



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 08/07/17**

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.

nb07180802

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

**SEE ALSO 2 3 4**

HEARING:

Hearing Re: STATUS OF SETTLEMENT AGREEMENT

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA  
THE FAMILY TRUST OF ANNA RAMON TRUST (TRU)...  
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAREN  
NATIONSTAR MORTGAGE (CC )...SONGSTAD RANDALL COFFEE & HUMP  
SANDRA YZAGUIRRE  
AMERICAN MORTGAGE NETWORK INC  
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)  
FIRST AMERICAN TITLE INSURANCE  
CLAUDIA ARROYO

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

No notes – Court to inquire.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

**SEE ALSO 1 3 4**

HEARING:

Hearing Re: CROSS COMPLAINT

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA  
THE FAMILY TRUST OF ANNA RAMON TRUST (TRU)...  
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAREN  
NATIONSTAR MORTGAGE (CC )...SONGSTAD RANDALL COFFEE & HUMP  
SANDRA YZAGUIRRE  
AMERICAN MORTGAGE NETWORK INC  
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)  
FIRST AMERICAN TITLE INSURANCE  
CLAUDIA ARROYO

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

Currently under review by Legal Research

(LR)

Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

**SEE ALSO 1 2 4**

HEARING:

Hearing Re: OSC RE: WHY ACCOUNTING SHOULD NOT BE FILED

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA  
THE FAMILY TRUST OF ANNA RAMON TRUST (TRU)...  
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAREN  
NATIONSTAR MORTGAGE (CC )...SONGSTAD RANDALL COFFEE & HUMP  
SANDRA YZAGUIRRE  
AMERICAN MORTGAGE NETWORK INC  
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)  
FIRST AMERICAN TITLE INSURANCE  
CLAUDIA ARROYO

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

GENERAL INFORMATION

Continued from **01/14/16, 03/24/16, 7/21/16, 08/24/16 and 11/14/16**. Counsel indicates agreement reached.

**Continued from 02/27/17 and 05/08/17 at request of counsel.**

THIS CASE SET FOR HEARING ON OSC re Why accounting Should not be Filed by George Acosta.

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

1. On 10/15/15, Court set OSC on Cross-Complaint, Declaratory Relief hearing; why George Ramon Acosta should not be required to file an accounting.
2. Any objections as to why he should not shall be filed by 12/4/15. Reply to be filed on 12/28/15.
3. Notice of Non-response filed by George Ramon Acosta with points and authorities on 12/28/15.
4. Improper accounting filed by George Ramon Acosta on 01/25/16. No fees taken, no hearing date etc as accounting is not proper.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

## RECOMMENDATION

Court's discretion re OSC.  
(lc/nb)

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Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

**SEE ALSO 1 2 3**

HEARING:

Petition for RECOVER PROPERTY HELD BY TRUST

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA  
THE FAMILY TRUST OF ANNA RAMON TRUST (TRU)...  
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAREN  
NATIONSTAR MORTGAGE (CC )...SONGSTAD RANDALL COFFEE & HUMP  
SANDRA YZAGUIRRE  
AMERICAN MORTGAGE NETWORK INC  
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)  
FIRST AMERICAN TITLE INSURANCE  
CLAUDIA ARROYO

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

Currently under review by Legal Research

(LR)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501083

CASE NAME: KENNETH AARON RAINS

**VACATED**

HEARING:

Readiness Calendar

COUNSEL:

TERRY ANDERSON

(PET)...TREVOR

KENNETH AARON RAINS

(DEC)...

BARBARA MOORE

(PET)...LINDA ROBERTS ROSS

SHELLIE DINNAUER

(PET)...LINDA ROBERTS ROSS

No notes – Readiness.  
(nb)

Future Hearings:  
8/28/17-9/01/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600012

CASE NAME: MTR OF BESSIE MAE BEAN

**SEE ALSO 7**

HEARING:

Hearing Re: OSC RE SANCTIONS FOR FAILURE TO APPEAR/FILE

COUNSEL:

PAUL D BEAN	(PET)...	JENNIFER L FIELD
BESSIE MAE BEAN	(DEC)...	
NAOMI ROSE JONES	(PET)...	DAVID M HUYNH

GENERAL INFORMATION:

**Continued from 07/03/17 due to non-appearances. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions as to Administrator for FTA/File Accounting** on Accounting Review

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

1. Letters of Administration issued 06/24/16, full authority, \$215,000 bond.
2. No accounting or status report of administration.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600012

CASE NAME: MTR OF BESSIE MAE BEAN

**SEE ALSO 6**

HEARING:

Accounting Review

COUNSEL:

PAUL D BEAN

(PET)...JENNIFER L FIELD

BESSIE MAE BEAN

(DEC)...

NAOMI ROSE JONES

(PET)...DAVID M HUYNH

See prior matter #6  
(nb)

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Superior Court of Calif, County of San Bernardino

Page: 8

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600981

CASE NAME: RUBEN TAFOLLA ARANDA

HEARING:

Spousal Property Petition hearing.

COUNSEL:

KARINA GOMEZ	(PET/OBJ)...PRO/PER
RUBEN TAFOLLA ARANDA	(DEC)...
MARIA DOLORES TAFOLLA	(PET)...GEORGINA LEPE

**X-REF: FAMSS1704094**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Maria Tafolla ["Petitioner"].

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

1. Petitioner requests a determination of real and personal property passing to the surviving spouse as community property. Specifically, real property at Ontario in San Bernardino County. Petition indicates parties were married on 05/05/07 and both used their earnings, a community asset, to pay the mortgage on the home.
2. Petition affixes Grant Deed [LF, p6] dated 08/23/04 wherein, decedent's brother granted a joint tenancy interest to decedent as "an unmarried man." Grand Deed [LF, p7] dated 03/29/05 grants the property to decedent, only, as "an unmarried man." Deed of Trust [LF, p9] dated 03/22/05 and Deed of Trust [LF, p25] are titled in decedent's name as "an unmarried man."
3. Section 9 [LF, p. 3] does not include relationships of persons listed. However, it appears decedent may have been survived by issue, who would also share a two-thirds distribution in the estate, per Pr.C. §6401, if the real and personal property is separate property of decedent.
4. **Objections filed 07/03/17 by daughter, Karina Gomez, with supporting declarations by siblings Chris Tafolla and Ruben Tafolla, Jr. Need verification by Karina.**
5. Petitioner's declaration in support of petition filed 07/11/17.
6. Points & Authorities filed 07/11/17. Referred to Legal Research.

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7. **Reply to Objections by Maria D. Tafolla on 07/13/17.**
8. ~Proposed Form Order 05/15/17.

RECOMMENDATION:

Set for contested hearing.

(nb)

Future Hearings:

09/25/17: Petition for Instructions & Suspension of Trustee Powers

02/05/18: Accounting Review

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700231

CASE NAME: CHARLES DAVID PEREZ

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARGARET L PEREZ	(PET)...PRO/PER
BRIANA PEREZ RICE	(PET)...PRO/PER
CHARLES DAVID PEREZ	(DEC)...

GENERAL INFORMATION:

**Continued from 05/15/17 at request of petitioners.**

THIS CASE IS SET FOR HEARING ON **AMENDED** (05/01/17) Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by Margaret Perez and Briana Perez Rice.

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

1. Amended Inventory & Appraisal filed 05/01/17, has the following issues:
  - a. Need appraised value for 3 US Bank Accounts on Attachment 1 [LF, p. 4];
  - b. Vin and license to 1980's Yamaha Scooter is not included;
  - c. License number to 2006 Toyota Scion is not included;
  - d. Need full legal description of real properties listed on Attachment 2 [LF, p. 5].Need corrected inventory.
2. Legal description to real property at Attachment 11 to petition [LF, p. 8] is incomplete and does not include values for 3 US Bank Accounts or legal descriptions for real properties. Need verified supplement.
3. Attachment 14 is not included. Need same via verified supplement.
4. Need bank /financial statements to support date of death balances per Local Rule 20-908.
5. Petitioners request determination that decedent's real and personal property located at Yucca Valley, CA in San Bernardino County pass to petitioners without administration.
6. ~Proposed Form Order 03/08/17.

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**RECOMMENDATION:**

Need to clear notes then Court's discretion.

(nb)

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700243

CASE NAME: MARY T MARSHALL

**SEE ALSO 11**

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JAMES L MARSHALL (PET)...JOHN G WURM  
MARY T MARSHALL (DEC)...

**X-REF: SPR 51309**

**\*\*COURT TO REVIEW NEXT MATTER PRIOR TO ADDRESSING THIS HEARING\*\***

GENERAL INFORMATION:

**Continued from 05/22/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Robert Joseph Kondalski ["Petitioner"- son].

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

1. Petition, section one [petition filed 03/16/17, LF, p2 and supp. filed 07/14/17, LF, p.6] does not include James L. Marshall (surviving spouse) who has also signed petition.
2. Inventory & Appraisal attached to petition [filed 3/16/17, LF, p. 15] has the following issues:
  - a. Need full legal address and descriptions of real properties listed on Attachment 2 for vacant land, parcels 15 and 16 in LA county and 4 parcels listed by APN #'s.
  - b. Attachment 2 includes community property in LA County.  
**Property profile [LF, p. 11 to supp. filed 07/14/17] indicates the property is in Lancaster, LA County. It appears decedent's separate and community property are being intermingled; subject properties may have already been distributed; or are vested in Mary T. Marshal's name. Need further clarification via verified supplement.**
3. Petitioner requests determination that decedent's real property located in San Bernardino County pass to petitioners without administration. Petitioners are decedent's son and surviving spouse. Petitioner attaches a copy of decedent's

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will [LF, p. 4] **dated 05/14/84**, however, will indicates decedent's surviving spouse, James L. Marshal is the primary beneficiary.

4. **Supp. (07/14/17) affixes a copy of a Judgment Settling Final Account and Directing Final Distribution on Waiver of Account et. seq. in related case by daughter, Mary T. Marshall (decedent) entered on 02/26/87 in County of San Bernardino. Subject order reflects decedent as only heir of 2 pieces of unimproved property in LA County and personal property [LF, pgs. 26-29].**
5. ~Proposed Form Order 03/16/17.

**RECOMMENDATION:**

Need to clear notes. Suggest Court require vesting documents to all properties at issue and require separate verified supplements for each petition. Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700243

CASE NAME: MARY T MARSHAL

**SEE ALSO 10**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JAMES L MARSHALL

(PET)...JOHN G WURM

MARY T MARSHALL

(DEC)...

