



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 08/16/17**

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

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

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

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

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

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

lc07/18/17; 08/10/17lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

HEARING: Petition for LETTERS OF ADMINISTRATION

COUNSEL:

DELLA MARIE LEWIS

(DEC)...

CARLA L JACKSON

(PET/OBJ)...PRO/PER

BILLY DON JACKSON

(PET)...INEZ TINOCO-VACA

LARRY WAYNE JACKSON

(PRO/PER)

GENERAL INFORMATION

**Court removed Carla Jackson as administrator on 05/24/17 and appointed Billy Don Jackson. Accounting to be filed by 08/28/17 by successor administrator Billy Don Jackson.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Billy Don Johnson, son

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

1. Petitioner is requesting that bond be waived but does not state the reason in section 3d.. The estate consists of \$120,000 in real property; however, the inventory and appraisal lists personal property also with a value that is to be determined. Court's discretion
2. Duties and liabilities filed, however, the telephone number for the proposed personal representative is missing. Need same.
3. The petition for probate is on an outdated form. Court's discretion.
4. **Letters issued to petitioner Billy Don Johnson, son, with full authority, no bond, on 05/24/17. Clerk notified on 07/14/17 order is missing in LF.**

RECOMMENDATION

Matter appears to be moot as Court has already appointed the successor administrator. Court's discretion

(ww)

Future Hearing: 9/27/17: OSC Re Sanctions for FTA/Failure to File Timely Account, Accounting Review, 1<sup>st</sup> Report & Account

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

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400931

CASE NAME: Larry Davis

HEARING:  
Accounting Review

COUNSEL:

BRENDA C DAVIS (PET)...PRO/PER  
LARRY DAVIS (DEC)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...  
LAWRENCE DAVIS (AARON F GARCIA)

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 Brenda Davis, daughter, on 12/10/14; limited authority, no bond.
2. Previous status report approved on 08/10/16.
3. Need accounting or status report.

RECOMMENDATION

Need to clear note 3.

(lc)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1401023

CASE NAME: Dominic Juarez Special Needs Trust

HEARING:

Hearing Re: STATUS RE ACCOUNTING OF NATALIE BLICKENSTAFF

COUNSEL:

MASS MUTUAL TRUST COMPANY (PET)...	PATRICK MCNALLY
SALVADOR JUAREZ	(PET)...FULLERTON LEMANN SCHAEFER
JAMIE JUAREZ	(PET/CT)...JENNIFER DANIEL
CRAIG E WILSON	(PET)...CRAIG E WILSON
DOMINICK JUAREZ	(REBECCA J THYNE)

GENERAL INFORMATION

**Continued from 05/31/17.**

THIS CASE SET FOR HEARING ON Accounting review for Natalie Blickenstaff.

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

1. Natalie Blickenstaff was appointed Successor Trustee on 03/28/16.
2. Need accounting.

RECOMMENDATION

Inquire status.

(lc/ww)

Future hearing dates: 03/28/18 Final Discharge for Jamie Juarez, previous trustee

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600892

CASE NAME: MTR OF RICHARD DENNIS SMITH

HEARING:

FIRST AND FINAL Account and Report of MARK SMITH and Petition  
for allowance of fees filed.

COUNSEL:

MARK SMITH (PET)...ROBERTA L. TAYLOR & ASSOCIATES  
RICHARD DENNIS SMITH (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees by Mark Smith, son.

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

1. Both heirs waive accounting.
2. Petitioner and attorney request statutory fees of \$8,852.29 each. Ok.
3. Petitioner seeks reimbursement of costs totaling \$1,670.90 of which \$670.90  
remains unpaid. Itemized [Acct. 05/24 LFpg 9].
4. Notice of hearing and proof of service filed 06/12/17; however, proof of service  
attachment is missing.
5. ~Proposed Order: 05/24/17.

#### RECOMMENDATION

RFA subject to notice. If approved, set hearing on the filing of receipts and final discharge  
for **08/22/18**.

(lc)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700262

CASE NAME: MTR OF GLADYS M DINTELMAN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

KELLIE MOSS (PET)...GREGORY L ZUMBRUNN  
GLADYS M DINTERLMAN (DEC)...

#### GENERAL INFORMATION

**Continued from 05/31/17. Counsel represented he objects to his own petition and requests a continuance.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Kellie Moss, successor Trustee.

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

1. Petitioner, Kellie Moss, as Trustee seeks 100% interest in the decedent's 100% interest in real property per terms of pour over will.
2. ~Proposed Form Order: 03/16/17.

#### RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700263

CASE NAME: MTR OF SHARON LOUISE DELGER

HEARING:

Petition to determine succession to Real Property

COUNSEL:

KELLIE LOUISE MOSS	(PET)...GREGORY L ZUMBRUNN
SHARON LOUISE DELGER	(DEC)...
DEPT OF HEALTH CARE SERVICES	(TP )...PRO/PER

GENERAL INFORMATION

**Continued from 05/31/17. Counsel represented he objects to his own petition and requests a continuance.**

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

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

1. Petitioner, Kellie Moss, seeks 100% interest in the decedent's 100% interest per terms of the will.
2. ~Proposed Form Order: 03/16/17.

RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700511  
CASE NAME: MTR OF MARY JANE VINCENT  
HEARING: Petition for PROBATE OF WILL AND FOR LETTERS OF  
ADMINISTRATION WITH WILL ANNEXED

COUNSEL:

VALERIE MCCULLAH (PET)...ROSE C ROSADO  
MARY JANE VINCENT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Valerie McCullah, daughter

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

1. Will waives bond and all heirs waive bond. The estate consists of \$265,000 in real property. The value of personal property has yet to be determined. JTD
2. Will is not self-proving as there is no statement that the will was not procured under duress etc. Need proof of subscribing witness. (DE-131)
3. Notice of Petition to Administer Estate filed 07/25/17; however, Proof of Service is incomplete at section 4a as to date of mailing. Need amended Proof of Service.
4. Declinations and nominations attached by Timothy and David Vincent; 2 of three sons.
5. ~Proposed Form Order: 05/24/17

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond and note 5. If approved, set Accounting/Status Review for **10/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(ww/lc/lh)



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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700512

CASE NAME: JUDY ANN BESWICK

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DAVID BESWICK (PET)...DIANA J CARLONI  
JUDY ANN BESWICK (DEC)...

#### GENERAL INFORMATION

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

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

1. All heirs waive bond. The net value of the estate consists of \$127,500 of which \$7,500 is personal property.
2. Notice to Petition to Administer Estate and proof of service filed on 05/26/17; however, department is missing. Need corrected notice. .
3. ~Proposed Form Order: 05/24/17

#### RECOMMENDATION

RFA subject to note 2. If approved, set Accounting/Status Review for **10/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700513

CASE NAME: Lorin Gene Tidd

HEARING:

Hearing re: Petition for Probate, Letters of Testamentary With Full Authority Under IAEA..

COUNSEL:

PHYLLIS J. GONZALES (PET)...FULLERTON LEMANN SCHAEFER & DO  
LORIN GENE TIDD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Phyllis Gonzales, sister

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

1. Will waives bond. The estate consists of \$430,000 of which \$30,000 is personal property.
2. Declination to act by named executor Katherine Tidd filed as an attachment to the petition.
3. The will conditionally incorporates decedent's Trust. Confidential declaration of trust filed on 05/24/17.
4. Will is not self-proving as there is no statement that the will was not procured under duress etc. Proofs of subscribing witnesses filed on 05/31/17.
5. The petition is not dated by Phyllis Gonzales. Need date verification.
6. ~Proposed Form Order: 05/24/17

RECOMMENDATION

RFA subject to note 5 and Court's discretion re bond. If approved, set Accounting/Status Review for **10/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 9A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/16/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700402

CASE NAME: MTR OF JOHN DUANE MAISCH

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

WILHELM MAISCH (PET)...CONSTANCE J LARSON

JOHN DUANE MAISCH (DEC)...

#### GENERAL INFORMATION

**Continued from 07/19/17. Court clears probate note 4 clarifying Chrisara Berg Rempel and Cris Sarah Berg are the same person.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Wilhelm Maisch, brother

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

1. Petitioner requests bond of \$130,000.00. Ok.
2. The petition for probate is an outdated form. Court's discretion.
3. ~Proposed Form Order: 4/24/17

#### RECOMMENDATION

Court's discretion, \$130,000 bond. If approved, set Accounting/Status Review for **10/24/18**.

Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

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DATE: 08/16/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700051

CASE NAME: Wanda Green

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

LORENE GREEN

(CPE)...DENNIS M SANDOVAL

WANDA GREEN

(CEP)...BRIAN

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference.

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

1. Lorene Green, mother, appointed limited Conservator of person only on 01/06/86 in Riverside County, transferred to Sacramento in 2000, ordered transferred back to Riverside on 07/03/02, ordered transferred to El Dorado 06/15/15, ordered transferred from El Dorado County to San Bernardino on 05/11/16, case received on 02/07/17.
2. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)? JTD
3. Does court wish to require an IRC inquiry/report? JTD
4. Need post move notice per CRC 7.1063(c) including notice to Alta Ca Regional Center and IRC. **Post Move Notice filed 08/10/17; however, not in LF at time of review.**
5. Need amended letters to reflect this county.

#### RECOMMENDATION

Need to clear notes 4-5 then Court's discretion.

(lc/lh)

Future hearing date: 01/31/18 - CI Biennial Review

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: 08/16/17 TIME: 9:30 DEPT: S35P  
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CASE#: VC VS00503

CASE NAME: MATTER OF THERESA RENEE HARDY

HEARING:  
Accounting Review

COUNSEL:

MILDRED E REAVIS	(CPE)...ZUMBRUNN LAW CORPORATION
FRANKLIN T REAVIS	(CPE)...PRO/PER
THERESA RENEE HARDY	(CEP)...
KATHERINE MCCOY	(CPE)...ZUMBRUNN LAW CORPORATION

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> Account for Mildred Reavis and Katherine McCoy, mother and sister, approved on 08/19/15.
2. Need 3<sup>rd</sup> Account beginning with 05/06/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 08/16/17      TIME: 10:00      DEPT: S35P  
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CASE#: SC SS8012

CASE NAME: IN THE MTTR OF JAMES JAMES JR

**VACATED**

HEARING:

Accounting Review

COUNSEL:

JAMES JAMES JR

(CEP)...

MELODIE Z SCOTT

(CPE)...J. DAVID HORSPOOL

CHRISTIE DAVIDSON

(SC/CPE )...HORSPOOL & PARKER

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

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 4<sup>th</sup> Account for successor conservator of the person and estate, Christie Davidson, approved on 08/19/15.
2. Need 5<sup>th</sup> Account beginning with 04/01/15

#### RECOMMENDATION

Inquire status of accounting.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 08/16/17 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600264

CASE NAME: CARMEN GREEN

HEARING:

Petition for allowance of compensation to Conservator and to his Attorney

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

CARMEN GREEN (CPE)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Allowance of Attorney's Fees by Public Guardian.

