have been made [Acct.08/23/16 LFpg3]. However, need itemization.
7. There is not a proper report per Pr.C.§16063. Need same.
8. Need notice of hearing and proof of service.

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.

9. Petitioner attaches an unsigned settlement agreement for Trust A and Trust B. [Acct.08/23/16 LFpg15-33]. It is unclear as to why settlement is attached. **Court to inquire.**
10. **Objections by Clara Jean Murillo and Michael Perez, successor trustees, filed 04/20/17.**
11. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 4-8. Matter is contested. If continued, please continue to a Thursday as originally set.
(lc/lh/nb)

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600783

CASE NAME: ESTATE OF JON FRANKLIN BURNSIDE

SEE ALSO 4, 5

HEARING:

Hearing Re: OSC RE DISMISSAL

COUNSEL:

BONNIE BURNSIDE	()...
ESTATE OF JON FRANKLIN BURNSID	(RES)...	
JAMES LAWRENCE HEYWOOD	()...
MICHAEL GRAY BURNSIDE	()...
RICHARD BLAINE YOUNG	(PET)...	SCOTT J SHELDON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Dismissal on Petition for (1) DETERMINATION OF PERSONS ENTITLED TO DISTRIBUTION (2)EQUITABLE ADOPTION; ETC.

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

1. Matter set at 05/02/17 hearing due to non-appearances, wherein, Court reviewed the information of the settlement agreement that was stated on the record at the last hearing.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600783

CASE NAME: ESTATE OF JON FRANKLIN BURNSIDE

SEE ALSO 3, 5

HEARING:

OSC re: Dismissal filed by RICHARD BLAINE YOUNG

COUNSEL:

BONNIE BURNSIDE	()...
ESTATE OF JON FRANKLIN BURNSID	(RES)...	
JAMES LAWRENCE HEYWOOD	()...
MICHAEL GRAY BURNSIDE	()...
RICHARD BLAINE YOUNG	(PET)...	SCOTT J SHELDON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Dismissal

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

1. Matter set at Settlement Agreement hearing held on 04/26/17, wherein, if there is no appearance by parties, Court will dismiss the petition with prejudice.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600783

CASE NAME: ESTATE OF JON FRANKLIN BURNSIDE

SEE ALSO 3, 4

HEARING:

Petition for 1)DETERMINATION OF PERSONS ENTITLED TO DISTRIBUTION
2)EQUITABLE ADOPTION; ETC

COUNSEL:

BONNIE BURNSIDE	()...
ESTATE OF JON FRANKLIN BURNSID	(RES)...	
JAMES LAWRENCE HEYWOOD	()...
MICHAEL GRAY BURNSIDE	()...
RICHARD BLAINE YOUNG	(PET)..	SCOTT J SHELDON

See prior matters #3 & 4

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

HEARING:

Petition for /to REMOVE TRUSTEE, APPOINT SUCCESSOR TRUSTEE,
SURCHARGE TRUSTEE, AND ASSESS DOUBLE DAMAGES

COUNSEL:

JAY JAY HENDERSON

(PET)...THE GROSSMAN LAW FIRM

POPPY ANN WA LKER TRUST DATED

(TRU)...

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

SEE ALSO 8

HEARING:

Hearing Re: AMENDED PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

PATRICIA ANNETTE REDFERN	(DEC)...
STEVEN REDFERN	(PET)...PRO/PER
SUZETTE A WHITE	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SUZETTE A WHITE is GRANTED

See notes on next page #8

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

SEE ALSO 7

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL AIAE

COUNSEL:

PATRICIA ANNETTE REDFERN	(DEC)...
STEVEN REDFERN	(PET)...PRO/PER
SUZETTE A WHITE	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 05/30/17. Court orders Suzette White to mail her written objections to Steven Redfern by 4PM today. Steven Redfern to respond, file and serve by 06/27/17 at 4pm. Final Reply by Suzette White to be filed and served by 07/18/17 at 4pm.

THIS CASE IS SET FOR HEARING ON

- **Petition #1** for Letters of Administration with full authority under IAEA by **Suzette White (daughter)**
- **Petition #2** for Letters of Administration with full authority under IAEA by **Steven Redfern (spouse)**

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

Petition #1 by Suzette White (daughter) filed 01/30/17:

1. Petition indicates all heirs waive bond. Decedent's issue have all waived bond; however, missing bond waiver from Steven Redfern (spouse). Suggested bond \$65,000. JTD
2. Proof of Publication filed 03/17/17.
3. ~Proposed form Order: 01/30/17

Petition #2 by Steven Redfern (spouse) filed 04/26/17:

4. Petition indicates all heirs waive bond; however, missing bond waivers from decedent's issue, Suzette White, John Allen III, and Lisa Windbigler. Estimated

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.

net value of estate is \$65,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD

5. Petitioner Steven Redfern appears to have priority of appointment as decedent's spouse per Pr. C. §8461.
6. Proof of Publication filed.
7. **Objections to Petition of Steven Redfern to Administer Estate filed by Suzette White on 05/30/17, with proof of service filed 06/12/17.**
8. **Response to Objections with proof of service filed by Steven Redfern on 06/21/17.**
9. **Reply to response of Steven Redfern with proof of service filed by Suzette White on 07/13/17.**
10. ~Proposed form Order: 04/26/17

RECOMMENDATION:

Matter is contested. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb/lh)

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700452

CASE NAME: MTR OF JUAN J DAVILA JR

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

JUAN J DAVILA JR	(DEC)...
LAURA A QUIGLEY	(PET)...PRO/PER
NATASHA MARIE AGUIRRE	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by fiancé and step-daughter, Laura Quigley and Natasha M. Aguirre ["Petitioners"].

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

1. It appears decedent was survived by sons who have higher priority but whose addresses are purportedly unknown. However, death certificate [LF, p. 7] includes address for son, Juan Jose Davila III. Need Declinations to Serve by sons and nomination of these petitioners.
2. Question if Natasha is a step-daughter from a former relationship or if Natasha is Laura's daughter? Need further clarification via verified supplement.
3. Petition is missing page 3. Need complete petition.
4. Petitioners allege all heirs waive bond. However, no waivers by sons, Juan, Joey and Joseph Davila. Suggest bond of \$200,000. JTD.
5. Need proof of publication.
6. Need Notice of Petition to Administer Estate and Due Diligence Declarations.
7. ~Proposed Form Order/Letters 05/11/17.

RECOMMENDATION:

Need to clear notes 1-6, \$200,000 bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700453

CASE NAME: ELSIE D ROBLEDO

HEARING:

Petition for LETTERS OF ADMINISTRATION

COUNSEL:

CHRISTINE A GRANILLO (PET)...PRO/PER

ELSIE D ROBLEDO (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Christine Granillo (daughter)

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

1. Petitioner requests no bond; however, need bond waivers from Cecilia Huerta and Patrick Robledo, decedent's issue. Estimated net value of estate is \$370,000, real property only. Court also has discretion to require bond per Pr. C. § 8481(b).
2. Need Notice of Petition to Administer Estate.
3. Need Proof of Publication.
4. No proposed order submitted.

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS04072

CASE NAME: VICTORIA QUENSENBERRY IRREVOCABLE SPECIAL NEEDS

HEARING:

Accounting Review

COUNSEL:

DEPT. OF DEVELOPMENTAL SERVICE (TP)...PRO/PER
RUTH L HENRICKS (PET)...HARTNELL LAW GROUP
VICTORIA QUESENBERRY IRREV SPC (TRU)...

GENERAL INFORMATION:

Continued from **03/26/15, 05/14/15, 07/30/15, 10/01/15** and **12/03/15**. The Court orders the accounting be filed by 2/29/16.

Continued from 3/29/16, 06/08/16, 08/18/16, 11/02/16, 02/15/17 and 05/03/17.

