



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 08/14/17**

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.

nb0726/0809

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: 08/14/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

**SEE ALSO 2**

HEARING:

Hearing Re: OSC RE TERMINATION OF SNT/STATUS OF C'TORSHIP PTN

COUNSEL:

PHYLLIS ANDERSON

(PET/TEE)...DENNIS M SANDOVAL

THE LYNN K ANDERSON SPECIAL NEEDS (TRU)...

**XREF: CONPS1700129**

GENERAL INFORMATION:

**Continued from 03/13/17 on courts motion.**

THIS CASE IS SET FOR HEARING ON OSC re Termination of SNT/Status of Conservatorship Petition.

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

1. Matter set at 11/28/16 hearing, wherein, an oral motion was made to dissolve the SNT. Phyllis Anderson to give notice to Department of Health Services and Department of Developmental Services.
2. No Conservatorship Petition filed as of the review of this matter.
3. Need Fifth and Final Account by Trustee beginning 08/01/14 to present.
4. Need Notice of Hearing with proof of service to include bonding company.

RECOMMENDATION:

Need to clear notes. Set hearing for Fifth and Final Account in 60 days.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/14/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO DS1000147

CASE NAME: LYNN K ANDERSON SPECIAL NEEDS TRUST

**SEE ALSO 1**

HEARING:

Accounting Review

COUNSEL:

PHYLLIS ANDERSON

(PET/TEE)...DENNIS M SANDOVAL

THE LYNN K ANDERSON SPECIAL NEEDS (TRU)...

**XREF: CONPS1700129**

See prior matter.

(nb)

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: 08/14/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500582

CASE NAME: MUHAMMAD AFZAL

HEARING:

PETITION FOR FINAL DISCHARGE AND WAIVER OF Account and Report of  
AFNAN AFZAL and Petition for allowance of fees filed.

COUNSEL:

AFNAN AFZAL

(PET)...TIMOTHY CAHILL PICKART

MUHAMMAD AFZAL

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Administrator, Afnan Afzal ["Petitioner"].

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

1. Caption to Inventory and Appraisal is incomplete. **Supp. (08/03/17) indicates inventory filed 05/18/17 is the final inventory.**
2. All heirs waive accounting.
3. Assets on Hand \$193,500.00 consisting of real property.
4. Statutory compensation of \$6,805.00 requested. Calculated.
5. Petitioner requests authority to withhold \$500 as a reserve for closing costs.
6. **Notice of Hearing affixed to supp. filed 08/03/17 is not filed. Need conformed copy of same.**
7. ~Proposed Order 08/03/17

RECOMMENDATION

Need to clear note 6 then Court's discretion. If approved, set next hearing for receipts  
and final discharge for **08/20/18**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1501121

CASE NAME: LUCY JOHNSON

HEARING:

Accounting Review

COUNSEL:

CAROLINE DALTON-ALVAREZ      (PET)...GREGORY PAUL BENTON

LUCY JOHNSON      (DEC)...

GENERAL INFORMATION:

**Continued from 04/10/17 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. Letters of Administration issued 06/09/16, limited authority, \$20,000 bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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: 08/14/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400720

CASE NAME: JOSEPH LEE ROSANO

HEARING:  
Hearing re Final Discharge

COUNSEL:  
ROBERT W ROSANO (PET)...WEITZEN, PHILLIPS & WEINBERG,  
JOSEPH LEE ROSANO (DEC)...

GENERAL INFORMATION:

**Continued from 07/17/17. No appearances. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving Fist and Final Account entered 07/11/16.
2. No receipt. Need same.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.  
(nb)

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: 08/14/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1200812

CASE NAME: IN THE MATTER OF ISAAC SHEPHERD

HEARING:

THIRD Account and Report of CHRISTI FRIED and Petition for allowance of fees filed.

COUNSEL:

ISAAC SHEPHERD SPECIAL NEEDS TRUST (TRU)...  
CYNTHIA SHEPHERD (PET)...BARETT BEASLY  
ISAAC SHEPHERD (MIN)..  
CHRISTI FRIED (PET/TEE)...MYERS URBATSCH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by Trustee (PPF) of Special Needs Trust, Christi Fried ["Petitioner"].

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

1. Accounting period 03/01/16 to 02/28/17.
2. Assets on Hand \$84,179.24 consisting of \$4,286.42 in cash and \$52,712.82 in mutual funds and a vehicle.
3. Current bond of \$114,320.00. Petitioner request bond reduction by \$19,320 for a new bond amount of \$95,000. Appears sufficient. JTD.
4. Petitioner requests approval of fees in the amount of \$1,257.31. Billed at 1.5 % of the first \$500,000 as previously approved by Court. Itemized [LF, p. 24]. JTD.
5. Attorney requests fees of \$2,692.28. Billed at \$450/hour for 4.6 hours' attorney time and \$100/hour for 6.9 hours' paralegal time. Itemized [LF, pgs. 31-32]. JTD.
6. Attorney requests reimbursement of costs advanced of \$126.78. Itemized [LF, p. 33].
7. ~Proposed Order 05/19/17

RECOMMENDATION:

Court's discretion. If approved, set next Accounting Review for **04/18/17**. 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.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 8:35      DEPT: S35P  
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CASE#: PRO PS1500110

CASE NAME: ALAN R. ARMSTRONG LIVING TRUST DATED 8/28/06

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

MARISSA ARMSTRONG	(PET/GAL)...MARY M BADER
ALAN R. ARMSTRONG LIVING TRUST	(TRU)...
ALYSSA MAY ARMSTRONG	(MIN)...
ALANA MARCY ARMSTRONG	(MIN)...
ALAN R ARMSTRONG JR	(RES)...MITCHELL I ROTH

No notes – TSC.

(nb)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 8:35      DEPT: S35P  
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CASE#: PRO PS1400492

CASE NAME: The Jack Whitey Clair Revocable Trust

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE/MOTION RE LAUREL PROPERTY

COUNSEL:

HEIDI ELFSTROM	(PET)...JOEL R BRYANT
HOLLY N WOOD	(PET)...PRO/PER
HOLLY WOOD	(OBJ)...DAVID HUYNH
JACKIE NUTTING	(PET)...JOEL R BRYANT
THE JACK WHITEY CLAIR REVOCABL	(TRU)...
WESLEY CLAIR	(PET)...JOEL R BRYANT

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 08/14/17      TIME: 8:30      DEPT: S35P  
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CASE#: SLC SS1720

CASE NAME: IN THE MATTER OF MARY ELIZABETH WEGENER

HEARING:

NINTH Account and Report of DAVID A VALENTINE and Petition for allowance of fees filed.

COUNSEL:

DAVID A VALENTINE

(CPE/CE)...EDMUND J BRADLEY

MARY ELIZABETH WEGENER

(CTE/CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

LPS Letters expire 06/02/18.

THIS CASE IS SET FOR HEARING ON Ninth Account Current of LPS Conservatorship and Petition for Fees by Conservator of the Estate, David Valentine ["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 \$169,438.08 consisting of \$2,041.90 in cash and the balance in real property, life insurance and a pre-need burial trust.
3. Petitioner does not seek compensation.
4. Attorney requests fees of \$1,100.00. Billed at \$290-\$350/hour for attorney time. Generally described in attached declaration [LF pgs.7-9]. JTD.
5. No current bond. Suggest bond of \$226,000 (includes recovery). JTD.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, Court to set next **LPS** hearing re Accounting Review for **05/28/18**.

(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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

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DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON DS1000265

CASE NAME: JACK STEINBERG

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN	(CPE/TC)...COUNTY COUNSEL
JACK STEINBERG	(CEP)...HARTNELL LAW GROUP
CRAIG PARKER	(CAA)

GENERAL INFORMATION:

Conservatee passed away on 04/09/15.

THIS CASE IS SET FOR HEARING ON Fourth and Final Account Current and Petition for Allowance of Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting covers 12/30/14 to 12/11/15 (pre & post death periods).
2. Assets on hand: \$2,430.95 in cash.
3. PG requests ratification of fees taken in the sum of \$1,800 pursuant to its fee schedule. JTD
4. County Counsel requests ratification of fees taken in the sum of \$800 pursuant to its fee schedule. JTD
5. Petitioner requests authorization to pay DHS the amount of \$1,558.20 for health care services provided to the conservatee which were paid by the Medi-Cal Program.
6. Petitioner requests authorization to pay decedent's sister, Ruth Geis, the amount of \$872.75 representing the final distribution of assets in the estate. Does Court wish to require a Pr. C,§13100 petition? JTD.
7. Proposed Order 02/02/17 discharges upon filing of documents.