**X-REF: SPR 51309**

GENERAL INFORMATION:

**Continued from 05/22/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by surviving spouse, James T. Marshall ["Petitioner"].

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

1. Petition [filed 3/16/17, LF, pgs. 13-14, indicates decedent's primary residence was in Agua Fria, California, in Mariposa County. Venue appears improper. **Supp. (07/14/17) alleges Agua Fria is in San Bernardino County. However, Grant Deed [LF, p. 5] reflects a mailing address in Rim Forest and property profile [LF, p. 11 to supp. filed 07/14/17] indicates the property is in Lancaster, LA County. It appears decedent's separate and community property are being intermingled. Need further clarification via verified supplement.**
2. Will [LF, p4], **dated 05/14/84**, also referenced all corporate and/or partnership interests [petition filed 3/16/17, LF, p6] in the business known as Advanced Vertical Systems, Inc., Tommy Glascock Heating and Air Conditioning, or any other business decedent had interest in. Question the status of subject assets? **Supp. (07/14/17) indicates Advanced Vertical Systems, Inc. and Tommy Glascock Heating and Air Conditioning were not in business at the time of decedent's demise.**
3. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically real property in San Bernardino County. **Supp. (07/14/17) indicates parties were married on 11/28/78 and the**

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**property was sustained for 26 years with community property funds. However, copy of Grand Deed [affixed at LF, p. 5 to supp. filed 07/14/17] vests title to “Mary B. Trammell, an unmarried woman & Mary T. Marshall, a married woman as her sole and separate property, Mother and Daughter as Joint Tenants.” .**

4. ~Proposed Form Order 03/16/17.

**RECOMMENDATION:**

Suggest Court require vesting documents to all properties at issue and require separate verified supplements to each petition. Court’s discretion

(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700301

CASE NAME: RONALD MARSH

HEARING:

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

COUNSEL:

DONNA MARSH BROOKS (PET)...DIANA J CARLONI

RONALD MARSH (DEC)...

**X-REF: FAMSS 1202637**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named Executrix and sister, Donna Faye Brooks, aka Donna Marsh Brooks ["Petitioner"].

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

1. Will dated 08/01/14 is not witnessed and thus, does not meet the requirements of Pr.C. §6110. Question the validity of the 08/01/14 document? Need verified supplement with points and authorities to prove the 08/01/14 document is a valid testamentary document. **P's and A's filed 07/06/17 proffer Pr. C. §§6110, 6111.5, and alleges that clear and convincing evidence that the Will propounded in the petition is the valid Last Will and Testament of Ronald Marsh and requests that said Will be admitted to probate. JTD.**
2. Will waives bond. However, petitioner is a non-resident and Court has discretion to require bond per Pr. C. §8571. Does Court wish to require minimum bond of \$20,000 or full bond of \$66,000? JTD.
3. Proof of publication filed.
4. ~Proposed Form Orders/Letters 04/03/17.

RECOMMENDATION:

Court's discretion. If approved, set future hearing for Accounting/Status Review on **08/20/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700421

CASE NAME: MTR OF BRYAN KIMBAL SMITH

HEARING:

Spousal Property Petition hearing.

COUNSEL:

MATHILDA H SMITH

(PET)...FD WHITLEY

BRYAN KIMBAL SMITH

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Mathilda H. Gonda-Smith ["Petitioner].

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

1. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically, real property at Forest Falls in San Bernardino County. Petition indicates property was acquired by parties while they were married and paid for using community property funds. Does Court wish to require a copy of vesting document? JTD.
2. Section 7b is marked instead of 7a.
3. Decedent died intestate with 2 issue, who would also share a two-thirds distribution in the estate, per Pr.C. §6401, if the real and personal property is separate property of decedent.
4. ~Proposed Form Order 05/01/17.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700471

CASE NAME: MTR OF DONALD EUGENE HAGEMAN AKA DONALD E.  
HAGEMAN

HEARING:

Petition for PROBATE OF WILL AND LETTERS TESTAMENTARY W/LIMITED  
AUTHORIZATION TO IAEA

COUNSEL:

JAMES M CODDINGTON (PET)...BETTY AUTON-BECK  
DONALD EUGENE HAGEMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full  
authority under IAEA by Executor, James M. Coddington ["Petitioner"-friend].

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

1. Non-resident petitioner requests bond in the amount of \$150,000 be fixed.  
Appears sufficient. JTD.
2. Proof of publication filed.
3. ~Proposed Form Letters, only 05/04/17.

RECOMMENDATION:

RFA , \$150,000 bond. If approved, set future hearing for Accounting Review on  
**10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of  
Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700472

CASE NAME: MTR OF MARY LOU JACKSON

HEARING:

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

COUNSEL:

SYLVIA ANDERSON  
MARY LOU JACKSON

(PET)...REIKO H HICKS  
(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of Lost Will and for Letters Testamentary full authority under IAEA by Executrix, Sylvia Anderson ["Petitioner"-sister]..

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

1. Declaration re: Lost Will is filed. Petitioner alleges the whereabouts of the Original Will is unknown and she has been unable to locate decedent's Original Will dated 08/13/04. Petition indicates Decedent showed Petitioner her signed Will in 2009 and mailed a copy of the signed will to petitioner prior to her death. Does Court wish to deem presumption in Pr. C. §6124 overcome? JTD.
2. Will waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. Estimated value of estate is \$140,000. JTD.
3. Proof of publication filed.
4. ~Proposed Form Order/Letters 05/05/17.

RECOMMENDATION:

Court's discretion re notes 1-2. If approved, set future hearing for Accounting Review on **10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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Superior Court of Calif, County of San Bernardino

Page: 15A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 08/07/17      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1600213

CASE NAME: MTR OF NICOLE JEANNE MACERA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JOSEPH C MACERA

COUNSEL:

JOSEPH C MACERA                      (CPE/FATHER)...CHRISTINA FERRANTE  
EVA A/ MACERA                        (CPE/STEPMOTHER)...CHRISTINA FERRANTE  
NICOLE JEANNE MACERA              (CEP)...SANDY L. TURNER

**GENERAL INFORMATION**

Order appointing Joseph and Eva Macera (father/stepmother) Limited Conservators of the person and estate, entered 12/05/16, \$20,000 bond.

**Continued from 07/10/17 at request of counsel. Notice to be given by Attorney Sandy Turner.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1      Proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c) with proof of service filed 04/25/17.
- 2      **Care Plan filed**
- 3      Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355) filed 06/30/17.

RECOMMENDATION:

None.

(nb/lh/nb)

Future Hearing: 02/26/18: Accounting Review

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

-----  
DATE: 08/07/17

TIME: 9:30

DEPT: S35P  
-----

CASE#: CON PS1700229

CASE NAME: GABRIEL SILVA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN

(PET)...COUNTY COUNSEL

GABRIEL SILVA

(CTP)...EDWARD B FISCHEL

GENERAL INFORMATION

Ex parte orders granted 07/10/17 and Court suspends the power of attorney held by Thuy Doa for Gabriel Silva.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Public Guardian ["Petitioner"].

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

- 1 No bond - PG.
- 2 Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
- 3 Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust; authority to abandon and/or donate personal property with value of \$300 or less; as storage or a sale would exceed the value of said property.
- 4 Petitioner seeks medical powers. Medical Capacity declaration filed in support.
- 5 Petitioner requests dementia powers; **Report by court-appointed counsel, Edward Fischel, filed.**
- 6 **Court Investigator's Report filed.**
- 7 Section 4c(3)(4) are incomplete. Need verified supplement.
- 8 Section 3a(1) to proof of service affixed to Citation appears incomplete. Need proper proof of service.
- 9 Need Notice of Hearing and proof of service.
- 10 Confidential Supplemental Information indicates prior APS involvement [LF, p.4]

**RECOMMENDATION:**

Need to clear notes 7-9. If approved, set hearing for Compliance Review for **03/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/15/18**. Any accounting to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(nb)



Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS0800037

CASE NAME: WAUNETA C. JONES

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN  
WAUNETA C JONES

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

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Fourth Account entered 01/25/16; fifth account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS0800107

CASE NAME: DWAIN GLOVER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

DWAIN GLOVER

(CEP)...HARTNELL LAW GROUP

7<sup>th</sup> Waiver of Account forwarded to department for signature on 07/24/17. Clerk's office to set next suggested hearing date of 06/25/18.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1300289

CASE NAME: LAURA BEARD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

LAURA BEARD

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 01/06/18.

Continued from **08/08/16**. Court states no further continuances on this accounting review.

**Continued from 02/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 08/03/15 Court approved the 1<sup>st</sup> account; 2<sup>nd</sup> accounting now due.
2. No accounting.

RECOMMENDATION:

Inquire status.

(lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

**SEE ALSO 21 22**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

KARON A SPIGNER	(CPE)...BRIAN C MILES
CLAUDE L. GILES	(CEP)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
JEFFALYN A GILES	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by CLAUDE L. GILES is GRANTED

No notes – TSC.

(nb)

Future Hearing:

8/14/17: Petition for Attorney's Fees

Superior Court of Calif, County of San Bernardino

Page: 21

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

**SEE ALSO 20 22**

HEARING:

Hearing Re: Petition for Successor C'tor of person/estate

COUNSEL:

KARON A SPIGNER	(CPE)...BRIAN C MILES
CLAUDE L. GILES	(CEP)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
JEFFALYN A GILES	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by CLAUDE L. GILES is GRANTED

GENERAL INFORMATION

Public Guardian appointed Temporary Conservator of the person and estate on 07/12/16. There is no vacancy.

Ex Parte orders denied on 03/02/17.

Continued from **04/03/17** to clear notes. County Counsel indicates they would consent to be relieved as conservator as to Claude Giles (of person and estate). Jennifer Daniel indicates she has objections to the requested 2590 powers on the petition filed by Jeffalyn Giles. Court authorizes the conservator of the estate to release up to \$2,000.00 for out of state trip to Louisiana of 10 days (up to 12 days in an emergency situation) for Claude Giles to visit with his sick wife in Homer, Louisiana. Jeffalyn Giles is to supply receipts/bills/expenses of the trip.

**Continued from 05/08/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Successor Conservatorship, person and estate by daughter, Jeffalyn A. Giles.