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

1. Petitioner alleges that petitioner and counsel have rendered services prior to and after appointment for which they have not been compensated.
2. Final Inventory and Appraisal filed showing sufficient assets for the fee request
3. Petitioner requests compensation of \$495.00 and County Counsel request fees of \$495.00.
4. **NOTE:** Conservatee passed away on 05/03/17. Court may wish to advance the Accounting review hearing.
5. ~Proposed Order: 07/11/17.

#### RECOMMENDATION

Court's discretion. Court may wish to continue matter to a Monday calendar as this is a Public Guardian matter.

(lc)

Future Hearing: 03/26/18: Accounting Review, Conservatorship Compliance Review Hearing

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

HEARING:  
Accounting Review

COUNSEL:

SIV LJUNGWE	(DEC)...
ALEX R BORDEN	(PET)...BORDEN LAW OFFICE
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION,	(TP )...LUCÉ HOWARD HAMILTON & SCRIP
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status **for Marilyn Kriebel administrator/successor trustee.**

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

1. Letters of Administration issued to Marilyn Kriebel, successor trustee, on 11/03/16; full authority, no bond.
2. Corrected Inventory and Appraisal filed by prior administrator on 03/24/16 reflecting that the \$0 balance is all of the estate. Does the Court wish to deem it as the final?
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report. Court's discretion re note 2.

(ww)

Future hearing dates:

09/21/17 Readiness Calendar

09/21/17 Hearing re: Status of second and final account by **S. Dimeff**

04/05/18 Hearing re Final Discharge (**Alex Borden**)



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: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500760

CASE NAME: MTR OF MYLRID URCEIL GILES

HEARING: Probate status report filed.

COUNSEL:

ROSLYN TOWNSEND (PET)...CRAIG E WILSON  
MYLRID URCEIL GILES (DEC)...

GENERAL INFORMATION

**Continued from 02/08/17, 04/12/17 and 06/28/17.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Roslyn Townsend, daughter, on 11/17/15; full authority \$230,000 bond.
2. Petitioner requests an additional six months to close the estate in order to marshal unclaimed property with the Controller's Office.
3. ~Proposed Order: 11/30/16.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **02/21/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/16/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1501116

**VACATED**

CASE NAME: MTR OF LEO WILLIAM FROELICH

HEARING:

Accounting Review

COUNSEL:

MARIE L FROELICH

(PET)...RICHARD SAMUEL PRICE

LEO WILLIAM FROELICH

(DEC)...

DIANA M MODICA

(TP )...NEIL R HEDTKE, ESQ

Future hearing dates: 08/31/17 Final Account of Marie Froelich

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1501186

CASE NAME: MTR OF ROSE CORRA

HEARING:  
Accounting Review

COUNSEL:  
JOHN PAUL CORRA (PET)...PRO/PER  
ROSE CORRA (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 Testamentary issued to John Corra, son, on 04/20/16; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status of accounting and I&A.

(ww)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600045

CASE NAME: MTR OF ALLAN BLAKE DICKINSON

HEARING: FINAL Account and Report of SHELLI DICKINSON and Petition for allowance of fees filed.

COUNSEL:

SHELLI DICKINSON (PET)...CARL G EHMANN  
ALLAN BLAKE DICKINSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Shelli Dickinson, daughter.

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

1. Petitioner and attorney requests statutory fees of \$1,674.45 each. Ok.
2. Funds of \$29,315.43 were reportedly taken from Dianne Dickson, daughter, of which \$4,141.61 was not returned to the estate. Dianne also allegedly took possession of the 1998 Mercedes appraised at \$6,500. These acts took place prior to Shelli being appointed as administrator. Petitioner wishes to deem the assets valued at \$10,641.61 as preliminary distribution and the overage assessed for the amount of \$3,716.51 to be paid to remaining heirs Shelli and Keith Dickinson, divided equally. See next note.
3. Petitioner seeks an ordered assessing the New York probate for the balance owed of \$3,716.51 as Dianne is to receive approximately \$44,000 from New York probate of which petitioner is allegedly administrator. It appears Dianne paid some expenses of the New York estate with the funds taken from estate. Question under what authority does this court have jurisdiction over New York probate? Need verified supplement.
4. Petitioner seeks a reserve of \$1,000.
5. Proposed Order: 05/25/17; however, not preapproved as note 2 must be cleared.

RECOMMENDATION

Need to clear note 3. If approved, set hearing on the filing of receipts and final discharge for **08/22/18**.

(lc)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

**SEE ALSO 7 8**

HEARING:

Hearing Re: PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

JASON W BENTON	(PET)...THOMPSON & COLEGATE
VICKI ELAINE BENTON	(DEC)...
DAVID J ZARICH	(PET/OBJ)...PHYLLIS M GALLAGHER

GENERAL INFORMATION:

Continued from **03/16/16 and 05/19/16**. Matter is contested.

**Ex Parte orders granted as modified on 08/03/16**, limited authority, no bond. Court authorizes the special administrator to maintain the real property, manage the two properties, address code violations, and secure/marshal personal property of decedent. Special Administrator is to notify David Zarich, 24 hours before coming to the property and inform him of the purpose of the visit.

**Continued from 10/18/16, 01/10/17, 04/20/17 and 06/14/17.**

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters of Administration with full authority under IAEA by Jason Benton, son.
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by David Zarich, brother.

