



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 08/09/17**

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

### **Destruction of Filed Documents:**

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

### **Contacting the Probate Examiners:**

Probate Examiners' email address: [ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org)

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

lc07/11/17; 08/03/17lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

-----  
DATE: 08/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1200623

CASE NAME: MARTHA SHOAF

HEARING:

Accounting Review (Final Discharge)

COUNSEL:

PATRICIA O'HAGAN	(PET)...	ROGER I. STEIN
MARTHA SHOAF	(DEC)...	
BERNARD M BIDART	(TP )...	

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Hearing appears to be inadvertently set as an Accounting review as the final accounting/distribution of Patricia O'Hagan, niece, was approved on 07/27/16.
2. Need receipts for Shirley Helmick, Courtney ,Michael and Ashley O'Hagan; and Ronald Penton.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of receipts and order.

(lc/lh)

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1200882

CASE NAME: GREGORY MARK LAWRENCE \*MF\*

HEARING:  
Accounting Review

COUNSEL:

THERESA REAGAN-BLOOD (PET)...LAW OFFICE OF THERESA REAGAN-B  
GREGORY MARK LAWRENCE (DEC)...  
THOMAS W. DOMINICK (PET)...  
SHELBY LAWRENCE (PET)...  
LEE LAWRENCE (PET)...MARK D PERRYMAN  
ALAN D. DAVIS (SA/PET )...MICHAEL J. ULISSE  
RHONDA LAWRENCE (TP )...JOYCE M HOLCOMB  
JOYCE M HOLCOMB (PRO/PER)  
US SPECIALTY INSURANCE COMPANY (LANAK & HANNA)  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

GENERAL INFORMATION  
**Continued from 05/10/17.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to **Shelby Lawrence**, daughter, on 04/18/13; full authority, \$100,000 bond. Letters of successor Administration issued to **Alan Davis** on 09/09/14; limited authority, no bond.
2. Previous status report of **Shelby Lawrence** approved on 08/21/14. It is unclear if court required an accounting for prior administrator. Court to clarify.
3. Need accounting or status report for successor **Alan Davis**.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500231

CASE NAME: Galen C. Brookins

HEARING:

FIRST AND FINAL, WAIVER OF Account and Report of CONNIE  
BROOKINS, RONALD BROOKINS and Petition for allowance of fees

COUNSEL:

CONNIE BROOKINS	(PET)...GARY A FOLTZ
RONALD BROOKINS	(PET)...GARY A FOLTZ
GALEN C. BROOKINS	(DEC)...
SOUTHERN BAPTIST CONVENTION	(TP )...PRO/PER
WELLS FARGO FINANCIAL NATIONAL	(PRO/PER)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Connie and Ronald Brookins, daughter-in-law and son.

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

1. All trust beneficiaries waive accounting.
2. Petitioner and counsel request statutory fees of \$14,500. Ok.
3. Attorney request extraordinary fees of \$2,205 for 6.3 hours at \$350 per hour. Itemized in declaration filed 05/15/17. JTD
4. There appears to be a gain on the real property. Need schedule(s) per C.R.C. 7.705(b). **Supp. filed 07/27/17 Schedule B reflecting gains is not attached as alleged. Need same.**
5. ~Proposed Order: 05/15/17.

RECOMMENDATION

RFA subject to note 4. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600342

CASE NAME: ROBERT G HERNANDEZ

HEARING:  
Accounting Review

COUNSEL:

MICHAEL HERNANDEZ (PET)...PRO/PER  
ROBERT G HERNANDEZ (DEC)...  
NORMAN H GREEN (TP )...IRSFELD, IRSFELD & YOUNGER, LL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to Michael Hernandez, brother, on 06/06/16; full authority, no bond.
2. Final Inventory and Appraisal filed 01/03/17 indicates the estate has no assets.
3. Need Petition to Terminate Probate Proceedings for Lack of Assets (Pr.C. §12251).

RECOMMENDATION

Need to clear note 3.

(lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/09/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600352

**VACATED**

CASE NAME: MTR OF ALBERTO GOLFO

HEARING:

Accounting Review

COUNSEL:

SONITA GOLFO

(PET)...BENJAMIN ALLEY

ALBERTO GOLFO

(DEC)...

Accounting was filed and heard on 07/20/17.

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700481

CASE NAME: YU HSIN CHIEN

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

HSIU LIN CHIEN

(PET)...LAW OFFICES OF YVONNE HS U

YU HSIN CHIEN

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA Hsiu Lin Chien, spouse.

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

1. All heirs waive bond. Estate consists of \$384,744.82 in personal property.
2. ~Proposed Form Order: 05/17/17

#### RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **10/17/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

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DATE: 08/09/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1501191

CASE NAME: THE GERALD TURNER LIVING TRUST

**SEE ALSO 8**

HEARING:

Motion Re: DEMURRER TO PETITION OF MARIA C. ROSEN Filed by  
Respondent MYRNA CARDENAS, RAFAEL CARDENAS

COUNSEL:

MARIA C ROSEN	(PET)...BRYAN C HARTNELL
THE GERALD TURNER LIVING TRUST	(TRU)...
MYRNA CARDENAS	(PET)...PRO/PER
RAFAEL CARDENAS	(PET)...PRO/PER
RAY CARDENAS	(RES)...
LOUISE CAMMARATA	

No notes – JTD

(LR)

Future Hearings: 8/17/17: Motion Re: Demurrer to Answer of Maria C Rosen. Motion Re: Strike Answer to Cross-Complaint, 9/27/17: Mediation Settlement Conference, Hearing Re: Status of Mediation, 11/15/17: Readiness Calendar, Hearing Re: Determine Title & to Require Transfer of Property, Petition for Cross Complaint Against Maria C Rosen for Specific Performance, Trust Fraud & Breach Etc, 12/04/17- 12/08/17: Court Trial



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

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DATE: 08/09/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1501191

CASE NAME: THE GERALD TURNER LIVING TRUST

**SEE ALSO 7**

HEARING:

Motion Re: STRIKE PORTIONS OF PETITION OF MARIA C ROSEN Filed  
by Respondent MYRNA CARDENAS, RAFAEL CARDENAS

COUNSEL:

MARIA C ROSEN	(PET)...BRYAN C HARTNELL
THE GERALD TURNER LIVING TRUST	(TRU)...
MYRNA CARDENAS	(PET)...PRO/PER
RAFAEL CARDENAS	(PET)...PRO/PER
RAY CARDENAS	(RES)...
LOUISE CAMMARATA	

No notes – JTD

(LR)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 08/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

**VACATED**

HEARING:

Hearing Re: STATUS OF REPORT BY DR. LEEB

COUNSEL:

STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
SHANIKA A LISTER	(CEP/CEE)...EDWARD B FISCHER & ASSO
EDWARD B FISCHER	(PET)...EDWARD B FISCHER & ASSOC
VICKY LISTER	(CPE/CP)...HARTNELL LAW GROUP
YO TASHI KO Y. TUCKER	(PET)...HARTNELL LAW GROUP
CARMELA C JOHNSON	(CP )...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
BANK OF THE WEST	(RANDOLPH M SHARON)

***XREF: PROPS1400134 CIVDS1309039***

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report by Dr. Leeb

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

1. On 06/07/17 Dr. Leeb was ordered to submit a report by 07/28/17.
2. Need report.

RECOMMENDATION

Inquire status of report.

