



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 08/23/17

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.

08/17/17lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0800273

CASE NAME: ANA ISABEL COLINDRES SPECIAL NEEDS TRUST

HEARING:

Hearing Re: BUDGET PLAN/DEPLETION ANALYSIS

COUNSEL:

PFF BANK & TRUST (PET)...ALTHOUSE & MCDONOUGH
DONNASUE SMITH ORTIZ (PET)...DONNASUE ORTIZ
ANA ISABEL COLINDRES SPECIAL NEEDS TRUST (TRU)...
CITIZENS BUSINESS BANK (STE)...ELIZABETH MCDONOUGH

XREF: RGRS01108 (Ana Isabel Colindres) CONPS1300281 (Ana Isabel Colindres)

GENERAL INFORMATION

Continued from 06/21/17. Donnasue Smith Ortiz to file report by 08/09/17.

THIS CASE SET FOR HEARING ON Budget Plan/Depletion Analysis.

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

1. Matter set on 03/22/17 when 7th Account was approved.
2. Need budget plan re depletion of assets.

RECOMMENDATION

Inquire status.

(lc)

Future Hearing: 01/10/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400551

CASE NAME: MTR OF TILLIE AGUILERA

HEARING:
Hearing re Final Discharge

COUNSEL:
MICHAEL J ARMENTA (PET)...ARMENTA LAW
TILLIE AGUILERA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Michael Armenta, grandson-in-law, approved on 08/17/16.
2. Receipts filed for Katherine, Gilbert and Linda is not equal. **Supp 08/09/17 explains differences of amounts due to reimbursements paid by Katherine, and a vehicle pay-off by Gilbert to other beneficiaries.**
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Need to clear notes 3.

(lc/lh)

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600021

CASE NAME: MTR OF NELLIE V JOHNSON

HEARING:

Probate status report filed.

COUNSEL:

RICHARD J JOHNSON (PET)...LINDA J GLADSON
NELLIE V JOHNSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters Testamentary issued to Richard Johnson, son/Trustee.
2. Final Inventory and Appraisal filed 07/08/16.
3. Petitioner seeks an additional 12 months to close the estate in order to receive distribution from Estate of Wilbur Bootsma, Orange County Case No.30-2014-00724270-PR-LA-CJC.
4. ~Proposed Order: 06/01/17.

RECOMMENDATION

Court's discretion. 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/lh)

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600930
CASE NAME: MTR OF TROY A BROWN
HEARING: Petition for LETTERS OF ADMINISTRATION WITH WILL ANNEXED

COUNSEL:

JERRY BROWN (PET)...ANDERSON LEBLANCE
TROY A BROWN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **Amended [05/31/17]** Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Jerry Brown, father.

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

1. Letters of Administration issued to Jerry Brown 01/24/17; full authority \$150,000 bond.
2. Petitioner has located the will. If the proponent of a will has received notice of a petition for letters of administration, the proponent of the will may petition for probate of the will only within the later of either of the following time periods: (1) 120 days after determining the decedent to be intestate; (2) Sixty days after the proponent of the will first obtains knowledge of the will (Pr.C.§8226). Need verified supplement as to when petitioner first obtained knowledge of the will.
3. All heirs waive bond; however, need bond waiver by Ryan Trefrey. Ryan was not mentioned in section 8 of the initial petition. Net value of the estate consists of \$150,814.16 of which \$6,814.16 is personal property. As bond is already filed, question if petitioner is seeking no bond? Need verified supplement.
 - a. If bond required a surety rider will be required to change the principal on the bond.
4. Proofs of subscribing witness filed 05/31/17.
5. **NOTE:** Court to see Creditor's Claim allowed for petitioner's spouse with charges re son as well as mortgage payments prior to death in amount of \$39,690.98. Court may wish to set for noticed hearing.
6. ~Proposed Form Order: 05/31/17

RECOMMENDATION

Need to clear notes 2-3. Accounting review already set.

(ww/lc)

Future hearing: 02/15/18 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700033

CASE NAME: MTR OF THERESA V FLORES

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY WITH
FULL AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

SYLVIA T SMITH (PET)...PRO/PER
THERESA V FLORES (DEC)...

GENERAL INFORMATION

Continued from 03/15/17 and 05/24/17.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Sylvia Smith, daughter.

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

1. Will waives bond. Inventory and Appraisal filed indicating \$230,000 in real property.
2. The will conditionally incorporates decedent's Trust. Copy of Trust attached.
3. Need Notice to Petition to Administer Estate and proof of service for remainderman beneficiary Charles Smith.
4. Section 8 of petition does not list Trustee. Need verified supplement.
5. Proof of publication filed 03/15/17; however, does not indicate IAEA powers requested. Need corrected publication.
6. ~Proposed Form Order: 01/18/17.