**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. If approved, set next hearing for receipts and final discharge for **08/20/18**.

(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.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS0700267

CASE NAME: KENZIE SCOTT

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

KENZIE SCOTT

(CPE)...COUNTY COUNSEL

(CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/24/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Second Account entered 06/26/1; account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS0800079

CASE NAME: JAMES OSCAR OWEN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

JAMES OSCAR OWEN

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 3/04/17.

**Continued from 10/03/16 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. On 09/30/15 Court approved the 6<sup>th</sup> account; 7<sup>th</sup> accounting now due
2. Proof of service of waiver of account filed. However, no accounting or waiver of accounting.
3. Need accounting.

RECOMMENDATION:

Inquire status.

(lc/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS0800193

CASE NAME: MTR OF LAUREN NEWLIN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

LAUREN NEWLIN

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 07/08/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Seventh Account entered 12/21/16; eighth account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1100261

CASE NAME: LAURA FLEMING

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

LAURA FLEMING

(CEP)...

GENERAL INFORMATION

**Continued from 07/11/16 and 03/20/17 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 7/7/14 Court approved the 2<sup>nd</sup> Account Current for the period ending 2/27/14.
2. Need an accounting.

RECOMMENDATION:

Inquire status.

(sa/nb)



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

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DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

HEARING:  
Petition for ATTORNEY FEES

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:

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

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

- 1 Petitioner was appointed on 11/20/13. Petitioner alleges that services have been provided for which counsel has not been compensated.
- 2 Attorney requests fees of \$22,782.50 for period 08/31/13 to 07/24/17. Billed at \$325/hour for 70.1 hours' attorney time. Itemized [LF, pgs. 6-15]. JTD.
  - a. Billing exceeds 2 years. However, petitioner indicates she has not previously filed a petition for fees as the estate has not, until recently, been sufficient to pay said fees.
- 3 Petitioner requests that the court allow this judgment to be recorded against the Conservatee's real property, located at 617 East Mesa Drive, Rialto, CA 92376, as a means to secure the judgment for fees, however, that the Public Guardian, as Conservator of the Person and Estate, be ordered to make installment payments to Petitioner in the event that Conservatee's reserves on hand are not adequate to pay the entire judgment. JTD.
- 4 Notice filed on 06/29/17 does not include conservatee. Need proper service.
- 5 Proposed Order 06/27/17 includes interest on judgment at the legal rate of 10% from the time of the judgment which is not prayed for in petition.

**RECOMMENDATION:**

Need to clear note 4 then Court's discretion.

(nb)

Future Hearings:

12/11/17-12/15/17: Court Trial

**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

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

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DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300348

CASE NAME: Rhonda J. Pearsall

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
RHONDA J PEARSALL (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Order denying petition for reappointment of conservator entered 05/05/17.

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 08/29/16; second and final account now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.  
(nb)

Future Hearing:

11/13/17: Accounting Review-**VACATE**

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1400037

CASE NAME: Deanna L. Wachtel

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DEANNA WACHTEL

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 04/04/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present First Account entered 08/29/16; second account or waiver of account now due.
2. Conservatee resides in Sylmar, CA. Suggest transfer to LA County. JTD.
3. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1600081

CASE NAME: MTR OF THELMA JONES

HEARING:

Petition for Allowance of Compensation to Conservator and to his Attorney

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

THELMA JONES

(PET)...E JOAN NELMS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Petitioner was appointed conservator on 08/22/16.
2. Petitioner alleges that petitioner and counsel rendered services prior to the appointment and for a period of 90 days after appointment for which petitioner and counsel have not been compensated.
3. Petitioner requests compensation of \$495.00 and County Counsel request fees of \$495.00.
4. ~Proposed Order 06/29/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

10/30/17

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1601089

CASE NAME: Dean Revocable Living Trust

HEARING:

Petition for ALLOWANCE OF COMPENSATION TO SUCCESSOR  
CONSERVATOR AND TO HIS ATTORNEY

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL  
DEAN REVOCABLE LIVING TRUST (TRU)...

**XREF: CONPS1600290**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by  
Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Petitioner was appointed conservator on 01/30/17.
2. Petitioner alleges that petitioner and counsel rendered services prior to the appointment and for a period of 90 days after appointment for which petitioner and counsel have not been compensated.
3. Petitioner requests compensation of \$495.00 and County Counsel request fees of \$495.00.
4. ~Proposed Order 05/09/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

04/30/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: SC SS6525

CASE NAME: IN THE MATTER OF MELVIN V GOFFNEY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MELVIN V GOFFNEY

(CEP)...

GENERAL INFORMATION

**Continued from 01/30/17 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 that Conservator need not present 27<sup>th</sup> Account entered 06/27/16;  
account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS3248

CASE NAME: IN THE MATTER OF CLINTON STROUD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

CLINTON STROUD

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/17/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 21<sup>st</sup> Account entered 06/26/17; 22<sup>nd</sup> account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS3626

CASE NAME: IN THE MATTER OF MARK ANTHONY KIRK

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

MARK A KIRK

(CPE)...COUNTY COUNSEL

(CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/18/17.

**Continued from 01/30/17 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. Ex Parte Order that Conservator need not present 11<sup>th</sup> Account entered 01/20/16; account or waiver of account now due.
2. Conservatee resides in San Fernando, CA. Suggest transfer to LA County. If so, court to set control date. JTD.
3. Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

8/18/17: Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 08/14/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS8971

CASE NAME: IN THE MATTER OF GLORIA REYES

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

GLORIA REYES

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 06/16/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

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

-----  
DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

**SEE ALSO 23**

HEARING:

Hearing Re: ISSUE RE VAN (INSURANCE, ISSUANCE OF TITLE)

COUNSEL:

PUBLIC GUARDIAN (CE )...COUNTY COUNSEL  
KATHERINE POWEL (CTE)...MITCHELL I ROTH

**XREF: CONPS1700074**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Issue re Van (Insurance, Issuance of Title)

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

1. Matter set at 07/31/17 hearing, wherein, Valerie Moore stated that the current title to the van with license plate 8H39756, is in the name of Todorovich Dempsey, and that the van was purchased for \$9,000.
2. Court authorized that auto insurance on the van may be minimum (15, 30, and 5).

RECOMMENDATION:

Inquire status.

(nb)

Future Hearings:

01/22/18: Readiness Calendar

2/20/18-2/21/18: Court Trial

Superior Court of Calif, County of San Bernardino  
Page: 23 add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 08/14/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1700074

CASE NAME: MTR OF WILLARD POWELL

**SEE ALSO 22**

HEARING:

Hearing Re: ISSUANCE OF TITLE AND PROOF OF INSURANCE RE VAN

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
WILLARD POWELL (CEP)...JEANNE KENNEDY

**XREF: CONPS1700050**

See prior matter #22.

Future Hearings:

01/22/18: Petition for Appointment of Conservator, Readiness Calendar,

02/20/18-2/21/18: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **MISC.**

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIV DS1619135

CASE NAME: DAVID R SHROPSHALL -V- SHROPSHALL

**SEE ALSO 5 6 7 8 9**

HEARING:

Hearing Re: Status

COUNSEL:

DAVID R SHROPSHALL,	(PLA)...GARCIA & REED
DARRELL J SHROPSHALL	(DEF)...THOMPSON & COLEGATE
ANA ROSA SHROPSHALL	(THOMPSON & COLEGATE)
JESSICA SHROPSHALL	(THOMPSON & COLEGATE)

**XREF: CIVDS1615271 PROPS1600415**

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1401126

CASE NAME: Milton Robison Borg Jr

HEARING:

Hearing re Final Discharge

COUNSEL:

LAURIE L. BERGERON

(PET)...RICKARD L BORG

MI.TON ROBISON BORG Jr

(DEC)...RICKARD L BORG

**VACATE** - Ex-Parte Petition/Order for Final Discharge forwarded to dept. for signature.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600246

CASE NAME: MTR OF HELEN Y GABLER

HEARING:  
Accounting Review

COUNSEL:  
SYLVIA DORADO (PET)...PRO/PER  
HELEN Y GABLER (DEC)...