Additional time needed for accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 11th Account Current of Ruth Hendricks, Trustee, on 3/27/14 for the period ending 8/5/13.
2. Need 12th accounting beginning with 08/06/13.

RECOMMENDATION:

Inquire status. When the trustee fails to file an accounting as ordered, the court may take action as specified in Pr.C. § 800 and C.C.P. § 128.

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

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

DATE: 08/01/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS07201

CASE NAME: ESTATE OF JANET FUZAK

HEARING:

Hearing Re: SECOND AND FINAL ACCOUNT OF ARTHUR W FUZAK

COUNSEL:

ARTHUR W. FUZAK (PET)...CAROL L. GILLAM
JANET FUZAK (DEC)...

GENERAL INFORMATION:

Continued many times **since 8/9/10**.

Last continued from **09/30/15** request of counsel to clear notes. Court deemed 3rd and final to be a supplement to the 2nd and final. 2nd and 3rd accountings to be consolidated into an amended 2nd and Final accounting. Verified supplement to be filed.

Continued from **12/10/15, 02/23/16, 04/26/16, 09/20/16 and 11/29/16**. No appearance. Court orders Carol Gillam to be present at next hearing personally. Notice by Judicial Assistant.

Continued from **02/14/17**. Court deems that no administration of the Lake Arrowhead property is necessary. Counsel indicates that Cathleen Lynch is petitioning to be appointed as successor administrator as Arthur Fuzak is deceased.

Continued from 03/28/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON **AMENDED (07/14/16) 2nd & final** account and petition for fees and final distribution of Arthur W. Fuzak.

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

- 1. Notice of Hearing with proof of service filed 02/02/17 reflects incorrect hearing title. Need proper notice.**
2. All beneficiaries waive accounting.
3. Corrected Inventory and Appraisal reflecting total aggregate assets of \$561,847 is not affixed as alleged. Need same.
4. Accounting period 09/09/09 to 11/15/11.
5. Total charges and total credits on Summary of Account [LF, p. 23] do not balance by a difference of \$4,481.19. Petitioner requests the Court to consider the discrepancy between the total credits and charges, de minimis as attorneys

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- are waiving the remainder of their statutory fees of \$2,727.33 and are not seeking any further fees. Also, the Petitioner is waiving the graduated filing fee of \$65 for which the personal representative is entitled to reimbursement. JTD.
6. Assets on Hand \$27,250 consisting of personal property.
 7. Petitioner waives compensation per supplement filed 10/12/12.
 8. Attorney requests statutory compensation of \$14,236.94 based on the corrected inventory and appraisal value. Calculated. However, as \$11,509.61 has already been paid, as approved by prior Court order, a balance of \$2,727.33 is owed. Attorneys waive remaining owed statutory compensation to help correct any imbalance of total credits on the Summary of Account.
 9. Petitioner asserts his right to a 50% community property share of the Lake Arrowhead property per Pr. C. § 13500, pursuant to Paragraph 7 of Decedent's codicil dated 09/17/02; alleges subject property is not part of Decedent's estate; thus, Petitioner took sole ownership of the Lake Arrowhead Property. Court may determine that no administration of the Lake Arrowhead property is necessary or issue an order to confirm the delivery of that property to Petitioner, the surviving spouse. Pr. C. § 13656.
 10. Petitioner alleges that decedent's Will and Codicil left certain cash gifts to beneficiaries, all of whom have waived such gifts. Waivers are on file.
 11. Petition indicates Plains Exploration and Oil Company will transfer the gas and oil interest as well as the royalty checks once to Craig Fuzak once the Final Distribution Order is signed.
 12. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1 & 3 then Court's discretion. If approved, set hearing on the filing of receipts (for both preliminary distributions and final distributions) and final discharge for **08/07/18**.

(gls/cbr/gls/cbr/vet/kra/gls/kra/fhl/vet/kra/cbr/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

DATE: 08/01/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700132

CASE NAME: THE EARLY LIVING TRUST

SEE ALSO 14

HEARING:

Petition for REMOVAL OF CO-TRUSTEE; PETITION FOR INSTRUCTIONS
CONCERNING CLAIM AGAINST ETC

COUNSEL:

AGNES FULLER

(PET)...CHUNG & IGNACIO, LLP

JAMES MOVCHAN

(OBJ)...DRISKELL & GORDON

THE EARLY LIVING TRUST

(TRU)...

Currently under review by Legal Research.
(LR)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700132

CASE NAME: THE EARLY LIVING TRUST

SEE ALSO 13

HEARING:

Petition for REMOVAL OF AGNES FULLER AS CO-TRUSTEE OF THE EARLY LIVING TRUST

COUNSEL:

AGNES FULLER	(PET)...CHUNG & IGNACIO, LLP
JAMES MOVCHAN	(OBJ)...DRISKELL & GORDON
THE EARLY LIVING TRUST	(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: CON DS1100022

CASE NAME: MARK MAGDALENO

HEARING:

Hearing Re: STATUS RE POSSIBLE TRANSFER

COUNSEL:

LINDA CABRAL

(CP)...PRO/PER

MARK MAGDALENO

(CTP)...E JOAN NELMS

GENERAL INFORMATION:

Continued from 04/18/17. Court orders conservator to be personally present for hearing. Notice given by E Joan Nelms.

THIS CASE IS SET FOR HEARING ON Status re Possible Transfer.

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

1. Matter set at 01/10/17 after oral report by court-appointed counsel, E. Joan Nelms.
2. Conservatee is residing in Las Vegas, Nevada.

RECOMMENDATION:

Court's discretion

(nb)

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

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700301

CASE NAME: CELESTINO MARTINEZ

HEARING:
Petition for PAYMENT OF FEES

COUNSEL:

BRUCE HITCHMAN	(CPE)...ERIC F BECKER
CELESTINO MARTINEZ	(CEP)...NOREEN T FONTAINE
CELESTINO MARTINEZ	(CEP)...PRO/PER
JAMES E MARTINEZ	(CPE)...E. JOAN NELMS
JAMES E MARTINEZ	(CPE)...LAW OFFICE OF INDU SRIVASTAV
JEANNIE E MARTINEZ	(CPE)...PRO/PER
JOHN A MARTINEZ	(CPE)...E. JOAN NELMS
JOHN A MARTINEZ	(CPE)...LAW OFFICE OF INDU SRIVASTAV
LEE ANN HITCHMAN	(CPE)...ERIC F BECKER
NOREEN T FONTAINE	(PET)...NOREEN T FONTAINE

CCP170.6 filed as to CYNTHIA LUDVIGSEN

Request for Waiver of Court Fees and Costs filed by JEANNIE E MARTINEZ is GRANTED

XREF: PROPS0801041

GENERAL INFORMATION:

Conservatee passed away on 02/24/16.

Continued from **11/15/16** at request of counsel. Court resets the accounting from November 29, 2016 to April 18, 2017. Notice given by attorneys for PPF, Co-Conservators, Lee Ann & Bruce Hitchman.

Continued from 04/18/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Noreen Fontaine.

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

- 1 Petitioner, Noreen T. Fontaine, was appointed in 2008 in conservatorship and trust proceedings to represent conservatee/beneficiary. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 07/30/13 to 02/24/16.