RECOMMENDATION

Need to clear notes 3-5 Court's discretion re bond. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700541

CASE NAME: RICHARD W BURNS

HEARING:

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

COUNSEL:

LYNN SMITH

RICHARD W BURNS

(PET)...ELISABETH KEMPE-OLINGER

(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 Lynn Smith, daughter/nominee

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

1. Will waives bond and all heirs waive bond. The estate consists of \$284,100 of which \$30,600 is personal property.
2. Proof of subscribing witness by Mary Daniel filed on 06/01/17.
3. ~Proposed Form Order: 06/01/17

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **10/31/18**. 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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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700542

CASE NAME: JOHN EDWARD MUNSON III

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

STEPHANIE N MUNSON (PET)...ZACHARY R. HAGENBUCH
JOHN EDWARD MUNSON III (DEC)...

GENERAL INFORMATION

Ex parte orders granted on 07/11/17. Stephanie Munson appointed Special Administrator with limited IAEA, no bond.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Stephanie Munson, daughter

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

1. All heirs waive bond; however, **need** bond waivers by guardian for K'Mya and Dajohnie Munson as they are the children of the predeceased brother, John Munson IV. The estate value is undetermined.
2. Need Notice to Petition to Administer Estate and proof of service.
3. Section 2b of the petition as to the proposed administrator is blank but it is clear that Stephanie Munson is the petitioner. Court's discretion.
4. ~Proposed Form Order: 06/01/17

RECOMMENDATION

Need to clear notes 1 & 2. Court's discretion re bond and note 3. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700559
CASE NAME: KIMBERLEY ANN HIRTH

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

COUNSEL:
CHRISTOPHER HIRTH (PET)...CALDWELL, KENNEDY & PORTER
KIMBERLEY ANN HIRTH (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 Christopher Hirth, brother

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

1. All heirs waive bond; however, need bond waiver by Angela Demarese as she is the only beneficiary of the will. The estate consists of \$200,000 in real property and the amount of personal property has yet to be determined.
2. Petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b). Does court wish to require minimum bond of \$20,000.00 or alternatively based on assets of \$200,000 in real property?
JTD
3. Notice to Petition to Administer Estate and proof of service filed 06/28/17; however, section 4 is not marked as petition requests will be admitted to probate. **Need corrected notice.**
4. Proof of Publication filed 07/19/17; however, notice does not indicate request decedent's will be admitted for probate per Pr. C. §8100. **Need corrected publication.**
5. ~Proposed Form Order: 06/07/17

RECOMMENDATION

Need to clear notes 3-4. Court's discretion re bond. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(ww/lh)

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

DATE: 08/23/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500673

CASE NAME: Margaret L. Beauvais 2000 Revocable Trust

HEARING:

Hearing Re: STATUS OF SIGNATURE OF JUDGMENT

COUNSEL:

RICHARD ALAN BEAUVAIS (PET)...CHARLES S ALTHOUSE
MARGARET L. BEAUVAIS 2000 REVOCABLE TRUST (TRU)...
ALAN R BEAUVAIS (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status of Signature of Judgment

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

1. Matter set on 07/26/17 wherein Court determined that petition was a 17200 petition; court took hearing re final discharge off calendar and set hearing re status of signature of judgment.

RECOMMENDATION

Inquire status.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300213

CASE NAME: Bertha Mae Chatman

SEE ALSO 10

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,000.00 ON CONSERVATOR

COUNSEL:

BERTHA MAE CHATMAN

(PET/CEP)...JAMES B CHURCH

JACQUELINE MARIE BANKS

(PCR/CPE)...

XREF: CONDS1000221(Dwight Banks)

GENERAL INFORMATION

Continued from 02/15/17. Additional time needed to file accounting.

OSC set on 04/19/17 for failure to file as ordered. Jacqueline Banks to appear.

Continued from 05/24/17 and further OSC set for further sanctions of \$1,000. Court imposes sanctions of \$500 on the conservator. Conservator to be present at next hearing. Court notes that it will consider suspending the powers of the co-conservators and referral to Public Guardian if they fail to appear.

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **OSC re Sanctions of \$1,000** Accounting review.

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

1. 1st Account of Jacqueline Banks, daughter, approved on 02/18/15.
2. Need 2nd Account beginning with **11/10/14**.

RECOMMENDATION

Court's discretion re OSC. Inquire status of 2nd accounting. No bonding company to notice.

(ww/lc)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300213

CASE NAME: Bertha Mae Chatman

SEE ALSO 9

HEARING:

Accounting Review

COUNSEL:

BERTHA MAE CHATMAN (PET/CEP)...JAMES B CHURCH

JACQUELINE MARIE BANKS (PCR/CPE)...

XREF: CONDS1000221 (Dwight Banks)

See notes on matter 9.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500130

CASE NAME: HAIDY RUIZ

SEE ALSO 12

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSALINA RUIZ

COUNSEL:

ROSALINA RUIZ

(PCR)...PRO/PER

JUAN CARLOS RUIZ

(PCR)...PRO/PER

HAIDY RUIZ

(PCE)...MARK J. FLORY

See notes on matter 12.

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500130

CASE NAME: HAIDY RUIZ

SEE ALSO 11

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,000.00 ON BOTH CONSERVATORS

COUNSEL:

ROSALINA RUIZ	(PCR)...PRO/PER
JUAN CARLOS RUIZ	(PCR)...PRO/PER
HAIDY RUIZ	(PCE)...MARK J. FLORY

GENERAL INFORMATION

Continued from 08/22/16, 11/02/16 and 02/08/17. Conservators to be personally present on 04/19/17.