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

1. **Supp. (08/01/17); Confidential Supplemental Information form is not filed as alleged. Need same.**
2. Petitioner requests bond be fixed at \$25,000. Insufficient. Suggest bond of \$55,000 (includes recovery). **Supp. (08/01/17) indicates petitioner is agreeable obtaining bond of \$55,000.**
3. Petitioner seeks Pr. C. § 2590 powers to provide exclusive authority to provide maintenance on real property; to provide for the health and welfare/wellbeing of

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

conservatee; travel with conservatee out of state; prepare a Living Trust; handle conservatee's debts; authority to borrow money and/or refinance conservatee's home at Rialto, CA; to represent conservatee in any legal matter that might arise. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **Supp. (08/01/17) indicates petitioner is seeking Pr. C. § 2590 powers to make the necessary repairs to the property and other authority to refinance or sale of the residence will be sought via Pr. C. §2540.** JTD

4. Petition indicates conservatee is a member of a federally recognized Indian Tribe and owns property on tribal land [LF, p. 5]. **Supp. (08/01/17) indicates proposed conservatee has Indian heritage but is not part of a tribe and does not own property on tribal land.**
5. **Petitioner seeks medical powers, need Medical Capacity Declaration.**
6. Need report of GAL, Mathew Sheasby.
7. Need report by court-appointed counsel, Jennifer Daniel.
8. Court Investigator's Report filed 03/23/17.
9. Certificate of Completion re Conservatorship Class filed 03/02/17.
10. Petitioner and Conservatee reside in Los Angeles County. Suggest transfer of matter to LA County. If so, Court to set control date. **Supp. (08/01/17) requests that matter remain in San Bernardino County as Conservatee's residence is here and once proposed conservatee's daughter graduates from high school next year, parties intend to move back into proposed conservatee's residence in this county.**
11. ~Proposed Form Order/Letters 02/23/17.

#### RECOMMENDATION:

Need to clear notes 1, 5-7 then Court's discretion, If approved, set hearing for Compliance Review for **03/16/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/09/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Future Hearing:

8/14/17: Petition for Attorney's Fees

Superior Court of Calif, County of San Bernardino  
Page: 22  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

**SEE ALSO 20 21**

HEARING:

FIRST Account and Report of KARON A SPIGNER and Petition for allowance of fees filed.

COUNSEL:

KARON A SPIGNER	(CPE)...BRIAN C MILES
CLAUDE L. GILES	(CEP)...JENNIFER M DANIEL
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
JEFFALYN A GILES	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by CLAUDE L. GILES is GRANTED  
TOTAL FEES WAIVED TO DATE: \$645.00

GENERAL INFORMATION:

Continued from **02/16/16** to clear notes.

Continued from **7/11/16** counsel informs Court that the conservator is currently in a coma. Court suspends the conservator and appoints PG as temporary conservator, person and estate. Court orders attorney Brian Miles to be personally present at the next hearing.

Continued from **09/26/16 and 11/07/16**. Court orders Brian Miles to be personally present in court. Court resets the motion currently set for November 9, 2016 to November 28, 2016. All temporary orders to remain in full force and effect. Notice by Judicial Assistant.

Continued from **11/28/16** at request of counsel. Notice waived.

Continued from **03/06/17**. Matter is contested. Ms. Giles to have notice given for 4/3/17.

Continued from **04/03/17**. Jennifer Daniel states she joins Matthew Sheasby's objections as to the first account of Karon Spigner. Court relieves Matthew Sheasby as guardian ad litem of Claude I Giles.

**Continued from 05/08/17 at request of counsel.**

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 11/25/13 to 11/04/15 (2 years).
2. Property on Hand at the beginning of the account period does not match amount on corrected inventory filed 09/10/15 and is short by \$680.31. Does Court wish to deem this amount de minimus? **Supp. (03/03/17) indicates the 09/10/15, corrected inventory shows the balance of the B of A Checking and the Hartford Annuity at the time of filing the Corrected Inventory. Inventory and approval should reflect amount as of date of appointment. JTD.**
3. Assets on Hand \$281,446.78 consisting of \$4,946.78 in cash, \$11,500 in personal property and \$276,500 in a community property interest.
4. Current bond of \$82,000. Appears adequate.
5. Petitioner does not request compensation at this time by reserves the right to petition the court at a later date should funds become available at a later date. **Supp. (03/03/17) indicates Conservator did not keep accurate records and requests that any possible surcharge be offset against any monies owed to her for caring for the Conservatee. JTD.**
6. Petition alleges monies from her personal funds were expended to care for Conservatee and will file a supplement itemizing such costs and will seek reimbursement, thereof. Need supplement itemizing and requesting reimbursement of costs. **Supp. (03/03/17) indicates Conservator did not keep accurate records and requests that any possible surcharge be offset against any monies that she is owed as reimbursement. JTD.**
7. Petitioner requests reimbursement of costs advanced of \$2,500.00.
8. Attorney requests fees of \$20,700.00. Billed at \$375/hour for 55.20 hours' attorney time. Itemized [LF, pgs. 21-23].
9. Attorney requests reimbursement of costs advanced of \$557.92. Itemized [LF, p. 10 & 16].
10. Disbursements – Schedule C requires further clarification via verified supplement as to the following:
  - a. Customer Withdrawal in the amount of \$10,220; **Supp. (03/03/17) indicates amount includes payments to electric and water company for past due bills. Need further clarification via verified supplement.**
11. Need copies of financial statement for ending balance on Hartford Annuity per Local Rule 20-908.
12. Need signed verifications by all care givers, per Local Rule 20-1406(c). **Supp. (03/03/17) includes verifications from some caregivers; copies of cashed checks for those she was not able to obtain signed verifications; and declaration by conservator as to those not able to be located or able to provide copies of canceled checks [LF, pgs. 14-20]. JTD.**
13. Notice given, no objections.
14. **Objections filed 02/17/16 by Claude Giles regarding attorney's fees and disbursements.**
15. **Reply to Objections by counsel, in the form of a declaration, affixed to supplement filed on 03/03/17 [LF, pgs. 22-23].**
16. No written joinder to objections filed as of the review of this matter.

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.



**RECOMMENDATION:**

Matter is contested. Need to clear notes then Court's discretion. If approved, set hearing on the next accounting review for **in 60 days** (if one year) or **01/30/18** (if two years). Account to be filed 30 days in advance. Note Local Rules.  
(nb/dl/nb)

Future Hearing:

8/14/17: Petition for Attorney's Fees

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1400084

CASE NAME: Larry D. Lucas

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

LARRY D LUCAS

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Court terminated LPS Conservatorship on 01/29/16.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered 06/20/16; second and final account now due for period 06/03/15 to 01/29/16.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1500301

CASE NAME: RONALD ANDERSON

HEARING:

Hearing Re: STATUS OF RELOCATION TO ENGLAND

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

RONALD ANDERSON

(CEP)...HARTNELL LAW GROUP

RITA A REHASTE

(TP )...SANDERS REHASTE STERNSHEIN & H

No notes – Status.

(nb)

Future Hearing:

9/11/17: Status on Temporary Conservatorship

**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](mailto: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

Page: 25

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

**SEE ALSO 26 27 28**

HEARING:

Hearing Re: Status of Foreclosure

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

ROBERT J ALDRED

(CEP)...J. DAVID HORSPOOL

KENNETH DAVID HERRING

(CPE)...PRO/PER

J DAVID HORSPOOL

(PET)...DAVID J HORSPOOL

Waiver of Court Fees and Costs filed by ROBERT J ALDRED is GRANTED

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 26

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

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

**SEE ALSO 25 27 28**

HEARING:

Hearing Re: Payment Plan

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT J ALDRED	(CEP)...J. DAVID HORSPOOL
KENNETH DAVID HERRING	(CPE)...PRO/PER
J DAVID HORSPOOL	(PET)...DAVID J HORSPOOL

Waiver of Court Fees and Costs filed by ROBERT J ALDRED is GRANTED

GENERAL INFORMATION:

**Continued from 06/19/17. Attorney Dale Martin states that the loan company is currently in the process of review of the documentation submitted by Chanteil Guy of the Public Guardian regarding the property.**

THIS CASE IS SET FOR HEARING ON Payment Plan

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

1. Matter set at 04/24/17 hearing, wherein, the Court made orders to enjoin the sale of the property to 08/08/17.
2. Counsel for lender and Public Guardian were to arrange a payment plan for Robert Aldred.
3. **Payment plan filed 07/17/17.**

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

**SEE ALSO 25 26 28**

HEARING:

Hearing Re: STATUS RE PAYMENTS & RECEIPTS

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT J ALDRED	(CEP)...J. DAVID HORSPOOL
KENNETH DAVID HERRING	(CPE)...PRO/PER
J DAVID HORSPOOL	(PET)...DAVID J HORSPOOL

Waiver of Court Fees and Costs filed by ROBERT J ALDRED is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status re Payments & Receipts.

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

1. Matter set at 06/19/17 hearing, wherein, court directed the caregivers to turn over bills as soon as they receive them for Robert Aldred to the public guardian. By the 5th of July, the caretakers are to turn over all receipts (up to the 30th of June) to the public guardian- to be delivered or mailed by 4pm July 5, 2017; and the 5th of the month, thereafter, to deliver the last month's receipts. Regarding payments- the court notes the deadline of 15th of the month- court notes that a payment will be sent out by July 15, 2017 (for payments up to date of June 30, 2017) and the 15th of the month thereafter.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 28

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

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600195

CASE NAME: MTR OF ROBERT J ALDRED

**SEE ALSO 25 26 27**

HEARING:

Hearing Re: STATUS RE I & A

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT J ALDRED	(CEP)...J. DAVID HORSPOOL
KENNETH DAVID HERRING	(CPE)...PRO/PER
J DAVID HORSPOOL	(PET)...DAVID J HORSPOOL

Waiver of Court Fees and Costs filed by ROBERT J ALDRED is GRANTED

GENERAL INFORMATION:

Public Guardian appointed Conservator of the Estate, only, on 04/24/17.

THIS CASE IS SET FOR HEARING ON Status of I & A

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

1. Need final Inventory and Appraisal per Pr.C. §2610.
2. Need proof of service of Inventory and Appraisal including Instructions for Objection per Pr. C. §2610.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 29

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

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1700035

CASE NAME: RUTH ELIZABETH ULLRICH

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
RUTH ELIZABETH ULLRICH (CEE)...

#### GENERAL INFORMATION

Ex Parte Orders granted 02/06/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of estate by Public Guardian ["Petitioner"].