Waiver of Court Fees and Costs filed by SYLVIA DORADO is GRANTED

#### GENERAL INFORMATION

**Continued from 07/11/17. No appearance. Court orders Sylvia Dorado to be present. 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. Letters of Administration with full authority issued 05/03/17, no bond.
2. Need final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

#### RECOMMENDATION

Inquire status.  
(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600364

CASE NAME: JOSEPH MARIE RODRIGUEZ

HEARING:  
Accounting Review

COUNSEL:

JOE M RODRIGUEZ JR (PET)...THOMAS V PRATT  
JOSEPH MARIE RODRIGUEZ (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 Joe Rodriguez Jr, on **06/27/17**; full authority, \$100,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Need to clear notes 2 & 3. Court may wish to continue accounting to **08/13/18** per Pr.C. § 10950 as letters recently issued.

(ww)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

**SEE ALSO 1 6 7 8 9**

HEARING:

Petition for TO DETERMINE VALIDITY OF TRUSTS AND AMENDMENT TO  
CONFIRM APPT OF TRUSTEE

COUNSEL:

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

**XREF: CIVDS1615271 CIVDS1619135**

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

**SEE ALSO 1 5 7 8 9**

HEARING:

Petition for TO DETERMINE VALIDITY OF TRUST

COUNSEL:

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

**XREF: CIVDS1615271 CIVDS1619135**

Currently under review by Legal Research.  
(LR)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

**SEE ALSO 1 5 6 8 9**

HEARING:

Petition for SETTLE OF FIRST ACCT AND RPT OF SUSPENDED TRUSTEE  
OF THE SHROPSHALL FAMILY TRUST

COUNSEL:

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

**XREF: CIVDS1615271 CIVDS1619135**

GENERAL INFORMATION

Continued from **03/01/17 and 04/04/17**. Notice to be given by Mitchell I Roth.

**Continued from 06/12/17. Notice waived.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account of Suspended Trustee David Shropshall by David Shropshall, Jr., son.

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

1. Trustors, David Shropshall, Sr. and Yvonne G. Shropshall created Shropshall Family Trust on 09/12/96 and amended on 09/26/15. David died on 12/13/15 and Yvonne allegedly suffered from Dementia. ***It appears that the accounting is for the 1996 family trust.*** Court to clarify.
2. Petitioner, David Jr. was successor Trustee; however, on was suspended on 12/09/16.
3. Accounting period 12/13/15 – 12/31/16.
4. Assets on hand \$1,948,119.94.
5. Petitioner reserves the right to Trustee fees until a later date.

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.

6. Petitioner alleges that he has administered his mother Yvonne as sole beneficiary of Trust without regard to the interest of any of the 1996 Trust beneficiaries.
7. Gresham, Savage, Nolan & Tilden [GSNT] was hired after Noreen Fontaine was counsel. A fee deposit of \$100,000 was paid to GSNT [Acct.01/31/17 LFpg31].
8. Need bank statements per local rule 20-908.
9. **Objections filed 04/04/17 by Kimberly A. Campbell.**
10. No proposed order. Submit after hearing.

RECOMMENDATION: Set for contested hearing.

Need to clear note 8. If continued, set on a Wednesday as originally set.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

**SEE ALSO 1 5 6 7 9**

HEARING:

Petition for SETTLEMENT OF FIRST ACCOUNT AND REPORT OF SUSPENDED ATTORNEY-IN-FACT FOR YVONNE G SHROPSHALL

COUNSEL:

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

**XREF: CIVDS1615271 CIVDS1619135**

GENERAL INFORMATION

Continued from **03/01/17 and 04/04/17**. Notice to be given by Mitchell Roth.

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

THIS CASE SET FOR HEARING ON 1st Account and Report of Suspended atty-in-fact for Yvonne Shropshall by David Shropshall, Jr., son.

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

1. Trustors, David Shropshall, Sr. and Yvonne G. Shropshall created Shropshall Family Trust on 09/12/96 [amended 09/26/15], an Educational Trust on 04/29/99 and Family Trust on 12/11/04. Petitioner is a person interested in one or more of the subject trusts in that he is a named Successor Trustee and a beneficiary under one or more of the subject trusts. David died on 12/13/15 and Yvonne allegedly suffered from Dementia.
2. Petitioner, David Jr., was attorney-in-fact for Yvonne; however, court suspended powers on 12/09/16.
3. Accounting period 12/16/15 – 12/31/16.

**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.**

4. Assets on hand \$1,387,480.91.
5. Petitioner reserves the right to compensation for a later date.
6. Petitioner alleges that he has administered his mother Yvonne's assets under the DPA without regard to the interest of any of Yvonne's heirs and provided Yvonne with her needs.
7. Petitioner states it remains to be determined as to what reimbursement petitioner is entitled to or what sum needs to be attributed to the DPA.
8. Gresham, Savage, Nolan & Tilden [GSNT] was hired after Noreen Fontaine was counsel. However, petitioner states that GSNT was not paid from assets subject to this accounting, yet incurred costs and extraordinary services. Noreen Fontaine appears to have been paid \$60,000. [Acct.01/31/17 LFpg28 &33].
9. Need bank statements per local rule 20-908.
10. Disbursements indicate large sums of money, \$2,500-\$60,000, with no description. Need verified supplement regarding the disbursements. [Acct.01/31/17 LFpg29].
11. Distributions totaled for Yvonne \$88,426.14 from IRA and Jackson National Life. [Acct.01/31/17 LFpg30].
12. Distributions made to Ryan re Education fund total \$20,000. [Acct.01/31/17 LFpg33&35].
13. **Objections filed 04/04/17 by Kimberly A. Campbell.**
14. No proposed order. Submit after hearing.

RECOMMENDATION: Set for contested hearing.

Need to clear notes 9-10. If continued, set on a Wednesday as originally set.

(lc/nb)

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

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DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600415

CASE NAME: MTR OF SHROPSHALL FAMILY TRUST

**SEE ALSO 1 5 6 7 8**

HEARING:

FIRST Account and Report of KIMBERLEY A CAMPBELL and Petition  
for allowance of fees filed.

COUNSEL:

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

**XREF: CIVDS1615271 CIVDS1619135**

GENERAL INFORMATION

Continued from **03/01/17 and 04/04/17**. Notice to be given by Mitchell Roth.  
**Continued from 06/12/17.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current of Successor Trustee and  
Reimbursement of Expenses by Kimberley Campbell, daughter.

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

Petitioner, Kimberley Campbell, is acting successor trustee of the Educational Trust  
created on 04/29/99, the Family Trust established on 12/11/04 , the David Shropshall  
Personal Residence Trust (David QPRT) and the Yvonne Shropshall Personal  
Residence Trust (Yvonne QPRT). Petitioner was appointed on 04/19/16.

**Educational Trust 04/29/99**

1. Accounting period 07/19/16 – 11/30/16.
2. Assets on hand \$269,717.44.

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.

3. Petitioner reserves the right to compensation on this and other trusts at this time.
4. Petitioner requests reimbursement of costs totaling \$5,777.78.

**Family Trust 12/11/04**

5. Accounting period 07/19/16 – 11/30/16.
6. Assets on hand \$1,731,737.19.

**David QPRT**

7. Accounting period 07/19/16 – 11/30/16.
8. Assets on hand \$99,323.00; ½ Interest in real property in Helendale.
9. Petitioner requests reimbursement of costs totaling \$1,801.57.

**Yvonne QPRT**

10. Accounting period 07/19/16 – 11/30/16.
11. Assets on hand \$99,323.00; ½ Interest in real property in Helendale.
12. Petitioner requests reimbursement of costs totaling \$1,801.56.
13. Need notice of hearing and proof of service to reflect 04/04/17 hearing date as original date was 04/05/17.
14. **Objections filed 03/30/17 by beneficiary, David R. Shropshall, Jr.**
15. No proposed order. Submit after hearing.

RECOMMENDATION: Set for contested hearing.

Need corrected notice. If Trusts remained supervised, set next Accounting review for **03/01/18**.

(lc/nb)



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: 08/14/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601005

CASE NAME: GLYNNDEAN SUGGS

HEARING:

FIRST AND FINAL Account and Report of DESHAWNA LANG and Petition  
for allowance of fees filed.

COUNSEL:

DESHAWNA LANG (PET)...PRO/PER  
GLYNNDEAN SUGGS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Administrator, Deshawna Lang ["Petitioner"-daughter].