OSC set on 04/19/17 for failure to file as ordered. Conservators to appear.

OSC continued from 05/24/17. Court imposed sanctions of \$500 on Conservator Rosalina Ruiz. Co-Conservators to appear at next hearing. further OSC set.

THIS CASE IS SET FOR HEARING ON **OSC re Surcharge/Sanctions of \$1,000/Compliance Review.**

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

1. Rosalina Ruiz and Juan Ruiz, parents, appointed limited Co-Conservators of the person only on 11/10/15.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.
4. Need Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Court's discretion re OSC. Need to clear notes 2-4.

(/lc)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500332

CASE NAME: ANITA POIRIER

SEE ALSO 14

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DIANE LEE GIEBNER

COUNSEL:

DIANE LEE GIEBNER	(CE)...GREGORY T ANNIGAN
JOEL RYAN HOLT	(CP)...GREGORY T ANNIGAN
ANITA POIRIER	(CEE)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 12/14/16, 01/11/17 and 03/29/17. "Jason" Holt has failed to comply with court orders. Bench warrant to issue at \$1,000,000.

Continued from 07/19/17 Bench warrant of Jason Holt was recalled and he was ordered to appear at the next hearing. Substitution of Attorney for Diane Gieber and Joel Holt must be filed by July 26 or Marivel Zialcita will not be permitted to be the attorney of record.

THIS CASE SET FOR HEARING ON Compliance Review/Accounting review..

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

1. Joe Lolt and Diane Lee Giebner, grandson and daughter appointed conservators on 05/11/16; \$180,197.00 bond; Joe as Person, Diane as Estate.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.
5. Partial Inventory and Appraisal filed. Need bank statements per local rule 20-1404(c).
6. Need final Inventory & Appraisal per Pr.C.§2610.
7. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
8. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.
9. Need 1st accounting.

10. Need substitution of attorney.

RECOMMENDATION

Need to clear notes 2-10.

(lc/lh/lc/ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500332

CASE NAME: ANITA POIRIER

SEE ALSO 13

HEARING:

Accounting Review

COUNSEL:

DIANE LEE GIEBNER

JOEL RYAN HOLT

ANITA POIRIER

(CE)...GREGORY T ANNIGAN

(CP)...GREGORY T ANNIGIAN

(CEE)...DONNASUE ORTIZ

See notes on matter 13.

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600223

CASE NAME: MTR OF JOSEPH CATALANO III

HEARING:

Conservatorship Compliance Review Hearing on PETIITON FOR
CONSERVATORSHIP of CHETAY CATALANO

COUNSEL:

CHETAY CATALANO (CP)...PRO/PER
JOSEPH CATALANO II (CP)...PRO/PER
JOSEPH CATALANO III (CTP)...E JOAN NELMS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Chetay and Joseph Catalano II, parents, appointed conservator of the person only on 01/18/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/17/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 03/17/17.

RECOMMENDATION

None.

(ww)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700141

CASE NAME: APRIL EDWARDS
HEARING: Petition for Appointment of Conservator

COUNSEL:

DEBBIE EDWARDS	(PET)...M DANIEL SAYLOR
JON RICHARDS	(CE)...
APRIL EDWARDS	(CEE)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 05/24/17. Referred back to Court Investigator for full report. Donnasue Smith Ortiz appointed counsel.

Continued from 07/19/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate Debbie Edwards, mother for Jon Richards, family friend.

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

1. Petitioner seeks bond of \$15,000. Court may wish to require bond of \$20,000. Alternatively, court to inquire need for conservatorship as there appears to be only public benefits.
2. Proposed Conservator Jon Richards is nominated by proposed conservatee and her father.
3. Jon Richards consents to act.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need report of Counsel Donnasue Smith Ortiz.
6. CI Report filed 08/07/17.
7. Citation returned served.
8. ~Proposed Form Order: 04/05/17.

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **03/28/18** for the filing of the required documents including a care plan.

Set hearing re Accounting Review for **11/07/18**. Any accounting to be filed 30 days in advance.

(lc/lh/lc/lh)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700261
CASE NAME: MTR OF ELLA MARIE BODELL
HEARING: Petition for Appointment of Conservator

COUNSEL:

DAVID BODELL (CPE/PET)...TREVOR D. MARTIN
ELLA MARIE BODELL (CEP)...

GENERAL INFORMATION

David Bodell appointed temporary Conservator on 07/18/17, person and estate; \$105,000 bond. Court noted that if motion for substituted judgment is filed, it shall be set on same date 08/23/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by David Bodell, brother

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

1. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). JTD
3. List of required contacts and petition only lists half-siblings. Court to inquire if there any other second degree relatives.
4. Petitioner seeks bond of \$105,000. Appears ok. Court to clarify if there is income or SNT.
5. Petitioner seeks medical powers. Need Capacity Declaration.
6. Return of Citation filed 07/27/17; however, need proper personal service.
7. Need Certificate of Completion of the Conservatorship Training Class.
8. **. CI Report filed 08/07/**
9. ~Proposed Form Order: 07/11/17.