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000 in an irrevocable burial trust; authority to abandon and/or donate personal property with value of \$300 or less; as storage or a sale would exceed the value of said property.
4. Petitioner seeks medical powers. Medical Capacity declaration filed in support.
5. Petition's caption does not indicate conservatorship of the person is being requested but includes request for medical and dementia powers. Also, 1g, requesting medical powers is not marked. Need verified supplement.
6. Section 4c and 4c(3) regarding tribal affiliation and land and section 5f regarding developmentally disabled are incomplete. Need verified supplement.
7. Petitioner requests dementia powers; Need report by court-appointed counsel, Bryan Hartnell..
8. Proof of Personal Service filed. However, need return of Citation.
9. **Court Investigator's Report filed.**
10. ~Proposed Form Order/Letters 01/26/17.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



**RECOMMENDATION:**

Need to clear notes 5-8. If approved, set hearing for Compliance Review for **03/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/15/18**. Any accounting to be filed 30 days in advance.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 30

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SG SS6572

CASE NAME: IN THE MTTR OF RONALD BLACKBURN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

RONALD BLACKBURN

(CEP)...FRANK J PRAINITO

GENERAL INFORMATION

**Continued from 07/11/16 and 02/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Court approved Thirty-Fourth Account on 07/07/14 for period ending 02/27/14.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(dl/nb)

Superior Court of Calif, County of San Bernardino

Page: 31

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS01997

CASE NAME: MTR OF KENNETH WANGELINE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

KEN WANGELINE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expired 01/02/16

Court terminated LPS conservatorship on 12/18/15.

**Continued from 03/07/16 and 12/12/16 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Waiving Eighth Account granted 03/09/15 for period ending 12/23/14.
2. Ninth and final account now due for the period 12/24/14 – 12/18/15.

#### RECOMMENDATION

Court's discretion.

(dl/nb)

Superior Court of Calif, County of San Bernardino

Page: 32

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS02108

CASE NAME: MTR OF STEVEN VICTOR

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN  
STEVEN LEE VICTOR

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

GENERAL INFORMATION:

Letters expire: 04/21/18

**Continued from 02/08/16, 06/20/16 and 12/12/16 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Waiving Twelfth Account Current entered 02/27/15 for period 01/17/14 – 12/05/14.
2. Thirteenth Account now due for the period of 12/06/14 – current date.

RECOMMENDATION

Court's discretion.

(dl/dl/nb)

Superior Court of Calif, County of San Bernardino

Page: 33

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS03196

CASE NAME: MTR RE CHRISTOPHER CHAVARRIA

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

CHRISTOPHER J CHAVARRIA

(CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **09/12/16**. All temporary orders to remain in full force and effect.

**Continued from 12/12/16 and 03/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 5/9/16 Court approved the 1<sup>st</sup> Account Current for the period ending 6/30/14.
2. Need an accounting.

RECOMMENDATION:

Inquire status.

(sa/nb)

Future Hearing:

9/15/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 34

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

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: SLC SS2660

CASE NAME: MTR OF ANTONIA SAENZ

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
ANTONIA SAENZ (CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Conservatee died on 08/16/14.

THIS CASE IS SET FOR HEARING ON Thirteenth and Final Account by Public  
Guardian ["Petitioner"].

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

1. Accounting period 05/08/14 to 06/23/16.
2. Assets on Hand will be \$0.00 after payment of petitioner's fees, attorney's fees and debt.
3. PG requests compensation of \$5,022.00.
4. County Counsel requests fees of \$2,622.00.
5. Proposed Order discharges upon filing of documents instead of upon entry of final discharge order.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**08/13/17.**

(nb).

Superior Court of Calif, County of San Bernardino

Page: 35

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS5023

CASE NAME: MTR OF WILLIAM OWENS

**SEE ALSO 36**

HEARING:

Hearing Re: Proof of Transfer

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLIAM OWENS

(CEP)...DONNA STURGILL DIAZ

#### GENERAL INFORMATION

Conservatee died (per 11/09/12 minute order)

**Continued from 12/14/15, 05/23/16, 11/07/16 and 03/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Proof of Transfer

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

1. Matter was set at 10/26/15 hearing re: petition to determine succession.

RECOMMENDATION:

None.

(lc/dl/lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 36

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS5023

CASE NAME: MTR OF WILLIAM OWENS

**SEE ALSO 35**

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLIAM OWENS

(CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION

Conservatee died (per 11/09/12 minute order)

Letters terminated on 11/19/12.

**Continued from 03/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Sixth Account entered 07/02/12; seventh and final account now due, to include pre and post-death account periods, beginning 12/09/11 to present.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

Page: 37

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

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS8717

CASE NAME: IN THE MTTR OF HUEY HARVEY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN  
HUEY D HARVEY

(CPE)...COUNTY COUNSEL  
(CEP/PLA/CEE)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 04/14/18.

**Continued from 10/03/16 and 03/20/17 at request of counsel.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 01/05/15, Court approved the 12<sup>th</sup> account; 13<sup>th</sup> accounting now due
2. 13<sup>th</sup> waiver of account sent to department for signature on 07/24/17; however, as accountings are currently behind. Need 14<sup>th</sup> waiver beginning with 02/01/16.

#### RECOMMENDATION

Inquire status.

(lc/nb/lc)

Superior Court of Calif, County of San Bernardino

Page: 38

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS9274

CASE NAME: IN THE MATTER OF SHELLEY WILSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

SHELLY WILSON

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expired 07/21/18.

**Continued from 10/03/16 and 03/20/17 at request of counsel.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 10/13/15, Court approved the 13<sup>th</sup> account; 14<sup>th</sup> accounting now due
2. Need accounting.

#### RECOMMENDATION

Inquire status.

(lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 39

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS02280

CASE NAME: MTR OF STEPHEN HEIN

## **VACATED**

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

STEPHEN HEIN

(CEP)...MARK J FLORY

RUTH L HENDRICKS

(STE)...HARTNELL LAW GROUP

Superior Court of Calif, County of San Bernardino

Page: 40 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

**SEE ALSO 41**

HEARING:

Hearing Re: PTN FOR APPT OF SUCCESSOR TRUSTEE

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GERALDINE HUANG

(CEP)...MITCHELL I ROTH

**XREF: CONPS1600079** (David Huang, spouse)

Currently under review by legal research  
(LR)

Notice:

Need Notice of Hearing with proof of service to children of Trustor, David T. Huang; Cynthia K. Reiser and Deborah J. Huang; children of Trustor Geraldine Huang; Paula Sockwell, Frank M. Grayson and David A. Grayson. Also, to Successor Trustee, Wong Chiu Kai; Unnamed Trustees of the Marital Trust; Unified Credit Trust and Residuary Trusts.

(nb)

Future Hearing:

10/16/17: Accounting Review

Superior Court of Calif, County of San Bernardino  
Page: 41 add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600079

CASE NAME: DAVID T HUANG

**SEE ALSO 40**

HEARING:

Hearing Re: PTN FOR APPT OF SUCCESSOR TRUSTEE

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
DAVID T HUANG (CEP)...SANDY L. TURNER

**XREF: CONPS1600080** (*Geraldine Huang, spouse*)

Currently under review by legal research  
(LR)

Notice:

Need Notice of Hearing with proof of service to children of Trustor, David T. Huang; Cynthia K. Reiser and Deborah J. Huang; children of Trustor Geraldine Huang; Paula Sockwell, Frank M. Grayson and David A. Grayson. Also, to Successor Trustee, Wong Chiu Kai; Unnamed Trustees of the Marital Trust; Unified Credit Trust and Residuary Trusts.

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 42 add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/07/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

HEARING:

Hearing Re: ORDER FOR SALE OF CONSERVATEE'S PERSONAL RESIDENCE

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
SHELBY JEAN MORGAN-PETRIZZI (CEP)...ROSE C ROSADO

GENERAL INFORMATION:

Order Shortening Time entered 07/26/17.

THIS CASE IS SET FOR HEARING ON Request for Authorization to Sell Conservatee's Personal Residence by Conservator of the person and estate, Public Guardian ["Petitioner"] per Pr. C. §2540(b).

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

1. Petitioner proposes to sell the Conservatee's personal residence, located at 3918 Conejo Drive, real property located in San Bernardino, CA, valued at \$205,000.
2. Protect real property from vandalism and loss of value and the Petitioner believes it is in the best interests of the conservatorship estate to sell the property.
3. Petition does not indicate whether conservatee was notified as to the sale of the residence; whether conservatee agrees or not to sale; and whether conservatee has the ability to live in the personal residence and why other alternatives, including in-home services are not available. Need verified supplement.
4. Does Court wish the CI to discuss the proposed sale with conservatee? JTD.
5. ~Proposed Order 07/26/17.

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion.

(nb)

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

Future Hearings:

10/23/17: Conservatorship Compliance Review Hearing

03/26/18: Accounting Review

**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](mailto: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

Page: 1

CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN MISC.

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: CIP DS1700045

CASE NAME: Harley Reinhart

HEARING:

Hearing Re: to Establish Fact, Time, and Place of Birth

COUNSEL:

JAMIE CHRISTOPHERSEN (PET)...PRO/PER  
HARLEY PATRICIAROSE REINHART (MIN)...

Waiver of Court Fees and Costs filed by JAMIE CHRISTOPHERSEN is GRANTED

GENERAL INFORMATION:

**Continued from 03/27/17 and 06/12/17 (no appearance). Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition to Establish Fact, Time and Place of Birth by Jamie Christophersen (mother).

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

1. Petitioner, Jamie Christophersen, requests the court to establish the fact, time, and place of birth in Apple Valley, CA, as to Harley Patricia Rose Reinhart.
2. Petitioner requests that the court make an order determining the at the birth of petitioner did in fact occur at the time and at the place stated, as shown by the Declaration in Support of Petition to Establish Fact, Time, and Place of Birth (filed 03/20/17), filed herewith, and by other proofs adduced at the hearing.
3. Need Notice of Hearing with proof of service to father, paternal grandparents and maternal grandparents.
4. No proposed order. Need California Dept. of Public Health Vital Records (CDPH Vital Records), the Order Establishing Fact of Birth (form VS 108)

RECOMMENDATION:

Require notice then Court's discretion.

(nb)

**Revised second check notes post two court days prior to the hearing.** Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at [ProbateNotes@sb-court.org](mailto: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

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500665

CASE NAME: JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST

**VACATED**

HEARING:

Accounting Review

COUNSEL:

JACQUELINE RUBIO

(PET)...MARK J. ANDREW FLORY

JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST (TRU)...

**VACATE** – First Account filed and set for 08/23/17.

(nb)

FUTURE HEARING DATES:

08/23/17 FIRST Account and Report

**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](mailto: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

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600736

CASE NAME: BETTIE LOU RAUK

HEARING:

PTN FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report of  
TIMOTHY RAUK and Petition for allowance of fees filed.

