



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 08/02/17**

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](mailto: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.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 08/02/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1100591

CASE NAME: ESTATE OF HOWARD D BOTTS

HEARING:

Hearing re Final Discharge

COUNSEL:

DEBORAH VENEGAS	(PET)...ROBERT W CANNON
HOWARD D BOTTS	(DEC)...
MIDFIELD AVIATION	(TP )...EDWARD G. OPERINI

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Deborah Venegas, daughter, approved on 08/09/16.
2. Need receipt for Yvonne Spencer.
3. Need Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status of receipt and order.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300113

CASE NAME: SHEILA WHITE SPECIAL NEEDS TRUST

HEARING: FOURTH Account and Report of LEE ANN HITCHMAN, BRUCE HITCHMAN and Petition for allowance of fees filed.

COUNSEL:

SHEILA WHITE SPECIAL NEEDS TRUST (TRU)...  
LEE ANN HITCHMAN (PET/TEE)...MELINDA S. BELL  
BRUCE HITCHMAN (PET)...MELINDA S. BELL  
DEPARTMENT OF HEALTH CARE SERVICES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4<sup>th</sup> Account SNT Current and Report of Trustees and Petition for Allowance of Fees by Lee Ann & Bruce Hitchman PPFs.

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

1. Beneficiary Sheila White passed away on 06/26/16.
2. Accounting covers 01/01/16 – 02/28/17.
3. Assets on Hand: \$718,167.23 (Merrill Lynch account).
4. Current bond of \$798,000. Petitioners request an increase to \$818,500. Ok
5. Petitioners/trustees request fees of \$6,227 for 45.5 hours at \$85/150 per hour. Itemized [Acct. 05/10 LFpg41-47]. Rate increase of \$15 per hour from last accounting period. Court to determine reasonableness of rates.
6. Attorney requests fees of \$5,465.00. Billed at \$350/hour for 14.6 hours. Itemized [Acct.05/10 LFpg. 52-63]. JTD.
7. Petitioners are in the process of collecting funds from Allianz Life Insurance Annuity valued at approximately \$537,079.58.
8. No proposed order. Submit after hearing.

RECOMMENDATION:

Court's discretion re fees and bond. If approved, set next accounting review for a final accounting for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500023

CASE NAME: \*\*MASTER FILE PATRICK MCDONNELL III

HEARING:

Hearing re Final Discharge

COUNSEL:

PATRICK MCDONNELL IV	(PET)...FINLAY LAW GROUP
PATRICK MCDONNELL III	(DEC)...
NATHANIEL QUINN	(PET/TP)...DUANE P BOOTH

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Patrick McDonnell, IV, son, approved on 08/17/16.
2. No receipts needed as only real property remains and petitioner is sole heir.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

#### RECOMMENDATION

Inquire status of order.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500553

CASE NAME: JOSE MENDEZ

HEARING:

FIRST AND FINAL Account and Report of MARTHA MENDEZ and Petition  
for allowance of fees filed.

COUNSEL:

MARTHA MENDEZ

(PET)...RANDAL P HANNAH

JOSE MENDEZ

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Martha Mendez, mother.

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

1. Both heirs, parents, waive accounting.
2. Petitioner and counsel request statutory fees of \$6,513 each.
3. Petitioner requests a reserve of \$2,000.
4. Need notice of hearing and proof of service to Robert Mendez.
5. No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA subject to notice. If approved, set hearing on the filing of receipts and final discharge for **08/09/18**.

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500701

CASE NAME: FRANK PELLEGRINO JR

HEARING:

Petition for BY TRUSTEE DORIS NEUHAUS FOR ORDER TERMINATING  
INSOLVENT TRUST AND ALL FURTHER PROCEEDINGS

COUNSEL:

FRANK PELLEGRINO	(PET)...PRO/PER
FRANK PELLEGRINO JR	(DEC)...
MARY LOUISE PELLEGRINO	(PET)...PRICE LAW FIRM, APC
DORIS NEUHAUS	(PET/OBJ)...J PATRICK RAGAN

Waiver of Court Fees and Costs filed by DORIS NEUHAUS is GRANTED

Currently under review by legal research

(LR)

NOTICE:

1. 30 days' notice filed.

Future Hearings: 08/30/17: First Amended Account & Report, 11/08/17: Hearing Re: Status  
Conference, 03/07/18: Readiness Calendar, 03/26/18-03/29/18 Court Trial

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501013

CASE NAME: HELEN DIX

HEARING:  
Hearing re Final Discharge

COUNSEL:

WESTAMERICA BANK	(PET)...RANDOLPH M SHARON
HELEN DIX	(DEC)...
TIFFANY ANN IMMERSO	(PET)...RANDOLPH M SHARON
NATHAN DIX	(PET)...RANDOLPH M SHARON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Westamerica Bank approved on 07/27/16.
2. Declaration of Administrator in lieu of receipts filed 07/10/17. Beneficiaries have failed to sign receipts despite request of administrator. Negotiated checks are attached, along with a copy of recorded quitclaim deed.
3. Proposed Ex Parte Petition for Final Discharge and Order filed 07/17/17; however, need recorded deed information in item 2(c). Attachments may not be included after judge's signature. See Local Rule 20-614(d).

RECOMMENDATION

Need corrected proposed Order.

(lc/lh)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600612

CASE NAME: THORSON REVOCABLE LIVING TRUST

HEARING:

Hearing Re: STATUS OF MEDIATION

COUNSEL:

KYATT GJOHR THORSON	(PET)...PETER M BOCHNEWICH
THORSON REVOCABLE LIVING TRUST	(TRU)...
MERILEE SAWYER THORSON	(OBJ)...J DAVID HORSPOOL

Status of Mediation – No notes – JTD

Future Hearings: 8/02/17: Mediation Settlement Conference, 12/13/17: Status of Trial Readiness, 6/20/18: Readiness Calendar, Petition for Determination of the Invalidity of the 4<sup>th</sup> Amendment, 7/23/18; Court Trial on Petition for Determination, etc.



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

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DATE: 08/02/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600822

CASE NAME: MTR OF RODERICK YZAGUIRRE

HEARING:

Order to Show Cause RE: Waiver of Felicia Johnson's objections

COUNSEL:

MEDHAT NASHED	(PET)...KRISTEN B. BROWN
RODERICK YZAGUIRRE	(DEC)...
JILL YZAGUIRRE	(OBJ)...PRO/PER

***XREF: CIVDS1511117***

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Waiver of Felicia Johnson's objections.

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

1. Matter set on 05/31/17 where a settlement was reached as to Felicia Johnson[fiancé]/Status of mediation. Parties consented on the record. Related matter pending.

#### RECOMMENDATION

Court's discretion.

(lc)

Future Hearings: 12/12/17: Readiness Calendar, 01/22/18-01/26/18: Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/02/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST

HEARING:

Petition for 1)BREACH OF FIDUCIARY DUTY 2)REMOVAL OF CO-TRUSTEE  
3)IMMEDIATE SUSPENSION OF CO-TRUSTEE

COUNSEL:

NORMA RUDAMETKIN (PET)...CHRISTOPHER B JOHNSON  
THE NINA WOOD IRREVOCABLE TRUST (TRU)...  
GARY WOOD (OBJ)...SHARON M ANDERSON

Currently under review by legal research

(LR)

NOTICE: 30 days' notice Appears sufficient.