(lc)

Future Hearings: 9/06/17: Hearing Re: Conference Re Trial Issues, 11/16/17: Readiness Calendar (x2), Petition for Conservatorship (x2), 12/11/17-12/15/17: Court Trial, 4/19/18: Accounting Review

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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

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DATE: 08/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1100110  
CASE NAME: MTR OF BERTHA MAE MATTHIAS  
HEARING: Petition for Appointment of Conservator

COUNSEL:

JUDY JACKSON	(CP/CPE )...PRO/PER
BERTHA MAE MATTHIAS	(CTP/CEP/CEE)...
PUBLIC GUARDIAN	(PCR)...COUNTY COUNSEL
CANDACE P HALL	(CP )...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of **Successor** Conservator estate only by Candace Hall, daughter.

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

1. Judy Jackson was prior Conservator of estate. The estate was terminated and Judy was discharged on 10/15/12. **Petitioner is current Successor Conservator of person only**, appointed on 04/13/15.
2. Petition is not actually for successor as there is no current *conservator of estate*. Need return of citation for this purpose.
3. Need notice of hearing and proof of service including to Veteran's Administration.
4. Petitioner seeks no bond as conservatee receives pensions under \$1,000 per month. It appears benefits are from Veteran's Affairs.
  - a. Court to inquire if petitioner reports accountings to Veteran's Administration as representative payee.
5. Need Court Investigator report.
6. Petitioner seeks medical powers. However, this matter is for estate only.
7. Petitioner seeks dementia powers. However, this matter is for estate only. Report of Counsel Hartnell filed 01/17/17. Does court wish to require an updated report?  
JTD
8. Certificate of Completion of the Conservatorship Training Class filed 11/06/14.
9. ~Proposed Form Order: 06/30/17.

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **03/14/18** for the filing of the required documents and hearing re Accounting Review for **10/17/18**. Any accounting to be filed 30 days in advance.

(lc)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/09/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700243

CASE NAME: Mariah Carroll

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BRANDY GARBA (PET)...PRO/PER  
MARIAH CARROLL (CEP)...

#### GENERAL INFORMATION

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

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

1. Petitioner does not medical powers; however, states in section 9 that proposed conservatee lacks capacity to give medical consent. Capacity Declaration filed 06/26/17.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report. **Confidential Letter from IRC filed 07/11/17. JTD**
6. Need notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
7. Need Court Investigator report.
8. Proof of Completion of the Conservatorship Training Class filed 07/31/17.
9. Return of citation filed 07/21/17.
10. ~Proposed Form Order: 06/26/17.

#### RECOMMENDATION

Need to clear notes 4-7. If approved, set hearing for Compliance Review for **03/14/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. § 1830(c); Level of Care and Care Plan per Pr.C. § 2352.5. (lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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DATE: 08/09/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600257

CASE NAME: ANNIE ODEN

HEARING:

Petition for ATTY FEES BY ATTY FOR CNSVTEE

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

ANNIE ODEN

(CEP)...LENITA A SKORETZ

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Allowance of Fees by Lenita Skoretz.

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

1. Petitioner, Lenita Skoretz, was appointed counsel on 09/12/16.
2. Petitioner requests fees of \$4,215 for 15.65 hours at \$300 per hour. Need Exhibit "A" itemization as stated in petition.
3. Need notice of hearing and proof of service.
4. ~Proposed Order: 06/30/17.

#### RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300805

CASE NAME: Twana R. McCallon

HEARING:

Probate status report filed.

COUNSEL:

AURELL P CATER

(PET)...PRO/PER

TWANA R MCCALLON

(DEC)...

GENERAL INFORMATION:

**Continued from 09/06/16, 11/22/16, 01/31/17 and 05/31/17. Counsel recently retained.**

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201.  
Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. This form of notice is mandatory.
2. Amended inventory filed 05/23/16 is not dated by petitioner. Need dated form.
3. Status Report indicates real property has already been distributed. See final discharge filed prematurely on 04/12/16; deed attached.
4. Petitioner alleges the estate is not in a condition to be closed as responses by the IRS; FTB; and DHS have not been received.
5. Petitioner requests an additional 2 months to close the estate. Suggest 12 months.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 1-2 then Court's discretion. If approved, set next Accounting Review for **02/06/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500274

CASE NAME: JOAN E CONLEY

HEARING:

Petition for FINAL DISTRIBUTION ON WAIVER OF ACCOUNT AND  
REPORT OF ADMINISTRATOR

COUNSEL:

EUGENE CONLEY (PET)...PRO/PER  
JOAN E CONLEY (DEC)...

#### GENERAL INFORMATION

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

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

1. All heirs waive accounting.
2. Petitioner waives statutory compensation.
3. Petitioner seeks a reserve of \$1,000.
4. No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500845  
CASE NAME: MIGUEL MARTINEZ ORTIZ  
HEARING: ACCOUNTING REVIEW Account and Report of GLORIA E. MARTINEZ  
and Petition for allowance of fees filed.

COUNSEL:

GLORIA E. MARTINEZ (PET)...PRO/PER  
MIGUEL MARTINEZ ORTIZ (DEC)...