- a. Period exceeds 2 year period. Local Rule 20-1402(b). JTD.
 - b. Per Order after Hearing re MSC entered 10/06/16, all remaining fee requests shall be paid at a pro rata rate. JTD.
- 2 Attorney requests fees of \$25,928.00. Billed at the reduced rate of 280/hour for an excess of 92.60 hours' attorney time. Itemized [LF, pgs. 7-9]. JTD.
- 3 Attorney requests reimbursement of costs advanced of \$128.00. Itemized [LF, pg. 6].
- 4 Petitioner requests and Order authorizing the Successor Trustee of the Celestino Martinez Trust to pay petitioner requested sum for services rendered.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

04/24/18 Final Discharge

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1200011

CASE NAME: MTR OF DAMION DEVON BLANTON

HEARING:

Hearing Re: OSC RE TERMINATION OF GUARDIANSHIP

COUNSEL:

DAMION DEVON BLANTON (CTP)...
ESSIE R BLANTON (CP)...PRO/PER

GENERAL INFORMATION

Per minutes of 08/16/16: Conservator not present, nor have required documents been filed for move of conservatee. Citation issued to Essie R. Blanton, who is cited and required to appear on 11/01/16 at 9:00 AM, in Department S35 and show cause why she has failed to appear and failed to file required documents.

Matter set at **11/01/16** hearing. No appearance. Notice by Judicial Assistant.

Continued from 12/13/16. Citation issued as to Essie R. Blanton on 08/16/16 but never returned. Court will notify conservator of the next hearing date, where a certified copy of a conservatorship filing in Colorado will be required. Should proof of conservatorship not be filed prior to the next court date, both conservator and conservatee will need to be present.

Continued from 04/11/17. No appearance. Citation issued to Essie R Blanton who is cited and required to appear on 08/01/17 at 9:30AM and show cause why failure to appear.

THIS CASE IS SET FOR HEARING ON **OSC re Termination** on Transfer to Colorado

THE FOLLOWING ISSUES AND OR DEFICIENCIES IN THE PAPERS ARE NOTED

1. Order appointing Essie R. Blanton Limited Conservator of the person entered 05/16/12.
2. Matter set on 06/14/16 upon receipt and review of Court Investigators Report filed 06 07 16.
3. Need to file Post Move Notice of Change of Address (Form GC-080) per Pr C 2352 and CRC 7.1013(c), after receiving court permission for the move.
4. The California Conservatorship Jurisdiction Act applies only to general probate conservatorships and does not apply in Limited Conservatorships for adults with developmental disabilities Pr C 1981.

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

5. No Petition to Fix Residence filed as of the review of this matter.
6. **Need return of Citation.**

RECOMMENDATION

Court's discretion re OSC. Require the filing of a Petition to Fix Residence per Pr C 2352 and if approved suggest Court order petitioner to seek Conservatorship in Colorado and show proof by 07/11/17. Court should order that should petitioner fail to show proof of guardianship in Colorado by 07/11/17 that Court will order termination of guardianship in CA.

(jm/nb/lh)

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

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700222

CASE NAME: EDGARDO CONTRERAS TORRES

HEARING:
Petition for Appointment of Conservator

COUNSEL:
EDDIE OROZCO TORRES (PET)...PRO/PER
EDGARDO CONTRERAS TORRES (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Eddie Torres, father

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

1. Petitioner seeks medical powers. Capacity Declaration filed 06/12/17.
2. Petitioner requests order related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Request to Excuse Notice as to Salvador Contreras (mgf) and Ricardo Torres (pgf) filed 07/10/17. JTD.
5. Return of Citation filed 07/10/17.
6. **Petition is not signed or dated by petitioner. Need verified supplement with completed signature page.**
7. Proposed conservatee is developmentally disabled. **Report by court-appointed counsel, Sherri Kastilahn filed.**
8. Proposed conservatee is developmentally disabled. **IRC report filed.**
9. **Certificate of Completion of the Conservatorship Training Class filed.**
10. **Court Investigator report filed.**
11. ~Proposed Form Order: 06/12/17

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **03/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BEULAH MAE TOLLIVER (CTP)...

CARLA RAE TOLLIVER (CP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Carla Rae Tolliver (daughter)

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

1. List of Required Contacts filed 06/20/17 is missing Carla Sawyers and Courtney Sawyers (granddaughters). Need completed form .
2. Proof of Completion of the Conservatorship Training Class filed 07/06/17.
- 3. Court Investigator report filed 07/25/17.**
4. Need return of Citation.
5. Need Notice of Hearing and Proof of Service.
6. ~Proposed Form Order: 06/20/17

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **03/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 9:30 DEPT: S35P

CASE#: PRO PS0801041

CASE NAME: CELESTINO MARTINEZ TRUST

HEARING:

Accounting Review

COUNSEL:

BRUCE HITCHMAN	(PET)...ERIC BECKER
CELESTINO MARTINEZ TRUST	(TRU)...
JAMES MARTINEZ	(PET)...WILLIAM M NASSAR &
JOHN MARTINEZ	(PET)...WILLIAM M NASSAR &
LEE ANN HITCHMAN	(PET)...ERIC BECKER
LIBERTY MUTUAL INSURANCE COMPA	(TP)...

XREF: CONPS0700301

GENERAL INFORMATION:

Court suspended Jeannie Martinez as Trustee and appointed Successor Trustees, Leann and Bruce Hitchman pending further order of Court on 02/10/12.

The Court finds accounting filed by Jeannie Martinez does not satisfy the Probate Code requirements of an accounting on 07/25/14 in related case.

Continued from 04/18/17. Matter is continued to 08/01/17 to be heard with CONPS0700301.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Matter set on 11/15/16. Matter not on calendar – on for related case. Court directed accounting to be filed 30 days in advance of the hearing date of 04/18/17. However, minute order is not clear as to which party this account review pertains to.
2. Matter specially set at 9:30 AM.
3. Notice to be given by Hope Mathena.

RECOMMENDATION:

Need account and notice as directed by court on 11/15/16.

(nb/lh)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PA/PG**

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1200229

CASE NAME: ESTATE OF THOMAS FRANCIS MCGINLEY

HEARING:

Accounting Review

COUNSEL:

INHERITANCE FUNDING COMPANY IN	(TP)...STEVEN D SCHROEDER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
THOMAS FRANCIS MCGINLEY	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Status Report of Administration entered 07/28/16.
2. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300077

CASE NAME: BRUCE E. COCKRELL

HEARING:

FIRST AND FINAL Account and Report of PUBLIC ADMINISTRATOR and
Petition for allowance of fees filed.

COUNSEL:

BRUCE ELLIOT COCKRELL	(DEC)...
DENNIS JAMES BALSAMO	(PRO/PER
DORI LEE COCKRELL	(PET)...
ELIZABETH MARIAN COCKRELL	(PET)...
KRISTINA ANN LEON	(PET)...PRO/PER
MICHAEL WILLIAMSON	(ADM)...
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by DORI LEE COCKRELL is GRANTED
Request for Waiver of Court Fees and Costs filed by ELIZABETH MARIAN COCKRELL is
GRANTED

Fee waiver amount due for both petitioners \$746.00

\$695.00 for petition for probate and temp petition on 02/07/13

\$51.00 for 2 cert copies of the letters special admin on 02/14/13

GENERAL INFORMATION:

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

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

1. Accounting period 11/28/12 to 04/25/17.
2. Assets on Hand \$211,352.69 consisting of \$151,352.69 in cash and remaining
in real property.
3. Petitioner requests statutory fees of \$7,890.24. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in
connection with the sale of real property. Billed at \$60/hour for a total of 8
hours' time. Generally described [LF, p.22]. JTD.

5. Attorney requests statutory fees of \$7,890.24 to be divided 25% to Dennis J. Balsamo for his services in the amount of \$1,972.56 and 75% to Craig Parker for his services in the amount of \$5,917.68. Calculated. JTD.
6. Attorney Parker requests extraordinary fees of \$2,800 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 8 hours' time. Itemized [LF, p. 27]. JTD.
7. Attorney Balsamo requests extraordinary fees of \$8,760 for services rendered in connection with complex matters involving a forged will; and recovery of assets. Billed at \$300/hour for a total of 29.2 hours' time. Itemized [see declaration filed 06/23/17, LF, pgs. 6-8]. JTD.
8. Petitioner requests authority to withhold the sum of \$2,500 as a reserve.
9. Proposed Order 05/09/17 does not address extraordinary fees requested by Attorney Balsamo.