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

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DATE: 08/02/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700461

CASE NAME: MTR OF THE INTER VIVOS TRUST OF ELMER E. HUBATKA

HEARING:

Petition for ORDER DETERMINING TITLE TO REAL ESTATE IN TRUST

COUNSEL:

JEFFERY S HUBATKA (PET)...LAW OFFICE OF BRADLEY N. ETTER  
SANDRA-KAYE BROWER (PET)...LAW OFFICE OF BRADLEY N. ETTER  
INTER VIVOS TRUST OF ELMER E. (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. 30 days' notice filed 06/09/17; however, does not include copy of petition was served per Pr.C. § 17203(b). Need corrected proof of service.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0800031

**See also matter 12 12A**

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

HEARING: Hearing Re: SIXTH ACCOUNT OF GREG OVEROSS

COUNSEL:

EVELYN JENNIFER PADRON (PCR/ CPE/CP)...HORSPOOL & HORSPOOL

JOSE JUAN PADRON RODRIGUEZ (PCE/CEP/CTP)...MITCHELL I ROTH

GREG OVEROSS (SC )...PATRICK L. HANRAHAN

MITCHELL I ROTH (PET)...MITCHELL I ROTH

MATTHEW E SHEASBY (PET)...CHO, SHEASBY, CHUNG & IGNACIO

JOSE JUAN PADRON RODRIGUEZ (CEP)...MITCHELL I ROTH

S.N. TRUST OF JOSE JUAN PADRON RODRIGUEZ (TRU)...

LOURDES BARRAGAN (RES)...LENITA A SKORETZ

**XREF: SBFSS67433** (*Juan Padron dissolution*) **CIVDS1504049** (*24/7 Home Health v Rodriguez*)

GENERAL INFORMATION:

Continued from 04/28/16, 05/12/16 and 07/22/16. Court granted a partial payment of \$10,000 to Trustee for fees and reserve on all other issues. Attorney fees for Patrick Hanrahan granted.

**Continued from 12/07/16 and 03/15/17. Accounting not approved. Greg Oveross to file 7<sup>th</sup> accounting.**

THIS CASE IS SET FOR HEARING ON 6<sup>th</sup> account current of SNT and Conservatorship and Petition for fees by Greg Oveross, Conservator/Trustee.

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

1. Accounting period covers 12/01/14 – 11/30/15.
2. Assets on hand in the SNT \$122,996.01 consisting of \$32,929.19 in cash and remainder in securities, furniture and a 2007 Hummer vehicle.
3. **NOTE:** The assets have substantially dwindled since 2010. Question the estate plan for beneficiary as the assets appear to be reduced at a rate of \$120,000 per year. **Supplement filed regarding care, budget, and litigation etc on 05/04/16.**
4. Petitioner requests trustee fees of \$21,620 for 179.6 hours at \$90/175 per hour for a total of. Itemized. Court to determine reasonableness of hourly rate. Itemized [LFpgs166-182]. **\$10,000 partial fees granted 07/22/16.**

5. Attorney Patrick Hanrahan requests fees of \$21,245 for 60.7 hours at \$350 per hour for paralegal and attorney services respectively. Itemized [LFpgs188-191]. Granted
6. Attorney requests reimbursement of \$2,017.46 for court costs advanced.
7. Declaration filed by J. David Horspool on 05/10/16 stating the high fees already paid in this estate and placement of conservatee issues.
8. Declaration also filed by Evelyn Padron, Conservator, on 05/10/16.
9. Petitioner requests a reduction of bond from \$770,000 to \$567,000. Appears ok.

**RECOMMENDATION:**

Court's discretion. Court to trail **08/08/17** 7<sup>th</sup> Account.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0800031

**See also matter 11 12A**

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

HEARING:

Motion Re: PROBATE COURT APPROVAL OF SETTLEMENT IN THE CIVIL  
ACTION ETC Filed by Petitioner JOSE JUAN PADRON RODRIGUEZ

COUNSEL:

EVELYN JENNIFER PADRON (PCR/ CPE/CP)...HORSPPOOL & HORSPPOOL  
JOSE JUAN PADRON RODRIGUEZ (PCE/CEP/CTP)...MITCHELL I ROTH  
GREG OVEROSS (SC )...PATRICK L. HANRAHAN  
MITCHELL I ROTH (PET)...MITCHELL I ROTH  
MATTHEW E SHEASBY (PET)...CHO, SHEASBY, CHUNG & IGNACIO  
JOSE JUAN PADRON RODRIGUEZ (CEP)...MITCHELL I ROTH  
S.N. TRUST OF JOSE JUAN PADRON RODRIGUEZ (TRU)...  
LOURDES BARRAGAN (RES)...LENITA A SKORETZ

**XREF: SBFSS67433 CIVDS1504049**

No notes – JTD

(LR)

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Page: 12A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0800031

**See also matter 11 12**

CASE NAME: JOSE JUAN PADRON RODRIGUEZ

HEARING:

SEVENTH Account and Report of GREG OVEROSS and Petition for allowance of fees

COUNSEL:

EVELYN JENNIFER PADRON (PCR/ CPE/CP)...HORSPOOL & HORSPOOL  
JOSE JUAN PADRON RODRIGUEZ (PCE/CEP/CTP)...MITCHELL I ROTH  
GREG OVEROSS (SC )...PATRICK L. HANRAHAN  
MITCHELL I ROTH (PET)...MITCHELL I ROTH  
MATTHEW E SHEASBY (PET)...CHO, SHEASBY, CHUNG & IGNACIO  
JOSE JUAN PADRON RODRIGUEZ (CEP)...MITCHELL I ROTH  
S.N. TRUST OF JOSE JUAN PADRON RODRIGUEZ (TRU)...  
LOURDES BARRAGAN (RES)...LENITA A SKORETZ

**\*\*\*Court to review following matter #11 before ruling on this matter\*\*\***

**XREF: SBFSS67433, CIVDS1504049**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON *Seventh* Account Current and Report of Trustee and Conservator of the Estate and Petition for Fees by Greg Oveross ["Petitioner"].

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

1. Accounting period 12/01/15 to 04/30/17.
2. Assets on Hand \$128,748.56 consisting of \$74,222.03 in cash and remaining in personal property.
3. Current bond of \$770,000. Suggest bond reduction by \$186,500 for a total new bond in the amount of \$583,500 (includes recovery). JTD.
4. Trustee requests compensation of \$5,630. Billed at \$100-\$125/hour for 51.70 hours' time. Itemized [see supp. filed 07/14/17, LF, pgs.139-153]. JTD.
5. Attorney requests fees of \$33,450 for services to Petitioner in capacities as Trustee and Conservator of the estate against the lawsuit brought by 24-Seven Home Health, Inc. Billed at \$375/hour for 89.20 hours' attorney time. Itemized [LF, pgs.39-42]. JTD.