GENERAL INFORMATION

**Continued from 03/29/17 Spanish Interpreter and 05/24/17. No appearance. Citation issued to Gloria Martinez.**

THIS CASE SET FOR HEARING ON Accounting review Gloria Martinez, daughter;

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

1. Petitioner filed an "Accounting review" with an accounting attached. **No fees appear to have been taken at filing** and the accounting appears to have conservatorship forms.
2. Petitioner appears to have distributed the assets to herself and the other 3 heirs. [Acct.01/26 LFpg6]. A personal representative ***may only preliminary distribute personal property per Pr.C. § 10520; if it is pecuniary per terms of a will under \$10,000 and/or personal property under \$50,000.*** There is no will. However, the estate does not appear to have suffered harm.
3. The report is not complete as to Creditor's Claim allegations, taxes paid, and notices to Department of Health Services etc. Need a proper report and summary of account and accounting schedules Pr.C.§10900 and Pr.C.§1060 et. seq.
4. Need final Inventory and Appraisal.
5. Proof of service filed; however, no notice filed. Need notice of hearing and proof of service.
6. **Need return of citation.**
7. No proposed order.

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc)



Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600365

CASE NAME: MTR OF CORNELIUS HOLLY

HEARING:  
Accounting Review

COUNSEL:

JUANA HOLLY (PET)...JAMES L HEYWOOD AND ASSOC  
CORNELIUS HOLLY (DEC)...  
SURETEC INSURANCE CO MPANY (TP )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Juana Holly, former spouse/mother of minors, on 06/15/16; full authority, \$110,000 bond. Letters do not indicate full authority, clerk's office notified on 07/13/17.
2. Final Inventory and Appraisal filed 9/26/16.
  - a. Inventory and Appraisal assets \$194,220. Court may wish to revisit bond.
  - b. Need bank statements per local rule 20-908.
3. Need accounting or status report.

#### RECOMMENDATION

Need to clear notes 2-3.

(lc)

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600864

CASE NAME: MTR OF NAOMI LEWIS JACKSON

HEARING:

FIRST AND FINAL Account and Report of EVA GARCIA and Petition  
for allowance of fees filed.

COUNSEL:

EVA GARCIA	(PET)...MICHAEL C MADDUX
NAOMI LEWIS JACKSON	(DEC)...
DEPT OF HEALTH CARE SERVICES	(TP )...

GENERAL INFORMATION

**Continued from 04/12/17 and 06/14/17.**

THIS CASE SET FOR HEARING ON **Amended** Final Account, Distribution and Petition  
for Allowance of Fees by Eva Garcia, daughter.

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

1. Petitioner waive statutory compensation.
2. Attorney seeks statutory fees of \$5,500. Ok.
3. Creditor's Claim filed by Department of Health Services in the amount of \$97,749.25 on 04/17/17. **Proof of payment filed 07/27/17.**
4. Notice of Hearing and proof of service re amendment to Department of Health Services (DHS) who requested special notice filed 06/07/17; however, need at least 15 days' notice per Pr. C. §1252. **Supp. 07/27/17 indicates notice was re-served. Proof of service does not appear in ROA; however, DHS creditor's claim has been satisfied. JTD**
5. Proposed Order: 02/15/17; however, a Creditor's Claim has since been filed.

RECOMMENDATION

Need to clear note 4. Court to continue matter for recently filed claim period. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700195

CASE NAME: MTR OF IRA PETE ELLER TRUST

HEARING:

Petition for ORDER INSTRUCTING TRUSTEE TO DISTRIBUTE RENTAL  
INCOME TO BENEFICIARY; FOR IMMEDIATE SUSPENSION ET

COUNSEL:

DOROTHY NOVELLA ELLER (PET)...DOWLING AARON INCORPORATED  
THE IRA PETE ELLER TRUST (TRU)...  
NATHAN PETE ELLER (OBJ)...GREGORY L ZUMBRUNN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700446

CASE NAME: WILLIAM HERBERT MCCALLEY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LINDA A MCCALLEY (PET)...ROSS H BERGMAN & ASSOCIATES  
WILLIAM HERBERT MCCALLEY (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Linda McCalley, sister.

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

1. Petitioner seeks 100% interest in the decedent's 100% interest in real property per intestate succession.
2. Inventory and Appraisal is not attached to petition as stated in section 8; however, is filed separately. Inventory and Appraisal is not dated by counsel and section 5 is incomplete as to property tax certificate. Need same.
3. No proposed order.

#### RECOMMENDATION

Need to clear note 2.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700456

CASE NAME: JOHN G PAYAN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LORI A BALLARD (PET)...SELTERS & SELTERS  
JOHN G PAYAN (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Lori Ballard, daughter.

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

1. Petitioner seeks 100% interest in the decedent's 100% interest in real property per intestate succession and assignment of interest [Pet.LFpg 7].
2. Petitioner attached a copy of deed; however, deed states decedent and Sally Neyes as joint tenants. Sally predeceased decedent. Question if there was ever an affidavit of Death of Joint tenant filed? **Supp. 07/25/17 Affidavit of Death of Joint Tenant recorded 06/19/17.**
3. Attachment 11 is not attached; however, it appears Attachment 13 includes the legal description of real property.
4. Attachment 14 does not include John Payan, Jr's address; however, John Payan assigned his interest.
5. ~Proposed Form Order: 05/11/17.

#### RECOMMENDATION

RFA.  
(lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700496

CASE NAME: MARIANNE MARGARET EDMON

HEARING:

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

COUNSEL:

RICH EDMON (PET)...PRO/PER  
MARIANNE MARGARET EDMON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters of Administration WWA with Full Authority under IAEA by Rich Edmon, son.

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

1. All beneficiaries allegedly waive bond. Estate value \$610,000 of which \$100,000 is personal property. Need bond waiver for Michelle Edmon. **Waiver of bond filed 08/03/17 not in LF at time of review.**
2. Will is holographic. **Proof of Holographic Instrument filed 08/03/17 not in LF at time of review.**
3. Need verified supplement clarifying if Jennifer Michelle Edmon is Jennifer Lilley. **Supplement filed 08/03/17 not in LF at time of review.**
4. ~Proposed Form Order: 05/19/17

RECOMMENDATION

Need to clear notes 1-3, Court's discretion re bond. If approved, set Accounting/Status Review for **10/17/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

Superior Court of Calif, County of San Bernardino  
Page: 9A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/09/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700404

CASE NAME: FULLER FAMILY TRUST

HEARING:  
Hearing Re: RECEIPT OF REPORT BY GAL

COUNSEL:  
W A HLAVATY (PET)...RICHARD W S PERSHING  
FULLER FAMILY TRUST (TRU)...PRO/PER

GENERAL INFORMATION:

**Continued from 07/31/17. Matter is continued to be heard with related pending conservatorship case. Parties agree to change the 08/10/17 conservatorship hearing to 08/09/17.**

THIS CASE IS SET FOR HEARING ON Receipt of Report by Guardian ad Litem [GAL].