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

**Petitioner 1 - Jason Benton, son**

1. Petitioner is the sole heir and waives bond.
2. **Objections filed by David Zarich, brother, on 04/15/16. Competing petition filed to be heard 06/14/17.**
3. **Response filed by Jason on 05/12/16.**
4. ~Proposed form order: 1/28/16

**Petitioner 2 - David Zarich, brother**

5. Petitioner seeks limited authority. There appears only real property. No bond appears ok until real property sells.
6. **Need proof of publication.**

7. No proposed order.

RECOMMENDATION:

Need to clear note 6 (see next matter **7**). Matter is contested; petitioner 1 appears to have higher priority per Pr.C. § 8461. If approved, set hearing for Accounting/Status Review on **10/24/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

**SEE ALSO 6 8**

HEARING:

OSC re: Dismissal of Petition by David Zarich filed by DAVID J  
ZARICH

COUNSEL:

JASON W BENTON

VICKI ELAINE BENTON

DAVID J ZARICH

(PET)...THOMPSON & COLEGATE

(DEC)...

(PET/OBJ)...PHYLLIS M GALLAGHER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Dismissal of Petition by David Zarich.

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

1. OSC set on 06/14/17 when court stated that this will be the last continuance for David Zarich's petition for administration. If all notes are not cleared, court will dismiss petition.

RECOMMENDATION

Court's discretion re OSC as notes remain un-cleared at time of review on 08/10/17.  
(lc/lh)

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600076

CASE NAME: MTR OF VICKI ELAINE BENTON

**SEE ALSO 6 7**

HEARING: Petition for BY CLAIMANT TO DETERMINE OWNERSHIP OF ESTATE  
PROPE RTY AND FOR ORDER AUTHORIZING TRANSFER ETC

COUNSEL:

JASON W BENTON	(PET)...THOMPSON & COLEGATE
VICKI ELAINE BENTON	(DEC)...
DAVID J ZARICH	(PET/OBJ)...PHYLLIS M GALLAGHER

GENERAL INFORMATION:

Continued from 12/06/16 and 01/10/17 for personal service.

**Continued from 03/14/17, 04/20/17 and 06/14/17 to be heard with other matters.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Ownership of Estate  
Property and for Order Authorizing and Directing Transfer of Property [Pr. C. § 850] by  
David Zarich.

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

1. Petitioner, David J. Zarich, is decedent's brother and claims a portion of the real property located at 345 S. Pampas Ave., Rialto, CA 92376. Petitioner claims and alleges that a share of the property listed in the Administrator's (Jason Benson) Inventory and Appraisal belongs to Petitioner.
2. Petitioner proffers a document described as "Statement to share profits re David Zurich," [see petition filed 10/13/16 – LF, p. 6] which reflects a document agreeing to give David J. Zurich a one-fifth share of the profits upon the sale of the residence. A Jurat is affixed [see petition filed 10/13/16 – LF, p. 7] which is not completed or notarized with a signature purported to be that of Decedents.
3. Petitioner indicates that since Decedent's demise, Petitioner has received neither money, nor assurances that he will receive his share, or anything of value from the Decedent or from her estate. Instead, Petitioner alleges being harassed by Jason W. Benton and told that he must vacate the premises, which has been Petitioner's home for more than 50 years.
4. Petitioner requests this Court determine that Petitioner is the true owner of a portion of the subject property; and to authorize and direct Administrator to transfer the portion of the property claimed, to the Petitioner.



5. Proof of Personal Service filed 11/23/16 does not include notice. Need proper notice.
6. **Objections filed 01/06/17 by Jason Benton (son of decedent) alleges that based on the arguments and allegations of Mr. Zarick, he may have a beneficial interest of some sort in the property at 345 S. Pampusa Avenue. However, he does not provide any evidence of an ownership interest or provide a calculable claim against the equity in the property.**
7. **Supporting declaration filed by Petitioner and Vicki Benton on 01/05/17.**

RECOMMENDATION:

Set for contested hearing.

(nb/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 10 11**

HEARING:

Petition for ORDER 1.DETERMINING THAT CERTAIN REAL PROPERTY  
IS AN ASSET OF THE REVOCABLE TRUST ETC.

COUNSEL:

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

Currently under review by legal research

(LR)

Notice deemed sufficient.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 9 11**

HEARING:

Petition for 1.SUSPENSION OF TRUSTEE SAMUEL SANDERS, JR:2.REMOVAL  
OF TRUSTEE; ETC

COUNSEL:

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

Currently under review by legal research

(LR)

Notice deemed sufficient.

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03  
**SEE ALSO 9 10**

HEARING:

FIRST Account and Report of SAMUEL J. SANDERS JR. and Petition  
for allowance of fees filed.

COUNSEL:

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

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current by Samuel Sanders Jr Trustee.

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

1. Petitioner, Samuel Sanders Jr., acting trustee since the death of his father on 07/20/15.
2. Accounting period 07/20/15 – 03/31/17.
3. Assets on hand \$9,671.20 and account receivables of \$138,604.14.
4. Petitioner alleges Samuel Sr. passed away with debts in excess of \$190,000 of which was a Bank of America credit line and a Los Angeles Housing Dept. loan. Cash on hand consisted of \$1,212.92. The real property was valued at \$500,000.
5. Trustee allegedly purchased the real property for \$417,000, given his 1/5<sup>th</sup> share, and later transferred the funds to the beneficiaries. Petitioner reports that he owes Trust approximately \$113,000 to equalize payment.
6. Petitioner alleges some beneficiaries have refused to cooperate with distribution by not cashing checks and failing to return the W-9 forms.
7. No proposed order. Submit after hearing.