6. Attorney requests reimbursement of costs advanced of \$488.99. Itemized [LF, p. 42-46]
7. Disbursements – Schedule C-! [LF, p. 21] reflects dues and subscriptions totaling \$13,312.00. Need further clarification via verified supplement.
8. Disbursements – Schedule C-! [LF, p. 22] includes postage totaling \$11.08, normally not allowed and considered overhead. Does Court wish to reduce reimbursement of costs by this amount? JTD.
9. Petitioner has paid for at home care services during this accounting period totaling \$285,663.11. Detail Payment and Time cards submitted in lieu of required, verified declarations, to verify dates of service, performance of services and that payment has been received per Local Rule 20-1406(c), by April Indira Medal, Adrianna Robles, Daisy Corrales Mendoza and Sofia Brown. JTD.
10. Notice filed 07/14/17 reflects incorrect hearing date; does not include conservatee/beneficiary; and does not give 30 days' notice. Need proper notice and service.
11. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 7-8 & 6 then Court's discretion re: bond, fees and note 9. If approved, set next hearing for Accounting Review for **03/21/18**.

(nb)



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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/02/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1300082

CASE NAME: MICHAEL GARCIA

HEARING: FOURTH Account and Report of MICHAEL GARCIA and Petition for allowance of fees filed.

COUNSEL:

MELISSA GARCIA

(CPE)...PRO/PER

MICHAEL GARCIA

(CEP)...J BENJAMIN SELTERS III

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 4<sup>th</sup> Account Current and Petition for Allowance of Fees with waiver of accountings by successor Conservator Melissa Garcia, sister.

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

1. Accounting period 05/01/14 – 11/30/16.
2. Assets on hand \$12,828.31. Beginning balance of \$24,142.68 does not match ending balance of 3<sup>rd</sup> account of \$24,220.09, a difference of \$77.41. **Need amended accounting or reconciliation.**
3. Attorney requests fees of \$3,275. Need itemization with totals and rates. **Supp. filed 07/25/17 with itemization. JTD**
4. Accounting is off balance by \$1. Court may wish to deem as de minimis. JTD
5. Attorney requests reimbursement of costs totaling \$601.70. [Acct.06/16 LFpg4-5].
6. Petitioner receives a monthly allowance of \$1,950 as previously ordered. Petitioner now seeks the entire amount of conservatee's settlement payments of \$2,085 for caregiving. Court to inquire what funds are used to support conservatee. JTD
7. Petitioner requests future accountings be waived due to size of estate and continued attorney's fees. However, conservatee receives \$2,085 monthly settlement payments, which is \$85 over the Pr.C. § 2628 maximum; however, qualifies as for assets on hand.
8. ~Proposed Order: 06/16/17.

RECOMMENDATION

Need to clear note 2. If approved, set hearing on the next accounting review for **02/28/18** (if one year) or **02/27/19** (if two years). Accounting to be filed 30 days in advance.  
(lc/lh)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600131

CASE NAME: MTR OF NANCY L DUGAN

HEARING:  
Accounting Review

COUNSEL:

MARGARET T DUGAN	(CPE)...AMY L GOSTANIAN
NANCY L DUGAN	(CEP)...
CYNTHIA J WILLIAMS	(CEP)...AMY L GOSTANIAN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Cynthia Williams, friend, appointed **Successor** conservator of the person and estate on 03/23/17, \$170,000 bond.
2. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
3. Need Care Plan in accord with Pr.C.§2352.5.
4. Need accounting.

RECOMMENDATION

Need to clear notes 2-4.

(lc)

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700091

CASE NAME: MIGUEL ANTONIO CARRILLO GOMEZ

HEARING: Petition for Appointment of Conservator

COUNSEL:

MIGUEL A CARRILLO (CP )...GISSELLE M AMINI  
DAMARES M CARRILLO (CP )...GISSELLE M AMINI  
MIGUEL ANTONIO CARRILLO GOMEZ (CTP)...PRO/PER

GENERAL INFORMATION

David Horspool appointed counsel.

**Continued from 06/28/17. \*interpreter\*.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Miguel and Damares Carrillo, parents.

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

1. Petitioners seek medical powers. Capacity Declaration filed 03/13/17.
2. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioners seek civil rights not be limited without court order. JTD
4. Certificates of Completion of the Conservatorship Training Class filed 04/06/17.
5. Court Investigator report filed 06/01/17.
6. Proposed conservatee is developmentally disabled. Need report of Counsel Horspool.
7. Proposed conservatee is developmentally disabled. IRC report filed 06/28/17.
8. Citation returned served.
9. ~Proposed Form Order: 03/13/17

RECOMMENDATION

Need report of counsel. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/lc)

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700143

CASE NAME: MTR OF TERESA CARLSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BRYAN H WOODS (CPE)...PRO/PER  
TERESA CARLSON (CEP)...WALTER T. MOORE

GENERAL INFORMATION

**Continued from 05/31/17. Walter Moore appointed counsel.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Bryan Woods, son.

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

1. Petitioner seeks medical powers. Capacity Declaration filed 04/14/17.
2. Petitioner seeks bond be waived as petitioner is son of proposed conservatee. This is not sufficient cause for bond waiver. There is \$25,000 in personal property and Social Security benefits. Pension is not clear if \$3,276 is monthly or yearly. **Supp. filed 07/21/17 pension is annual income deposited in a bank account held in name of both proposed conservatee and conservator. Personal property is assigned to proposed conservatee's living trust of which proposed conservator is trustee. Question need for estate powers?**
3. Petitioner seeks dementia powers. Need report of Counsel Moore.
4. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
5. Citation returned served.
6. CI Report filed 05/23/17.
7. ~Proposed Form Order: 04/14/17.

RECOMMENDATION

Need to clear note 3. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the required documents and hearing re Accounting Review for **10/10/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc/lh)

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700231  
CASE NAME: FERNANDO RANDOLPH AGUILAR  
HEARING: Petition for Appointment of Conservator

COUNSEL:

PEACHES MORENO (PET)...PRO/PER  
FERNANDO RANDOLPH AGUILAR (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of **Limited** Conservator person only by Peaches Moreno, adoptive mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks funds of \$8,751.20 be placed into a blocked account at Bank of America re Special Needs Trust. Need verified supplement.
  - a. Question if there is an existing SNT? If so, does court wish to take jurisdiction over trust.
  - b. Question if petitioner is seeking to establish a SNT?
  - c. Question the need for estate powers if there is a SNT in existence?
4. Powers under Pr.C. § 2590 et seq. are granted in the court's discretion. The court cannot properly exercise its discretion in the absence of a declaration indicating what specific powers are sought and why each power sought is actually needed. Need verified supplement
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Petitioner seeks medical powers. Need Capacity Declaration.
8. List of required contacts (Local form SB-12224) does not include all 2<sup>nd</sup> degree relatives; siblings Jose and Joselin missing as well as maternal grandfather. Need same.
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need due diligence declaration for maternal grandfather, Daniel Moreno.
11. Need Court Investigator report.
12. Return of Citation with proof of personal service filed 07/17/17.

13. ~Proposed Form Order: 06/20/17.

**RECOMMENDATION**

Need to clear notes 3-11. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the required documents and hearing re Accounting Review for **10/10/18**. Any accounting to be filed 30 days in advance.

(lc/lh)

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400112

CASE NAME: ERIK J GUTIERREZ

HEARING:

Hearing Re: STATUS OF TRANSFER TO RIVERSIDE COUNTY

COUNSEL:

JOSE J GUTIERREZ	(CP )...PRO/PER
ROBIN GUTIERREZ	(CP )...PRO/PER
AMBER M GUTIERREZ	(PCR)...PRO/PER
JESSICA R GUTIERREZ	(PCR)...PRO/PER
ERIK J GUTIERREZ	(CEE)...MARK J. FLORY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Transfer to Riverside County.