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

1. Sole heir waives accounting.
2. Accounting period 09/04/16 to 05/02/17.
3. Petitioner does not request statutory compensation.
4. Need findings re: sole and separate property.
5. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614(c).
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. Pr. C. § 1064 (a)(4).
7. Proposed distribution indicates real property is to be distributed. However, petition also states real property was sold. Need further clarification via verified supplement.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 4-7 then Court's discretion. If approved, set next hearing for final discharge for **08/20/18**.

(nb)

Future Hearing:

02/03/18: 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

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

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700354

CASE NAME: MTR OF EDWARD NEIDICH

HEARING:

Hearing Re: Bond/Issuance of Letters

COUNSEL:

KC NEIDICH (PET)...JASON EBERT  
EDWARD NEIDICH (DEC)...

GENERAL INFORMATION:

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

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

1. Order appointing Administrator, KC Neidich, entered 07/13/17, full authority, \$500,000 bond.
2. Need proof of bond and subsequent letters.

RECOMMENDATION:

Court's discretion  
(nb)

Future Hearing:

09/20/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700466

CASE NAME: DONALD R. CARTER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

CHERI ANDRESEN

(PET)...HARTNELL LAW GROUP

DONALD R CARTER

(DEC)...

#### GENERAL INFORMATION

Letters of Special Administration issued 07/26/17, \$20,000 bond.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Cheri Andresen, step-daughter/executor

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

1. Will waives bond. The estate consists of \$310,000 of which \$20,000 is personal property.
2. Will is not self-proving as there is no statement that the will was not procured under duress etc. **Proof of subscribing witness. (DE-131) filed.**
3. **Declination to act by named co-executor Robert Andresen Jr. filed 08/03/17**
4. Notice to Petition to Administer Estate and proof of service filed on 05/17/17; however, the addresses of "Terry", "Donnie" and Mike Thrasher are unknown. Need due diligence declarations for each person.
5. Need original will lodged and receipt for lodging of will with the Court.
6. ~Proposed Form Order: 05/12/17

#### RECOMMENDATION

Need to clear notes 4-5. Court's discretion re bond If approved, set Accounting/Status Review for **10/22/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/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.**

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

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DATE: 08/14/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700525

CASE NAME: LINDA L PINA

HEARING:  
Spousal Property Petition hearing.

COUNSEL:  
ADRIAN F PINA (PET)...JOSEPH D BORJAS  
LINDA L PINA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Adrian F. Pina ["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 Apple Valley, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. How was the property interest acquired – with community funds, etc? Need verified supplement.
2. Petition affixed an Interspousal Grant Deed [LF, p. 6] that is titled "to Linda L. Pina, a married woman as her sole and separate property."
3. Petitioner alleges that although title on the 2013 deed is in decedent's name alone, this was done because Decedent was 18 years younger than petitioner and they believed that decedent would outlive Petitioner.
4. Creditor Claim filed by Capital One in the amount of \$3,778.24.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:  
Need verified supplement then Court's discretion  
(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/14/17      TIME: 8:35      DEPT: S36P  
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CASE#: PRO PS1700299

CASE NAME: EDWARD LEE ROSENBERRY

HEARING:

Petition for REMOVAL OF TRUSTEE AND TO APPOINT SUCCESSOR  
TRUSTEE

COUNSEL:

ALYSSA RIGGS                      (PET)...COSGROVE, CO SGROVE & HUM PHRE  
EDWARD LEE ROSENBERRY REVOCABLE TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

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DATE: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0700202

CASE NAME: MTR OF SHARELL A PARAMO

HEARING:

FIFTH Account and Report of LINDA J PARAMO and Petition for allowance of fees filed.

COUNSEL:

LINDA J PARAMO	(CPE)...MICHAEL J OFFENHEISER
SHARELL A PARAMO	(CEP)...MARK J. ANDR EW FLORY
INLAND COUNTIES REGIONAL CENTER	(AGN)...PRO/PER
MELVIN L. FRIEDLAND	(PET)...MELVIN L FRIEDLAND

GENERAL INFORMATION:

**Continued from 05/08/17 to clear notes.**

THIS CASE IS SET FOR HEARING ON Fifth Account Current and Petition for Fees by Conservator of the Person and Estate, Linda J. Paramo.

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

1. Account period 11/29/14 – 11/**30**/16 (2 years).
2. Assets on hand \$24,363,007.**41** [LF, pgs. 36-37] consisting of \$3,116,503.**50** in cash and the balance of \$21,246,503.91 in bonds and mutual funds.
3. Petitioner waives compensation.
4. Petitioner indicates conservatee's counsel, Brown, White and Newhouse LLP has been compensated from conservator's personal funds and waives reimbursement from the Conservatorship Estate.
5. Petitioner indicates conservatee's current counsel, Brown & Streza LLP has been compensated from conservator's personal funds and waives reimbursement from the Conservatorship Estate
6. Current bond fixed at \$80,000. Petitioner requests bond be increased by \$20,000 for a total bond of \$100,000. Appears sufficient. JTD.
7. Petition indicates the bond for the balance of assets in the conservatorship of the estate and the Sharell Paramo Revocable Trust dated 08/14/13 should again be waived because they are still held in a blocked account. JTD.
8. Notice filed 04/26/17 does not give 15 days' notice. Need proper service.

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

9. ~Proposed Order 06/08/17.

**RECOMMENDATION:**

Need to clear note 9 then Court's Discretion. If approved, set hearing re next Accounting Review for **01/29/18** (if one year) or **01/28/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0800286

CASE NAME: MTR OF PHILIP BARRETT

**SEE ALSO 17 18**

HEARING:

Hearing Re: PETITION FOR ATTORNEY FEES

COUNSEL:

THOMAS BARRETT (CE/CPE )...JAMES B CHURCH  
PHILIP BARRETT (CTP)...  
COURTNEY L BARRETT (OBJ)...NOREEN T FONTAINE

GENERAL INFORMATION

**Continued from 10/27/14, 11/4/14, 1/5/15, 2/18/15, 3/24/15, 4/30/15, 6/10/15, 07/27/15, 9/01/15, 10/13/15, 12/10/15, 01/19/15, 05/09/16, 08/08/16, 10/24/16, 12/07/16 and 04/17/17.**

THIS CASE IS SET FOR HEARING ON Petition for Court-appointed Attorney fees

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

1. Joan Nelms was appointed for conservatee on 4/6/11.
2. Petitioner, Jack Osborn, alleges that Joan Nelms performed services on behalf of conservatee along with Walter Moore, Jack Osborn and their paralegals while employed by Brown, White, & Newhouse.
3. Petitioner requests fees of \$16,264.25 for the period 10/4/10 - 5/19/14. Billed for Joan Nelms at \$295/hour for 44.00 hours totaling \$13,029.00, other attorneys at \$295/hour totaling \$2,537.00 and paralegals at \$75-\$105/hour for a total of \$698.25. Itemized.
4. Declaration filed on 3/05/15 by prior GAL Joan Nelms states she has never spoken to Phillip Barret, nor received any confidential information from Mr. Barrett.
5. Report by GAL, Matthew E. Sheasby, filed 05/09/16.
6. Proposed Order granting Atty Fees submitted: 9/16/14.

RECOMMENDATION:

Court's discretion.

(kra/abs/kra/gls/cbr/kra/gls/vet/cbr/nb/dl/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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/14/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0800286

CASE NAME: MTR OF PHILIP BARRETT

**SEE ALSO 16 18**

HEARING:

Hearing Re: PETITION FOR PAYMENT OF COURT APP'D ATTY FEES

COUNSEL:

THOMAS BARRETT                      (CE/CPE )...JAMES B CHURCH

PHILIP BARRETT                      (CTP)...

COURTNEY L BARRETT              (OBJ)...NOREEN T FONTAINE

GENERAL INFORMATION:

**Continued from 01/19/16, 05/09/16, 08/08/16, 12/07/16 and 04/17/17.**

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation

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

5. Petitioner, Matthew E. Sheasby, was appointed Guardian ad Litem on 08/22/14. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 08/22/14 to present. Services included propounding discovery; objecting to the first accounting; preparing p's & a's; and appearing at hearings.
6. Attorney requests fees of \$8,256.50. Billed at \$325/hour for attorney time and \$65/hour for other services totaling 27.2 hours' time. Itemized [LF, pgs. 7-10]. JTD.
  - a. Question who is billing \$65/hour and if a paralegal, whether qualifications meet the requirements of CRC 7.703(e)(1)(c) which requires a showing of completion of mandatory continuing education per Business & Professions Code 6450(d). Need verified supplement.  
**Supp: (1/13/16) states there were charges for .5 hrs at rate of \$65 on original bills for secretary. Requested fees should be reduced by \$32.50 for a total of \$8,224.**
7. Petitioner requests the conservator of the estate deliver requested sum for fees in this matter.
8. Notice given, no objections.
9. Proposed Order 12/11/15 does not comply with Local Rule 20-614(a).