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

1. Matter set at 06/05/17 hearing, wherein, the Court appointed Rose Rosado as guardian ad litem for June Fuller.
2. GAL report filed 07/26/17.

RECOMMENDATION:

Court's discretion  
(nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/09/17    TIME: 8:35    DEPT: S36P  
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CASE#: PRO PS1601134

CASE NAME: THE SIMPSON TRUST DATED OCTOBER 30, 2004

HEARING:

Petition for TO CONFIRM REAL PROPERTY BELONGS TO TRUST AT  
SETTLOR'S DEATH ETC

COUNSEL:

MICHAEL S SIMPSON            (PET)...JASON L GAUDY  
THE SIMPSON TRUST            (TRU)...PRO/PER

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**CONSERVATORSHIPS**

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DATE: 08/09/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1200284

CASE NAME: MTR OF WILLIS KADE ALAN STOKES

HEARING:

Accounting Review

COUNSEL:

WILLIS KADE ALAN STOKES

(CEP)...JACK B OSBORN

CRAIG E STOKES

(CPE)...FULLERTON LEMANN SCHAEFER

JACK B. OSBORN

(PET)...JACK B OSBORN

GENERAL INFORMATION

**Continued from 03/22/17 and 06/14/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> Account of Craig Stokes approved on 08/23/16.
2. Need 3<sup>rd</sup> Account beginning with 12/15/14.

RECOMMENDATION

Inquire status of accounting.

(lc)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500020  
CASE NAME: JOSEPH G EVANS SR  
HEARING: FIRST Account and Report of JOSEPH G EVANS JR and Petition for allowance of fees filed.

COUNSEL:

JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR
MARY TURCOTTE EVANS	(OBJ)...JOYCE M HOLCOMB

**CASE TO REMAIN IN S36**

GENERAL INFORMATION

**Continued from 06/14/17. Roberta Taylor relieved as counsel.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees by Joseph Evans, son.

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

1. Accounting period 02/04/15 – 12/18/16.
2. Assets on hand \$71,942.34 of which \$27,942.34 is cash.
3. Attorney requests fees of \$7,503 for 47 hours at \$120/350 per hour for paralegal and attorney services. Itemized [Acct. 03/29 LFpg 57-60]. JTD
4. Petitioner requests fees of \$32,012.50 for 1280.5 hours at \$25 per hour. Itemized [Acct. 03/29 LFpg 85-92]. JTD
5. Joyce Evans-Sandin [Joyce] paid herself \$71,515.83 in caregiver services and repaid the estate \$43,045, leaving caregiver services paid to her totaling \$28,470.73. Petitioner and Joyce are now aware that the payments were inappropriate without a court order. Petitioner requests ratification of services totaling \$28,470.73. JTD
6. Petitioner requests that Joyce's caregiver fees of \$5,700 be ratified. Itemized [Acct. 03/29 LFpg 91-92]. JTD
7. Petitioner requests reimbursement of expenses totaling \$14,803.42 of which \$9,744.19 have already been reimbursed leaving a balance of \$5,059.23. Expenses include mostly hotel stays and meals. Itemized [Acct. 03/29 LFpg 93-99]. JTD Also see next note.

8. Disbursements appear to list more lodging/vacations than average. Court to inquire [Lfp45].
9. Petitioner seeks ratification of expenses paid to Joyce totaling \$15,431.34 Itemized [Acct. 03/29 LFpg 100-106]. JTD
10. Disbursements indicate gifts to family and friends on 02/27/15 totaling \$2,000. Need further explanation[Lfp29]. **Supp 06/20: paid to Gladys Miles as a gift allegedly promised prior to conservatorship.**
11. Disbursements indicated \$32,900 transferred to account ending in 6652 [Lfp34]. Question what account ends in 6652 as it does not appear to be listed? **Supp 06/20: Petitioner alleges she made periodic disbursements between her person accounts and conservatorship accounts. Petitioner reportedly transferred back \$30,500. Court to inquire if petitioner is commingling funds.**
12. Petitioner requests current bond of \$39,425 to \$68,000. Ok.
13. ~Proposed Order: 03/29/17.

#### RECOMMENDATION

Court's discretion re fees/reimbursement. If approved, set hearing on the next accounting review for **02/28/18** (if one year) or **02/27/19** (if two years). Accounting to be filed 30 days in advance.

(lc)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500040  
CASE NAME: VIOLETTE K. GRAVES AKA VIOLET GRAVES  
HEARING: FIRST AND FINAL Account and Report of VERONICA MARKS and  
Petition for allowance of fees filed.

COUNSEL:

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

GENERAL INFORMATION

**Continued from 07/26/17. Petitioner will withdraw request for termination.**

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

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

1. Accounting period 02/26/15 – 04/30/17.
2. Assets on hand \$105,541.19; cash and real property valued at \$30,000.
3. Petitioner waives compensation.
4. Attorney requests fees of **\$8,906.25** for a combined 34.75 hours at \$300/\$150/\$125 per hour. Itemized Counsel to reimburse San Bernardino County \$1,205 for compensation. **Supp. filed 08/03/17 ~Proposed Order 08/03/17**
5. Petitioner seeks termination of the conservatorship as the threat of undue influence from Janice Jones is no longer apparent. Petitioner states the Capacity Declaration was insufficient to establish the need for conservatorship of person. Counsel Kennedy was noticed. Report of Counsel filed 07/12/17.
6. Need notice of hearing and proof of service to Veteran's Administration. Counsel to confirm if actual Veteran's Administration or department of defense, who would not need notice.
7. Petitioner seeks bond of \$100,000 to be reduced to \$65,000 if matter not terminated in its entirety. Need bond calculation as it appears after attorney's fees bond would be \$74,000.
8. Proposed order 06/19/17; however, bond calculation does not appear in petition, and indicates attorney's fees of \$7,848.75.

RECOMMENDATION

Need to clear notes 6-7. If approved, set hearing on the next accounting review for **06/27/18** (if one year) or **06/26/19** (if two years). Accounting to be filed 30 days in advance.  
(lc/lh/lc/lh)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500246

CASE NAME: CHRYSTLE MICHELLE PEREZ

**SEE ALSO 14**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CLAUDIA PEREZ

COUNSEL:

CLAUDIA PEREZ	(CPE)...LAYNE A BARTHOLOMEW
GREGORIO PEREZ	(CPE)...LAYNE A BARTHOLOMEW
CHRYSTLE MICHELLE PEREZ	(CEP/CEE)...ROBERTA L TAYLOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Claudia & Gregorio Perez, parents, appointed **limited** conservator of the person only on 10/15/15. Amended order correcting powers filed 07/03/17; letters issued.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 11/13/15; however, as an amended order was filed 07/03/17, **need updated notice.**
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 12/15/15.