RECOMMENDATION:

Court's discretion re extraordinary fees. If approved, set next hearing for receipts and final discharge for **08/07/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300138

CASE NAME: CARL MARSH

HEARING:

Accounting Review

COUNSEL:

CARL MARSH

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from 08/04/15 and 07/26/16.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Public Administrator granted authority to summarily dispose of estate property on 03/14/13.
2. At prior hearing held on 08/05/14, Counsel stated this is a summary estate under Probate Code §7660. The property is in Newberry Springs and currently listed.
3. Need statement of disposition.

RECOMMENDATION

Court to inquire.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300993

CASE NAME: Raul Leanos Robles

HEARING:

Hearing re Final Discharge

COUNSEL:

OLGA ROBLES (PET)...PRO/PER

RAUL LEANOS ROBLES (DEC)...

Request for Waiver of Court Fees and Costs filed by OLGA ROBLES is GRANTED

GENERAL INFORMATION

Continued from 06/28/17 at request of counsel.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Olga Robles approved on 05/18/16.
2. No receipts needed as only real property remains.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b). **Proposed order sent by clerk's office to department for review on 06/02/17. However, appears to be missing recording information as previously requested.**
4. **Gladys Robles presents to the court the death certificate of Olga Robles (date of death of June 5, 2017). Court refers this matter to the public administrator.**

RECOMMENDATION

Inquire status of order.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01808

Vacate

CASE NAME: MTR OF SWAKETHA DEED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

SWAKETHA DEED

(CEP)...HARTNELL LAW GROUP

Pr.C. § 2628 waiver sent to department for signature on 07/21/17. Clerk's office to set next Accounting review as stated in proposed order.

(lc)

Future Hearing:

08/25/17 Non-appearance placement etc.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/01/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4264

CASE NAME: MTR OF LINDA AUSTIN

HEARING:

Accounting Review

COUNSEL:

LINDA AUSTIN

PUBLIC GUARDIAN

(CEP)...HARTNELL LAW GROUP

(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Letters expire 01/29/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Seventh Account entered 09/16/15; eighth account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200275

CASE NAME: FREDERICO QUIJADA, JR. SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

CITIZENS BUSINESS BANK

(PET)...RANDOLPH M SHARON

FREDERICA QUIJADA JR SPECIAL N

(TRU)...

GLADYS QUIJADA

(PET)...VELASCO LAW GROUP

VACATE – Sixth Account filed and set for 09/20/17.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

HEARING:
Accounting Review

COUNSEL:
CHERRAKEE LEE GROETZINGER (DEC)...
LON M ANDERSON (PET)...PRO/PER
SUSAN C BUCKELEW (PET)...PRO/PER

GENERAL INFORMATION:

Set on **10/31/16** due to non-appearance. Notice by Judicial Assistant.
Continued from **01/09/17**. No appearance. Court notifies the Public Administrator of possible appointment.

Continued from 01/10/17 at request of counsel. Public administrator to conduct investigation.

Continued from **03/07/17**. Citation issued to Lon Anderson, who is cited to appear on 05/16/17 and show cause why FTA/failure to file required documents.

Matter set on 06/16/17. An accounting is ordered to be filed by 07/01/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/24/15, full authority, no bond.
2. **Final inventory and appraisal filed.**
3. **Declaration filed 05/16/17 by Lon Anderson.**
4. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.
(nb/lh/nb)

Future Hearing:
09/04/18 Accounting Review (by Successor)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501136

CASE NAME: JOYCE A BRASWELL

HEARING:

FIRST AND FINAL Account and Report of JAMES W BRASWELL and
Petition for allowance of fees filed.

COUNSEL:

JAMES W BRASWELL	(PET)...	S. SCOTT REYNOLDS
JAMES WAGNER BRASWELL	(AKA)...	
JOYCE A BRASWELL	(DEC)...	
JOYCE ARLENE BRASWELL	(AKA)...	

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees.

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

1. Account waived by Petitioner in his capacity as Trustee.
2. Accounting period covers 05/06/15 to 12/31/16.
3. Assets on Hand \$227,111.90 consisting of \$3,059.39 in cash and remaining in annuity.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$7,596.04. Calculated.
6. Need bank/financial statements to support date of death balances per Local Rule 20-908.
7. The will conditionally incorporates decedent's Trust. Need a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 6-7 then Court's discretion. If approved, set next hearing for
receipts and final discharge for **08/07/18**.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600004

CASE NAME: MTR OF CHARLES SPEAKER SISK

HEARING:

Accounting Review

COUNSEL:

CHARLES SPEAKER SISK (DEC)...

MELANIE SWEET (PET)...THOMAS W DOMINICK

VACATE – First and Final Account filed and set for 09/21/17.
(nb/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700016

CASE NAME: MTR OF FLORENCE MARIE SUMMERS

HEARING:

Petition for AMENDED PROBATE OF LOST WILL & FOR LTRS OF ADMIN
W/WILL ANNEXED

COUNSEL:

FLORENCE MARIE SUMMERS (DEC)...

PAULA MARIE WHITESIDE (PET)...CARPENTER, ZUCKERMAN &

GENERAL INFORMATION:

Continued from 03/20/17. Court notes an Amended Petition was filed and set for 05/16/17. Counsel represents the amended petition should have been filed as a supplement.

Continued from 05/16/17. Matter is continued for proper notice and publication of an amended petition.

THIS CASE IS SET FOR HEARING ON **AMENDED** Petition for Letters of Administration w/WA of a **LOST WILL** and LIMITED authority under IAEA by Paula Marie Whiteside (daughter).

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

1. Will waives bond. Petitioner requests bond of \$6,000 on an estate estimated at \$0.00. Petition indicates there are no assets at this time and this petition is being filed to pursue litigation which may, or may not have a favorable result.
JTD
2. Petition alleges the whereabouts of the original, recorded Affidavit (with the original will attached) is unknown [LF, p. 11]. A copy of the decedent's will dated 08/10/19 is attached [LF, p. 6]. Petitioner alleges the will was attached to an Affidavit for Transfer of Title to Real Property in Arizona, although the original recorded Affidavit is also believed to be lost. Petitioner alleges the will was never revoked and that it was the intention of decedent that her estate be distributed according to that will.
3. Supp. filed 04/28/17 alleges a certified copy of Affidavit recorded in Arizona was filed with petition on 01/09/17; **copy of certified Affidavit for Transfer of Title to Real Property in Arizona with copy of will, filed 05/09/17.**

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

4. Will names Kathleen R. Summers Adams and Thomas Trefry as Co-Personal Representatives then Linda C. Parker Trefry as Personal Representative, whom petitioner alleges have failed to act. Parties have been served notice.
5. Proof of publication filed 06/15/17
6. Amended Petition filed 03/08/17. **Supp. filed 04/28/17 alleges filing was meant to be treated as a supplement, not an amended petition. JTD**
7. ~Proposed Form Order/Letters 01/09/17.

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh/nb/lh)

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

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700304

CASE NAME: KATHRYN ANN SMITH

HEARING:

Hearing Re: PROOF OF BOND/ISSUANCE OF LETTERS

COUNSEL:

KATHRYN ANN SMITH (DEC)...
KRISTOPHER J SMITH (PET)...JAMES B CHURCH

GENERAL INFORMATION:

Continued from 07/25/17 for a signed bond to be submitted to the court.

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

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

1. Bond filed on 07/06/17 is not signed by Jeff Aase. Need proper bond.
2. Need subsequent letters.

RECOMMENDATION:

Need to clear notes.