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. Need new Proposed Order.  
(nb/dl/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.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 08/14/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0800286

CASE NAME: MTR OF PHILIP BARRETT

**SEE ALSO 16 17**

HEARING:

Hearing Re: Attorney Fees request James Church

COUNSEL:

THOMAS BARRETT                      (CE/CPE )...JAMES B CHURCH

PHILIP BARRETT                      (CTP)...

COURTNEY L BARRETT              (OBJ)...NOREEN T FONTAINE

GENERAL INFORMATION:

**Continued from 04/17/17.**

THIS CASE IS SET FOR HEARING ON Attorney Fee request by James Church

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

- 1      Matter set at 02/08/17 hearing, wherein, the Court approved costs to Attorney James Church in the amount of \$2,961.50 and reserved on attorney fees by Attorney Church.
- 2      No moving papers. Need same.

RECOMMENDATION:

Need moving papers then Court's discretion.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300026

CASE NAME: CHERI LYNN AUCOIN

**SEE ALSO 19A**

HEARING:

Petition for APPOINTMENT OF SUCCESSOR CONSERVATOR OF THE  
PERSON, LIMITED CONSERVATORSHIP

COUNSEL:

CHERI CLAYTON	(CP )...PRO/PER
CHERI LYNN AUCOIN	(CTP/CEP)...ROSE C ROSADO
PUBLIC GUARDIAN	(CP )...COUNTY COUNSEL
DIRECTOR, DEPT OF DEVELOPMENTAL SRVCS	(CP )

GENERAL INFORMATION

**Continued from 06/21/17. Public guardian relieved as the temporary guardian.  
Department of Developmental Service appointed successor temporary guardian  
of Cheri Aucoin.**

THIS CASE SET FOR HEARING ON Petition for **Successor** Appointment of Limited  
Conservator person only by Department of Developmental Services.

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

1. Cheri Clayton, mother, was prior Conservator. Public Guardian was appointed temporary successor conservator on 10/24/16. Conservatee nominated petitioner as successor Conservator.
2. Petitioner seeks medical powers. Updated Capacity Declaration filed on 04/10/17; however, is not dated by physician, nor is section 5 completed as to ability to attend hearing. Does court wish to require a corrected form as capacity has already been determined by current conservatorship? JTD
3. Proposed conservatee is developmentally disabled. Report of appointed Counsel filed 06/15/17.
4. Proposed conservatee is developmentally disabled. IRC report filed 06/19/17.
5. Report of Craig Parker (GAL) filed 07/19/17.
6. Letter from DDS filed 06/13/17.
7. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD

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

8. Petitioner seeks civil rights not be limited without court order. JTD
9. Due diligence declaration filed 05/01/17 as to Father and half siblings. JTD
10. Court Investigator memo filed 04/05/17.
11. Need Confidential Supplemental Information.
12. **Objection in the form of a Declaration by Cheri Clayton filed 07/07/17.  
Need proof of service.**
13. ~Proposed Form Order: 04/10/17.

#### RECOMMENDATION

Need to clear note 11, then Court's discretion. If approved, set hearing for Compliance Review for **01/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh)

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Page: 19A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300026

CASE NAME: CHERI LYNN AUCOIN

**SEE ALSO 19**

HEARING:

Hearing Re: Trial Setting Conference

COUNSEL:

CHERI CLAYTON (CP )...PRO/PER  
CHERI LYNN AUCOIN (CTP/CEP)...ROSE C ROSADO  
PUBLIC GUARDIAN (CP )...COUNTY COUNSEL  
DIRECTOR, DEPT OF DEVELOPMENTAL SRVCS (CP )

No notes – TSC  
(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500095

CASE NAME: HSUEHJU SHEU

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SOLOMON C CHEN

COUNSEL:

SHARON HSIANGYUAN CHEN	(PET/OBJ)...J. DAVID HORSPOOL
HSUEHJU SHEU	(CEP/PCE)...MARK J. FLORY
SOLOMON C CHEN	(PET)...FIDUCIA LEGAL

#### GENERAL INFORMATION

**Continued from 07/10/17. Sharon Hsiangyuan Chen ordered to turn over social security check and security deposit to conservator. The Court directs attorney David Horspool to have his client turn over proof of health insurance and/or medical records. Attorney Frankie Woo to prepare order.**

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

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

1. Solomon C. Chen, son, appointed as conservator of the person and estate on 04/07/17, \$50,000 bond.
2. Notification of Conservatee's Rights per Pr.C.§1830(c) filed on 07/03/17.
3. **Care Plan and Determination of Conservatee's Appropriate Level of Care filed.**
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. **Proof of recordation of letters filed..**
7. **Post-move notice filed 08/04/17 does not give 15 days' notice. Need proper service.**
8. Order after hearing by Frankie Woo filed on 07/11/17.

#### RECOMMENDATION:

Need to clear notes 4-5 & 7.

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.

(nb/lh/ww)

Future Hearing:  
7/09/18: 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.**



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

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DATE: 08/14/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700244

CASE NAME: MTR OF BERTHA BOYD

HEARING:

Hearing Re: PTN FOR TEMPORARY CONSERVATORSHIP

	COUNSEL:
BERTHA BOYD	(CTP)...
ERNEST HAYES	(CP )...PRO/PER

No notes – Judge to decide.  
(nb)

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO DS1000778

CASE NAME: ELIAS PULIDO SPECIAL NEEDS TRUST

HEARING:

SIXTH Account and Report of FIRST AMERICAN TRUST, FSB and  
Petition for allowance of fees filed.

COUNSEL:

ELIAA PULIDO JR (PET)...THOMPSON & COLEGATE  
ELIAS PULIDO , JR. SPECIA L NEEDS TRUST (TRU)...  
FIRST AMERICAN TRUST, FSB (PET)...THOMPSON & COLEGATE  
JOANNA AVERETT (TEE)...

**CCP170.6 FILED AS TO CYNTHIA LUDVIGSEN**

**X-REF: CONPS 0900256**

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Sixth Account Current of SNT and Petition for Fees by First American Trust FSB ["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 \$1,601,623.57 (carry value) of which \$41,542.17 is in cash.
3. No bond – corporate fiduciary.
4. Petitioner has taken monthly management fees of \$19,587.19, as previously authorized, payment schedule based on month-end market value [LFpgs. 59-62]. Petitioner requests Court ratification of monthly management fees paid and authorization for its continuation. JTD.
5. Petitioner requests reimbursement of costs advanced for tax preparation of \$1,404. JTD.
6. Attorney requests fees of \$6,147.50 and costs of \$252.63 for 41.5 hours at \$225-\$250/ hour for attorney time and \$125/hour for paralegal services. Itemized. [LFpgs. 63-71].

**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.**

- a. Costs include items considered overhead totaling \$39.44 [LF, pgs. 71-72].  
Does court wish to reduce reimbursement request by same?
7. Petitioner requests future accountings set on a biennial basis. JTD.
8. ~Proposed Order 05/30/17

**RECOMMENDATION:**

Court's discretion re fees. If approved, set hearing on the next accounting review for **05/28/18** (if one year) or **05/27/19** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400470

CASE NAME: Forrest E Spitler, Jr Living Trust

HEARING:

Hearing Re: ACCOUNT OF AMOUNT OF SURCHARGE

COUNSEL:

KATHERINE WALDRON (PET)...PRO/PER  
FORREST E SPITLER, JR LIVING TRUST (TRU)...  
MARK ST JOHN (PET/OBJ)...GEORGE S THEIOS

GENERAL INFORMATION:

Continued from **08/17/16**. Katherine Waldron informs the court that an accounting will be filed today after the hearing and requests a continuance of today's matter.

Continued from **12/05/16**. The Court having reviewed the declaration of Mark St John and request to vacate orders of 5/18/16 can find no indication in the court records that orders of 5/18/16 were to be vacated. The Court requests counsel order a copy of the transcript to verify that the orders they claim were made were actually the order of the Court. Mr. St John is ordered to comply with current court orders and turn over records to the current trustee.