RECOMMENDATION

Need to clear notes 4-7. If approved, set hearing for Compliance Review for **03/28/18** for the filing of the required documents and hearing re Accounting Review for **10/31/18**. Any accounting to be filed 30 days in advance.

(lc/lh)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700262

CASE NAME: MTR OF KATHRYN LEIGH DAVIS

HEARING: Petition for Appointment of Conservator

COUNSEL:

CHERYL DAVIS (CP)...
DAVID DAVIS (CP)...JEFFREY A GOTTLIEB
KATHRYN LEIGH DAVID CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Cheryl and David Davis, parents.

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

1. Petitioners seek medical powers. Capacity Declaration filed 07/12/17.
2. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
3. Petitioners seek civil rights not be limited without court order. JTD
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Need Court Investigator report.
7. Return of Citation filed 08/08/17.
8. Proof of Completion of the Conservatorship Training Class filed 08/0717.
9. ~Proposed form Order: 08/16/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **03/28/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lc/lh)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S35P

CASE#: VC VS00200

CASE NAME: MTR OF DANIELLE LADA
HEARING: TWELFTH Account and Report of ROSWITHA G LADA, MICHELLE R LADA and Petition for allowance of fees filed.

COUNSEL:

ROSWITHA G LADA	(CPE)...JEANNE E KENNEDY
ULRICH F LADA	(CPE)...PRO/PER
DANIELLE LADA	(CEP)...
MICHELLE R LADA	(SC)...JEANNE E KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 12th Account Current and Petition for Fees by Roswitha and Michelle Lada, mother and sister.

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

1. Accounting period covers 05/01/15 – 04/30/17 per **Supp filed 08/09/17**.
2. Assets on hand \$402,679.46 in cash.
3. Conservatee resides in a care facility in Covina, CA and a review of the file shows conservatee has resided in Los Angeles County since the conservatorship was established.
4. Petitioners waive compensation.
5. Attorney requests fees of \$3,692.50 for 20.05 hours at \$150/300 per hour for paralegal and attorney services. Itemized [Acct. 07/12/17 LFpg7-10].
6. Current bond is \$339,000 by each conservator. Ok.
7. ~Proposed order: 07/12/17.

RECOMMENDATION:

Court's discretion re fees.. If approved, set hearing re next Accounting Review for **07/25/18** (if one year) or **07/24/19** (if two years). Accounting to be filed 30 days in advance.
(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 08/23/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

VACATED

HEARING:

Hearing Re: COURT TRIAL (THIRD DAY)

COUNSEL:

REAGENE YOUNG

(PET)...IGNAZIO FICARA

WERNER LEE WEINMEISTER

(DEC)...

DAVID WEINMEISTER

(PET)...LAW OFFICE OF SUSAN E. CLARK

Trial – No notes – JTD

Future Hearing: 8/24/17-8/25/17 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100434

CASE NAME: LUCY ANN SARMIENTO

HEARING: THIRD AND FINAL Account and Report of ROJELIO DORADO and
Petition for allowance of fees filed.

COUNSEL:

ROJELIO DORADO (PET)...CRAIG E WILSON

LUCY ANN SARMIENTO (DEC)...

US SPECIALTY INSURANCE COMPANY (TP)...PRO/PER

GENERAL INFORMATION

Continued from 03/01/17, 04/19/17 and 06/21/17.

THIS CASE SET FOR HEARING ON: **Amended** 1st Account, Distribution and Petition for Allowance of Fees and extraordinary fees by Rojelio Dorado.

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

1. Assets on hand. \$127,292.55
2. Petitioner and attorney request statutory fees of \$4,276 each.
3. Petitioner request reimbursement of costs advanced of \$17,167.12. [Acct. 12/22/16 LFpg35].
4. Need verified supplement to explain payment to Samuel from Valencia Property, as settlement *agreement indicates Samuel traded his 1/3 interest in the Valencia property to Johnny. Supp 05/19: simply states the accounting now reflects as such.*
5. Attorney requests extraordinary fees of \$18,857.12 for 71.35 hours. [Acct. 12/22/16 LFpg 30-34]. Summarized, not Itemized [Sup. 07/11 LFpg3-4]. JTD
6. Beginning property on hand value of \$160,000 does not match corrected inventory & appraisal value of \$109,200. **Supp05/19: Petitioner states this is result of final settlement from family law matter. However, accounting should begin with actual value at date of death 02/18/10. Supp 07/11/17 pg4 states further explanation. JTD**
7. Need amended accounting to remove negative receipts of \$139,207.47. An accounting cannot show a negative receipt. **Supp 05/19: the accounting appears to balance; however, there are still negative receipts rather than disbursements. Need proper accounting schedules per Pr.C. § 1060 et seq. Supp 7/11/17 remains non-compliant with Pr.C. § 1060. A receipt is not a distribution. Receipts and distributions to be separate schedules.**

8. Need verified supplement to clarify basis for \$3,536.18 in “Estate costs” requested in the prayer. **Supp 05/19: Does not appear to give a breakdown [Sup. LFpg12]. Supp 07/11: Breakdown is not clear [lfpgs12-18]. Court to clarify and/or require list of costs totaled.**
9. Need verified supplement to show gains/losses on sale as the difference between the inventory and appraisal value, and the sale price. A payment to Samuel is not a gain or loss on sale. **Supp05/19: as follows:**
 - a. Sales prices for the properties do not appear to match the estate’s interest in the properties. i.e. 1/3rd interest and properties sold for \$146,500 and \$120,000; however, 97,666.67 and \$80,000 listed in supplement do not appear to match sales price or percentages of estate’s interest. See [Acct. 12/22/16 LFpg106-108]. [Sup.05/19 LFpg9]. **Supp 07/11/17: Petitioner alleges the amounts represent the estate’s share of value.**
- 10.No proposed order submitted. Submit after hearing.