COUNSEL:

TIMOTHY RAUK

(PET)...BETTY AUTON-BECK

BETTIE LOU RAUK

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Executor, Timothy Rauk ["Petitioner"-son].

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

1. Sole beneficiary waives accounting.
2. Assets on Hand \$657,212.84 of which \$3,200.42 is cash.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$16,066.17. Calculated.
5. Need copy of bank/financial statement to support date of death balance for  
Franklin California Tax Free Income Fund –Class A.
6. ~Proposed Order 05/04/17

RECOMMENDATION

Need to clear note 5 then Court's discretion. If approved, set next hearing for final  
discharge for **08/13/18**.

(nb)

Future Hearing:

11/22/17: Accounting Review - **VACATE**

**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](mailto: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

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700235

CASE NAME: CHARLES HENRY BERGENER

HEARING:

Petition for LETTERS OF TESTAMENTARY WITH FULL

COUNSEL:

JENNIFER LYNN BERGENER (PET)...MERHAB ROBINSON, JACKSON & CLAR  
CHARLES HENRY BERGENER (DEC)...

GENERAL INFORMATION:

**Continued from 06/12/17 for publication.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named Executrix and daughter, Jennifer Lynn Bergener ["Petitioner"].

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

1. Estimated value of the estate is \$140,000. Will waives bond.
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 03/14/17.

RECOMMENDATION:

RFA, no bond. If approved, set future hearing for Accounting/Status Review on **10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700240

CASE NAME: MTR OF JANET WEAR

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

RICHARD HARTMAN (PET)...RANDAL P HANNAH  
JANET WEAR (DEC)...

GENERAL INFORMATION:

**Continued from 06/12/17 to complete publication.**

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

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

1. Section 5a(1) to petition [LF, p4] indicates Decedent was survived by spouse who may have remarried.
2. Section 8 to petition [LF, p5] does not specify relationships of Richard Hartman and Mario Rubio. Need verified supplement.
3. **Proof of publication filed.**
4. Petitioner requests bond not be required as all heirs are adults and have waived bond. However, need Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111 by spouse, Dennis Wear. Alternatively, require bond of \$155,000.
5. Notice given.
6. ~Proposed Form Letters 03/15/17.

RECOMMENDATION:

Need to clear notes 2 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/15/18**. 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](mailto: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

Page: 6

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

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700475

CASE NAME: MTR OF RAYMOND LEON ESCARZAGA SR

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

BARBRA CONTRERAS (PET)...RYAN MICHAEL DARLING  
RAYMOND LEON ESCARZAGA SR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Barbra Contreras ["Petitioner"].

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

1. Proof of Publication filed.

RECOMMENDATION:

RFA, no bond. If approved, set future hearing for Accounting Review on **10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700485

CASE NAME: RAYMOND G HALL

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JANICE W HALL

(PET)...ELISABETH KEMPE-OLINGER

RAYMOND G HALL JR

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Janice W. Hall ["Petitioner"].

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

1. Petitioner requests determination and confirmation of property passing to the surviving spouse as community property. Specifically, real property at Loma Linda in San Bernardino County.
2. Petition indicates parties purchased this property as investment property together in 1976, with each couple identified as husband and wife as joint tenants as to an undivided ½ interest [see deed at LF, p. 5]. Thereafter, petitioner and decedent bought out the other couple's interest in this property in 1980, wherein, the other couple deeded the property to decedent and petitioner as "Tenants in Common," unnoticed by petitioner and decedent [see deed at LF, p. 6].
3. ~Proposed Form Order 05/18/17.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17 TIME: 8:35 DEPT: S36P  
-----

CASE#: PRO PS1601125

CASE NAME: MTR OF FAYE ESQUIVEL

HEARING:

Motion Re: SET ASIDE THE DISMISSAL OF THE PROBATE ACTION ON  
MARCH 28,17 Filed by Petitioner MARIA DORADO

COUNSEL:

MARIA DORADO (PET)...JOHN  
FAYE ESQUIVEL (DEC)...  
PAUL WILKINS (TP )...PRO/PER  
APPROVED INHERITANCE CASH INC.(PRO/PER)

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1300294

CASE NAME: ROZELLA FOWLER

**SEE ALSO 10 11**

HEARING:

Hearing Re: COMPLIANCE REVIEW

COUNSEL:

ALFRED H FOWLER

(CP )...PRO/PER

ROZELLA FOWLER

(CTP/CEE)...WALTER T. MOORE

MELROSE ODEN

(CP )...PRO/PER

VERNEEN MINCEY SEALS

(CP )...PRO/PER

#### GENERAL INFORMATION

Order appointing Conservator Person and Estate, Melrose Oden and Verneen Mincey Seals appointed with IAEA entered 02/08/16. Bond 66,000.00.

Continued from **08/29/16 and 11/07/16**. Attorney Roth to assist with notice of conservatee's rights. Conservators state that the I & A will be submitted to the probate referee shortly. Court states that property has been sold thru a short sale without further hearing.

**Continued from 01/30/17 and 04/03/17. The Court declines to transfer this matter until property issues are resolved. Notice waived.**

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

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

- 1 Care Plan indicates **Conservatee resides in Canoga Park, CA**. Suggest transfer to LA County. JTD.
- 2 **Final inventory and appraisal filed.**
- 3 Determination of Conservatee's Appropriate Level of Care filed 08/22/16.
- 4 Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 5 Proof of recordation of letters filed 02/08/16.

#### RECOMMENDATION:

Need to clear note 4. When documents are not filed as ordered, court may set a hearing in accord with Pr.C.§2655.

(nb/lc/nb)

**Revised second check notes post two court days prior to the hearing.** Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at [ProbateNotes@sb-court.org](mailto: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

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1300294

CASE NAME: ROZELLA FOWLER

**SEE ALSO 9 11**

HEARING:

Hearing Re: Status on Joint Accounts/Support/Sale of Property

COUNSEL:

ALFRED H FOWLER

(CP )...PRO/PER

ROZELLA FOWLER

(CTP/CEE)...WALTER T. MOORE

MELROSE ODEN

(CP )...PRO/PER

VERNEEN MINCEY SEALS

(CP )...PRO/PER

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

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

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1300294

CASE NAME: ROZELLA FOWLER

**SEE ALSO 9 10**

HEARING:

Hearing Re: ACCOUNTING REVIEW

COUNSEL:

ALFRED H FOWLER	(CP )...PRO/PER
ROZELLA FOWLER	(CTP/CEE)...WALTER T. MOORE
MELROSE ODEN	(CP )...PRO/PER
VERNEEN MINCEY SEALS	(CP )...PRO/PER

GENERAL INFORMATION

**Continued from 04/03/17. Notice waived.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order Appointing Melrose Oden and Verneen Mincy Seals, Conservators of the person and estate entered 02/08/16. \$66,000 bond; account now due.
- 2 No account or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 13 14 15 20**

HEARING:

Hearing Re: Kenia Orendayn's Account and Report/Petition

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

GENERAL INFORMATION:

Clerk's note dated 06/07/17 indicates filing of 03/20/17 had been mis-scanned.

THIS CASE IS SET FOR HEARING ON Kenia Orendayn's Account and Report

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

1. Purported account filed 03/20/17 is comprised of a list of expenses; receipts; check copy & care time sheet.
2. No Summary of Account or supporting schedules.
3. This accounting does not appear to be a proper and complete accounting. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

RECOMMENDATION:

Need amended accounting to be set on first check calendar no sooner than **09/18/17**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 13

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

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 12 14 15 20**

HEARING:

Petition for Appointment of Conservator 022717

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED  
Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

GENERAL INFORMATION:

Continued from **6/23/15**. Court Investigator notified that there are competing petitions and requests report to address both petitions.

Continued from **8/6/15** at request of counsel. Notice to be given by Krishna Malhotra.  
Continued from **9/29/15**.

On 10/2/15 **Christina Taube-Erikson appointed temporary conservator of estate** and successor GAL in Worker's Compensation Appeals Board action.

Continued from **1/25/16** Court notes that there are several competing petitions. All temporary orders to remain in full force and effect.

Continued from **6/7/16** at request of counsel.

**Continued from 06/22/16. Court appoints Christina Erickson-Taube as temporary conservator of person;** counsel to submit for signature revised/amended order and letters showing temporary conservator of person and estate.

Continued from **10/25/16** pending outcome of motion to be relieved.

Continued from **12/06/16 and 12/12/16**. Matter is continued for Kenia Orendayn Isaldo to file an accounting. Accounting to be filed by 01-27-17. Notice to be given by Attorney Mitchell Roth.

Continued from **02/27/17**. Court orders that Kenia Orendayn Isaldo file her

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

accounting prior to the next hearing. If the accounting has not been filed court will strike her petition and surcharge her for the full amount of the monies received for caregiver services. All temporary orders to remain in full force and effect until 04/24/17.

Continued from **04/24/17**. Court finds: All future payments from medical compensation are to be given to Christina Erickson-Taube. Mitchell Roth prepared order regarding funds. Kenia Orendayn Isaldo and counsel Richard Moss are ordered to appear at the next hearing. Accounting is to be filed no later than 5-19-17. No account filed.

**Continued from 06/19/17.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship 022717.

- Petition 1 – for Conservatorship, person only, by **Maria Orendain Isaldo** (sister)
- Petition 2 – for Conservatorship, person and estate, by **Kenia Orendain** (sister)
- Petition 3 – for Conservatorship, person and estate, by **Christina Erickson-Taube** (PPF)

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

**Petitioner 1 – Maria Orendain Isaldo, sister**

1. Matter transferred from Los Angeles County. Per LA minute order dated 12/04/14, it does not appear temporary or general orders were made.
2. Medical Capacity Declaration filed 10/6/15 supporting request.
3. Certificate of Completion re Conservatorship Class filed 07/08/16.
4. **Objections filed by competing petitioner on 06/19/15.**
5. **Objections filed by Kenia Orendayn Isolda on 06/16/16.**
6. **Supplemental Report by Court-Appointed Counsel, Mitchell Roth, filed 05/09/17.**

**Petitioner 2 - Kenia Orendain, sister**

7. Petitioner is seeking bond to be determined. Suggest bond of \$41,800. **Supp. (06/22/16) requests no bond be required pursuant to Pr. C. §§ 2323(a), 2628(a). JTD.**
8. Petitioner is not seeking medical powers. Capacity Declaration filed 10/6/15
9. Certificate of Completion of the Conservatorship Training Class filed 08/21/15.
10. Citation returned served on 06/30/15
11. Petitioner has filed a second petition on 06/16/16. Court to inquire.
12. **Declaration by Kenia Orendain filed 06/06/17.**
13. ~Proposed Form Order/Letters 08/05/16.