Continued from **03/06/17** at request of counsel to obtain transcripts. Mark St. John objection do not have supporting evidence, needs to file a supplement. Notice waived.

Continued from **05/08/17**. Parties do not stipulate to judge pro tem. Notice waived.

**Continued from 06/05/17. The Court confirms surcharge has not yet been ordered. Matter continued for response to be filed.**

THIS CASE IS SET FOR HEARING ON Account of Amount of Surcharge.

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

1. Need copy of transcripts as directed by Court on 12/05/16.
2. Supplemental declaration and p's & a's of Respondent, Mark St. John's, Request for Relief from Default filed. Referred to Legal Research.

RECOMMENDATION:

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

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

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DATE: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400629

CASE NAME: DUANE EDWIN SKOKUT

HEARING:  
Accounting Review

COUNSEL:

MARSHA G ROBINSON	(PET)...PRO/PER
DUANE EDWIN SKOKUT	(DEC)...
JUSTIN HART ROBISON	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from **01/05/16, 02/25/16, 05/05/16, 06/23/16 and 09/01/16** (no appearance).

**Set at 12/15/16 hearing.** The Court approves petition in part. The Court accepts the waiver of accounting but not the final distribution as specific percentages/amounts for distribution are not specified.

Continued from **03/06/17**. No appearances. Court orders Marsha G. Robinson to be present at the next hearing date 5/8/17. Notice by Judicial Assistant.

**Continued from 05/08/17. No appearances. Marsha Robinson and Justin Robinson are cited to be present at next hearing. Should they not appear a bench warrant may be issued for their arrest.**

THIS CASE IS SET FOR HEARING ON (Accounting Review) s/b Petition for Final Distribution upon Waiver of Account and for Fees by Marsha G. Robinson ["Petitioner"]

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

1. All heirs waive accounting.
2. Petitioner waives statutory compensation.
3. Real Property located in Apple Valley, CA appears to be currently listed for sale. Estate does not appear to be ready to close. Court to inquire if petitioner will sell the home after distribution.
4. Four heirs now assigned their interest to petitioner in land. It appears that petitioner is purchasing the real property for \$1,200. Property appraised for \$4,000 per Inventory and Appraisal; date of death 03/26/14. Pr.C. § 9881 states that personal representative may purchase property if written consents are filed with the court and it is to the benefit of the estate.

**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.**

5. Please file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
7. Need specific percentages/amounts for distribution.
8. **Receipts of final distribution filed 08/19/16.** 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. Amounts appear to exceed \$50,000 and recipients acknowledge the property “constitutes all of the property to which the undersigned is entitled to the Order of Final Distribution.”*
9. **Justin Robison appointed as successor administrator w/will annexed with full authority, no bond, on 05/30/17.**
10. No proposed order.

#### RECOMMENDATION

Need to clear notes 5-7. If approved as a final accounting/distribution, set hearing on the filing of receipts and final discharge for **08/20/18**.  
(nb/lc/nb)

Future Hearing:

06/05/18: Accounting Review (Justin Robinson)

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600697

CASE NAME: MTR OF JUANITA MOLINA

HEARING:

Probate status report filed.

COUNSEL:

LUIS MOLINA (PET)...LA VONNA HAY ASHI  
JUANITA MOLINA (MIN)...

GENERAL INFORMATION:

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

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

1. All heirs waive accounting.
2. Assets on Hand \$64,821.76 consisting of cash held in attorney's IOLTA account.
3. Statutory compensation of \$8,000 requested. Calculated.
4. ~Proposed Order 08/03/17.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for **08/20/18**.

(nb)

Future Hearing:

02/14/18: Accounting Review - **VACATE**

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700298

CASE NAME: MARY FRANK BENZ

HEARING:

Petition for DETERMINE SUCCESSION TO REAL PROPERTY

COUNSEL:

JULIANNA ORR (PET)...VELASCO LAW GROUP  
MARY FRANK BENZ (DEF)...

GENERAL INFORMATION:

**Continued from 06/19/17 on courts motion.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Julianna Orr, Janice Orr Curtis, Jennifer Orr Krakover, Sean Corkill and Lyle Hopper.

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

1. Petitioners request a determination that decedent's real property located in San Bernardino County pass to petitioners without administration. Petitioners are decedent's children and equal beneficiaries in decedent's will. [LF, pgs. 9-11]. Copy of vesting grant deed affixed to supp. filed 06/14/17, LF, p.3
2. Court to review sticky note at LF. p.11.
3. **Supp. filed 07/21/17 with p's & a's. Referred to Legal Research.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's Discretion.

(nb)



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

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DATE: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700519

CASE NAME: JOHN HARRY REYNOSO

HEARING:

Petition to determine succession to Real Property

COUNSEL:

DONALD J REYNOSO	(PET)...PRO/PER
JOHN M REYNOSO	(PET)...PRO/PER
SUSAN K SCHROYER	(PET)...PRO/PER
JOHN HARRY REYNOSO	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Donald & John Reynoso, sons & Susan Schroyer, daughter.

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

1. Petitioners seek 100% interest, 1/3 each, in decedent's 100% interest in real property per intestate succession.
2. Proposed Form Order: 05/25/17

RECOMMENDATION

RFA.

(ww)

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700528

CASE NAME: WILLIAM PICKEL

HEARING: Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

DENNIS GLENN PICKEL (PET)...PRO/PER

WILLIAM PICKEL (DEC)...

#### GENERAL INFORMATION

Special letters of administration with limited authority issued to Dennis Pickel on 06/05/17.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Dennis Pickel, son

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

1. Bond in the amount of \$15,000 is being requested. Appears ok as the estate value is **negative** \$124,578.44.
2. **Objection** to notice of proposed action **filed on 06/26/17 by Cynthia Pickel, surviving spouse**; however, it appears to be an objection to petition for probate as no notice of proposed has been filed. Does Court wish to deem it as an objection to the petition for probate and require the objection fee of \$435.00 to be paid?
3. Need proof of service of objection by Cynthia Pickel on all interested parties entitled to notice.
4. ~Proposed Form Order: 06/07/17

#### RECOMMENDATION

Court's discretion re objection. Matter appears to be contested. If approved, set Accounting/Status Review for **10/04/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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CASE#: SPR SS04008

CASE NAME: ESTATE OF BOBBY P. MAC LACHLAN

**SEE ALSO 9**

HEARING:

Accounting Review

COUNSEL:

DOROTHY N. KINSEY

(PET/TEE)...HORSPPOOL & HORSPPOOL

BOBBY P. MAC LACHLAN

(DEC)...

**XREF: SPRSS57143**

GENERAL INFORMATION:

**Continued from 06/05/17. Counsel stated that this a trust matter that does not need court supervision. Court requested that waivers of accounting and consents be filed with a formal request that the court divest itself of jurisdiction and supervision of the trust.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 15<sup>th</sup> Account by Dorothy Kinsey, trustee, approved on 11/14/16;
2. If an accounting is required then the 16<sup>th</sup> account would be due beginning with 01/01/16.

RECOMMENDATION:

Court's discretion as to whether jurisdiction is retained over the trust. Require accounting if trust remains Court supervised.

(nb/ww)

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: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: SPR SS57143

CASE NAME: MTTR OF DONNELL FRANK MACLACHLAN TRUST

**SEE ALSO 8**

HEARING:

Accounting Review

COUNSEL:

DONNELL FRANK MACLACHLAN (DEC)...  
BOBBY P. MAC LACHLAN (CEP)...ROBERT C CHANDLER  
DOROTHY KINSEY (CPE/STE)...HORSPPOOL & HORSP  
DONNELL FRANK MACLACHLAN TRUST (TRU)...

**XREF: SPRSS04008**

GENERAL INFORMATION:

**Continued from 06/05/17. Counsel stated that there is no reason for court supervision of this trust. Court requested that waivers of accounting and consents be filed with a formal request that the court divest itself of jurisdiction and supervision of the trust.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 26<sup>th</sup> Account by Dorothy Kinsey, trustee, approved on 10/13/16.
2. If an accounting is required then the 27<sup>th</sup> account would be due beginning with 01/01/16.

RECOMMENDATION:

Court's discretion as to whether jurisdiction is retained over the trust. Require accounting if trust remains Court supervised.