RECOMMENDATION

Need to clear note 2.

(lc)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500246

CASE NAME: CHRYSTLE MICHELLE PEREZ

**SEE ALSO 13**

HEARING:

Hearing Re: Proof of purchase of van

COUNSEL:

CLAUDIA PEREZ	(CPE)...LAYNE A BARTHOLOMEW
GREGORIO PEREZ	(CPE)...LAYNE A BARTHOLOMEW
CHRYSTLE MICHELLE PEREZ	(CEP/CEE)...ROBERTA L TAYLOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Purchase of Van.

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

1. On 03/01/17 Court approved the purchase of a van up to \$35,000.
2. Need proof of purchase/sales contract for modified van.

RECOMMENDATION

Inquire status of sale contract.

(lc/lh/lc)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600032

CASE NAME: JACQUELINE BEARCE

HEARING:  
Accounting Review

COUNSEL:

ROBERT L BEARCE	(PCR)...PRO/PER
SHERI L KASTILAHN	(PET)...SHERRI L KASTILAHN
KATHLEEN BEARCE CLARKE	(CPE)...PRO/PER
JACQUELINE BEARCE	(CEE)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. **Robert Bearce**, spouse appointed Conservator of person and estate on 06/08/16, no bond. **Kathleen Bearce Clarke**, sister-in-law, appointed successor Conservator of person and estate on 04/05/17, \$80,000 bond.
  - a. **NOTE:** Bond filed for Kathleen on 04/12/17; however, appears to be incomplete as to whether bond is qualifying or additional and section re appointment of successor is not checked. Need corrected bond.
2. Need accounting for prior Conservator Robert Bearce.

RECOMMENDATION

Inquire status of accounting for prior Conservator and require corrected bond for current Conservator.

(lc)

Future Hearings: 11/08/17: Conservatorship Compliance Review Hearing. 6/13/18: Accounting Review for **Kathleen Bearce Clarke**

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700255

CASE NAME: ALLWYN E D KELLY  
HEARING: Petition for Appointment of Conservator

COUNSEL:

LEIANI KELLY (CPE)...PRO/PER  
ALLWYN E D KELLY II (CPE/CEP)...PRO/PER

GENERAL INFORMATION

07/12/17 Bryan Hartnell appointed counsel. Counsel to visit Allwyn today in hospital. Leiani and Allwyn E D Kelly II appointed temporary Conservators, person and estate \$20,000 bond on 07/13/17. Oral report given by Mr. Theios; Mr. Theios stated Bryan Hartnell visited proposed conservatee. As soon as petitioner knows the bank balance, they are to contact Mr. Theios and bond will be increased as needed.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Leiani and Allwyn E D Kelly II, daughter & son.

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

1. Petitioners seek no bond. No assets appear to be listed. Court may wish to require minimum bond of \$20,000 for general conservatorship and revisit bond at a later date.
2. Petitioners seek medical powers. Capacity Declaration filed 07/05/17; however, caption as to parties is incomplete. Need same.
3. Need return of citation.
4. Need notice of hearing and proof of service including to Veteran's Administration.
5. Need report of Counsel Hartnell.
6. Certificates of Completion of the Conservatorship Training Class filed 07/06/17.
7. CI report filed 08/01/17.
8. No proposed order.

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond. If approved, set hearing for Compliance Review for **03/14/18** for the filing of the required documents and hearing re Accounting Review for **10/17/18**. Any accounting to be filed 30 days in advance.  
(lc/lh)



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

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: VC VS255

CASE NAME: IN THE MATTER OF DANIELLE KAY LUCIA

HEARING:

Hearing Re: Final Accounting

COUNSEL:

DANIELLE KAY LUCIA	(CEP)...
LOUIS E LUCIA	(CPE)...PRO/PER
DEBORAH J LUCIA	(SC/CPE )...JEANNE E KENNED
PATRICIA A FREITAS	(CPE/SC)...CALDWELL, KENNEDY & PORTER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON re **Final Accounting**/Accounting review.

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

1. Co Conservator **Deborah Lucia**, step-mother resigned and **Patricia Frietas**, sister is sole remaining Conservator of person and estate.
2. On 04/26/17 court granted motion to fix conservatee's residence in Alameda county. However, it appears the matter was not ordered transferred.
3. 12<sup>th</sup> Account approved on 01/25/17 **Need 13<sup>th</sup> and final Account for Co-Conservators for 01/01/16- 04/26/17** as only one Conservator remains.

RECOMMENDATION

Need final accounting Co-Conservators. Accounting review for **02/21/18** to remain on calendar for remaining Conservator.

(lc)

Future Hearing: **02/21/18**: Accounting Review as to **Patricia Frietas only**

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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/09/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500259

CASE NAME: BROOK GREEN

HEARING:

Hearing Re: Bond Calculation/Receipt for SNT/Status

COUNSEL:

BARBARA EISENBEISZ	(PET)...JAMES B CHURCH
BARBARA EISENBEISZ	(PET)...PRO/PER
BROOK GREEN	(CEE)...
SANDY TURNER	(PET)...

***XREF: PROPS1400404 (Estate of Harvey Green)***

#### GENERAL INFORMATION

**Continued from 07/06/17.** Brook Green not to spend any money received from the distribution and verification of funds must be brought to the next hearing. \$45,000 bond required. Brook Green to personally appear.

**Continued 7/13/17 at request of court to post bond. Attorney Melvin Friedland appointed for Brook Green**

THIS CASE SET FOR HEARING ON Bond Calculation/Receipt of SNT/Status.

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

1. Matter set on 05/18/17 Status of Funding SNT hearing. Distribution must be done to fund SNT. Waiver of final account/distribution for PROPS1400404 was approved same day. **Proof of bond \$45,000 filed 08/02/17 not in LF at time of review.**
2. Substituted judgment to create SNT granted on 08/30/16.
3. Brook Green's distribution appears to be \$39,606.35.
4. Need report of Counsel.