### **Petitioner 3 – Christina Erickson-Taube**

14. Petitioner requests bond, but does not state an amount. Current bond of \$100,000 posted as to the Temporary Conservatorship. Estimated estate value is \$38,222. Based on estate value and cost of recover, Court may wish to require bond of \$43,000.
15. Medical powers sought. Capacity Declaration filed 10/6/15. **Updated Capacity Declaration filed 09/29/16. Capacity Declaration filed 11/14/16.**
16. Need return of Citation.
17. Court Investigator report filed on 7/22/15 as to petitioners Maria and Kenia. **CI report as to petitioner Christina Erickson-Taube filed 07/28/16.**
18. Consents to act filed 10/23/14 by mother, Ascencion Isaldo Diaz, and brother-in-law, Samuel Brambila; however, no petitions filed by them.
19. Report of LA court-appointed counsel filed 12/04/14. Report by Attorney Roth filed 8/6/15, 9/24/15 and 1/12/16. **Court to review supp. report by Attorney Roth filed 08/03/16.**
20. **Objections filed by Kenia Orendayn Isolda on 06/16/16**

#### **RECOMMENDATION:**

Set for contested hearing. If approved, set hearing for Compliance Review for **03/12/18** 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.

Set hearing re Accounting Review for **10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.  
(vet/lc/vet/abs/ds/nb/sa/nb)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 12 13 15 20**

HEARING:

Petition for APPOINTMENT OF CONSERVATOR PERSON/ESTATE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

See prior matter #13.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 12 13 14 20**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED  
Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

See prior matter #13.  
(nb)



Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/07/17      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1600275

CASE NAME: MTR OF OFELIA FERNANDEZ CABRAL

HEARING:

Hearing Re: Status on PG accounting

COUNSEL:

ARTHUR ROY CABRAL      (CPE)...PRO/PER

OFELIA FERNANDEZ CABRAL      (CTP)...J. DAVID HORSPOOL

Waiver of Court Fees and Costs filed by OFELIA FERNANDEZ CABRAL is GRANTED

No notes – Status.

(nb)

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

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1700095

CASE NAME: Therese Magdi Ghandour  
HEARING:  
Petition for Appointment of Conservator

COUNSEL:

MARY DAOUD (CPE)...PRO/PER  
THERESE MAGDI GHANDOUR (CTP)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 05/01/17. Attorney Craig M. Parker appointed.**

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
2. Petitioner seeks limited powers under PrC §2351.5 to fix residence, access confidential records at IRC, control right to contract, make and consent to medical decisions. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 04/03/17.
5. Proposed conservatee is developmentally disabled. **IRC report filed.**
6. Proposed conservatee is developmentally disabled. **Need report by Attorney Parker.**
7. Court Investigator report filed.
8. **Certificate of Completion of the Conservatorship Training Class filed.**
9. Citation returned served.
10. Notice given.
11. ~Proposed Form Order: 03/20/17

RECOMMENDATION

Need to clear note 8. If approved, set hearing for Compliance Review for **03/12/18** 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

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/07/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700240

CASE NAME: MARJORIE ADLINE NORTHERN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JUDY ANN GODWIN

(CPE)...PRO/PER

MARJORIE ADLINE NORTHERN

(CTP)...

Waiver of Court Fees and Costs filed by MARJORIE ADLINE NORTHERN is GRANTED

Per minute order dated 07/05/17, proposed conservatee is deceased. Matter appears moot.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS8140

CASE NAME: IN THE MATTER OF ROSE B ARCHER

HEARING:

Accounting Review

COUNSEL:

ROSE B ARCHER	(CEP)...NOREEN T FONTAINE
KRISTIE DEL CASTILLO	(CPE)...
JEFFERY ARCHER	(SC/CPE )...PRO/PER
JENNIFER ARCHER	(SC/CPE )...

Waiver of Court Fees and Costs filed by JENNIFER ARCHER is GRANTED

Waiver of Court Fees and Costs filed by JEFFERY ARCHER is GRANTED

#### GENERAL INFORMATION

Continued from **02/27/17**. No appearance; matter continued. Court orders next accounting to be filed, and for counsel be present at next hearing if this is not done. Court is also in need of the conformed copy of Order entered on 03/30/15 for scanning. **Continued from 05/01/17. No appearances. Court orders conservators to both be present at hearing and to file an accounting/waiver of account. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order Dispensing with Accounting entered 03/30/15 per register of actions; account now due.
- 2 No account or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh/nb)

**Revised second check notes post two court days prior to the hearing.** Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at [ProbateNotes@sb-court.org](mailto: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  
Page: 19A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0900066

CASE NAME: WILLIAM BENFORD

HEARING:  
Hearing Re: Posting of Bond

COUNSEL:  
MARY BANKS (PCR)...ROBERT A. FAIRFIELD  
WILLIAM BENFORD (PCE/CTE/CEP)...SHERRI L KASTILAHN  
ROSALIND HATCHER (CPE/FRIEND)...JANET M HERRING  
LARRY E HOOVER (CE )...SU P CHEAH  
R DENNIS FRENCH (CE )...JOHN D MICKUS  
ROBERTA L TAYLOR (PET)...  
VETERANS ADMINISTRATION (TP )...  
SOUTHERN CALIFORNIA BONDING SERVICE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Posting of Bond.

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

1. Matter set at 07/10/17 hearing, wherein, the Court approved petitioner's request to reinstate the bond of \$156,000.
2. If Bond is posted by the next hearing date, the hearing will be taken off calendar.

RECOMMENDATION:

Need proof of bond.  
(nb)

Future Hearing:  
11/13/17: 22<sup>nd</sup> Account and Report of Larry E Hoover.

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

-----  
DATE: 08/07/17 TIME: 9:35 DEPT: S36P  
-----

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 12 13 14 15**

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner KENIA  
ORENDAYN ISALDO

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION

**Hearing originally set for 07/06/17.**

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Richard Moss III.

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

1. Petitioner, Richard Moss III, seeks to be removed as Counsel for Kenia Orendain Isaldo due to attorney client relationship breakdown.
2. Proof of service filed; however, need proof of service of declaration and proposed Order in compliance with Rules of Court, rule 3.1362(d).
  - a. (d) Service *The notice of motion and motion, **the declaration, and the proposed order** must be served on the client and on all other parties who have appeared in the case. The notice may be by personal service, electronic service, or mail.*
3. No Proposed order.

RECOMMENDATION

Need to clear note 2.

(lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**ELDER ABUSE**

-----  
DATE: 08/07/17      TIME: 8:30      DEPT: S37P  
-----

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

**SEE ALSO 15**

HEARING:

Hearing Re: PRETRIAL ON OSC RE: CONTEMPT

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

PATRICIA MAE LAWRENCE PARK

(PP )...PRO/PER

JUDITH KATHLEEN PARK

(RP )...LENITA A SKORETZ

**XREF: CONPS1600269**

No notes – Judge to decide.  
(nb)

Future Hearing:  
8/24/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 08/07/17      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO DS1000839

CASE NAME: JOSE M MARTIN

HEARING:

FIRST AND FINAL Account and Report of JESUS J MARTIN, M ELICENA BLANCO and Petition for allowance of fees filed.

COUNSEL:

JESUS J MARTIN	(PET)...MARIA G NICIFOROS
M ELICENA BLANCO	(PET)...MARIA G NICIFOROS
JOSE M MARTIN	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Personal Representatives, Jesus J. Martin and M. Elicena Blanco, ["Petitioners"-son/daughter].

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

1. Accounting period 10/01/10 to 04/30/17.
2. Assets on Hand \$699,308.85 consisting of cash held in attorney's IOLTA trust account.
3. Co-Administrators request one-half total statutory compensation, each, in the sum of \$20,622.23. Calculated.
4. Attorney requests statutory compensation in the sum of \$20,622.23. However, it appears there was prior counsel, Attorney Patrick J. Rogers. Need apportionment of compensation. Pr. C. §10814.
5. Attorney requests reimbursement of costs advanced of \$1,043.00. Itemized [LF, p. 88].
6. Attorney requests extraordinary fees of \$3,850 for services rendered in connection with the Chapter 7 Bankruptcy of M. Elicena Blanco and sale of real properties. Billed at \$385/hour for an excess of 10 hours' time. Generally described [LF, p. 81-85]. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verifies supplement.
7. Petitioner Jesus requests reimbursement of costs advanced of \$1,091.54. Itemized [LF, p. 72-73].

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



8. Petitioner M. Elicena requests reimbursement of costs advanced of \$3,601.74. Itemized [LF, p.74-79].
9. Need copy of bank statement to support date of death balance and Chase Bank account per Local Rule 20-908.
10. Petitioners request authority to withhold the sum of \$450 for closing costs.
11. Proposed Order 05/16/17 does not apportion attorneys' fees and reflects incorrect reimbursement amount for M. Elicena Blanco.

**RECOMMENDATION:**

Need to clear notes 4, 6 & 9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **08/13/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/07/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1100367

CASE NAME: MTR OF WALTER RICHARD QUIGLEY

**SEE ALSO 4**

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT AGREEMENT

COUNSEL:

KIM WILLIAMS	(PET)...DIANA J CARLONI
WALTER RICHARD QUIGLEY	(DEC)...
HAROLD ADAMS	(PET)...DIANA J CARLONI
LAYNE A. BARTHOLOMEW	(PET)...LAYNE A BARTHOLOMEW
PATRICIA QUIGLEY	(OBJ)...DON C GONZALES
JOHN G WURM	(JOHN G WURM)
DIANA J CARLONI	(DIANA J CARLONI)

See next matter #4

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1100367

CASE NAME: MTR OF WALTER RICHARD QUIGLEY

**SEE ALSO 3**

HEARING:

Accounting Review

COUNSEL:

KIM WILLIAMS	(PET)...DIANA J CARLONI
WALTER RICHARD QUIGLEY	(DEC)...
HAROLD ADAMS	(PET)...DIANA J CARLONI
LAYNE A. BARTHOLOMEW	(PET)...LAYNE A BARTHOLOMEW
PATRICIA QUIGLEY	(OBJ)...DON C GONZALES
JOHN G WURM	(JOHN G WURM)
DIANA J CARLONI	(DIANA J CARLONI)

GENERAL INFORMATION:

Notice of Settlement of Entire Case entered 01/11/17.

Continued from **04/11/17** at request of counsel for settlement to be filed. Settlement includes agreement to a waiver of accounting. Notice given by Attorney Bartholomew.