(nb)

Future Hearing:

09/04/18 Accounting Review.

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

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700425

CASE NAME: MTR OF ELEANOR D GEORGE

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ELEANOR D GEORGE	(DEC)...
MELVIN GEORGE	(PET)...MICHAEL C. MADDUX
SURETEC INSURANCE COMPANY	(TP)...

GENERAL INFORMATION:

Ex parte orders entered 05/10/17. Melvin George appointed Special Administrator with \$20,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Melvin George (son)

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

1. Requested bond \$20,000. Suggested bond \$98,000 based on real property.
2. ~Proposed form Order: 05/03/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/09/18** Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Future Hearing:

10/25/17 Hearing re: Preliminary Injunction

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700460

CASE NAME: JEFFREY RICHARD SMITH

HEARING:

Petition for LETTERS FOR ADMINISTRATION W/ FULL IAEA

COUNSEL:

JEFFREY RICHARD SMITH

(DEC)...

MICHAEL D SMITH

(PET)...VARNER & BRANDT

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Michael Smith, (brother)

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

1. Bond waived by both heirs. Estimated net value of estate is \$465,000, personal property. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. ~Proposed form Order: 05/12/17

RECOMMENDATION:

RFA. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700465

CASE NAME: CARMEN TOSCANO

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

CARMEN TOSCANO (DEC)...

GUADALUPE L TOSCANO (PET)...GEORGINA LEPE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Guadalupe Toscano (daughter-in-law)

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

1. Requested bond \$41,400. Suggested bond \$1,241,400, consisting of \$41,400 in personal property and \$1,200,000 in real property. JTD.
2. Caption of petition is incomplete as to type of petition; however, it appears petitioner seeks appointment as administrator. Need verified supplement.
3. Notice of Petition to Administer Estate filed 05/18/17 contains incorrect hearing date of 08/10/17. Need proper notice.
4. Proof of Publication contains incorrect hearing date of 08/10/17. Need proper notice.
5. ~Proposed form Letters 07/11/17

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/09/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN **TRUSTS AND MOTIONS**

DATE: 08/01/17 TIME: 8:35 DEPT: S36P

CASE#: CIP DS1700072

CASE NAME: IN RE JOEY LOPEZ

SEE ALSO 7B

HEARING:

Hearing Re: PETITION FOR AUTHORITY TO CREATE SNT/MINORS COMP

COUNSEL:

JOEY LOPEZ

(MIN)...BALABAN & SPIELBERGER, LLP

LUPE LOPEZ

(PET)...BALABAN & SPIELBERGER, LLP

Currently under review by Legal Research.
(LR)

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

Superior Court of Calif, County of San Bernardino

Page: 7B

CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 8:35 DEPT: S36P

CASE#: CIP DS1700072

CASE NAME: IN RE JOEY LOPEZ

HEARING:

Petition for Compromise of Disputed Claim of Minor

COUNSEL:

JOEY LOPEZ

(MIN)...BALABAN & SPIELBERGER, LLP

LUPE LOPEZ

(PET)...BALABAN & SPIELBERGER, LLP

Currently under review by Legal Research.
(LR)

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

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL
SEE ALSO 7D, 7E

HEARING:
Hearing Re: Status of Accountings

COUNSEL:
DORIS M CARROLL (CEP)...MARK J. ANDREW FLORY
LOWETA CARROLL (CPE)...PRO/PER
LOWETA CARROLL (PET)...KEITH S WALKER

No notes – Status. Nothing new filed.
(nb)

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

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

SEE ALSO 7C, 7E

HEARING:

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

COUNSEL:

DORIS M CARROLL	(CEP)...MARK J. ANDREW FLORY
LOWETA CARROLL	(CPE)...PRO/PER
LOWETA CARROLL	(PET)...KEITH S WALKER

GENERAL INFORMATION:

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

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

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

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

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

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

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

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

1. Daughter, Loweta Carroll, was appointed conservator, person/estate, on 4/16/13. Recent amendment filed did not appear to have many changes.

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.

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

authority to expend funds for repairs filed. **Supp. (11/10/15) indicates Conservator is not required to obtain authority to expend funds for repairs to Conservatee's home. However, as home is held in trust, question why trust should not be liable for cost of repairs? JTD.**

16. Disbursements show several payments noted as "unknown" payee. Does Court wish to require further explanation for these payments **[05/02 LF, p. 74-75]**.
17. Disbursements show 2 payments to psychiatrist of \$115.00 each. Court may wish to inquire as to conservatee's care plan. **Supp. (11/10/15) indicates these payments were for fees incurred by Petitioner, personally, in her efforts to cope with caring for Conservatee full-time. JTD.**
18. Bond was set at \$21,000. Petitioner requests bond exonerated as the estate now qualifies for bond waiver under Pr.C."§2323, 2628. Ok.
19. Waiver of Objections to First Account Current filed 01/05/16 by counsel, Margaret Helen Arter, on behalf of conservatee.
20. **Objections filed 09/20/16 by GAL, Walter Moore, for Conservatee.**
 - a. **Need proof of service.**
 - b. **No objections to amendment filed at time of review.**
21. **Supplement filed 03/30/17 by Loweta Carrol, Conservator, which appears to be a reply to objections.**

RECOMMENDATION:

Set for contested hearing. If approved, set next Accounting Review in **60 days** as second account is overdue. Account to be filed 30 days' in advance of hearing date.

Note requirements of Local Rules.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300060

CASE NAME: DORIS M. CARROLL

SEE ALSO 7C, 7D

HEARING:

Readiness Calendar

COUNSEL:

DORIS M CARROLL

(CEP)...MARK J. ANDREW FLORY

LOWETA CARROLL

(CPE)...PRO/PER

LOWETA CARROLL

(PET)...KEITH S WALKER

No notes – readiness

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300204

CASE NAME: Carly Suzanne Peralta

HEARING:

Accounting Review

COUNSEL:

CARLY SUZANNE PERALTA (CEE)...JENNIFER M DANIEL

DEBRA LEE ESPINOZA (CP)...PRO/PER

DEBRA LEE ESPINOZA (CPE)...ARLIN

GENERAL INFORMATION

Continued from **02/21/17** at request of counsel.

Continued from 05/02/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Petition to Establish SNT granted on 12/22/15; Order Authorizing Establishment of SNT entered 03/25/16; first and current report now due.
2. No accounting. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500044

CASE NAME: ELLEN H. MANULLANG

HEARING:

FIRST Account and Report of SANDRA TOBING and Petition for allowance of fees filed.

COUNSEL:

ELLEN H MANULLANG (CEP)...
SANDRA TOBING (CPE)...JAMES B CHURCH & ASSOCIATES

GENERAL INFORMATION:

Continued from **01/31/17 and 04/18/17**. Counsel is to submit additional Information regarding conservatee's ability to return to her residence, status of conservatee's vehicle, and any renovations made.

Continued from 05/01/17 and 05/16/17 for proof of service on supplement to be filed.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees.