#### RECOMMENDATION

Court's discretion. No future hearing dates as trust is not court supervised.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700314

CASE NAME: CHARLOTTE GOMEZ CASTRO

**VACATED**

HEARING:

Hearing Re: Posting of Bond

COUNSEL:

CECILIA M CASTRO (PET)...PRO/PER  
CHARLOTTE GOMEZ CASTRO (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Hearing re: Proof of Bond

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

1. Cecilia Castro, daughter, appointed as executor, full authority, \$150,000 bond on 07/12/17.
2. Need bond of \$150,000 and issuance of letters.

#### RECOMMENDATION

Inquire status of bond and issuance of letters.

(ww)

Future Hearing: 9/19/18: Accounting Review

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700434

CASE NAME: MTR OF MARGARET E PRICE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JOHN THOMAS PRICE	(PET)...GREGORY L ZUMBRUNN
STEVEN CHARLES PRICE	(PET)...GREGORY L ZUMBRUNN
MARGARET E PRICE	(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by John and Steven Price, sons

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

1. Petitioners seek 100% interest, 50% each, in decedent's 100% interest in real property per intestate succession.
2. Proposed Form Order: 04/27/17

#### RECOMMENDATION

RFA.

(ww)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700436

CASE NAME: MTR OF BEATRICE F STEVENS

HEARING:

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

COUNSEL:

RICHELLE E CARLSON (PET)...ZUMBRUNN LAW CORPORATION  
BEATRICE F STEVENS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Richelle Carlson, daughter

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

1. Will waives bond. The estate consists of \$302,000 of which \$2,000 is personal property.
2. Will is holographic. Proof of holographic Instrument filed on 05/11/17.
3. ~Proposed Form Order: 05/04/17

#### RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **10/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700446

CASE NAME: WILLIAM HERBERT MCCALLEY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

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

#### GENERAL INFORMATION

**Continued from 08/09/17. Matter continued to file a supplement to clear notes regarding I&A.**

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

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

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

#### RECOMMENDATION

Need to clear note 2.

(lc/lh)



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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/16/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700684

CASE NAME: MTR OF THEODOROU FAMILY TRUST

HEARING:

Petition for ORDER INSTRUCTING TRUSTEE

COUNSEL:

NANCY HASSARD

(PET)...HARTNELL LAW GROUP

THEODOROU FAMILY TRUST

(TRU)...

Currently under review by legal research

(LR)

NOTICE:

Need 30 days' notice of hearing and proof of mailed service to the approximate 31 persons mentioned in trust LF pages 5-8 of trust filed 07/12/17.

Superior Court of Calif, County of San Bernardino  
Page: 15A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/16/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600115

CASE NAME: HARRIET JANE BELVEAL FAMILY TRUST

HEARING: Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

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

GENERAL INFORMATION:

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

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

**Continued from 01/25/17, 04/05/17, 06/07/17 and 08/02/17. Kariann Vorhees is to be custodian of the bank accounts.**

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

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

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

RECOMMENDATION

Inquire status of report and receipt for blocked account.

(lc/lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**CONSERVATORSHIPS**

-----  
DATE: 08/16/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1200214

CASE NAME: AMADOR SANTANA

HEARING:    FIFTH Account and Report of IVETTE SANTANA and Petition for allowance of fees filed.

COUNSEL:

IVETTE SANTANA

(CPE)...CHRISTOPHER A POULOS

AMADOR SANTANA

(CEP)...JENNIFER M DANIEL

JENNIFER M. DANIEL

(PET)...JENNIFER DANIEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 5<sup>th</sup> Account Current, Petition to Deposit funds and Petition for Insurance of Bond by Ivette Santana, daughter.

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

1. Account period covers 04/02/15 – 04/06/17.
2. Assets on hand \$188,943.31 of which \$184,708.31 is cash.
3. Beginning assets of \$149,869.15 does not match ending assets of prior account \$150,064.15, a difference of \$-195. Need reconciliation or amended accounting.
4. Petitioner requests to use \$195 cash for outside activity such as tickets to an Angel's game and one baseball cap. Court to inquire as this is exact amount accounting is off (See previous note).
5. Petitioner requests to transfer \$17,605.32 into a blocked account.
6. Bond is currently set at \$20,000 and appears sufficient.
7. No fees are requested.
8. No proposed order; submit order after hearing.

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **07/11/18** (if one year) or **07/12/19** (if two years). Accounting to be filed 30 days in advance.

(lc)

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

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DATE: 08/16/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400260

CASE NAME: Mildred Doyle

HEARING:  
Accounting Review

COUNSEL:

SANDRA OLSON	(CPE)...LENITA A SKORETZ
MILDRED DOYLE	(CEP)...E JOAN NELMS
JAMES B CHURCH	(PET)...JAMES B CHURCH
E JOAN NELMS	(PET)...E. JOAN NELMS
CHRISTINA M GRAY	(TP)...PRO/PER

GENERAL INFORMATION

**Continued from 04/05/17 and 06/21/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 1<sup>st</sup> Account approved on 07/14/16.
2. Need 2<sup>nd</sup> Account and Final account beginning with 02/01/16.
3. **Note: conservatee passed away on 02/12/17.**

RECOMMENDATION

Inquire status of accounting.  
(lc/lh/lc/ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 08/16/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700225

## **VACATED**

CASE NAME: MTR OF EVAN CHANDLER M. MORRIS

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

MARIA LUISA MORRIS            (CP )...PRO/PER  
BRANDON SCOTT MORRIS        (CP )...PRO/PER  
EVAN CHANDLER M. MORRIS    (CTP)...

### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference.

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

1. Maria and Brandon Morris, parents, appointed limited Conservator of person only in Orange County on 12/09/14. Matter order transferred to San Bernardino on 04/11/17.
2. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)? JTD
3. Regional Center of Orange County report filed 12/05/14. Does court wish to require an updated report from IRC? JTD
4. Post move notice filed 01/10/17 per CRC 7.1063(c); however, is not dated and proof of service is incomplete. Need corrected notice as well as notice to IRC and Orange County Regional Center.
5. Need amended letters to reflect San Bernardino county.

### RECOMMENDATION

Need to clear notes 4-5, then Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS00486

CASE NAME: THOMAS CHARLES RICHARDS

HEARING:  
Accounting Review

COUNSEL:

ASUNCION RICHARDS	(PET)...LAYNE A BARTHOLOMEW
DANIEL G STUBBS	(PCR/CPE/CE)...HORSPOOL & HORSPOOL
THOMAS CHARLES RICHARDS	(PCE/CEP/CTE)...
DANIEL G STUBBS	(CE )...J. DAVID HORSPOOL

GENERAL INFORMATION

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

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 9<sup>th</sup> Account of Daniel Stubbs, PPF approved on 06/29/16.
2. Need 10<sup>th</sup> Account beginning with 04/01/16.

RECOMMENDATION

Inquire status of accounting.  
(lc/ww)

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

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DATE: 08/16/17 TIME: 9:30 DEPT: S36P  
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CASE#: VC VS00145

CASE NAME: MTR OF JENNIFER RODDY

HEARING:  
Accounting Review

COUNSEL:  
EMILY PATINO (PLA)...MARIELLEN ROSS  
JENNIFER RODDY (PLA)...  
MARK ROBERT RODDY (OBJ)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 3<sup>rd</sup> Account for Emily Patino, mother, approved on 12/17/15
2. Need 4<sup>th</sup> Account beginning with 03/02/15.

RECOMMENDATION  
Inquire status of accounting.

(ww)

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: 08/16/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700235

CASE NAME: MARICA KAY BISSONNETTE

HEARING: Petition for Appointment of Conservator

COUNSEL:

KRISTIN COX

(CPE)... BRADLEY J. HAGUE

MARCIA KAY BISSONNETTE

(CEP)...MITCHELL I ROTH

#### GENERAL INFORMATION

Mitchell Roth appointed Counsel on 06/29/17, ex parte continued.

Kristin Cox appointed temporary Conservator on 07/26/17; person and estate \$82,000 bond.

**Continued from 08/10/17.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Kristin Cox (daughter)

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

1. Temporary bond \$82,000 issued. If approved, need bond as to general conservatorship.
2. Petitioner seeks powers under Pr. C. §2591; however, does not specify requested powers and reasons for each. Also, question if real property is conservatee's separate property as proposed conservatee is married? Need verified supplement.
3. Petitioner seeks all powers under Pr. C. §2351-2358. Need verified supplement specifying each requested power and reasons for each.
4. Proof of Service of Notice of Hearing filed 06/29/17 as to Richard Bissonnette (husband) is incomplete at item #6 re server's address. Need amended proof of service.
5. Petitioner seeks medical powers. Capacity Declaration filed 06/22/17.
6. Petitioner seeks dementia powers. Report of Counsel M. Roth filed 08/01/17.
7. Return of Citation filed 06/29/17.
8. Proof of Completion of Conservatorship Training Class filed 07/06/17.
9. Court Investigator report filed 08/01/17.
10. No proposed Order submitted.



## RECOMMENDATION

Need to clear notes 2-4. If approved, set hearing for Compliance Review for **03/21/18** for the filing of the required documents and hearing re Accounting Review for **10/24/18**. Any accounting to be filed 30 days in advance.

(lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 08/16/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO DS1100139

**VACATED**

CASE NAME: PETER VINCENT MACALUSO

HEARING:

Hearing re Final Discharge

COUNSEL:

KATHRYN SOLIS

(PET)...PRO/PER

PETER VINCENT MACALUSO

(DEC)...

Discharge order sent to department for signature on 07/19/17.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200037

CASE NAME: PABLO DEL OLMO

HEARING:  
Hearing re Final Discharge

COUNSEL:  
TRINIDAD PALOMA DE ANDRES (PET)...MERCEDES Z WHEELER  
PABLO DEL OLMO (DEC)...

GENERAL INFORMATION  
**Continued from 03/23/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Trinidad Paloma De Andres approved on 10/20/16.
2. Receipts filed.
3. Ex Parte Petition for Final Discharge and Order forwarded to department for signature on 08/03/17.

RECOMMENDATION  
None.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1300529

CASE NAME: VICKI L MATTA

HEARING:  
Hearing re Final Discharge

COUNSEL:  
SHANNON MATTA (PET)...PRO/PER  
VICKI L MATTA (DEC)...

Waiver of Court Fees and Costs filed by SHANNON MATTA is GRANTED

GENERAL INFORMATION

**Continued from 02/08/17, 04/26/17 and 07/05/17 (no appearance). Shannon Matta ordered to appear.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Shannon Matta approved on 02/03/16.
2. No receipt required, personal representative, Shannon Matta, is sole heir.
3. Need Ex Parte Petition for Final Discharge and Order re-submitted with corrections.

RECOMMENDATION

Inquire status.

(lc)

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

-----  
DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400678

CASE NAME: Frieda Faunette Magby

HEARING:

Probate status report filed.