**Continued from 05/30/17 at request of counsel. Notice to be given by Mr. Bartholomew.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Order Settling Second Account entered 02/02/16; third and final account now due.
2. No accounting or status report of administration. Need same.
3. **Notice filed 06/29/17 does not give 15 days' notice. Need proper service.**

RECOMMENDATION:

Need proper service.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/07/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1300497

CASE NAME: MARIA P CORONA

HEARING:

Hearing re Final Discharge

COUNSEL:

VERONICA BRAMBILA DE LOPEZ (PET)...LAYNE A BARTHOLOMEW

MARIA P CORONA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on Waiver of Account entered 08/01/17.
2. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400169

CASE NAME: MARTIN R PAPPALARDO

HEARING:

Hearing re Final Discharge

COUNSEL:

MICHAEL G PAPPALARDO (PET)...MARIO D VEGA

ANTONIO M PAPPALARDO (PET)...MARIO D VEGA

MARTIN R PAPPALARDO (DEC)...

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order for Final Account entered 05/25/16..
2. No receipts. Need same.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400379

CASE NAME: THOI VAN PHAM \*\*MF\*\*

HEARING:

Motion Re: NTC OF MOTION & MOTION FOR THE APPOINTMENT OF A  
RECEIVER Filed by Petitioner CITY OF REDLANDS

COUNSEL:

RUTH L HENRICKS	(PET)...TREVOR D MARTIN
THOI VAN PHAM	(DEC)...
CITY OF REDLANDS	(PET)...SILVER & WRIGHT LLP
NANCY ROCCHINO	(DEF)...
JOHN PHAM	
MIKE PHAM	

Currently under review by legal research  
(LR)

Superior Court of Calif, County of San Bernardino

Page: 8

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

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600328

CASE NAME: SALLY CANALES-LOPEZ

HEARING:

FIRST AND FINAL Account and Report of HENRY AGUILAR and Petition  
for allowance of fees filed.

COUNSEL:

HENRY AGUILAR (PET)...DIANE E ROBBINS  
SALLY CANALES-LOPEZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Administrator, Henry Aguilar ["Petitioner"-son].

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

1. Accounting period 12/23/05 to 03/31/17 [11.3 years].
2. Assets on hand \$300,000 consisting of real property.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory compensation of \$9,000 to be paid outside of probate via a lien on the real property located in Fontana, CA. JTD.
5. Attorney requests reimbursement of costs advanced of \$1,742.40 to be paid outside of probate via a lien on the real property located in Fontana, CA. Itemized [LF, p. 10]. JTD.
6. Pursuant to the Agreement by Heirs as to Distribution of Residence [LF, p. ], the entire remaining estate of the decedent shall be distributed to Henry Aguilar. Does Court wish to require assignments? JTD.
7. Petition does not include receipts or disbursement. Question whether rental income was received or whether maintenance/ overhead costs re: real property were paid. Need verified supplement.
8. ~Proposed Order 05/17/17.

RECOMMENDATION:

Need to clear note 7 then Court's discretion. If approved, set next hearing for final discharge for **08/13/18**.

(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](mailto: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

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1601198

CASE NAME: DYLAN JESSE GRAHAM SNT

**SEE ALSO 10**

**VACATED**

HEARING:

Accounting Review

COUNSEL:

ERIN ANN MCDERMOTT (PET)...DONAHUE & HORROW,LLP

DYLAN JESSE GRAHAM (MIN)...DOREATHA L MILLER

MIDLAND STATES BANK (PET/TEE)...MELINDA S. BELL

**VACATE** – Fourth Account filed – see next matter.

(nb)



Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1601198

CASE NAME: DYLAN JESSE GRAHAM SNT

**SEE ALSO 9**

HEARING:

Fourth Account and Report of MIDLAND STATES BANK and Petition  
for allowance of fees filed.

COUNSEL:

ERIN ANN MCDERMOTT	(PET)...DONAHUE & HORROW,LLP
DYLAN JESSE GRAHAM	(MIN)...DOREATHA L MILLER
MIDLAND STATES BANK	(PET/TEE)...MELINDA S. BELL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees  
by Trustee of SNT, Midland State Bank ["Petitioner"].

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

1. Accounting period 04/01/16 to 03/31/17.
2. Assets on Hand \$515,519.01 consisting of \$29,497.34 in cash and \$486,021.67  
in non-cash assets.
3. No bond – corporate fiduciary.
4. Trustee requests court ratification of fees taken, per Court Order dated 09/07/16  
by Riverside County, in the amount of \$9,279.72. JTD.
5. Trustee requests further Order of this Court authorizing payment of Trustee  
Fees on account pursuant to Pr. C. §15682 and according to its published fee  
schedule, not to exceed 15 months [LF, p. 33]. JTD.
6. Attorney requests fees and costs of \$8,013.35. Billed at \$350-\$400/hour for  
attorney time and \$175-225/hour for paralegal time. Itemized [LF, pgs. 37-].  
JTD.
  - a. Paralegal rates exceeds community standard of \$150/hour;
  - b. Costs include copy fees; audit or maintenance of file; research of probate  
notes; and postage charges, normally considered overhead, totaling \$315.85  
[LF, pgs. 42-45].
7. Declaration of Trustee in Support of Trustee's Fees is not signed [LF, p. 32].  
Need same.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

8. Beneficiary appears to be developmentally disabled. Need appointment of counsel and report by same.
9. Need report by Inland Counties Legal Services.
10. Notice filed 06/06/17 does not include Inland Counties Legal Services. Need proper service.
11. Petition indicates matter was transferred from Riverside County as beneficiary resides in San Bernardino County. Question where the principal place of administration of the trust is located? Pr. C. § 17005. Need verified supplement.
12. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 7-11 then Court's discretion. If approved, set next hearing for Accounting Review on **05/28/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700239

CASE NAME: MTR OF HOLLIS EARL RICKLES

HEARING:

Petition for ORDER AUTHORIZING PARTICULAR TRANSACTIONS

COUNSEL:

REBECCA A RICKLES

(PET)...DAVID M GROSSMAN

HOLLIS EARL RICKLES

(INC)...

Currently under review by Legal Research.  
(LR)

**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](mailto: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

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700470

CASE NAME: CLARENCE ARTHUR BUDD

HEARING:

Petition to determine succession to Real Property

COUNSEL:

GLORIA DAVIS (PET)...PRO/PER

CLARENCE ARTHUR BUDD (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by daughter, Gloria Davis ["Petitioner"].

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

1. Attachment 11 does not identify the character of the property. Need verified supplement.
2. Decedent was survived by 6 issues. The petition needs to include all those joining in the petition that have succeeded to the real property by intestate succession. Pr. C. §13150. Need amended petition.
3. Inventory & Appraisal attached to petition has the following issues:
  - a. No signatures on the I&A by siblings. Need signatures of verification.
  - b. Need full legal description of real property listed on Attachment 2.
  - c. Section 5 re Property Tax Certificate is incomplete.  
Need corrected inventory
4. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is one of 6 issue and heirs per intestate succession.
5. Petition affixes a Pr. C. § 13100 Affidavit [LF, p.9]. However, this procedure is used during formal probate proceedings and cannot be used in conjunction with these proceedings.
6. ~Proposed Form Order 05/16/17.

RECOMMENDATION:

Need to clear notes then Court's discretion.

(nb)

**Revised second check notes post two court days prior to the hearing.** Documents filed at least **seven days prior to the hearing** will be included while later documents may be delivered to the courtroom for consideration at the judge's discretion. ♦ Examiners can be contacted at [ProbateNotes@sb-court.org](mailto: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

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700480

CASE NAME: MARIA DE LOS ANGELES VELOZ

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

TERESA DE JESUS CRUZ VELOZ (PET)...PRO/PER

MARIA DE LOS ANGELES VELOZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Teresa de Jesus Crus Veloz ["Petitioner"].

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

1. Petition contradicts itself by indicating decedent had a will but also indicates decedent died intestate. Further, section 5a marks there in no child but section 8 includes 5 issues. Need verified supplement.
2. Petition alleges all heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by remaining 4 issue. Alternatively, suggest bond of \$86,000.
3. **Publication filed on 07/26/17 is published in newspaper that is not adjudicated; includes a portion of another case; and reflects incorrect courtroom. Need corrected publication that is published on adjudicated newspaper.**
4. Notice filed 05/24/17 is the wrong type of notice. Need Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 05/17/17.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **10/15/18**. 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](mailto: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

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

-----  
DATE: 08/07/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0800266

CASE NAME: KYLE AVERY TILTON

HEARING:

FOURTH & FINAL Account and Report of MELODIE Z SCOTT and  
Petition for allowance of fees filed.

COUNSEL:

JUDY TILTON	(CE/CPE )...HORSPOOL & PARKER
WELLS FARGO BANK, TRUSTEE	(PET)...JENNIFER M DANIEL
KYLE AVERY TILTON	(CTE/CEP/CEE)...MARTINA KANG RA
KENNETH F JENKINS	(CE )...PRO/PER
BRYAN C HARTNELL	(PET)...HARTNELL LAW GROUP
CHRISTINA ERICKSON-TAUBE	(SC/TC )...PRO/PER
NEVIN OLIPHANT	(SC )...J. DAVID HORSPOOL
MELODIE Z SCOTT	(SC/CPE )...HORSPOOL & HORSPO
JENNIFER L HAAS	(PCR)...
W.A. (SAM) HLAVATY	(SC/CPE )...THOMPSON & COLEGAT

**XREF: PROPS0900847**

GENERAL INFORMATION

Continued from **05/19/16**. Court ordered that written objections be filed by 06/01/16.  
Responses to be filed by 06/10/16.

Continued from **06/20/16**. Court granted attorney fees of \$28,958.50 and \$5,000 to  
Melodie Scott.

Continued from **10/06/16**. Counsel Craig M. Marshall advises court of a possible issue  
with the internal revenue service and asks that case be held over for further review. A  
correction to the accounting period is noted by the court. Correct accounting period is  
01/01/14 through 09/30/15.

Continued from **11/29/16**. The issue of taxes discussed. It appears 1099s were not  
filed and the IRS is adding income as a result. Ms. Ravicz states she intends to object  
to accounting. The Court orders any objections to be filed in writing by 12/9/16.

Notice to be given by Mr. Roth.

**Continued from 02/21/17. Judge Brodie had ordered objections to be filed by  
06/01/16. Objections filed on 12/08/16 are stricken as untimely. Attorney  
Horspool and Mr. Hlavaty are to meet regarding tax issues.**

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

THIS CASE SET FOR HEARING ON 4<sup>th</sup> and Final Account/Distribution and Petition for Allowance of Fees by Melodie Scott, former Conservator.