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

1. Accounting period 05/14/15 to 05/13/16.
2. Assets on Hand \$255,227.50 consisting of \$3,727.50 in cash and \$251,500 in real and personal property.
3. Petitioner indicates that the current bond of \$20,000 is insufficient and requests bond be increased by \$13,000 for a new bond of \$33,000. Appears sufficient.
4. Petitioner requests compensation of \$5,243.58. Billed at \$25/hour for 301.55 hours. Itemized [LF, pgs. 33-37]. JTD.
 - a. Fee request include mileage totaling \$608.58 which is not allowed per Local Rule 20-1406. Does Court wish to disallow mileage fee? JTD.
 - b. Petitioner requests that said fees in the amount of \$5,243.58 payable to Petitioner, Sandra Tobing, shall be a lien, with interest at the legal rate of 10%, against the residential real property of the conservatee located at 10655 Mountain View Avenue, Redlands, CA. JTD.
5. Petitioner requests reimbursement of costs advanced of \$768.59.
6. Attorney requests fees of \$10,917.00. Billed at \$375/hour for 18.95 hours' attorney time and \$115-\$150/hour for 28.55 hours' paralegal time. Itemized [LF,

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.

pgs. 28-32]. **Attorney requests that said fees in the amount of \$10,917.00 payable to James B. Church of James B. Church & Associates, shall be a lien, with interest at the legal rate of 10%, against the residential real property of the conservatee located at 10655 Mountain View Avenue, Redlands, CA**

7. Attorney requests reimbursement of costs advanced of \$965.00. Itemized.
8. It is requested that the Court authorize payment for services provided to the Conservatee to become a lien against the real property of the Conservatee. It is understood that payment for services will not be received until sometime after the death of the Conservatee.
9. Supplement filed 04/13/17 with requested information filed 04/13/17.
10. ~Proposed Order 12/23/16.

RECOMMENDATION:

Court's discretion re: fees and bond. If approved, set hearing on the next accounting review for **08/01/17** (if one year) or **07/31/18**(if two years). Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600040

CASE NAME: LUGENE ROBINSON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROXANNE ROBINSON

COUNSEL:

LUGENE ROBINSON SR (CTP)...JAMES B CHURCH
ROXANNE ROBINSON (CP)...PRO/PER

GENERAL INFORMATION

Roxanne Robinson appointed conservator of the person on 06/30/16.

Continued from **02/06/17**. The conservator and counsel state that Lugene Robinson went to Las Vegas for a visit with some of her children and they now will not return her to the custody of the Roxanne Robinson. Court orders that Lugene Robinson to be returned to Roxanne Robinson immediately.

Continued from **02/21/17**. Conservator presents to court the Conservatorship Documents filed in Las Vegas by conservator. Counsel offers to assist conservator in her attempts to have conservatee returned to her.

Continued from **04/18/17**. Counsel represents there is a guardianship matter filed in Las Vegas, Clark County which has been granted. Referred to Court Investigator for investigation and report. The Court investigator is to make effort to contact Las Vegas (Clark County) as it appears the family members who took Lugene Robinson Sr. without the consent of the caregiver have filed for guardianship and guardianship has been granted.

Continued from 05/01/17. Matter is continued. Attorney Church is going to try to contact the District Attorney Elder Abuse unit regarding the conservatee

Continued from 05/16/17. Attorney Church to look into other options to get the conservatee returned to conservator.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights filed 02/03/17, section 5 to proof of mailing is blank. Question if the Order Appointing Probate Conservator was also provided? JTD.

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.

- 2 Need Statement of Care Plan in accord with Pr.C.§2352.5.
- 3 Determination of Conservatee's Appropriate Level of Care filed.
- 4 **CI report filed 04/19/17.**

RECOMMENDATION:

Inquire status.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700115

CASE NAME: JORJINA ELIZABETH LOPEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JORJINA ELIZABETH LOPEZ (CEP)...DONNASUE ORTIZ
MARYHELEN LOPEZ (CP)...PRO/PER

GENERAL INFORMATION

Continued from 05/16/17 to clear probate notes. Attorney Donnasue Ortiz is appointed for Jorjina Elizabeth Lopez.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maryhelen Lopez (mother)

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

1. Petitioner seeks civil rights not be limited without court order. JTD
2. Petitioner seeks powers under Pr. C. §2351.5 to access confidential records, to give or withhold medical consent, to make decisions re-education, the power to contract. Need verified supplement as to whether petitioner also seeks power to fix residence as indicated in Notice of Hearing Attachment 3(LF, pg4) filed 04/04/17.
3. Petitioner seeks medical powers. **Capacity Declaration filed 06/28/17 is not dated at signature on page 3.** Note: prior page 3 of Capacity Declaration filed 04/03/17 is complete. Does Court wish to require an amended Capacity Declaration?
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. **Court Investigator report filed.**
7. **Certificate of Completion of the Conservatorship Training Class filed.**
8. Return of Citation and Proof of Personal Service filed 04/04/17.

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.

9. ~Proposed Form Order: 04/03/17

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **03/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

MISC.

DATE: 08/01/17 TIME: 1:30 DEPT: S36P

CASE#: CON PS1700164

CASE NAME: LORELEI SVEUM

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GARY SVEUM

(CPE)...JAMES B CHURCH

LORELEI SVEUM

(CEP)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Gary Sveum appointed temporary conservator, on 05/11/17 \$160,000 bond. Court is not authorizing the move for Lorelei Sveum. Attorney Mark Flory appointed counsel.

Continued from 06/15/17. Counsel Church and petitioner stated conservatee is objecting to conservatorship. Walter Moore appointed counsel.

Continued from 06/22/17. Court authorizes temporary conservator to change the residence of Lorelei Sveum to Brookdale Senior Living Solutions.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Gary Sveum (son)

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

1. Petitioner seeks bond of \$160,000. Appears sufficient.
2. Citation returned served.
3. Petitioner seeks medical powers. Capacity Declaration filed 06/09/17.
4. Petitioner seeks dementia powers. Report of Counsel Flory filed 05/30/17.
5. **Need report of Walter Moore.**
6. Proof of Completion of the Conservatorship Training Class filed 07/06/17.
7. Court Investigator report filed 06/14/17.
8. ~Proposed Form Order: 05/04/17

RECOMMENDATION

Need to clear note 5. If approved, set hearing for Compliance Review for **03/06/18** the filing of the required documents and hearing re Accounting Review for **10/09/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/lc/lh/nb)

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

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400548

CASE NAME: MTR OF EULA MARIE HILL

HEARING:
Probate status report filed.

COUNSEL:
ARLINE H EDWARDS (PET)...HENRY T HEUER
EULA MARIE HILL (DEC)...

GENERAL INFORMATION:

Petitioner, Arline Edwards, suspended on 08/09/16. Court appoints the PA as Special Administrator.

Continued from **01/17/17 and 04/04/17** at request of counsel. Notice to be given by Mr. Heuer.

Continued from 06/06/17 at request of counsel. Notice given by Mr. Heuer.

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

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

1. Petitioner requests reinstatement as Executrix of the Estate of Eulah M. Hill.
2. It does not appear filing fees for accounting were paid. Court to inquire.
3. Final Inventory and Appraisal filed 10/31/16 is not signed by counsel. Need complete inventory.
4. Accounting period covers 07/16/10 to 09/26/16.
5. Assets on hand \$322.85 in cash.
6. Statutory fees of \$1,890.23 requested. Calculated. Question how parties intend on being paid as there are not enough assets on hand? Need verified supplement,
7. Attorney requests reimbursement of costs advanced of \$681.00.
8. No Summary of Account. Need same via verified supplement.
9. Disbursements – Exhibit A [LF, p. 10] requires further clarification via verified supplement as to the following:
 - a. Disbursements to A. Edward totaling \$14,000;
 - b. Cashier's Check to John D. Hill in the amount of \$15,000;
 - c. Foreclosure costs to A. Edwards totaling \$10,984.02.

10. Disbursements – Schedule A [LF, p. 10] reflects repairs to the home in the amount of \$5,000. Does Court wish to require further itemization of repairs? JTD.
11. Petition alleges real property was sold at foreclosure netting \$47,255.87 after the foreclosure sale. Need Trustee's Deed of Sale.
12. Need bank/financial statement to support date of death and closing balances per Local Rule 20-908.
13. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
14. No proposed order. Submit Order after Hearing.
15. Notice filed 11/07/16 and 01/09/17 does not include Public Administrator. Need proper service.