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

1. Jose, Robin, Amber and Jessica Gutierrez, parents & siblings, appointed **limited** Conservators of person only on 06/18/14.
2. Matter set after pre-move notice indicated conservatee is moving to Moreno Valley, Riverside County. Court ordered matter transferred on 07/10/17.
3. Need receipt of acknowledgement from Riverside County with new case number.

RECOMMENDATION

Need receipt of transfer.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

-----  
DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1100545

CASE NAME: IN MATTER RE SPECIAL NEEDS TRUST OF ROBERT H CLOUD

HEARING: Fifth Account and Report of INLAND COUNTIES REGIONAL CENTER, INC. and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTER (TRU)...STEVEN K BECKETT

ROBERT H CLOUD (BEN)...

MITCHELL ROTH (GAL)...

GENERAL INFORMATION

Continued from 10/12/16. Need supplement re amendment to trust. Counsel stated that all other notes have been cleared.

**Continued from 12/14/16 to file supplement and 02/22/17. Mitchell Roth appointed GAL for beneficiary, who lives in Ventura County. Supplement filed and reviewed. Continued from 05/17/17. Court has concerns and would like to hear from master trust representative.**

THIS CASE IS SET FOR HEARING ON 5<sup>th</sup> Account Current and Petition for Fees

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

1. Beneficiary currently resides in Ventura, CA. Court to determine if matter should be transferred.
2. Account period covers 1/1/15 – 1/31/16.
3. Assets on hand \$47,509.96 in cash.
4. Petitioner, IRC, requests confirmation of fees already taken in the amount of \$1,286.72 per approved fee schedule. However, one of the payments for 12/31/15 is not listed in the Schedule of Disbursements.
5. Petitioner requests to continue authority to advance fees per approved schedule.
6. Attorney requests fees of \$1,535.00 billed for attorney at \$250/hour and paralegal at \$100/hour. Itemization filed separately.
7. Petitioner requests authority to revoke the previous Master Trust and execute a revised Master Trust.
8. Need GAL report.
9. ~Proposed order 1/12/17; however, will be reviewed post hearing by legal research.



RECOMMENDATION:

Need GAL Report then Court's discretion. If approved, set hearing re next Accounting Review for **05/17/18**.

(sa/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1200096

CASE NAME: GERALD EMERALD NELLESEN

**SEE ALSO 3**

HEARING:

Motion Re: NTC OF MTN AND MTN TO BE RELIEVED AS COUNSEL Filed  
by Petitioner GARY NELLESEN

COUNSEL:

GARY NELLESEN (PET)...LAW OFFICES OF SUSAN L WINDSOR  
GERALD EMERALD NELLESEN (DEC)...

GENERAL INFORMATION

**Continued from 03/08/17, 04/26/17 and 06/13/17 as accounting was filed.**

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Susan Windsor.

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

1. Petitioner seeks to be removed as counsel for Gary Nellesen, administrator. Petitioner alleges that her client has failed to communicate. Petitioner has sent administrator a substitution of attorney; however, has not been successful in receiving any communication back from Gary.
2. ~Proposed Form Order: 04/24/17.

RECOMMENDATION

Court's discretion

(lc/nb/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1200096

CASE NAME: GERALD EMERALD NELLESEN

**SEE ALSO 2**

HEARING:

SECOND Account and Report of GARY NELLESEN and Petition for allowance of fees filed.

COUNSEL:

GARY NELLESEN (PET)...LAW OFFICES OF SUSAN L WINDSOR  
GERALD EMERALD NELLESEN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> Account Current, Reimbursement of Costs and Approval of Statutory fees Pr.C. § 10953 by Counsel Windsor for Gary Nellesen, son.

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

1. Accounting period 06/2013 – 05/03/17. Accounting period should begin at 07/01/13. However, only real property remains. JTD
2. Assets on hand \$70, 000 in real property.
3. Counsel brings forth accounting per Pr.C. § 10953 as personal representative's whereabouts are allegedly unknown.
4. Counsel seeks reimbursement of costs totaling \$1,536.61. Itemized [Acct. 05/05LFpg6].
5. Counsel reserves the right to statutory fees at a later date.
6. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300206

CASE NAME: MTR OF KENNETH P BURRES

**SEE ALSO 5**

HEARING:

Hearing Re: DISCHARGE OF PRIOR ADMINISTRATOR- JEFFREY BURRES

COUNSEL:

JEFFREY BURRES	(PET)...PHILIP K FIFE
KENNETH P BURRES	(DEC)...
STEVEN BURRES	(PET)...JERRY T MORGAN
PHILLIP K. FIFE	(PET)...PHILLIP K FIFE

GENERAL INFORMATION

**Continued from 05/17/17.**

THIS CASE SET FOR HEARING ON Final Discharge re Jeffrey Burres.

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

1. Final account/distribution of deceased administrator Jeffrey Burres, brother waived on 05/18/16.
2. No receipts needed as no assets were marshaled.
3. Need Ex Parte Petition for Final Discharge and Order filed by counsel for Jeffrey Burres.

RECOMMENDATION

Inquire status of exparte order.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300206

CASE NAME: MTR OF KENNETH P BURREN

**SEE ALSO 4**

HEARING:

Accounting Review

COUNSEL:

JEFFREY BURREN	(PET)...PHILIP K FIFE
KENNETH P BURREN	(DEC)...
STEVEN BURREN	(PET)...JERRY T MORGAN
PHILLIP K. FIFE	(PET)...PHILLIP K FIFE

GENERAL INFORMATION

**Continued from 05/17/17.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Successor** Administration issued to Steven Burren, brother, on 04/05/16; limited authority, bond issue deferred.
2. Final Inventory and Appraisal indicating \$0 assets.
3. Need accounting/status report or Pr.C. § 12251 petition.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1300398

**VACATED**

CASE NAME: ALAN RUSSELL ANTHONY

HEARING:

Hearing re Final Discharge

COUNSEL:

LINDA M ANTHONY

(PET)...DANIEL C SEVER

ALAN RUSSELL ANTHONY

(DEC)...

Final Discharge sent to department on 07/05/17 for signature.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400475

CASE NAME: Jewell Dean Ferrera

HEARING:  
Hearing re Final Discharge

COUNSEL:  
LAURA D WOOD-GRAHAM (PET)...JASON L GAUDY  
JEWELL DEAN FERRERA (DEC)...  
GORDON WOOD (PET)...ROBERTA L. TAYLOR & ASSOCIATES

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Laura Wood-Graham, granddaughter approved on 07/27/16.
2. Need receipts for Peter and Georgia Wood.
3. Need corrected Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

#### RECOMMENDATION

Inquire status of receipts and order.

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401074

CASE NAME: DOROTHY C PARSONS

HEARING: Petition for APPOINTMENT OF SUCCESSOR ADMINISTRATOR OF THE ESTATE

COUNSEL:

TERRI L PARSONS	(PET)...MATTHEW E SHEASBY
DOROTHY C PARSONS	(DEC)...
DAVID PARSONS	(PET)...MATTHEW E SHEASBY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by David Parsons, son.