RECOMMENDATION

Need to clear notes 7-8. If approved, set hearing on the filing of receipts and final discharge for **08/29/18**.

(jm/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400826

CASE NAME: RODNEY L PARAMOURE JR

HEARING:

Probate status report filed.

COUNSEL:

MELANIE AJANWACHUKU (PET)...JAMES L HEYWOOD & ASSOCIATES
RODNEY L PARAMOURE JR (DEC)...

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 Melanie Ajanwachuku, creditor, on 12/19/14 [vacated] and reissued 06/09/16; full authority, \$20,000 bond.
2. Petitioner seeks an additional 180 days in order to discover if there are any other assets.
3. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **03/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500386

CASE NAME: OLIVE SADIE MITTELSDORF

HEARING:
Accounting Review

COUNSEL:

RICHARD SAYLES	(PET)...JAMES B CHURCH
OLIVE SADIE MITTELSDORF	(DEC)...
APRIL MAY	(PET)...SHERRI L KASTILAHN
SURETEC INSURANCE CO	(TP)...

XREF: CONPS1400294 (Olive Mittelsdorf)

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 April May, on 06/22/16; full authority, \$200,000 bond.
2. Final Inventory and Appraisal filed 07/25/17. Northwestern Access account x2251 reflects \$91,644.20 as of post date of death on 04/30/15. Date of Death value is \$91,384.71. Does Court wish to deem de minimis?
3. Need supporting bank statement for US Bank x4176 and American Funds x3951 accounts as of date of death on 04/11/15.
4. Need accounting or status report.
5. **Declaration requesting a comprehensive audit/accounting be done filed by Shawnee Lopez, granddaughter on 04/28/17**

RECOMMENDATION

Need to clear note 2-4. .

(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: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500665

CASE NAME: JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST

HEARING: FIRST Account and Report of JACQUELINE RUBIO and Petition for allowance of fees filed.

COUNSEL:

JACQUELINE RUBIO (PET)...MARK J. ANDREW FLORY
JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees by Jacqueline Rubio, Trustee.

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

1. Establishment of SNT granted on 08/31/15; Jacqueline Rubio, mother, appointed Trustee \$440,000 bond.
2. Accounting period 08/31/15 – 03/31/17.
3. Assets on hand \$71,421.40.
4. Notice of non-payment of bond filed on 07/13/17. Court to inquire.
5. Attorney seeks fees of \$18,876.50 for 64.10 hours at \$105/350 per hour for paralegal and attorney services. Amount owed \$14,106.50. Itemized [Acct. 07/11 LFpg 15-25].
6. Need statement re beneficiary and contingent beneficiaries per CRC. 7.902. **Supp 08/11/17 includes addresses for Jonathan Rodriguez.**
7. No propose order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **06/27/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501114

VACATE

CASE NAME: MTR OF FRANCOIS BRIOT

HEARING:
Accounting Review

COUNSEL:
JOHN J UGALDE (PET)...PRO/PER
FRANCOIS BRIOT (DEC)...

Status Report filed 08/16/17.
(lh)

Future hearing: 11/16/17 Status Report

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600024

CASE NAME: ROBERT Y. VILLANUEVA AKA ROBERT YRIBE VILLANUEVA

HEARING:

FIRST AND FINAL Account and Report of ANTHONY VILLANUEVA and
Petition for allowance of fees filed.

COUNSEL:

ANTHONY VILLANUEVA (PET)...THE PATTON LAW FIRM
ROBERT Y. VILLANUEVA (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner and attorney request statutory fees of \$3,008.07 each. Ok
2. Petitioner seeks \$2,000 in mileage reduced from \$5,479 for 9,960 miles at \$.55 per hour. Fees for travel are generally not allowed per local rule 20-909. JTD
3. Petitioner seeks reimbursement for costs totaling \$2,000. Itemized [Acct. 05/19 LFpg9].
4. Petitioner seeks reimbursement for estate expenses totaling \$5,498.42. Itemized [Acct. 05/19 LFpg23-24].
5. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **08/29/18**.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600455

CASE NAME: CHRISTOPHER LWOWSKI

HEARING:
Accounting Review

COUNSEL:

GREGORY S RISTER (PET)...BEWLEY, LASSLEBEN & MILLER
CHRISTOPHER LWOWSKI (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to by Gregory Rister, executor/beneficiary, on 07/06/16; full authority, no bond.
2. Final Inventory and Appraisal 05/24/17 and Supplemental filed on 06/28/17.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600506

VACATE

CASE NAME: MTR OF MARIE DUPLISEA

HEARING:

Accounting Review

COUNSEL:

GAIL DUPLISEA

(PET)...PRO/PER

MARIE DUPLISEA

(DEC)...