RECOMMENDATION:

Need to clear notes. If approved, set next hearing for receipts and final discharge for **08/07/18**.

(nb)

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400998

CASE NAME: THE TUMEY TRUST DATED 10/3/89

HEARING:
Accounting Review

COUNSEL:

BRENDA PERRY	(PET)...F ELLIOT GOLDMAN
BROWN WHITE AND OSBORNE, LLP	(BROWN WHITE & OSBORNE, LLP
DEBORAH L. TUMEY HARRISON	(OBJ)...
DEBORAH TUMEY HARRISON	(PET)...JACK B OSBORN
KATRINA GARCIA	(PET)...F ELLIOT GOLDMAN
THE TUMEY TRUST DATED 10/3/89	(TRU)...

GENERAL INFORMATION:

Continued from 10/25/16 at request of counsel. No accounting filed.

Continued from 04/04/17 to file accounting. Counsel to resubmit the settlement agreement order to the Court.

THIS CASE IS SET FOR HEARING ON Accounting Review.

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

1. Matter set at 04/25/16 hearing, wherein, the Court granted the Petition for Approval of Settlement Agreement; F. Elliot Goldman to prepare order on settlement agreement. Proposed order returned for corrections on 05/09/16. Need same.
2. Court does not approve the accounting- pursuant to the agreement, new accounting is to be filed. No accounting. Need same.

RECOMMENDATION:

Need to clear notes. When the trustee fails to file an accounting as ordered, the court may take the action specified in Pr. C. § 800 and CCP § 128.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500457

CASE NAME: Miguel Gonzalez

HEARING:
Accounting Review

COUNSEL:
JOSE GONZALEZ (PET)...POONAM K KOCH
MIGUEL GONZALEZ (DEC)...

XREF: CIVDS1506907

GENERAL INFORMATION:

Continued from 12/06/16. Related civil action is set for trial 01/23/17. Matter continued for trial to complete. Supplement will be filed.

Continued from 04/04/17. Notice to be given by Ms. Koch. Counsel reports civil action has settled and this is a no asset estate. Request for waiver of accounting, status report, and request for discharge to be filed.

Continued from 06/13/17. No appearance. Jose Gonzalez and/or Counsel are ordered to be present at next hearing if accounting not filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Jose Gonzalez on 10/08/15, full authority, no bond.
2. Counsel alleges this is a no asset estate. Need proper petition for termination of proceedings in accordance with Pr. C. §12251.

RECOMMENDATION:

Inquire status.
(nb/lh)

Future Hearing:
08/31/17 Motion to be relieved as counsel

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

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500487

CASE NAME: LUNA 1994 FAMILY TRUST

HEARING:

PETITION FOR SETTLEMENT OF FINAL Account and Report of LINDA
CALLAWAY and Petition for allowance of fees filed.

COUNSEL:

CHRISTINE KOTULA (DAVID D WERNER)...DAVID D W
CHRISTINE KOTULA (PET)...JOSEPH M. MONA
GWENDOLYN M. ANDRADE (PRO/PER
LINDA CALLAWAY (PET)...JOANN JACKSON KALAMA
LUNA 1994 FAMILY TRUST (TRU)...
STEVIE ANDRADE (PET)...DIANE E ROBBINS
SURETEC INSURANCE COMPANY (PRO/PER
TINA ROSCO (PET)...JOSEPH M. MONA
TINA ROSCO (TEE)...JOSEPH M. MONA

GENERAL INFORMATION:

Petitioner, Linda Callaway, PPF, appointed Successor Trustee via court order dated
01/26/15. Order Accepting Resignation of Linda Callaway entered 02/06/17.
Trust Beneficiary is Stevie Andrade, an adult, age 21. Trust monies to be held in trust
until the age of 25.

THIS CASE IS SET FOR HEARING ON Third and Final Account and Petition for Fees
by Prior Successor Trustee, Linda Callaway, PPF.

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

1. Accounting period 10/01/16 to 02/28/17.
2. Assets on Hand \$422,215.01 consisting of \$7,280.65 in cash and remaining in securities.
3. Current bond of \$467,000. Petitioner requests her bond be exonerated as Successor Trustee Kenneth Blickenstaff has received all assets. However, bond is not exonerated until entry of final discharge order.
4. Trustee requests fees of \$2,047.00. Billed at \$100/hour for 22.47 hours' time. Itemized [LF, pgs. 18-19]. JTD.

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

5. Attorney requests fees of \$5,720.00. Billed at \$325/hour for 16.1 hours' attorney time. Itemized [LF, pgs. 23-28]. JTD.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. Next hearing for final discharge as to Linda Callaway on **02/05/18**.
(nb)

FUTURE HEARINGS:

09/07/17 Final Discharge (re: Tina Kotula)

11/27/17 Accounting Review (re Callaway) - **VACATE**

02/05/18 Final Discharge (Ms. Callaway)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501039

CASE NAME: MTR OF RUTILIA OLVERA

HEARING:

Accounting Review

COUNSEL:

IRMA OLVERA

(PET)...GARY H BLAYLOCK

RUTILIA OLVERA

(DEC)...

GENERAL INFORMATION

Continued from 05/09/17 to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 03/07/16, full authority, no bond.
2. No accounting or status report of administration.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600078

CASE NAME: JOHN HANF

HEARING:

Accounting Review

COUNSEL:

JOHN HANF	(DEC)...
PAT PERLEY	(PET)...MITCHELL I ROTH
SCOTT A HANCOCK	(SNYDER & HANCOCK
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION

Continued from 05/23/17 for accounting to be filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court appointed Pat Perley as administrator with full authority, \$220,000 bond. Letters issued 01/27/16.
2. Partial Inventory and Appraisal filed 05/31/16. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600137

CASE NAME: MICHAEL E SODERBERG

HEARING:

Accounting Review

COUNSEL:

KRISTEN MARIE SODERBERG (PET)...LINDA K ROSS

MICHAEL E SODERBERG (DEC)...

GENERAL INFORMATION

Continued from 06/13/17. No appearance. Kristen Soderberg and/or Counsel is ordered to be present at next hearing if accounting is not filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Kristen Marie Sogerberg on 04/06/17 with full authority, no bond.
2. Need final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600307

CASE NAME: MTR OF GERALD SLATER

HEARING:

Accounting Review

COUNSEL:

COLE MCCALL

(PET)...CRAIG E WILSON

GERALD SLATER

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Cole McCall on 07/27/16 with full authority, \$20,000 bond.
2. Need Final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600319

VACATE

CASE NAME: ESATE OF GILDA JOAN DONCHE

HEARING:

Accounting Review

COUNSEL:

BRUCE BRAZEAU

(PET)...ROBERT G PETROVICH

GILDA JOAN DONCHE

(DEC).

STATE OF CALIFORNIA FRANCHISE

()...

VICTIM COMPE NSATION AND GOVER (TP)...

Status report filed 06/30/17

(lh)

Future hearing date: 09/28/17

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600738

CASE NAME: PAUL BARCELONA SPECIAL NEEDS TRUST

HEARING:

Petition for AUTHORIZATION TO PURCHASE RESIDENCE

COUNSEL:

CLARISSE VILLALPANDO

(PET)...MICHELS & LEW

PAUL BARCELONA

(MIN)...

PAUL BARCELONA SPECIAL NEEDS T

(TRU)...

WESTAMERICA BANK

(PET)...RANDOLPH M SHARON

XREF: CIVDS1506803

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Future Hearing:

12/05/17 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: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601267

CASE NAME: FLORENCE SHIRLEY SIGEL LIVING TRUST

HEARING:

Petition for AN ACCOUNTING OF TRUSTEE FOR REDRESS OF BREACH
OF TRUST FOR REMOVAL OF TRUSTEE

COUNSEL:

FLORENCE SHIRLIE SIGEL LIVING (TRU)...