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

1. Letters of Administration issued to Terri Parsons, daughter, on 02/05/15, full authority no bond. ***Terri passed away on 03/03/17 creating a vacancy.***
2. Petitioner does indicate request for bond. Need verified supplement.
3. Petition is not on mandatory judicial council form. Need same.
4. Need verified supplement and Notice to Petition to Administer Estate and proof of service as to any surviving heirs of Terri.
5. Waiver of Final Account and Distribution had already been approved on 03/02/17. It appears petitioner merely needs to distribute/change distribution as to Terri's heirs and file receipts and discharge for deceased personal representative. Court to clarify.
6. ~Proposed Form Order: 05/04/17.

RECOMMENDATION

Need to clear notes 2-4. If approved, set Accounting/Status Review for **03/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future Hearing: 03/08/18: Hearing Re: Final Discharge for Terri Parsons.



Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500415

CASE NAME: ELEANOR A GRIGGS

HEARING:  
Accounting Review

COUNSEL:

JOANN CHRISTY (PETSTE)...GUAY P WILSON  
ELEANOR A GRIGGS (DEC)...  
THE ELEANOR A GRIGGS LIVING TRUST (TRU)...

GENERAL INFORMATION:

OSC set on 11/02/16 when there was no appearance of accounting filed in last two hearings.

**Continued from 01/18/17, 03/29/17 and 05/17/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review/Status.

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

1. Letters of Administration issued to Joann Christy, daughter, on 07/21/15, full authority, no bond.
2. Final Inventory and Appraisal filed 03/29/17.
3. Need accounting or status report.

RECOMMENDATION:

Inquire status of accounting.

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600035

CASE NAME: RUTH PRICE

HEARING:

Probate status report filed.

COUNSEL:

SALLY PRICE (PET)...JOHN F WEBER  
RUTH VALORA PRICE (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report by Sally Price.

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

1. Letters Testamentary issued to Sally Price, daughter, on 03/09/16, full authority, no bond.
2. Petitioner seeks an additional year to close the estate in order to sell the real property and water rights.
3. ~Proposed Order: 04/28/17.

#### RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600036

CASE NAME: CARL J HUNT

HEARING:  
Accounting Review

COUNSEL:  
JEFF HUNT (PET)...JOHN F WEBER  
CARL J HUNT (DEC)...

GENERAL INFORMATION  
**Continued from 05/03/17.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Jeff Hunt, son, on 04/01/16; full authority, no bond.
2. Final Inventory and Appraisal filed 06/02/16.
3. Waiver of account filed by other heir Tracy Hunt. However, notwithstanding said waivers, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C. §10954(c)(1) or Status Report of Administration per Pr.C. §12201.

RECOMMENDATION

Inquire status of accounting or waiver of accounting.  
(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600115

CASE NAME: HARRIET JANE BELVEAL FAMILY TRUST

HEARING: Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

MARIE PASILLAS	(PET)...KARIANN VORHEES
KORTNIE JANE BOVAIRD	(MIN)...PRO/PER
BRITTANY MORGAN HOWARD	(MIN)...PRO/PER
BRIANNA MASON HOWARD	(MIN)...PRO/PER
KELLY LYNN HOWARD	(MIN)...PRO/PER
HARRIET JANE BELVEAL FAMILY TRUST (TRU)	...PRO/PER
JACK OSBORN	(GAL)...

GENERAL INFORMATION:

**Continued from 11/02/16 and 11/30/16.** No appearance. Jack Osborn appointed GAL for minors.

Continued from 12/28/16. Attorney Mark Flory present for GAL. Counsel informs the Court that there is no custodian available for the blocked account for the minors and it is a requirement of the bank to open the blocked account. Counsel requests a continuance to try to find a solution to the issue.

**Continued from 01/25/17, 04/05/17 and 06/07/17. Kariann Vorhees is to be custodian of the bank accounts.**

THIS CASE SET FOR HEARING ON Proof of Blocked Accounts for Money Belonging to a Minor Pr.C. § 3410.

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

1. Petitioner, Marie Pasillas, is Successor Trustee of the Harriet Jane Belveal Trust created 12/27/13.
2. Need receipt and acknowledgements re proof of blocked accounts for each minor Kortnie (17) Brittany (10), Brianna (10) and Kelly (9).
3. Need report of GAL Jack Osborn.

RECOMMENDATION

Inquire status of report and receipt for blocked account.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700165

CASE NAME: JIMMIE F. RAYBURN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

EILEEN WAZEWSKI (PET)...ZUMBRUNN LAW CORPORATION  
JIMMIE F RAYBURN (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Domestic Partner Petition by Eileen Wazewski.

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

1. Petitioner seeks court determine property left by decedent to pass to petitioner per terms of the will without administration.
2. Assignments of interest filed by children.
3. Will attached is holographic. Proof of holographic instrument filed.
4. ~Proposed Form Order: 02/10/17.

#### RECOMMENDATION

Court's discretion.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS

HEARING:

Hearing Re: STATUS ON MEDIATION

COUNSEL:

ANTHONY SANDERS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
TREBIEN BELLOWS (PET)...OLDMAN, COOLEY, SALLUS, GOLD,  
IN RE REVOCABLE TRUST OF SAMUEL J SANDERS (TRU)...  
SAMUEL J. SANDERS JR. (PET/OBJ)...GIFFORD, DEARING & ABERNATHY,

Status – No notes – JTD

Future Hearings: 8/16/17: Petition for Order 1.

Determining that Certain Real Property is an Asset of the Revocable Trust etc. Petition for  
1. Suspension of Trustee Samuel Sanders, Jr. 2. Removal of Trustee, Etc. First Account  
Report of Samuel J Sanders Jr. & Petition for Allowance of Fees.

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700426

CASE NAME: FRIEDA AUGUSTA HIRSCH

HEARING:

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

COUNSEL:

BENNETT WILLIAM HIRSCH (PET)...THOMAS W DOMINICK  
FRIEDA AUGUSTA HIRSCH (DEC)...

#### GENERAL INFORMATION

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

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

1. Will waives bond. The estate consists of \$284,000 of which \$4,000 is personal property.
2. ~Proposed Form Order: 05/03/17

#### RECOMMENDATION

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

(ww/lc)

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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS0701036

CASE NAME: MARIA ANNA SCHULTZE

HEARING:

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

COUNSEL:

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

Future Hearing: 9/05/17: Accounting Review

No notes—JTD



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700554

CASE NAME: Mary Hope Vasquez

HEARING:

Hearing Re: PRELIMINARY INJUNCTION

COUNSEL:

TINA MARIE VASQUEZ                      (PET)...PRO/PER

MARY HOPE VASQUEZ                      (DEC)...

No notes – JTD

(LR)

Future Hearing: 9/14/17: Petition for Letters of Administration

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700236

CASE NAME: SALVATROE PIGNATELLI

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

KENNETH A. SMITLEY (PET/NEPHEW)...MEISSNER, JOSEPH & PALLEY  
SALVATORE PIGNATELLI (DEC)...

GENERAL INFORMATION:

**Continued from 07/12/17** at request of Counsel. Counsel represents bond will be posted by Friday. Court trials this matter 1 week.

**Continued from 07/19/17.**

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. Kenneth Smitley, nephew, appointed executor on 06/12/17, full authority \$20,000 bond.
2. Need bond in order for letters to issue.

RECOMMENDATION:

Inquire status.