#### RECOMMENDATION

Inquire status distribution and report.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 08/09/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS0701047

CASE NAME: MTR ABEL A GONZALES

HEARING: Hearing Re: ATTY FEE REQUEST BY JEFFREY MAYES/DISMISSAL

**COUNSEL:**

CHRISTINE RAMEY	(PET)...HARTNELL LISTER & MOORE
ABEL A GONZALES	(DEC)...
SENNI GONZALES	(MIN)...MELVIN L FRIEDLAND
BITIA GONZALES	(MIN)...MELVIN L FRIEDLAND
JEFFREY C MAYES	(PET)...MAYES LAW OFFICES
MELVIN L FRIEDLAND	(MELVIN L FRIEDLAND)

**GENERAL INFORMATION**

THIS CASE SET FOR HEARING ON Dismissal on Attorney Fee Request by Jeffrey Mayes.

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

1. Matter set on 06/14/17. Jeffrey Mayes, prior counsel for personal representative, has filed a separate fee request for 10% of statutory fees (not calculated), reimbursement of \$1,379 costs (itemized), and \$25,635 extraordinary fees pursuant to prior petition filed in 2008. Suggest court inquire of personal representative re objection to extraordinary fees (reset petition if necessary) and whether she agrees to apportion 10% of statutory fees to prior counsel.
2. Accounting appears to have been approved on 06/14/17. Inventory and Appraisal was to be filed. Court ordered extraordinary fees for estate reduced to \$4,322.50 from \$9,362.50 and litigation reduced to \$17,227.50 from \$22,902.50.
3. Inventory and Appraisal filed 06/14/17 indicating assets of \$981,523.23.
  - a. This amount would calculate statutory fees as \$22,630.46; however, the accounting appears to have been approved...
  - b. The real property was not appraised by probate referee...
  - c. There are no bank statements to support Inventory and Appraisal balance.
  - d. Section 5 re tax certificate incomplete.

**RECOMMENDATION**

Court's discretion.

(lc)

Future Hearings: 6/20/18: Hearing Re: Final Discharge

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**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.**

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400577

CASE NAME: \*\*MASTER FILE\*\* REVEKKA ALVA

HEARING:

Probate status report filed.

COUNSEL:

JOHN D SALAS (PET)...HORSPPOOL & HORSPPOOL  
REVEKKA ALVA (DEC)...  
MOUSES ANTONIO SALAS SOTO (PET)...PRO/PER

#### GENERAL INFORMATION

**Continued from 06/14/17. Mouses Soto's objections to be addressed at next hearing.**

THIS CASE SET FOR HEARING ON Status Report filed 03/30/17.

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

1. Letters of Administration issued to John Salas on 04/24/15, limited authority, \$20,000 bond. Cases now consolidated.
2. Final Inventory and Appraisal filed 03/30/15.
3. Petitioner seeks an additional year to close the estate in order to settle civil lawsuit under CIVDS 1511834. **The matter was dismissed on 04/14/17.**
4. **NOTE:** original petition filed by John Salas does not indicate any other relatives; however, there was notice given to a Miguel Salas and a Salvador Salas. Additionally, another petition filed by Mouses Soto indicates other parties (see other matter): Leonardo Soto (nephew) and Miguel Hernandez (brother). Need clarification of relatives and whether consulate of Mexico shall be noticed as Salvador Salas lives in Mexico.
5. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

#### RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **06/06/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500907

CASE NAME: MTR OF CHRISTINE MARY DEDIANOUS

HEARING:

Probate status report filed.

COUNSEL:

KATHLEEN ANN OWENS

(PET)...DALE C HUFFAKER

CHRISTINE MARY DEDIANOUS

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to by Kathleen Owens, sister, on 11/16/15; full authority, no bond.
2. Petitioner seeks additional time to close the estate in order to sell the real property.
3. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit after hearing.

#### RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **03/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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HONORABLE: TARA REILLY

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600346

CASE NAME: MTR OF ROBERT DENNIS DEHART

HEARING:  
Accounting Review

COUNSEL:

MICHAEL DEHART (PET)...PECCORINI & PECCORINI  
ROBERT DENNIS DEHART (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Michael Dehart, son/sole heir, on 06/01/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lc)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600839

CASE NAME: MTR OF JEANETTE P HAMBLY

HEARING:

PET FOR FINAL DISTRIBUTION ON WVR OF Account and Report of MARIA  
LUIZA FLORES and Petition for allowance of fees filed.

COUNSEL:

MARIA LUIZA FLORES (PET)...PRO/PER  
JEANETTE P HAMBLY (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Maria Luisa Flores, friend.

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

1. Both beneficiaries waive accounting.
2. Petitioner waives statutory compensation.
3. Need statement regarding notice to Franchise Tax Board or proof of service of the same Pr. C. § 9202(c)(1).
4. ~Proposed Order: 05/19/17.

#### RECOMMENDATION

RFA subject to note 3. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc)



Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700497

CASE NAME: THE RESTATED AMENDMENT TO DOLORES LIVING TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSESTS

COUNSEL:

THE RESTATED AMENDMENT TO THE DOLORES LIVING TRUST (TRU)...

VICTOR MIRANDA (STE)...STEPHEN A. WORKMAN

Currently under review by legal research

(LR)

NOTICE:

1. Need 30 days' mailed notice to all parties listed in petition [Pet. 05/22/17LFpg.4] and mortgage company if there is a lienholder.

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/09/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700499

CASE NAME: DOUGLAS RAY HICKS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AIAE

COUNSEL:

VANESSA E LEAL (PET)...E. MARIE HENNING  
DOUGLAS RAY HICKS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Vanessa Leal, nominee

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

1. All heirs waive bond. The estate consists of \$33,682.78 in personal property. JTD
2. ~Proposed Form Order: 05/22/17

#### RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **10/17/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino

Page: 7A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/09/17    TIME: 8:30    DEPT: S37P  
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CASE#: PRO PS1601199

CASE NAME: SUSAN KATHRYN HIRSCH

HEARING:

Petition for INJUNCTION AGAINST TRUSTEE FROM SELLING REAL  
PROPERTY AT TRUSTEES SALE

COUNSEL:

MCCARTHY & HOLTHUS, LLP

(TP )...MCCARTHY & HOLTHUS

MICHAEL D AYALA

(PET)...HORSPOOL & HORSPOOL

SUSAN KATHRYN HIRSCH

(DEC)...

Currently under review by Legal Research.  
(LR)

Future hearing: 05/02/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

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DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON DS1000180

CASE NAME: LUISA PEPILASCOV

HEARING: (AMENDMENT)TO FIRST Account and Report of LEIA CHASE and  
Petition for allowance of fees filed.