JON IZZO

(PET)...JON W DE VAN

RICHARD BERMAN

(OBJ)...SKAPIK LAW GROUP

Currently under review by Legal Research.
(LR)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700439

CASE NAME: DEL E WHITNEY

HEARING:

Spousal Property Petition hearing.

COUNSEL:

DEL E WHITNEY (DEC)...
HELEN WHITNEY (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition

1. Petitioner requests confirmation of property passing to the surviving spouse as community property. Specifically, real property located at San Bernardino County. Petitioner states parties were married on 08/23/69, and all funds to purchase said property were community property funds.
2. Petition affixes the vesting Grant Deed [LF, p.4] which states "husband and wife" and, petitioner claims by inadvertence, the words "joint tenants" was left off the deed.
3. ~Proposed Form Order 05/08/17.

RECOMMENDATION:

Judges' discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 08/01/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

HEARING:

Petition for OBJECTIONS TO TRUSTEE'S ACCOUNT DATED 01/24/17
PETITION FOR RELIEF, SURCHARGE, AND REMOVAL ETC

COUNSEL:

MARIE T KNOTT LIVING TRUST DAT
SHRINERS HOSPITALS FOR CHILDRE

(TRU)...

(PET)...KEITH L MEEKER

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700468

CASE NAME: Willene Ford Revocable Living Trust

HEARING:

Petition for Determination of Title of Trust Residence

COUNSEL:

EILEEN SANDOR

(PET)...SELTERS & SELTERS

WILLENE FORD REVOCABLE LIVING

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 8:36 DEPT: S37P

CASE#: PRO PS1500848

CASE NAME: SANJIV BARSE SPECIAL NEEDS TRUST

HEARING:

PETITION FOR APPROVAL OF THIRD Account and Report of CITIZENS
BUSINESS BANK and Petition for allowance of fees filed.

COUNSEL:

CITIZENS BUSINESS BANK	(PET)...RANDOLPH M SHARON
CITIZENS BUSINESS BANK	(TEE)...RANDOLPH M SHARON
SANJIV BARSE SPECIAL NEEDS TRU	(TRU)...

X-REF: RIP 1400803

GENERAL INFORMATION

Continued from 06/13/17. The Court approves petitioner's fees as requested and attorney fees in the reduced amount of \$3,320.00. The Court denies request for Federal Express costs of \$20.23. The Court denies request for reimbursement for registration and repair of Honda Van in the amounts of \$188 and \$390.61. The Court will approve Lego Land expense this time, but in the future will require explanation of outing expenses.

THIS CASE SET FOR HEARING ON Third Account Current and Petition for Fees by Trustee, Citizens Business Bank re SNT and Medicare Set-Aside Trust and Petition for Fees.

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

1. SNT was established in Riverside County on 12/03/14 with funds divided between the SNT and a Medicare Set-Aside Trust.
2. Account period 06/01/16 to 02/28/17
3. SNT assets on hand \$685,565.44 consisting of \$20,593.85 in cash and the balance in mutual funds.
4. Medicare Set-Aside assets on hand \$61,064.62 consisting of \$3,98.19 in cash and the balance in mutual funds.
5. No bonds – corporate fiduciary.
6. Petitioner requests confirmation of fees paid in the amount of \$8,509.01 per court approved fee schedule. Itemized [LF, pgs. 60-61]. JTD.

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

7. Attorney requests fees of \$3,735.00 and costs of \$230.00. Billed at \$450/hour for 8.3 hours attorney time. Itemized [LF, p. 10]. JTD.
8. Court previously approved expenditures for home modifications up to \$95,000. Petitioner states that the modifications to the home owned by Anjali Barse Sequeira have been completed. The cost of such modifications exceeded the amount previously authorized by the Court by an additional \$7,000. Anjali Barse Sequeira requests reimbursement of the balance of the construction costs paid in the amount of \$7,000. Prior notes indicated Mr. Sequeira previously agreed to pay the difference. **Supp. (07/17/17) alleges bids for handicapped modification had not yet been obtained and the actual cost turned out to be more expensive than anticipated. JTD.**
9. **Supplement filed 07/17/17 submits Federal Express charges are reasonable and appropriate; Legoland expenses were for conservatee, only; and the Trust has a lien on the vehicle to secure the purchase price.**
10. Proposed order 04/03/17 includes reimbursement of \$7,000 to Anjai Barse Sequeira.

RECOMMENDATION

Court's discretion. If approved, set hearing re next Accounting Review for **04/24/18**. Accounting to be filed 30 days in advance.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 08/01/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600081

CASE NAME: MTR OF THELMA JONES

HEARING:

Petition for ATTORNEY FEES BY COURT APPOINTED COUNSEL

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
THELMA JONES	(CEP)...
THELMA JONES	(PET)...E JOAN NELMS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, E. Joan Nelms, ["Petitioner"].

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

1. Petitioner was appointed on 04/14/16. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$7,661.25. Billed at \$375/hour for 18.7 hours' attorney time and \$100-\$135/hour for 5 hours' paralegal time. Itemized [LF, pgs. 8-9].
3. Petitioner requests Public Guardian, as conservator of the estate, to pay requested fees for services rendered.
4. ~Proposed Order 06/16/17.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/01/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700148

CASE NAME: MTR OF MICHELLE HERNANDEZ

HEARING:

Petition for Appointment of Limited Conservator

COUNSEL:

JUAN A HERNANDEZ (CPE)...YESIKA M FIGUEROA
MARIA I HERNANDEZ (CPE)...YESIKA M FIGUEROA
MICHELLE HERNANDEZ (CEP)...MARK J. FLORY

GENERAL INFORMATION

Continued from 06/13/17. Court deems this petition to be a petition for limited conservatorship of the person only. Return of Citation is waived by proposed conservatee's appearance in court. Court orders IRC to prepare a report for the Court. Referred to Court Investigator for report. Attorney Mark J. Flory is appointed for Michelle Hernandez.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator by Juan A Hernandez and Maria I Hernandez (parents)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 04/24/17.
2. Need report of appointed counsel Mark J. Flory.
3. Need IRC report.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. **Court Investigator report filed.**
6. ~Proposed Form Order: 04/24/17

RECOMMENDATION

Need to clear notes 2-4. If approved, set hearing for Compliance Review for **03/06/18** for the filing of the required documents and hearing re Accounting Review for **10/09/18** Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DENISE TIBKE

(CP)...PRO/PER

MADISON LEANN TIBKE

(CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Denise Tibke (mother)

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

1. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. **Court Investigator report filed.**
7. Petition, items 11, list of relatives does not include Denise Tibke (petitioner); however, it is clear she is the mother.
8. List of Required Contact Information form is missing paternal grandparents. Need completed form.
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need Notice of Hearing and Proof of Service to include 30 days' notice to Inland Regional Center.
11. Need return of Citation.
12. ~Proposed Form Order: 06/05/17

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

RECOMMENDATION

Need to clear notes 4-5; 8-11. If approved, set hearing for Compliance Review for **03/06/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/01/17 TIME: 9:30 DEPT: S37P

CASE#: OC RS596

CASE NAME: IN THE MTTR OF KEVIN ALBERS

HEARING:

Accounting Review

COUNSEL:

KEVIN ALBERS	(CTE)...PRO/PER
LINDA ALBERS	(CE)...PRO/PER
LINDA ALBERS	(CP)...PRO/PER
LINDA ALBERS	(CPE)...PRO/PER

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

Continued from 05/23/17. No appearance. Linda Albers is ordered to appear at next hearing if accounting not filed. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved 14th account current and report of conservator on 12/16/15.
2. Need 15th account current.

RECOMMENDATION

Inquire status.

(lh)