(nb/ww)

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

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DATE: 08/14/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500738

CASE NAME: MTR OF DORIS ANNE SUNDEEN

HEARING:  
Accounting Review

COUNSEL:  
MARJORIE SUNDEEN HUMPSTEAD (PET)...H. BROOKS TRAVIS  
DORIS ANNE SUNDEEN (DEC)...  
DONALD HEMPSTEAD (PET)...KATHRYN A FLANIGAN

GENERAL INFORMATION:

Continued from **11/21/16** to file accounting (Marjorie Humpstead).  
Continued from **05/22/17**. No appearances. Marjorie Humpstead and/or Counsel are ordered to be present at next hearing if accounting not filed. Notice by Judicial Assistant.

**Continued from 07/31/17. Counsel represents he has previously filed a substitution of attorney. Counsel is to file a declaration/notice form and provide contact information for Donald Hempstead and counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of administration issued 09/14/15 to Marjorie Sundeen Hempstead as administrator, full authority, no bond. **Marjorie passed away on 06/02/16.**
2. Need final inventory and appraisal.
3. Need accounting or status report of administration by H. Brooks Travis, attorney for Marjorie Sundeen Hempstead per Pr. C. §10953. JTD

RECOMMENDATION:

Inquire status.  
(nb/lh)

Future Hearing:  
01/16/18: 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.**

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

-----  
DATE: 08/14/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON DS1000249

CASE NAME: IRMA SUSANA MELENDEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIO MELENDEZ

COUNSEL:

MARIO MELENDEZ	(CP )...PRO/PER
IRMA MELENDEZ	(CP )...PRO/PER
IRMA SUSANA MELENDEZ	(CTP)...CANDICE A GARCIA-RODRIGO
ENRIQUE MELENDEZ	(SC )...PRO/PER

Waiver of Court Fees and Costs filed by MARIO MELENDEZ is GRANTED

#### GENERAL INFORMATION

Enrique Melendez appointed Successor Limited Conservator of the person on 03/29/16.

Continued from **10/03/16**. The Court takes judicial notice of the fact that ENRIQUE MELENDEZ was appointed successor conservator for IRMA SUSANA MELENDEZ and letters issued 4/4/16 without the filing of a petition for successor conservatorship. Continued from **12/12/16**. The Court orders IRC to prepare report for the court. The Court further orders conservator to complete conservator class and file proof with the court.

**Continued from 03/13/17 to clear notes. Court finds the proof of completion of conservatorship class has been filed.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Enrique Melendez, brother, appointed as successor limited conservator of the person only on 02/29/16.
2. Notification of Conservatee's Rights; Statement of Care Plan; and Determination of Conservatee's Appropriate Level of Care filed 11/18/16.
3. Proof of completion of conservatorship training class filed on 03/06/17.
4. Need IRC 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.**

RECOMMENDATION:  
Need to clear note 4.

(nb/ww)

**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: TARA REILLY

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DATE: 08/14/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0900067

CASE NAME: GAYE SIMS

HEARING:

Petition for APPROVAL AND PAYMENT OF INTERIM ATTY'S FEES AND COSTS TO COURT APPOINTED COUNSEL

COUNSEL:

RONALD B OLUND	(CPE)...HORSPOOL & PARKER
STEVE A HOOKER	(CPE)...HORSPOOL & PARKER
RONALD B OLUND	(CPE)...HORSPOOL & PARKER
GAYE SIMS	(CPE/CEP)...MITCHELL I ROTH
LINDA ROGERS	(TC/SC )...LAW OFFICE OF CHERYL L WALSH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
MOUNTAIN AREA REGIONAL TRANSIT (TP )	...CIHIGOYENETCHE GROSSBE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Mitchell I. Roth ["Petitioner"].

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

1. Petitioner was appointed conservator on 03/26/09. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$39,095.00 for the period 08/01/12 to 07/04/17. Billed at the reduced rate of \$350/hour for 111.90 hours' attorney time. Itemized [LF, pgs. 9-44]. JTD.
3. Attorney requests reimbursement of costs advanced of \$13.44. Itemized [LF, p.5].
4. Petitioner requests that the Trustee, Linda Rogers, be ordered to pay these fees forthwith.
5. Need Notice of Hearing with proof of service.
6. ~Proposed Order 07/06/17.

RECOMMENDATION:

Require notice then Court's discretion.

(nb)

Future Hearing: 02/01/18: Accounting Review (Trust)

**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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/14/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1500238

CASE NAME: BEATRICE ZEEK

HEARING:

FIRST & FINAL Account and Report of THOMAS J ZEEK JR and  
Petition for allowance of fees filed.

COUNSEL:

THOMAS J ZEEK JR	(PET)...JASON L GAUDY
CANDICE A GARICA-RODRIGO	(PET)...CANDICE A GARCIA-RODRIGO
BEATRICE JOY ZEEK	(CEE)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION:

Conservatee passed away on 02/21/17.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Conservator of the Person and Estate, Thomas J. Zeek, Jr. ["Petitioner"].

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

1. Petitioner does not request fees.
2. Attorney does not request fees.
3. Petitioner alleges all assets consist of real and personal property held in joint tenancy; petitioner did not open a conservatorship bank account; therefore, a probate is not required.
4. Petitioner requests that the conservatorship be terminated; that he be discharged as Conservator and his bond exonerated. JTD.
5. ~Proposed Order 08/04/17

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 08/14/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700137

CASE NAME: MTR OF ABRAHAM MEJIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

WENDY BARRETO  
ABRAHAM MEJIA

(CP )...PRO/PER  
(CTP)...CRAIG M PARKER

GENERAL INFORMATION

Ex Parte Orders denied 04/24/17.

**Continued from 06/21/17.**

THIS CASE IS SET FOR HEARING ON **Amended** Petition for Appointment of Conservatorship of person only, by Wendy Barreto, mother.

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

1. Caption of documents indicate proposed conservatee's name rather than petitioner.
2. *Proposed conservatee appears to be a minor, age 17*, but Confidential Screening form does not indicate when he will attain the age of majority. Court to confirm age and date of majority of proposed conservatee.
3. Conservator Screening form filed 05/08/17; however, no attachments explaining issues. Need same.
4. Confidential Supplemental Information filed 04/14/17, section 1 reflects proposed conservator's information instead of proposed conservatee's information. Need corrected form with attachments 3, 4c, and 4c(3).
5. Petitioner requests Pr. C. § 2590 powers; however, petitioner does not seek estate powers and there is no attachment. Court may wish to deny.
6. Petitioner requests Pr. C. § 2351-2358 powers. Need Attachment 1f specifying powers sought.
7. Petitioner requests Pr. C. § 2351.5 powers. Need Attachment 1j specifying powers sought.
8. **Need report of court appointed counsel, Craig Parker.**
9. Due Diligence, Section 3f is marked on petition. Need Attachments or separate request(s) to excuse notice.

**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.**

10. Section 4b indicates proposed conservatee is receiving or entitled to receive benefits from the U.S. Dept. of Veteran's Affairs but does not give an estimate of monthly benefit payable. Need verified supplement.
11. Section 5 is incomplete as to proposed conservatee's ability to provide for himself. Need verified supplement.
12. Section 6 indicates there is a spouse who is party to action. Need verified supplement. Alternatively, court to clarify on the record.
13. List of Required Contacts filed 04/14/17 lists 2 mothers (petitioner and Yvette Mejia); does not include father, paternal grandparents or maternal grandparents. Need complete form.
14. Section 11 of petition indicates Yvette is sister and Federico is "father in law son". Question how Federico is related to proposed conservatee, father than petitioner? Need verified supplement.
15. Section 11 to petition does not list father, paternal or maternal grandparents. Need verified supplement.
16. Need notice of hearing and proof of service including to Veteran's Administration.
17. Need CI Report.
18. Need return of citation.
19. ~Proposed Form Order 04/14/17.

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **03/19/18** 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)

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

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DATE: 08/14/17 TIME: 9:30 DEPT: S37P  
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CASE#: RC RS659

CASE NAME: IN THE MTTR OF DAVID J OMLIN

HEARING:

THIRD CURRENT Account and Report of KATHERINE BRIGGS, KARIN LANGWASSER and Petition for allowance of fees filed.

COUNSEL:

ELSIE L OMLIN	(PET)...ALLAR, SHELTON & O'CONNOR
DAVID JOSEPH OMLIN	(PCE/CEP)...
WELLS FARGO BANK, N.A.	(CE )...MARK L SAMSON
KATHERINE BRIGGS	(CPE/SC)...BRIGGS LAW CORPORATION
KARIN LANGWASSER	(CPE/SC)...BRIGGS LAW CORPORATION

**XREF: PROPS1200657**

Continued from **2/18/15** at request of counsel.