(lc/lh)

Future Hearing: 8/20/18: Accounting Review

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**CONSERVATORSHIPS**

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DATE: 08/02/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1500110

**See also 17A**

CASE NAME: LUCIO CORONADO

HEARING:

Accounting Review

COUNSEL:

CHERI SIPLE

(CPE)...PRO/PER

CHERI SIPLE

(PET)...PRO/PER

LUCIO CORONADO III

(CPE)...FULLERTON LEMANN SCHAEFER & DO

LUCIO CORONADO

(CEE)...JAMES B CHURCH

**CASE TO REMAIN IS S36**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Lucio Coronado III appointed temporary conservator of the person and estate on 08/31/15 and general on 12/05/16, \$20,000 bond.
2. Need 1<sup>st</sup> Account beginning with 08/31/15.

RECOMMENDATION

Inquire status of accounting.

(lc)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/02/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500110

**See also 17**

CASE NAME: LUCIO CORONADO

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CHERI SIPLE

COUNSEL:

CHERI SIPLE (CPE/FRIEND)...PRO/PER  
LUCIO CORONADO III (CPE)...FULLERTON LEMANN SCHAEFER & DO  
LUCIO CORONADO (CEE)...JAMES B CHURCH

**CASE TO REMAIN IN S36**

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Lucio Coronado III appointed conservator of the person and estate on 12/05/16, \$20,000 bond.
2. Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 filed 07/10/17.
3. Proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c) filed 06/30/17 and 07/11/17.
4. Statement of Care Plan filed 07/14/17.
5. Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610 did not include son Lucio Coronado, Jr. **Need** same per Pr. C. §2610(a).
6. Final Inventory and Appraisal filed 05/17/17.
7. Proof of recordation of temporary letters filed 09/16/15 per Pr.C. § 2313; petitioner alleges general letters were recorded on 05/01/17.

RECOMMENDATION:

Need to clear note 5.

(nb/lh/lc/lh)

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600055  
CASE NAME: RAY R RAMOS  
HEARING: Petition for Appointment of Conservator

COUNSEL:

RETA R RIOS (CPE)...BRYAN C HARTNELL  
RAY R RAMOS (CEP)...E JOAN NELMS

GENERAL INFORMATION:

Ex-parte hearing 3/17/16 continued. Joan Nelms appointed counsel.  
Continued from 07/18/16 and 09/26/16. Temporary orders denied on 10/13/16.  
Continued from 12/21/16 and **03/08/17. Order for physician to complete Capacity Declaration – HIPPA signed on 03/06/17.**  
**Continued from 05/24/17.**

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person and estate, by sister

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

1. Petitioner requests bond waived as petitioner has no assets in this state and receives only public benefits. Court may wish to inquire the necessity of estate powers. Alternatively, bond may be waived per Pr.C.§2628. JTD
2. Report of court appointed attorney, E. Joan Nelms, filed 05/02/16.
3. Medical powers sought. **Need** Capacity Declaration.
4. Declaration of Completion of Riverside County's Video Orientation filed 02/28/17.
5. Court Investigator report filed 04/15/16.
6. Citation returned served.
7. ~Proposed form order: 3/10/16.

RECOMMENDATION:

Need to clear note 3. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the required documents and hearing re Accounting Review for **10/10/18**. Any account to be filed 30 days in advance of hearing.

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

Superior Court of Calif, County of San Bernardino

Page: 18A add-on

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS424

## **VACATE**

CASE NAME: KENNETH ANDERSON AKA KENNETH DALE ANDERSON

HEARING:

Hearing Re: Bond Review.

### COUNSEL:

BARBARA ANDERSON (PET/WIFE)...PRO/PER  
KENNETH DALE ANDERSON (PCE/CEP)...DONNASUE ORTIZ  
LINDA MAXWELL (SC/CPE/TEE )...ELISABETH KEMPE-OLINGER  
DONNASUE SMITH ORTIZ (PET)...DONNASUE ORTIZ  
KENNETH AND BARBARA ANDERSON TRUST (TRU)...

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Bond Review

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

1. Matter set on 07/05/17. Bond increased by \$172,000 for total of \$1,974,000.
2. Proof of additional bond filed 07/06/17.

### RECOMMENDATION

None.

(lh)

Future Hearings: 1/22/18: Accounting Review, 3/29/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **MISC.**

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DATE: 08/02/17 TIME: 1:30 DEPT: S36P  
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CASE#: MC MS00062

CASE NAME: IN THE MATTER OF ROY LEE PAYNE III

HEARING:

Hearing Re: Status

COUNSEL:

JEANETTE PAYNE

(PET)...PRO/PER

ROY LEE PAYNE

(CTP)...MARK J. FLORY

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status

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

1. Jeanette Payne, mother, was appointed Conservator of person only on 03/10/97.
2. Matter originally set on 11/10/16 Court Investigator report review. Parties reached an agreement for the care of conservatee.
3. Walter Moore appointed counsel on 04/25/17. Need report.

#### RECOMMENDATION

Need report of counsel.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **MISC.**

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DATE: 08/02/17 TIME: 8:30 DEPT: S37P  
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CASE#: CIV DS1616871

CASE NAME: IN RE: 3442 GRAY STREET

HEARING: Hearing Re: CLAIM FOR SURPLUS FUNDS BY MARLO R MARTINEZ

COUNSEL:

WESTERN PROGRESSIVE, LLC (PET)...ZIEVE, BRODNAX & STEELE, LLP  
MANUEL A. LEO (CLA)...PRO/PER  
ANTHONY HENRY MARTINEZ (PRO/PER)  
STATE OF CALIFORNIA (PRO/PER)  
STATE OF CALIFORNIA EMPLOYMENT (PRO/PER)  
JAN C. STURLA, DEPUTY (PRO/PER)  
DISTRICT ATTORNEY CHILD SUPPORT (PRO/PER)  
FAMILY SUPPORT DIVISION (PRO/PER)  
GROVER TRASK DISTRICT ATTORNEY (PRO/PER)  
DISTRICT ATTORNEY (PRO/PER)  
SAN BERNARDINO COUNTY DEPT OF CHILD SUPPORT SRVCS (PRO/PER)  
L. ART, CHIEF ATTORNEY (PRO/PER)  
ADVANCE DISPOSAL COMPANY (PRO/PER)  
PHIL LOWE ATTORNEY (PRO/PER)  
JEFFREY SCHROER (PRO/PER)  
EDWARD J. MCCUE (PRO/PER)  
JENNIFER A. COULTAS (PRO/PER)  
COLIN S. ANDERSON (PRO/PER)  
COUNTY OF SAN BERNARDINO, CENTRAL COLLECTIONS (PRO/PER)  
HUNT & HENRIQUES (PRO/PER)  
LAW OFFICES OF KENOSIAN & MIELE (PRO/PER)  
NEUHEISEL LAW FIRM, P.C. (PRO/PER)  
MARLO R. MARTINEZ, ADMINISTRATION (MICHAEL C MADDUX)

Waiver of Court Fees and Costs filed by MARLO R. MARTINEZ is GRANTED

**XREF: PROPS1600899**

No notes – JTD

(LR)



Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 08/02/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1200099

CASE NAME: RUTH M SNYDER

HEARING:

Accounting Review

COUNSEL:

GARY R SNYDER

(PET)...JACK B OSBORN

RUTH M SNYDER

(DEC)...