Petition for final distribution filed 08/07/17.

(lh)

Future hearing date: 11/07/17 Petition for Final Distribution on Waiver

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600522

CASE NAME: MTR OF LUCY R TAYLOR

HEARING:
Accounting Review

COUNSEL:
BERNARD TAYLOR JR (PET)...WILFRID C LEMANN
LUCY ROMERO TAYLOR (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 Bernard Taylor Jr, son on 07/18/16; full authority, \$350,000 bond.
2. Final Inventory and Appraisal 09/01/16
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700094

CASE NAME: THE PHILLIP WARREN CLEM TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

DOUGLAS JAMES CLEM

THE PHILLIP WARREN CLEM TRUST

(PET)...LINDA ROBERTS ROSS

(TRU)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino
Page: 10A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0701196

CASE NAME: MTR OF RAMON OTERO JR

HEARING:
Accounting Review

COUNSEL:

DAVID LEE RICE	(PET)...DAVID L RICE
LUKE ESSLINGER	(PET)...DAVID E SIMON
MARK J ANDREW FLORY	(MARK J. ANDREW FLORY
MICHAEL RAMOS	(PET)...DAVID E SIMON
MIKE MURPHY	(PRO/PER
NINA C MUNOZ	(TP/PET)...SANDRA N. BALDONADO
RAMON OTERO JR	(DEC)...
SIBYLLE GREBE	(CONOVER & GREBE)
SPENCER ROGERS	(PRO/PER)
TOYOTA MOTOR CREDIT CORP	(RAYMOND F MOATS)
VANESSA OTERO	(PET)...WILLIAM M NASSAR &

XREF: PROPS0800011

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 with will annexed issued to daughter on 05/20/08, \$4,650,000 bond.
2. Court approved status report on 09/01/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.
(lh)

Future Hearing: 10/17/19: 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: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700705

CASE NAME: MTR OF VIRGINIA COOPER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

RONALD P ANDERSON

(PET)...PRO/PER

VIRGINIA COOPER

(DEC)...

GENERAL INFORMATION

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

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

1. All heirs waive bond. Calculation is not totaled in section 6; however, net estate value is \$194,500 of which \$8,000 is personal property. JTD
2. Section 5 is incomplete as to whether there is a registered domestic partner. Need verified supplement.
3. ~Proposed Form Order: 07/17/17.

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 11A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700660

CASE NAME: GEORGIA L DEHARTY

HEARING:

Hearing Re: ORDER DETERMINING SUCCESSION TO REAL PROPERTY

COUNSEL:

DOUG BUCKLY

(PET)...RANDAL P HANNAH

GEORGIA L DEHARTY

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Deneise Vader Pol, Douglas and David Buckley, children.

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

1. Petitioners seek 100 % interest, 1/3rd each, in the decedent's 50% interest in real property per intestate succession.
2. Decedent's sister, owner of other 50% interest, consents to petition.
3. No proposed order. Submit after hearing.

RECOMMENDATION

RFA.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 11B add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400376

VACATE

CASE NAME: THE LUCILLE SABBATH GRIFFIN REVOCABLE TRUST

HEARING:

Hearing Re: Proof of Additional Bond

COUNSEL:

THE LUCILLE SABBATH GRIFFIN RE
YOLANDA QUAM

(TRU)...

(PET/TEE)...MATTHEW E SHEASBY

XREF: CONPS1500124

Proof of additional bond filed 08/15/17.
(lh)

Future Hearings: 10/10/17: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000260

CASE NAME: NORMA BRACERO

HEARING: SIXTH Account and Report of GLEN D PRIOR and Petition for allowance of fees filed.

COUNSEL:

ARLENE T CHUNG

(CE)...HARTNELL LAW GROUP

NORMA BRACERO

(CTE/CEP)...MARK J. ANDREW FLORY

ROSA GILMA REY

(CE)...JACK B OSBORN

GLEN D PRIOR

(SC/CPE/CE)...KEVIN A MCKENZIE

MARK J. ANDREW FLORY

(PET)...MARK J. ANDREW FLORY

XREF: CONDS1000268 (Norma Bracero letters expired 03/03/12)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for Fees by Glen Prior, PPF.

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

1. Accounting period 04/01/16 – 03/31/17.
2. Assets on Hand \$2,226,796.01 consisting of \$15,959.25 in cash, remaining in life insurance, real and personal property.
3. Current bond is \$1,454,000. Petitioner seeks a \$330,004.92 reduction for a total bond of \$1,123,995.08.
4. Petitioner requests compensation of \$4,330.00 for 43.3 hours at \$100 per hour. . Itemized [Acct. 07/06/17 LFpg9-10].
5. Attorney requests fees of \$3,750 for 23.71 hours at \$100/300 per hour for paralegal and attorney services. Itemized [Acct. 07/06/17 LFpg11-27].
6. Petitioner has paid Lisa Tucker for accounting services as it allegedly greatly reduces fees. Court to inquire how \$6,244.59 is greatly reducing fees.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion re fees and bond. If approved, set hearing on the next accounting review for **06/27/18** (if one year) or **06/28/19** (if two years). Accounting to be filed 30 days' in advance of hearing.