COUNSEL:

LUISA PEPILASCOV	(CEP)...MITCHELL I ROTH
RAQUEL PEPILASCOV	(CPE)...EDWARD B FISCHER & ASSOCIATES
MARCOS PEPILASCOV	(CPE)...EDWARD B FISCHER & ASSOCIATES
LINDA MAXWELL	(CE/CPE )...MAUREEN MURATORE
LEIA CHASE	(CPE)...CHO, SHEASBY, CHUNG & IGNACIO,
CHARLES CORNETT	(PET)...EDWARD G. OPERINI
MITCHELL I ROTH	(PET)...
EDWARD B FISCHER	(PET)...EDWARD B FISCHER & ASSOCIATES
US SPECIALTY INSURANCE COMPANY	(TP )
LISA LEHAR	(PRO/PER)

**XREF: PRODS1000524** (*Simon & Luisa Pepilascope Trust*)

GENERAL INFORMATION:

Per stipulation entered on 03/16/15, Leia Chase was appointed to replace Linda Maxwell as Successor Trustee. Leia Chase appointed as Successor Trustee on 09/25/15.

**Continued from 12/12/16, 03/13/17 and 06/14/17. Issue of whether conservatorship is necessary set for 08/29/17. Mitchell Roth appointed counsel.**

THIS CASE IS SET FOR HEARING ON **Amendment (04/26/17)** First and Current Account by **Successor Trustee, Leia Chase**.

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

1. Accounting period 09/25/15 to **03/31/17**.
2. Need notice of hearing and proof of service for amendment.
3. Assets on hand \$384,319.00 consisting of \$76,519 in cash and \$308,300 in improved real property in Hesperia, CA and unimproved real property in Apple Valley, CA.
  - a. Petitioner now submits an amendment **[04/26/17]** with a summary indicating carry valued as "not valued" and \$0 cash. Question why this summary of account has \$0 cash as there is the \$76,519 as stated in accounting 02/21/17? **See next.**

b. **Declaration filed by Raquel Pepilascov current Conservator 07/19/17 attempting to clarify the values for conservatorship estate. It is alleged that Leia referred incorrectly to \$76,519 in cash assets as of 09/25/15. See [Sup. 07/19 LFpg3-4 ].**

c. **Need clarification of assets by Leia Chase.**

4. Need Capacity Declaration.
5. Reports of Counsel Roth filed 08/01/17.
6. Trustee requests reimbursement of \$300 for filing costs and \$500 in fees. JTD
7. Court to inquire if income or distributions related to upkeep/overhead of real property have occurred during this account period. If so, need supporting schedules.
8. Special Report by CI filed 03/07/17.
9. ~Proposed Order: 04/26/17. Ok as to form and content matching amendment.

**RECOMMENDATION:**

Need to clear notes 2-4. If approved, set next hearing for Accounting Review on **05/16/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules. (nb/lc)

Future Hearing: 8/29/17: Accounting Review for Raquel Pepliascov, Conservator  
08/29/17Hearing Re: Petition to Terminate

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200270  
CASE NAME: HOLLEY GRAHAM

**SEE ALSO 15**

HEARING: FIRST AND FINAL Account and Report of JOHNIE B SEALS and  
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
HOLLEY GRAHAM	(CEP)...CHO, SHEASBY, CHUNG & IGNACIO
PATRICIA LARRY	(CP/PCR )...PRO/PER
NATALIE BLICKENSTAFF	(CE/CPE )...PRO/PER
RAYMOND L TOWNE	(CP )...PRO/PER
MATTHEW E. SHEASBY	(PET)...CHO, SHEASBY, CHUNG & IGNACIO
JOHNIE B SEALS	(PCR)...MITCHELL I ROTH

***XREF: PROPS1401080(Estate of Holley Graham)***

GENERAL INFORMATION

**Continued from 05/31/17. Supplement to be filed separating conservatorship and probate cases. Accounting to be sent to Mr. Mokterian today.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> and Final Account and Petition for Fees and Costs by Johnie Seals

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

1. Accounting period 10/09/14 – 10/19/14 (10 days). Conservatee passed away on 10/19/14.
2. Assets on hand \$49,643.30; cash.
3. Final Inventory and Appraisal does not appear to be filed; however, court may waive requirement per Pr.C. § 2633. JTD
4. Petitioner proposes distribution to himself as administrator of conservatee's estate PROPS1401080.
5. Attorney Roth requests fees of \$21,935.50 for 65.9 hours at \$325 per hour. Fees go beyond accounting period through 06/07/17. Itemized [Acct. 03/16 LFpg 16-36]. JTD
6. Petitioner requests reimbursement of costs totaling \$1,673.68. Itemized [Acct. 03/16 LFpg38]. JTD
7. Need financial statements per local rule 20-1404(c) and Pr. C. § 2620(c).
8. Need notice of hearing and proof of service.

9. Current bond is \$250,000. Ok.
10. ~Proposed Order: 03/16/17.

#### RECOMMENDATION

Need to clear notes 7-8, then Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **08/15/18**.

(lc)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500157

CASE NAME: LOTTIE SCOTT

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ANGEL SCOTT

COUNSEL:

ANGEL SCOTT (PET)...PRO/PER  
LOTTIE SCOTT (CEP)...SHERRI L KASTILAHN

GENERAL INFORMATION

**Continued from 09/26/16, 11/28/16, 01/18/17, 04/12/17 and 06/15/17(no appearance).  
Angel Scott is ordered to be present at next hearing. Should Angel fail to appear,  
matter may be set for possible suspension.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Angel Scott, daughter, appointed conservator of the person and estate on 08/01/16, no bond.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 08/08/16; verification on 08/08/16.
3. Care Plan filed 06/13/16 and verification on 09/08/16.
4. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 4-7.

(lc/nb/lc/ww)



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

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DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600051

CASE NAME: ANDREW B HUBBARD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JOSEPH HUBBARD

COUNSEL:

JOSEPH HUBBARD	(PCR)...MATTHEW J SINGER
MARIA MINDA HUBBARD	(PCR)...MATTHEW J SINGER
ANDREW B HUBBARD	(CEE)...PRO/PER

GENERAL INFORMATION

Continued from 01/18/17 and 04/05/17. No appearance at last hearing. Conservators ordered to appear.