COUNSEL:

MICHAEL MAGBY	(PET)...JAMIE P GELBER
FRIEDA FAUNETTE MAGBY	(DEC)...
CHARLOTTE D JACKSON	(OBJ)...PRO/PER
REBECCA CARTER	(PRO/PER)
ROBIN VILICANA	(PRO/PER)
RUTH BEIBERS	(PRO/PER)
DEPARTMENT OF HEALTH CARE SERVICES	(PRO/PER)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Michael Magby, son, on 03/23/15; full authority, no bond.
2. Petitioner seeks an additional year to close the estate in order to sell the real property and pay the Department of Health Services claim.
3. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Need to notice. If approved, set Accounting/Status Review for **08/22/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500849

CASE NAME: MICHAEL D. JUDD AKA MICHAEL DAVID JUDD ETC

HEARING:

Hearing Re: STATUS OF MEDIATION

COUNSEL:

SUZANNE BAILEY	(PET)...HARTNELL LAW GROUP
MICHAEL D. JUDD	(DEC)...
RANDI L KENNEDY	(PET/TP)...CHRISTOPHER A SHUMATE
BARBARA JUDD	(DEBRA L LEFFLER STREETER)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Mediation.

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

1. Matter set at 06/19/17 Final Accounting.

RECOMMENDATION

Court's discretion. As accounting does not appear to be approved, court to place final accounting back on calendar.

(lc)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600139

CASE NAME: SCOTT RANDALL WELDY

HEARING:

FIRST AND FINAL Account and Report of KIM WELDY and Petition for allowance of fees filed.

COUNSEL:

KIM WELDY (PET)...ROBERTA L. TAYLOR & ASSOCIATES  
SCOTT RANDALL WELDY (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner alleges she is the sole **beneficiary** and waives accounting.
  - a. There is no will, therefore, petitioner appears to be **sole heir** rather than beneficiary.
2. The estate is allegedly community property. An election must be filed within four months after the issuance of letters or within further time that the court may allow before entry of any order determining passing to surviving spouse (Pr. C. §13650 § 13656). Need election per Pr. C. § 13502. **Supp 08/03/17 approximately one year after Letters were issued, an investigation determined asset to be 100% community property. Spousal election is included; petitioner requests Court allow late election to take place for good cause. JTD.**
3. Petitioner seeks a reserve of \$1,000.
4. Proposed order 05/24/17. Not reviewed as note 2 needs to be cleared.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **08/22/18**.

(lc/lh)

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: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600637

CASE NAME: MTR OF BRUCE ROBERTS

HEARING:

WAIVER OF Account and Report of DAWN MARIE WAGEMAN and Petition  
for allowance of fees filed.

COUNSEL:

DAWN MARIE WAGEMAN (PET)...GREGORY L ZUMBRUNN  
BRUCE ROBERTS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Dawn Wageman, step-daughter.

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

1. Petitioner is sole beneficiary of will, waives accounting and statutory compensation.
2. Attorney seeks statutory fees of \$7,987.16.
3. ~Proposed Order: 05/31/17.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **08/22/18**.

(lc)



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

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601039

CASE NAME: MTR OF MARCELLA WASHINGTON TRUST

HEARING:  
Accounting Review

COUNSEL:

BENNIE HILL	(PET)...PRO/PER
THE MARCELLA WASHINGTON TRUST	(TRU)...PRO/PER
JEANNIE PORTER	(TEE)...PRO/PER

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

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Bennie Hill requested an accounting from Jeannie Porter, daughter/trustee. Informal accounting provided was not satisfactory to family members and Bennie Hill, son, objected on 03/22/17.
2. Duplicate objection by Bennie Hill filed on 06/21/17.
3. Need accounting.

RECOMMENDATION  
Inquire status of accounting.

(lc/ww)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700379

CASE NAME: MILDRED MOUNGER

HEARING:

Petition to determine succession to Real Property

COUNSEL:

DEBRA JORNS

MILDRED MOUNGER

(PET)...ALLEN LAW CORP

(DEC)...

GENERAL INFORMATION

**Continued from 07/05/17.**

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

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

1. Petitioner seeks 100% interest, 50% to petitioner and 50% to Randall Mounger; decedent's son, in decedent's 100% interest in real property per the laws of intestate succession. However, Randall must petition as well per Pr.C. § 13152(a). Need amended petition.
2. Section 18 does not indicate how many pages attached.
3. Inventory and Appraisal filed separately. Inventory and Appraisal is to be attached per section 8.
4. No proposed order.

RECOMMENDATION

Need amended petition.

(lc/ww)

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

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700539

CASE NAME: JO ANNA SZONDY

HEARING:

Petition to determine succession to Real Property

COUNSEL:

WILLIAM H DODSON	(PET)...DIANA J CARLONI
DAVID DODSON	(PET)...DIANA J CARLONI
JOHN MARK DODSON	(PET)...DIANA J CARLONI
JO ANNA SZONDY	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by William, David and John Dodson, sons.

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

1. Petitioners seek 100% interest in decedent's 100% interest in real property intestate succession. 1/3 each.
2. Proposed Form Order: 06/01/17

RECOMMENDATION

RFA.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 10A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 08/16/17 TIME: 8:30 DEPT: S37P  
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CASE#: PROPS1700727

CASE NAME: JAMES SCOTT MOSELY

HEARING:

Hearing Re: PTN FOR LTS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ROBERT L MOSELY (PET)...HARTNELL LAW GROUP

JAMES SCOTT MOSLEY (DEC)...