Continued from **4/15/15** for review of supplement filed this date.

**Continued from 03/13/17 and 06/05/17 to clear notes.**

THIS CASE IS SET FOR HEARING ON Second Account Current and Report of Successor Co-Conservators, Katherine Briggs and Karin Langwasser; Request for Conservators' Fees and for Attorney's Fees

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

1. Accounting covers 12/05/14 to 12/31/16.
2. Assets on hand: \$178,090.96 of which \$9,382.96 is cash and the balance in securities.
3. Petitioners request fees of \$18,525 for services rendered during this account period through 01/10/17. It is unclear if petitioner is requesting fees or requesting to pay a CPA. **Supp. (06/02/17) indicates petitioner is requesting to pay for CPA services and affixes invoice [LF, pgs. 9-37]. JTD.**
4. Petitioner requests attorney fees and costs of **\$2,972.50**. Billed at \$225/hour for attorney time. Itemized [see supp. filed 06/02/17, LF, pgs. 51-55].
5. Liabilities at End of Account Period – Schedule G [LF, p. 25] reflects a total of \$18,525 to petitioner's CPA. Invoices by petitioner's CPA affixed [pgs. 527-557]. Billed in varying rates of \$125-\$225 totaling \$18,525.00. These fees appear excessive based on the size of the estate. Question why the substantial

**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.**

fees on preparing an annual accounting and \$225/hour for preparing checks to pay bills; or the need for a CPA? **Supp. (06/02/17) affixes declaration of Karen Langwasser [LF, p. 6], co-conservator and CPA, indicates she took over the accounting and tax services, along with managing Conservatee's personal and medical care, Conservatee's 96-year old mother is no longer able to manage his care.**

6. Distributions to Conservatee or Ward – Schedule K [LF, pgs. 19-20] reflects a monthly allowance to Elsie Omlin in the amount of \$800/month for providing clothing, transportation, music, supplies and other expenses for the benefit of Conservatee, David Omlin. Does Court wish to ratify monthly allowance? JTD.
7. Proposed Order 01/17/17 does not include assets on hand at end of account period; reflects incorrect account period and hearing date; and purports to pay Conservator's fees directly to CPA.

#### RECOMMENDATION

Court's discretion re: fees. If approved, set next Accounting Review for **02/27/18** (if one year) or **2/26/19** (if two year). Account to be filed 30 in advance of hearing. Note requirements of Local Rules.

(nb)

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: 08/14/17      TIME: 9:30      DEPT: S37P  
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CASE#: SC SS02728

CASE NAME: MTR OF JULIE A FISCHBACH

## **VACATED**

HEARING:

Accounting Review

COUNSEL:

DONNA C FISCHBACH                      (CP/TEE )...PRO/PER

JULIE A FISCHBACH                      (CTP)...

SPECIAL NEEDS TRUST OF JULIE A FISCHBACH (TRU)...

Waiver of Court Fees and Costs filed by DONNA C FISCHBACH is GRANTED

Waiver of Court Fees and Costs filed by JULIE A FISCHBACH is GRANTED

Ex Parte Petition to dispense with accounting and order entered 07/12/17.

(nb)

FUTURE HEARING DATES:

07/16/18 Accounting Review

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HONORABLE: TARA REILLY

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CASE#: VC VS00310

CASE NAME: MATTER OF WILLIAM JOSEPH PRUSINSKI

HEARING:

Hearing Re: MTN TO TERM CONSERVATORSHIP AND APPT PUBLIC  
GUARDIAN

COUNSEL:

LINDA PRUSINSKI (PET)...LUTHI, GARY & APPEL  
WILLIAM JOSEPH PRUSINSKI (CEP)...WALTER T. MOORE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Motion to Terminate Conservatorship and  
Appoint Public Guardian

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

1. Matter set on 07/24/17, wherein, the Court was informed conservatee's home burned down and conservatee is missing. Arson investigation has returned inconclusive. A missing person report has been filed with law enforcement.
2. The Court ordered Public Guardian be present at next hearing for possible appointment.
3. **CI Special Report filed 05/22/17.**

RECOMMENDATION:

Court's discretion

(nb)

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

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DATE: 08/14/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700272

CASE NAME: MTR OF LLOYD H DODD, JR

**SEE ALSO 18**

HEARING:

Hearing Re: PETITION FOR CONSERVATORSHIP

COUNSEL:

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

**XREF: CIFDS1700018**

GENERAL INFORMATION

Ex Parte orders granted on 07/19/17. Mitchell Roth appointed. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Lloyd H. Dodd, III (son) and Consuelo C. Dodd (daughter-in-law) ["Petitioners"].

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

- 1 Conservatee resides at Beaumont in Riverside County. Suggest transfer to Riverside County. If so, Court to set control date. JTD.
- 2 Power of Attorney affixed to petition [LF, pgs. 15-21] nominates Lloyd [LF, p.20].
- 3 Power of Attorney affixed to petition [LF, pgs. 15-21] waives bond [LF, p.20]. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE- Alternatively, suggest bond of \$100,000. JTD.
- 4 Petitioners seek Pr. C. §§1873, 1901 and Pr. C. §2351-2358 powers. Need Attachments 1e and 1f specifying orders, facts and reasons via verified supplement.
- 5 Petitioner seeks medical powers. Need Medical Capacity Declaration with Dementia attachment GC-335A.
- 6 Petitioners request dementia powers; Need report by court-appointed counsel, Mitchell Roth.
- 7 Need Court Investigator's Report.
- 8 Need return of Citation.

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.



- 9 Need proof of completion re Conservatorship Class.
- 10 Need Notice of Hearing and proof of service to include Dept. of Veterans' Affairs.

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **03/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); 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 **10/22/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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DATE: 08/14/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700272

CASE NAME: MTR OF LLOYD H DODD, JR

**SEE ALSO 17**

HEARING:

Hearing Re: TEMPORARY SUCCESSOR CONSERVATORSHIP

COUNSEL:

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

**XREF: CIFDS1700018**

No notes – see prior matter #17.  
(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: 08/14/17 TIME: 1:30 DEPT: S37P  
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CASE#: CON PS1600023

CASE NAME: MTR OF BETTY J ELLIS

**SEE ALSO 20**

HEARING:

Court Trial set for PETIITON FOR CONSERVATORSHIP of ASIRRA  
ELLIS-SUGUITAN

COUNSEL:

ASIRRA ELLIS-SUGUITAN (CPE)...SHENIECE J SMITH  
BETTY J ELLIS (CPE)...WALTER T. MOORE

No notes – Court Trial.  
(nb)

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: 08/14/17 TIME: 1:30 DEPT: S37P  
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CASE#: CON PS1600023

CASE NAME: MTR OF BETTY J ELLIS

**SEE ALSO 19**

HEARING:

Hearing Re: Petition for Conservatorship

COUNSEL:

ASIRRA ELLIS-SUGUITAN (CPE)...SHENIECE J SMITH  
BETTY J ELLIS (CPE)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **03/22/16**. Attorney Walter Moore appointed.

OSC set on **05/10/16**. Walter Moore appeared.

**OSC re dismissal vacated on 06/30/16.**

Continued from **07/19/16**. Temporary orders granted person and estate; \$55,000 bond.

**Continued from 03/02/17 and 08/03/17. Parties announce ready for trial.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Asirra Suguitan, daughter.

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

1. Bond of \$123,000 requested. Suggest bond of \$135,000 (includes recovery). JTD.
2. Petitioner seeks medical powers. Capacity Declaration filed 05/18/16.
3. Petitioner requests dementia powers; Report of Counsel Moore filed 07/19/16.
4. Court Investigator's Report filed 02/22/16.
5. Citation returned served 03/22/16.
6. Certificate of Completion re Conservatorship Class filed 03/03/16.
7. ~Proposed Form Order/Letters 02/08/16.

RECOMMENDATION:

Court's discretion. If approved, set hearing for Compliance Review for **03/08/18** for the filing of the required documents including a Determination of Conservatee's

Appropriate Level of Care per Pr.C. §2352.5 (form GC-355).

Set hearing re Accounting Review for **10/11/18**. Any accounting to be filed 30 days in advance. (nb/lc/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.**