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

1. Accounting period 01/01/14 – **09/30/15**.
2. Assets on hand \$0. On 7/29/15, W A Hlavaty was appointed Successor Conservator, estate only, with \$250,000 bond.
3. Attorney requests fees of \$28,958.50 for 77.7 hours at \$295/375 per hour. Itemized [LFpgs70-77]. Granted on 06/20/16.
4. Petitioner requests fees of \$27,693.25 with a balance owed of \$13,993.50 for 246 hours at \$112 per hour [LFpgs44-68]. Periodic payments of \$13,700 were received. Court to inquire why all services are charged at the same rate. **Court granted \$5,000 on 06/20/16.**
5. Petitioner requests funds advanced not reimbursed of \$570.
6. Current bond is \$200,000. Ok.
7. **Objection filed 06/02/16 and 12/08/16 by GAL for Kyle Avery Tilton.**
8. **Objections filed 12/08/16 by Conservatee through court-appointed counsel. Need proof of service.**
9. ~Proposed Order: 03/30/16.

#### RECOMMENDATION

Set for contested hearing. If approved, set hearing on the filing of receipts and final discharge for **08/16/18**.

(lc/dl/lc/nb)

Future Hearings: 09/26/17: Hearing Re: Accounting Review (Trustee), Hearing Re: Accounting Review (WA Hlavaty), Hearing Re: TSC on Petition for Conservatorship

Superior Court of Calif, County of San Bernardino  
Page: 15  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 08/07/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK

**SEE ALSO 1**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JANICE L PARK

PATRICIA MAE LAWRENCE PARK

(CP)...PRO/PER

(CTP)...CHANDLER LAW FIRM

**XREF: CIFMS1600004**

GENERAL INFORMATION

Ex Parte orders denied on **09/12/16**. Referred to Court Investigator for investigation and report. Attorney Jennifer M. Daniel appointed for proposed conservatee. Notice by Judicial Assistant.

**Continued from 10/03/16.** Parties report Patricia Park has moved into Judith Park's home. Parties note that in a related action, CIFNS1600004, Judith Park is restrained from removing Patricia Park for her placement and from being financially connected to Patricia Park. Ms. Daniel is ordered to go to Patricia Park's bank to ensure that there is no comingling of funds and that Judith Park has no access to Patricia Park's funds. The Court appoints Walter Moore as guardian ad litem for Patricia Park. Notice by Judicial Assistant.

**Continued form 11/15/16.** Court finds CIFMS1600004 should be heard in probate court. Court orders Judith Park to provide all bank records from 01/01/16 to 10/21/16 to Mr. Moore by 11/30/16. Court is concerned about Patricia Park's living and financial arrangements, and medical capacity declaration filed by Patricia Park. Janice Park intends to file a contempt action in related matter for Judith Kathleen's violation of court order. Court appoints Robert Sawicky as 730 expert in this matter. Mr. Moore to prepare order appointing Dr. Sawicky.

**Continued from 02/28/17.** Janice L. Park is ordered temporary conservator of Patricia Mae Lawrence Park, no bond. Order signed this date. Dr. Sawicky is working on 730 report waiting for subpoena documents.

**Continued from 05/09/17.** The Court advises the parties that the sealed Adult Protective Services documents she received yesterday have not been opened or reviewed at this time. PATRICIA PARK informs the Court that she has



retained counsel, CHRIS NELSON, who could not be present today. The Court will not appoint an attorney not on our court-appointed list. The Court will allow private counsel to be retained, but conservatee will bear the cost of privately retained counsel. JANICE PARK as temporary conservator will need to speak with Mr. Nelson about retaining his services. JENNIFER DANIEL is relieved as counsel of record for PATRICIA PARK. Ms. Carey-Wilson informs the Court that Adult Protective Services has provided a report to the Court regarding the appropriateness of PATRICIA PARK'S current residence in the sealed envelopes provided to the Court. The Court gives PATRICIA PARK two options of how to proceed. All existing orders shall remain in full force and effect.

**Continued from 05/30/17. The matter trailing other hearings in CIFMS1600004. The Court orders the redacted documents provided by Adult Protective Services be provided to Counsel in this matter along with the protective order. The Court orders that any monies received since the time the temporary conservatorship has been in place given to Janice Park for appropriate distribution. All temporary orders to remain in full force and effect.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by non-resident, daughter.

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

- 1 Proposed Conservatee admitted 08/27/16 to a Rehab Center in Palm Springs (Riverside County).
- 2 Petitioner requests no bond be required but does not include Attachment 1c explaining why. However, review of the estimated value of property reflects income consisting of only Social Security and does not include estimated value of conservatee's real property. Need verified supplement with reasons to support why bond should not be required and estimated value of real property in order to determine a bond amount.
- 3 Petitioner seeks Pr. C. § 2590 powers. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
- 4 Need proper completion of Section 3b to petition, sections (1)(2)(4) and (7) via verified supplement.
- 5 Petitioner requests dementia powers; Need report of court-appointed counsel, Jennifer Daniel.
- 6 Petition, Section 1g, seeking medical powers is incomplete. Need completed Capacity Declaration (see note 6).
- 7 Capacity Declaration filed 11/10/16 is incomplete at item 5 and declarant's initials on page 3. Need same.
- 8 Need return of Citation.
- 9 Need Notice of Hearing with proof of service.
- 10 Need Certificate of Completion re Conservatorship Class.
- 11 Court to review Confidential Conservator Screening Form, #8. Need Attachment 8 to Confidential Conservator Screening Form.
- 12 Need 730 Report of Dr. Robert Sawicky.
- 13 Oral report presented by GAL, Walter Moore, on 10/17/16.

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

- 14 CI Report filed 11/09/16. **CI Special Report filed 04/27/17.**
- 15 **Objections filed 10/03/16 on behalf of proposed conservatee by Court-appointed counsel, Attorney Daniel.**
- 16 ~Proposed Form Order/Letters 09/02/16.

RECOMMENDATION: Matter is contested.

Need to clear notes 2, 4-12, bond to be determined. If approved, set hearing for Compliance Review for **03/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr. C. §2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/15/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 16

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

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DATE: 08/07/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700097

CASE NAME: DANIEL DARWAZEH

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAVID DARWAZEH	(PET)...PRO/PER
CHRISTINE DARWAZEH	(PET)...PRO/PER
DANIEL DARWAZEH	(CEE)...SANDRA TURNER

#### GENERAL INFORMATION

**Continued from 05/30/17. Return of citation waived by Attorney Daniel's presence today. The Court needs IRC report. Proof of completion of conservatorship class is shown in court. Attorney Sandra Turner is appointed. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by David Darwazeh and Christine Darwazeh (parents).

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

1. Petitioner seeks medical powers. Capacity Declaration filed 03/21/17.
2. Petitioner seeks powers under Pr. C. §2351.5 to fix residence, access confidential records, consent to marriage, control right to contract, give or consent to medical treatment, control sexual and social contacts, and make decisions re education. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
5. Proposed conservatee is developmentally disabled. **Report filed by court-appointed counsel, Sandra L. Turner.**
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Court Investigator report filed.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need Notice of Hearing and Proof of Service.
10. ~Proposed Form Order: 03/21/17

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

## RECOMMENDATION

Need to clear notes 6, 8-9. If approved, set hearing for Compliance Review for **03/12/18** 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)

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

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DATE: 08/07/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700238

CASE NAME: GABRIEL MARIE CEZAR GONZALES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALICIA CEZAR (CP)...PRO/PER  
GABRIEL MARIE CEZAR GONZALES (CTP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Alicia Cezar ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Need report of court-appointed counsel, J. David Horspool..
3. Medical Capacity Declaration is not dated at page one. Judge to determine if sufficient.
4. **Court Investigator's Report filed.**
5. Need Inland Regional Center Report.
6. Citation returned SERVED .
7. List of Required Contact form is missing petitioner, father, sister and paternal grandmother. Need amended form.
8. Certificate of Completion re Conservatorship Class filed.
9. ~Proposed Form Order only 06/26/17.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **03/12/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.  
(nb)

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

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DATE: 08/07/17 TIME: 9:30 DEPT: S37P  
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CASE#: RC RS00536

CASE NAME: MICHAEL M MORETTA

HEARING:

THIRD Account and Report of KENNETH ALLISON and Petition for allowance of fees filed.

COUNSEL:

PENELOPE WILLIAMS	(PET)...MAUREEN MURATORE
MICHAEL MORETTA	(PCE/CEP)...CHRISTINA FERRANTE
KENNETH ALLISON	(CPE)...MAUREEN MURATORE
CHRISTINA FERRANTE	(PET)...PRO/PER

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

Waiver of Court Fees and Costs filed by KENNETH ALLISON is GRANTED  
TOTAL FEES WAIVED TO DATE: \$465.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Report of Conservator of the Estate, Kenneth Allison ["Petitioner"-cousin] and for Fees; Authority to Sell Residence Owned by Conservatee and Purchase Replacement Residence.

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

1. Accounting covers 02/01/15 to 06/19/17.
2. Assets on hand: \$415,185.36 (of which \$185.36 is cash and the balance in carry value of real property).
3. Petitioner waives fees as conservator during this accounting period.
4. Attorney requests fees of \$1,212.50. Fees are billed at \$250/hour for 7.95 hours' attorney time. Itemized [LF, p. 17-19]. JTD.
5. The conservatee inherited the residence located at 12081 Lester Place in Chino, CA, from the estate of his mother, in 2009. Conservatee of the person, Penelope Williams and her husband moved into the residence to care for the conservatee in his home. The large home has proven too much for Mrs. William to clean and maintain. Petitioner and his wife own a smaller, rental property located in Alta Loma, CA that would be sufficient for Mr. & Mrs. William and the

conservatee. Conservator seeks an order authorizing him to sell the Chino residence and purchase the property in Alta Loma, at a fair market value to be determined by the Court, as there is little cash in the estate to fund the extras needed to enhance the conservatee's life. JTD.

6. ~Proposed Order 07/03/17

#### RECOMMENDATION

Court's discretion. If approved, set next Accounting Review for **08/20/18** (if one year) or **08/19/19** (if two years). Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 19 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/07/17      TIME: 9:30      DEPT: S37P  
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CASE#: CIF DS1700069

CASE NAME: BARTHOLOMEW -VS- MORAN

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

MARY JO DI GESU BARTHOLOMEW      (PP)...PRO/PER

BRANDON KANE MOREN                      (RP)...

No notes – Judge to decide.

(nb)