GENERAL INFORMATION:

Ex parte orders for early setting granted on 7/26/17.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Robert Mosley (brother/sole heir)

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

1. Bond waived by petitioner/sole heir. Estimated net value of estate is \$110,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Need Proof of Publication.
3. ~Proposed form Order: 07/21/17

RECOMMENDATION:

RFA subject to note 2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/24/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**ELDER ABUSE**

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DATE: 08/16/17      TIME: 9:30      DEPT: S37P  
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CASE#: CIF DS1700009

CASE NAME: LAGUTANSKI V LAGUATAN

HEARING:

Hearing Re: EDLER ABUSE RESTRAINING ORDER

COUNSEL:

BILL LAGUTANSKI

(PP )...PRO/PER

JEFFREY LAGUATAN

(RP )...

No notes – JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 08/16/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON DS1000339

CASE NAME: MTR OF BRIAN Z YAUCHI

HEARING:

Hearing Re: STATUS CONF ON RETROACTIVITY OF RENT AND UTILITY

COUNSEL:

GLORIA Z YAUCHI	(CPE/CE)...LAYNE A BARTHOLOMEW
RYO YAUCHI	(CPE/CE)...LAYNE A BARTHOLOMEW
BRIAN Z YAUCHI	(CEP/CTE/CE)...MITCHELL I ROTH
COUNTY OF SAN BERNARDINO	(PLA)...COUNTY COUNSEL
DONNASUE SMITH ORTIZ	(PET)...
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
LIBERTY MUTUAL INSURANCE COMPANY (TP )	...PRO/PER
CONSERVATORSHIP ESTATE OF BRIAN Z YAUCHIS (LAYNE A BARTHOLOM	

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Conference of Retroactivity of Rent and Utilities.

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

1. Matter set at 06/21/17 Rent Contributions hearing.
2. Parties reported Gloria Yauchi has agreed to pay rent and utilities for her husband and son. Both husband and son owe \$500 for rent and \$150 for utilities. Court orders payment to begin 7/1/17 Court reserves on the issue of retroactive of the rent and utility payments by Ryo Yauchi and Brian Yauchi. Counsel to resolve issue prior to this hearing.

#### RECOMMENDATION

Inquire status.

(lc)

Future Hearing: 3/07/18 Accounting Review

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

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DATE: 08/16/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1300327

CASE NAME: RANSOM GEORGE BALLARD

HEARING:  
Accounting Review

COUNSEL:  
GLORIA L MCFARLAND (PET)...DONNASUE ORTIZ  
RANSOM GEORGE BALLARD (CEE)...

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

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2<sup>nd</sup> Account of Gloria McFarland, cousin, approved on 06/22/16.
2. Need 3<sup>rd</sup> Account beginning with 02/01/16.

RECOMMENDATION  
Inquire status of accounting.  
(lc/ww)

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

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DATE: 08/16/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700197  
CASE NAME: CLARENCE WARE

**SEE ALSO 15**

HEARING: OSC re: Dismissal

COUNSEL:

LACHELLE WARE (CPE)...PRO/PER  
CLARENCE WARE (CEP)...WALTER T. MOORE

GENERAL INFORMATION

**OSC set when there was no appearance on 07/05/17. Walter Moore appointed counsel.**

THIS CASE SET FOR HEARING ON **OSC re Dismissal** on Petition for Appointment of Conservator person and estate by Lachelle Ware, daughter.

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

1. Petitioner seeks all funds of \$1,650 be placed into a blocked account. As the Conservatee's only assets are Social Security income no bond would be required. Pr.C. §§ 2323 and 2628. JTD
2. Petitioner does not seek medical powers; however, seeks dementia powers. Need verified supplement.
3. Petitioner seeks dementia powers. Need report of Counsel Moore.
4. List of required contacts (Local form SB-12224) lists more persons that in petition. Need verified supplement re second degree relatives.
5. Need notice of hearing and proof of service.
6. Need return of citation. Petition does not indicate if proposed conservatee will attend the hearing.
7. CI Report filed 08/09/17.
8. Certificate of Completion of the Conservatorship Training Class filed 06/02/17.
9. Court to see letter from Senior Living facility [Pet. 05/25 LFpg 10-11].
10. ~Proposed Form Order: 05/25/17.

RECOMMENDATION

OSC re dismissal. Need to clear notes 2-6. If approved, set hearing for Compliance Review for **03/21/18** for the filing of the required documents and hearing re Accounting Review for **10/24/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc/lh)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 08/16/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700197

CASE NAME: CLARENCE WARE

**SEE ALSO 14**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LACHELLE WARE

(CPE)...PRO/PER

CLARENCE WARE

(CEP)...WALTER T. MOORE

See notes on matter 14.

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

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DATE: 08/16/17 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS00690

CASE NAME: IN THE MATTER OF INEZ O ALNER

HEARING:  
Accounting Review

COUNSEL:

INEZ O ALNER	(CEP)...DUANE P BOOTH
DIANA MILLER	(CPE)...HARTNELL HORSPOOL & FOX
JUNE SCHAFFRAN	(CPE)...HORSPOOL & H ORSPOOL

GENERAL INFORMATION

**Continued from 04/19/17 and 06/21/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 9<sup>th</sup> Account approved on 05/13/15 for period ending 12/31/14.
2. Proposed order to dispense with accounting filed 08/02/17 indicates conservatee passed away on 05/03/15.
3. Need final accounting for pre-death and post-death accounting periods beginning on 01/01/15, per Pr. C. §2620.

RECOMMENDATION

Inquire status of accounting.

(lc/ww/lh)