**Continued from 06/07/17. Counsel reports that Joseph Hubbard, Conservator/father, has passed away.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Joseph & Maria Hubbard, parents, appointed conservator of the person only on 09/14/16. **Need** amended letters as to Maria only.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 06/21/16; however, proof of service is not dated or signed. Additionally, section 5 is incomplete as to service of the order. **Need** corrected proof of service.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 1-4.

(lc)

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

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DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600377

CASE NAME: Chante Fortenberry

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

JOHN C HORNING jr (PET)...PRO/PER  
ROSA A ROBINSON (CP)...PRO/PER  
CHANTE FORTENBERRY (CTP)...

GENERAL INFORMATION

**Continued from 03/01/17 and 06/14/17. No appearances. John Horning and Rosa Robinson to appear at next hearing.**

THIS CASE SET FOR HEARING ON Case Management Conference.

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

1. Rosa Robinson, mother, appointed **limited** Conservator of person only on 11/02/1989 in Santa Clara County. Matter transferred to Riverside County on 11/23/04. Matter transferred to San Bernardino County on 12/14/16. Conservatee now resides in Hesperia.
2. Court Investigator report filed 06/13/17.
3. **Need** letters to reflect this county.

RECOMMENDATION

Inquire status of letters.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/09/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700157

CASE NAME: MARTINA CRUZ

**SEE ALSO 14**

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

DONNA KATHLEEN MORENO      (PET)...PRO/PER

MARTINA CRUZ      (CTE)...J. DAVID HORSPOOL

Temporary hearing – No notes – JTD

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

-----  
DATE: 08/09/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700157  
CASE NAME: MARTINA CRUZ

**SEE ALSO 13**

HEARING: Petition for Appointment of Conservator

COUNSEL:

DONNA KATHLEEN MORENO (PET)...PRO/PER  
MARTINA CRUZ (CTE)...J. DAVID HORSPOOL

GENERAL INFORMATION

Ed Fischel appointed counsel on 05/08/17.

**Continued from 06/14/17. Bond required of \$75,000. Notice of related case to be filed re elder abuse. Ed Fischel relieved as counsel and J David Horspool appointed.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Donna Moreno, daughter.

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

1. Petitioner allegedly has power of attorney. Court may wish to revoke if conservatorship is granted.
2. Petitioners request bond be waived as petitioner is daughter and primary caregiver. This is not sufficient cause for bond waiver. Personal property is valued at \$5,000 and real property at \$200,000; however, no income is stated. Court will require bond of \$75,000.
3. Petitioner **does not** medical powers. However, attachment [Page10] indicates medical, personal and financial requests. Court to inquire as no medical powers are sought. Capacity Declaration filed 06/08/17; however, section 1 states conservatee's name instead of physician, verifications are not dated. Need corrected Capacity Declaration if medical powers sought.
4. Proposed conservatee's son has allegedly taken over the residence and proposed conservatee does not live in her home. There is allegedly elder abuse orders, but do not appear to be attached [Page 11]. Need notice of related case.
5. Need report of Counsel David Horspool.
6. Need Confidential Screening form.
7. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
8. CI report filed 06/06/17.
9. Citation returned served.
10. ~Proposed Form Order: 04/28/17.

## RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **03/14/18** for the filing of the required documents and hearing re Accounting Review for **10/17/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 08/09/17      TIME: 9:30      DEPT: S37P  
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CASE#: PRO PS1401080

CASE NAME: HOLLEY GRAHAM

**SEE ALSO 9**

HEARING:

Accounting Review

COUNSEL:

JOHNI SEALS

(PET)...MITCHELL I ROTH

HOLLEY GRAHAM

(DEC)...

HUNTLEY GRAHAM

(PET)...MARK MOKTARIAN

***XREF: CONPS1200270(Holley Graham)***

GENERAL INFORMATION

**Continued from 07/27/16, 03/16/17 and 05/31/17 for conservatorship accounting to finalize.**

THIS CASE IS SET FOR HEARING ON Accounting review

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

1. Letters of administration with will annexed issued to Johnie Seals on 2/17/15.
2. Partial Inventory and Appraisals filed. Need Final Inventory and Appraisal.
3. Need accounting or probate status report.

RECOMMENDATION

Inquire status of Inventory and Appraisal and accounting.

(ds/sa/lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 08/09/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

**SEE ALSO 17**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

THOMAS BEFERT

(PET)...HARTNELL LAW GROUP

MARIE J HUMPHREY

(PET/CEP)...HARTNELL LAW GROUP

JOYCE ELLEN GOBBEL

(CEP)...CRAIG M PARKER

GENERAL INFORMATION:

Temporary orders granted 6/28/16 with \$20,000 bond.

Continued from **7/20/16** at request of counsel.

Continued from 10/12/16. Court will order \$20,000 bond subject to reconsideration upon filing of Inventory and *Appraisal*.

**Continued from 12/14/16 and 05/17/17.**

**Continued from 07/19/17 to report on condition of the home.**

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person and estate, by Marie Humphrey and Thomas Befert, sister & brother-in-law.

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

1. Bond set at \$20,000; subject to reconsideration.
2. Petitioner requests medical and dementia powers and specific orders under §§ 2351-2358. Capacity Declaration filed 05/17/17.
3. Certificates of Completion of the Conservatorship Training Class filed 03/02/17.
4. Report of court-appointed counsel, Craig Parker, filed 6/28/16.
5. Court Investigator report filed 7/15/16.
6. Proposed conservatee will attend the hearing. Citation returned served.
7. ~Proposed form order: 5/18/16

RECOMMENDATION:

Court's discretion. If approved, set hearing for Compliance Review for **03/14/18** for the filing of the required documents and hearing re Accounting Review for **10/17/18**. Any accounting to be filed 30 days in advance. (sa/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 08/09/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

**SEE ALSO 16**

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

THOMAS BEFERT	(PET)...HARTNELL LAW GROUP
MARIE J HUMPHREY	(PET/CEP)...HARTNELL LAW GROUP
JOYCE ELLEN GOBBEL	(CEP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **02/15/17, 03/08/17 and 05/17/17.**

**Continued from 07/19/17 to trails other hearing set same date.**

THIS CASE SET FOR HEARING ON Inventory and Appraisal

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

1. Marie Humphrey and Thomas Befert, sister & brother-in-law are petitioning for conservatorship. Court set matter on calendar to determine assets.
2. Final Inventory and Appraisal filed 03/08/17 indicating \$0 assets. Public benefits only. As the Conservatee's only assets are Social Security income no bond would be required. Pr.C. §§ 2323 and 2628.

RECOMMENDATION

Inquire status.

(lc/lh/lc/lh)