(lc)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

SEE ALSO 14

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SHANNON M DEBENEDICTIS

COUNSEL:

SEAN E SITTLER (CEP)...PRO/PER
SHANNON M DEBENEDICTIS (CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from 01/18/17, 04/12/17 and 07/05/17. Counsel stated that Patty Sittler (grandmother) is now deceased. The Court notes that an amended inventory and appraisal was filed on 06/28/17.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Shannon DeBenedictis, sister, appointed conservator of the person and estate on 07/14/16, no bond.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care form GC-355 and care Plan in accord filed 03/15/17
3. Amended Final Inventory & Appraisal filed on 06/28/17.

RECOMMENDATION

None.

(lc/lh/lc/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

SEE ALSO 13

HEARING:

Accounting Review

COUNSEL:

SEAN E SITTLER (CEP)...PRO/PER
SHANNON M DEBENEDICTIS (CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Shannon DeBenedictis, sister, appointed conservator of the person and estate on 07/14/16, no bond.
2. Amended Final Inventory and Appraisal filed 06/28/17.
3. Need first accounting.

RECOMMENDATION

Inquire Status of accounting.

(ww)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600160

CASE NAME: BRIAN J. PARRA

HEARING:

Motion Re: NTC OF MTN AND MTN TO BE RELIEVED AS COUNSEL Filed
by Petitioner BRIAN J PARRA

COUNSEL:

MARIA VIORATO	(PET)...PRO/PER
VICTOR F. PARRA ANTE	(PET)...PRO/PER
BRIAN J PARRA	(CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Roberta Taylor.

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

1. Petitioner, Roberta Taylor, seeks to be relieved as appointed counsel for conservatee Brian Parra. Petitioner is retiring and in the process of closing her office.
2. ~Proposed Form Order: 07/13/17.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700025

CASE NAME: BETTY J ALTHER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JANET E SACKWAR

COUNSEL:

JANET E SACKWAR (CPE)...ROBERTA L. TAYLOR & ASSOCIATES
BETTY J ALTHER (CEP)...PRO/PER
LIBERTY MUTUAL INSURANCE (TP)...

GENERAL INFORMATION

Continued from 06/21/17. Inventory and Appraisal with the probate referee.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Janet Sackwar, sister, appointed conservator of the person and estate on 04/24/17, \$1,091,021.00 bond.
2. Determination of Conservatee's Appropriate Level of Care form, Care Plan filed 05/24/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 06/28/17.
4. Proof of recorded letters filed on 06/28/17 per Pr.C.§2313 as conservatee owns real property in Los Angeles County.
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.

RECOMMENDATION

Need to clear notes 5-6.

(lc/ww)

Future hearing: 5/02/18: Accounting Review

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

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700146
CASE NAME: ANDREA ALVAREZ
HEARING: Petition for Appointment of Conservator

COUNSEL:

MARTIN ALVAREZ (PET)...LAYNE A BARTHOLOMEW
MIREYA ALVAREZ (PET)...LAYNE A BARTHOLOMEW
ANDREA ALVAREZ (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Temporary orders denied on 05/01/17. Jennifer Daniel appointed counsel.

Continued from 06/21/17. Attorney Bartholomew to file amended petition and SNT.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Mireya and Martin Alvarez, parents.

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

1. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). JTD
2. Proposed conservatee is developmentally disabled; however, this is not a petition for Limited Conservatorship, Court requires report for proposed conservatee per Pr.C. §1470. Need report of Counsel Daniel.
3. Petitioner does not seek medical powers. However, section 9 indicates proposed conservatee does not have capacity. Capacity Declaration filed 04/21/17; however, address and phone number for physician is incomplete. Need completed form.
4. Need notice of hearing and proof of service.
5. Certificates of Completion of the Conservatorship Training Class filed 07/06/17.
6. Receipt of Acknowledgement re Citation filed on 05/04/17.
7. Court Investigator report filed 05/23/17.
8. ~Proposed Form Order: 04/21/17

RECOMMENDATION

Need to clear notes 2-4. If approved, set hearing for Compliance Review for **03/28/18** 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: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700176

CASE NAME: ANDREW RAMIREZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JOSE L RAMIREZ	(PET)...PRO/PER
YOLANDA RAMIREZ	(PET)...PRO/PER
ANDREW RAMIREZ	(CTP)...WALTER T. MOORE

GENERAL INFORMATION

Temporary orders granted on 05/31/17. Walter Moore appointed counsel. Clerk's office to notice IRC. Need report.

Continued from 06/14/17. Maternal and paternal grandfathers are deceased.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Jose and Yolanda Ramirez, parents.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc. Per Pr.C. § 2356 JTD
2. Petitioners seek medical powers. Capacity Declaration filed 05/31/17.
3. Report of Counsel Moore filed 05/31/17.
4. Need Certificates of Completion of the Conservatorship Training Class for Yolanda.
5. Need IRC report.
6. Citation returned served.
7. Court Investigator report filed 06/06/17.
8. ~Proposed Form Order: 05/10/17.