DANIEL SNYDER

(BEN)...THOMAS C. WATTS

GENERAL INFORMATION:

Continued from **4/13/16, 6/15/16, 08/17/16, 11/16/16, 01/11/17, 03/22/17 and 05/31/17**. No asset declaration to be filed.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration W/WA issued to Gary Snyder, son, on 09/04/13; full authority, no bond.
2. Previous status report approved on 04/08/15.
3. Need accounting or next status report.

RECOMMENDATION

Inquire status of accounting or Pr.C. § 12251 petition.

(lc/sa/lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200178  
CASE NAME: MTR OF HIAM A BAKRIKASSBAH  
HEARING: FIRST Account and Report of AHLAM ALGAOUNI and Petition for allowance of fees filed.

COUNSEL:

AHLAM ALGAOUNI (PET)...CHO, SHEASBY, CHUNG & IGNACIO  
HIAM A BAKRIKASSBAH (DEC)...  
BASSIM EL-JAOUNY (PET)...EDWARD B FISCHER & ASSOCIATES

**XREF: CONPS1100276**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account current and Report, Petition for Approval of Agreement and Reimbursement of Costs by Ahlam Algaouni, son.

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

1. Accounting period 03/13/12 – 01/31/17. Accounting period shall start at date of death 12/15/11. Need corrected accounting period.
2. Assets on hand \$843,098.15; cash of \$298,098.15, remaining in real property and judgment against Bassim El-Jaouny (\$485,000). However, the judgment appears to be for double damages totaling \$970,000. Need verified supplement explaining and/or corrected accounting.
3. Inventory and Appraisal indicates judgment of \$485,000; however, order states total judgment of \$970,000 [05/01/17]. Need verified supplement explaining and/or corrected Inventory and Appraisal.
4. Petitioner seeks bond of \$500,000 be reduced to \$0. Bond waivers filed with supplement filed 05/18/17. JTD
5. Bassim El-Jaouny's share of estate was ordered forfeited per Pr.C. § 259(a).
6. Petitioner seeks approval of signed distribution agreement. Itemized [Acct. 05/12LFpg22-23]. JTD
7. Counsel seeks reimbursement of costs totaling \$889.30. Itemized [Acct. 05/12LFpg24]. JTD

RECOMMENDATION

Need to clear notes 1-3. If approved, set Accounting/Status Review for **08/08/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/02/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500087

CASE NAME: Jean-Jacques Ackermann

HEARING:  
Hearing re Final Discharge

COUNSEL:

DAVID M WILSON (PET)...RACHEL J HARRIS  
JEAN-JAQUES ACKERMANN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of David Wilson, non-relative, approved on 07/25/16.
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).

RECOMMENDATION

Inquire status of discharge order.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/02/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1501067

## **VACATE**

CASE NAME: MTR OF MARILYN MILLER

HEARING:

Accounting Review

COUNSEL:

WAYNE FAWCETT

MARILYN MILLER

(PET)...J. PETER WAKEMAN

(DEC)...

First and Final Account and Report filed 07/26/17.

Future hearing date: 10/18/17: First and Final Account and Report of Wayne Fawcett

Superior Court of Calif, County of San Bernardino

Page: 6

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

-----  
DATE: 08/02/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600968

CASE NAME: MTR OF KATHLEEN DELORES CLASPELL

HEARING:

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

COUNSEL:

JANICE HAYNES (PET)...ROBERTA L. TAYLOR & ASSOCIATES  
KATHLEEN DELORES CLASPELL (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Janice Haynes, sister.

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

1. All beneficiaries waive accounting.
2. Petitioner waives statutory compensation.
3. Attorney seeks statutory fees of \$8,842.40. Ok.
4. Attorney seeks reimbursement of costs totaling \$1,531; leaving a balance of \$531 unpaid. Itemized [Acct.04/24 LFpg 8-9].
5. Petitioner seeks a reserve of \$1,000.
6. ~Proposed Order: 04/24/17.

#### RECOMMENDATION

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

(lc)

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

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DATE: 08/02/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700467

CASE NAME: MTR OF CATRINO SABARIAN HERNANDEZ

HEARING: Petition for LETTERS OF ADMINISTRATION

COUNSEL:

REYES HERNANDEZ CHAPARRO (PET)...PRO/PER  
CATRINO SABARIAN HERNANDEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Reyes Hernandez Chaparro, sister

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

1. All heirs waive bond.
  - a. Section 3e is incomplete as to why bond should not be ordered. However, bond waiver filed.
  - b. The estate consists of \$27,385.00 of which \$3,385.00 is personal property; however, property calculation is incorrect as there is also income of \$21,828. Need verified supplement.
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication
4. Section 2a requests that decedents' will be admitted; however, the petition is for letters of administration. Court may wish to deem as an inadvertence. JTD
5. Section 5 of the petition states that the decedent has children but none are listed on attachment 8. Court to clarify if there are any surviving children.
6. Section 5b of the petition must address whether the decedent was survived by a stepchild or foster child. Court to clarify.
7. ~Proposed Form Order: 05/15/17

RECOMMENDATION

Need to clear notes 1-3, then Court's discretion re bond. If approved, set Accounting/Status Review for **10/10/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:35 DEPT: S37P  
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CASE#: CON PS1500269

CASE NAME: JORDAN ALAN WASHINGTON

HEARING:

Petition for Substituted Judgment to Create a Special Needs Trust

COUNSEL:

RONALD WASHINGTON (CPE)...GUY A BOVEE  
VERNETTE WASHINGTON (CPE)...GUY A BOVEE  
JORDAN ALAN WASHINGTON (CEP)...SHERRI L KASTILAHN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearing: 9/13/17: Accounting Review

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/02/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700247

CASE NAME: ROBERT D. BAILY, udt dated May 19,1998

HEARING:

Petition for APPOINTMENT OF SUCCESSOR TRUSTEE

COUNSEL:

IAN BAILY (PET)...DALE K BETHEL  
TRUST OF ROBERT D. BAILY (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. 30 days' notice appears to be sufficient.



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/02/17 TIME: 8:35 DEPT: S37P  
-----

CASE#: PRO PS1700459

CASE NAME: MTR OF VLADO RADOSAVLJEVIC TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

DUNJA RADOSAVLJEVIC (PET)...CHRISTINA E GENTILINI  
THE VLADO RADOSAVLJEVIC TRUST (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. 30 days' notice filed. If any property has an encumbrance, court may wish to require notice to mortgage holder.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

-----  
DATE: 08/02/17      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS0800028

CASE NAME: MTR OF TERRY R LACOSTE

HEARING: NINTH AND CURRENT Account and Report of CHRISTINA ERICKSON-TAUBE and Petition for allowance of fees filed.

**COUNSEL:**

CHRISTINA ERICKSON-TAUBE	(CE/CPE )...ALEX R BORDEN
TERRY R LACOSTE	(CEP/CTE)...WALTER T MOORE
JACK B. OSBORN	(PET)...JACK B OSBORN
MELODIE Z SCOTT	(TP )...PRO/PER
EDWARD IRVING	(PRO/PER)

**CCP170.6 filed as to CYNTHIA LUDVIGSEN**

**GENERAL INFORMATION**

**Continued from 05/24/17.**

THIS CASE SET FOR HEARING ON 9<sup>th</sup> Account Current and Petition for Allowance of Fees by Christina Erickson Taube.

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

1. Accounting period 02/01/16 – 01/31/17.
2. Assets on hand \$101,850.65 of which \$97,350.65 is cash.
3. Petitioner requests fees of \$10,611.90 for services billed at \$65/115 per hour. Itemized, not totaled. [Acct. 04/12 LFpg 22-31].
4. Attorney requests fees of \$4,444.50 for 14.6 hours at \$135/390 for paralegal and attorney services. Itemized [Acct. 04/12 LFpg 34-36].
5. Petitioner requests a reduction of bond from \$167,000 to \$160,000. Appears ok.
6. ~Proposed Order: 04/12/17.

**RECOMMENDATION**

Court's discretion re fees. If approved, set next hearing re Accounting Review for **04/19/18**, or a biennial Accounting Review for **04/18/19**. Accounting to be filed 30 days' in advance.

(lc/lh/lc)

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1100151

CASE NAME: STEVEN BURNICE MOORE

HEARING:

Petition for ATTORNEY'S FEES (THIRD)

COUNSEL:

LYLE STOTELMYRE	(CE/CPE)...	M DANIEL SAYLOR
STEVEN BURNICE MOORE	(CTE/CEP)...	
MICHELLE VANCE	(CP )...	EDWARD B FISCHEL & ASSOCIATES
BRYAN C HARTNELL	(PET)...	BRYAN C HARTNELL

GENERAL INFORMATION

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

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

1. Petitioner, Bryan Hartnell, appointed counsel on 03/13/03.
2. Petitioner requests fees of \$2,637.50 for 10 hours at \$75/425 per hour for paralegal and attorney services. Itemized [Pet. 06/28/17 LFpg 8-9]. Need qualifications of paralegals per requirements of CRC 7.703(e)(1)(c) which show the completion of mandatory continuing education per Business & Professions Code 6450(d).
3. ~Proposed Order: 06/28/17.

RECOMMENDATION

Need to clear note 2.

(lc/lh)

Future Hearing: 01/17/18: Accounting Review

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500023

CASE NAME: SARAH WINE

HEARING:  
Hearing re Final Discharge

COUNSEL:  
INLAND COUNTIES REGIONAL CENTER (CE )...LAYNE A BARTHOLOMEW  
SARAH WINE (CTE)...  
INLAND COUNTIES REGIONAL CENTER (PET)...LAYNE A BARTHOLOMEW  
SPECIAL NEEDS TRUST OF SARAH WINE (BEN)...PRO/PER

***XREF: CIVDS1400687***

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. First account and termination of Court supervision of IRC approved on 07/27/16.
2. No receipt required as there was no distribution and court supervision terminated.
3. Need Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status of discharge.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600009

CASE NAME: LARRY WRIGHT JR

**VACATED**

HEARING:

Accounting Review

COUNSEL:

GLORIA BLAKELY-JONES

LARRY WRIGHT JR

(CPE)...GREGORY L ZUMBRUNN

(CEE)...

GENERAL INFORMATION

**Continued from 05/17/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Gloria Blakely-Jones, mother, appointed Conservator of person and estate on 03/09/16, no bond.
2. Final Inventory and Appraisal filed; \$0 assets.
3. Need accounting or waiver.

RECOMMENDATION

Inquire status of accounting.

(lc)

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700059

CASE NAME: LARDINE ROBINSON  
HEARING: Petition for Appointment of Conservator

COUNSEL:

TYTIANA DAWSON (CPE)...PRO/PER  
LARDINE ROBINSON (CEP)...JAMES B CHURCH

GENERAL INFORMATION

Temporary orders denied on 02/28/17; no emergency.  
Continued from 03/22/17. James Church appointed counsel.  
**Continued from 05/31/17.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person by Tytiana Dawson, daughter.

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

1. Petitioner seeks medical powers. Capacity Declaration filed on 06/19/17.
2. Petitioner seeks dementia powers. Report of Counsel James Church filed 05/23/17.  
**Petitioner withdrawals dementia power request on 05/31/17.**
3. Dismissal entered 05/18/17 as to conservatorship of the estate only.
4. Certificate of Completion of the Conservatorship Training Class filed 04/10/17.
5. Citation returned served.
6. CI report filed 03/03/17.
7. Notice of Change of Address filed 07/20/17 indicates proposed conservator Tytiana Dawson now resides in Alabama. As it appears proposed conservatee was previously residing with Tytiana Dawson, question address of proposed conservatee? Need verified supplement.
8. ~Proposed Form Order: 05/31/17

RECOMMENDATION

Need to clear note 7. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the required documents and hearing re Accounting Review for **10/10/18**. Any accounting to be filed 30 days in advance.  
(lc/lh/lc/lh/lc/lh)

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

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DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700089  
CASE NAME: MTR OF MARGO DIANA GONZALEZ  
HEARING: Petition for Appointment of Conservator

COUNSEL:

MONA ANGELES VIDALES (CP)...PRO/PER  
MARGO DIANA GONZALEZ (CTP/CEP)...SANDY L. TURNER  
HENRY VIDALES (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Mona Vidales, sister.

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

1. Mona and Henry Vidales, Sister and step-father, appointed **limited** Conservators of person only on 04/29/15 in Los Angeles County; matter transferred to San Bernardino on 02/28/17. It appears petitioner is seeking to remove co-conservator Henry Vidales. Henry is allegedly 92 and suffering from advanced kidney disease. **Need resignation of Henry or petition for removal.**
2. List of required contacts (Local form SB-12224) does not appear to list all relatives in 2<sup>nd</sup> degree. **Need** same.
3. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
4. Petitioner does not appear to seek medical powers; however, has current medical powers, yet a Capacity Declaration is not filed. Court to inquire.
5. Petitioner does not seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351 or civil rights not be limited without court order. Court to inquire.
6. Proposed conservatee is developmentally disabled. Report of Counsel Turner filed 06/28/17.
7. Proposed conservatee is developmentally disabled. IRC report filed 06/27/17.
8. Certificate of Completion of the Conservatorship Training Class filed 07/03/17.
9. Court Investigator report filed 06/29/17 and 07/13/17.
10. ~Proposed Form Order: 06/30/17.

RECOMMENDATION

Need to clear notes 1-3. If approved, set hearing for Compliance Review for **03/07/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. § 1830(c); Level of Care and Care Plan per Pr.C. § 2352.5.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700119

**VACATED**

CASE NAME: MTR OF CHRISTOPHER MICHAEL VALLET  
HEARING: Petition for Appointment of Conservator

COUNSEL:

DEOTTIS L VALLET (CPE)...PRO/PER  
CHRISTOPHER MICHAEL VALLET (CEP)...MITCHELL I ROTH

Dismissal filed 06/27/17.



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/02/17 TIME: 9:30 DEPT: S37P  
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CASE#: VC VS408

CASE NAME: IN THE MATTER OF TOM W BROWN JR

HEARING:  
Accounting Review

COUNSEL:

GRACE BROWN	(CPE)...DIANA J. CARLONI ATTORNEY AT L
TOM W BROWN	(CEP)...SHERRI L KASTILAH
TOM W BROWN JR	(CPE)...DIANA J CARLONI

GENERAL INFORMATION

**Continued from 03/22/17 and 05/31/17. Accounting to be filed by 07/02/17. Nothing new filed.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 12<sup>th</sup> Account of Grace Brown, mother, approved on 05/23/16.
2. Need 13<sup>th</sup> Account beginning with 11/01/15.

RECOMMENDATION

Inquire status of accounting.

(lc)