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **03/28/18** 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: CYNTHIA LUDVIGSEN

DATE: 08/23/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700265
CASE NAME: MTR OF PEGGY ANN CHRISTIAN
HEARING: Petition for Appointment of Conservator

COUNSEL:

PAUL EDWARD CHRISTIAN (CPE)...SKOUSEN LAW
PEGGY ANN CHRISTIAN (CEP)...

GENERAL INFORMATION

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

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

1. Petitioner seeks bond of \$10,000; however, it appears bond of \$77,500 should be posted based on personal property and income. JTD
2. Petitioner seeks Pr.C. § 2591.5 powers to operate a business, sell personal property, borrow money and sell conservatee's residence without court confirmation. However, must demonstrate to the court that the terms of sale, including price and commissions, are in the conservatee's best interests prior to sale.
 - a. Court may wish to grant Pr.C. § 2590 powers and require petition to sell residence at a later date.
 - b. Court to inquire re residence as section 3e(5) does not state there is real property.
3. Confidential Screening form filed 07/12/17 is incomplete as to section 2a and 3 as to relationship and for person and estate; however, it is clear that petitioner is son and petitioner seeks conservatorship of person and estate.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351-2358 JTD
5. Petitioner interprets the Advance Healthcare Directive as nomination [Pet. 07/12 LFpg 16].
6. Petitioner seeks medical powers even if proposed conservatee objects Pr.C. § 2356. Capacity Declaration filed 08/14/17 is incomplete at section 4 as to last date seen and whether proposed conservatee is a current patient. Also, form not dated at signatures. Need completed form.
7. Need report of Counsel W. Moore.
8. Need Certificate of Completion of the Conservatorship Training Class.

9. Return of Citation filed 08/14/17.
10. CI report filed 08/07/17.
11. ~Proposed Form Order: 07/12/17.

RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing for Compliance Review for **03/28/18** for the filing of the required documents and hearing re Accounting Review for **10/31/18**. Any accounting to be filed 30 days in advance.

(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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500217

CASE NAME: CHARLINE MCFARLING

HEARING:

Accounting Review

COUNSEL:

COLLIN CHARLES MUNRO	(PET)...GARY H BLAYLOCK
CHARLINE MCFARLING	(DEC)...
BRANDON MUNRO	(PET)...NANCY E LOFDAHL

GENERAL INFORMATION

Continued from 05/24/17. Counsel Gary Blaylock ordered to prepare an accounting to the best of his ability as he is unable to find his client.

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 **Collin Munro**, son, on 09/14/15; full authority, no bond. Collin was removed as administrator on 10/19/16. **Brandon Munro**, son was appointed temporary, then later successor administrator and letters issued 03/06/17.
2. Need final Inventory and Appraisal.
3. Need accounting by Gary Blaylock for Collin Munro Pr.C. § 10953.

RECOMMENDATION

Need to clear notes 2 & 3.

(lc/ww/lc)

Future Hearing: 05/14/18 Accounting Review for **Brandon Munro**

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500580

CASE NAME: MARGARET A. CLEMENTS

HEARING:

Hearing Re: STATUS/ACCOUNTING REVIEW

COUNSEL:

CLARE E CLEMENTS (PET)...PRO/PER
MARGARET A CLEMENTS (DEC)...

GENERAL INFORMATION

OSC set on 12/01/16 when there was no appearance. As letters have not issued and no accounting has been filed, court will vacate previous orders and dismiss matter.

Continued from 02/16/17. OSC taken off calendar. Continued from 05/03/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Clare and Dino Clements, children, appointed administrators on 11/19/15; full authority, \$210,000 bond. On 02/22/16, court ordered powers ***limited*** and **no bond**.
2. Need amended order indicating ***limited authority*** and letters issued.
3. Need final Inventory and Appraisal.
4. Need accounting or status report.

RECOMMENDATION

Inquire status. Accounting is premature as letters have still not issued. Court may wish to set hearing re compliance for letters on **09/28/17** and continue accounting review to **03/29/18**.

(lc/ww/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500707

CASE NAME: ERNEST EDWARD HANSEN JR

HEARING:

PETITION FOR FINAL Account and Report of MARIE BROCK and
Petition for allowance of fees filed.

COUNSEL:

MARIE BROCK	(PET)...	ROBERT E PEARSON
ERNEST EDWARD HANSEN JR	(DEC)...	
DEPARTMENT OF STATE HOSPITALS	(TP)...	

XREF: CIVDS1616806 (Dept. State Hosp. v Marie Brock as administrator)

GENERAL INFORMATION

Continued from 11/30/16. Mr. Pearson presented oral argument. Ms. Geoffroy reports civil action has been filed and Creditor's Claim has been denied. Civil action set for 04/18/17.

Continued from 04/26/17. Civil action pending and parties working on settlement. Next TSC sent 05/22. Should matter settle, notice of settlement with copy to be filed.

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

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

1. Petitioner is sole beneficiary, waives accounting and statutory compensation.
2. Attorney requests statutory fees of \$13,213.54. Calculated.
3. Objection to Petition for Final Distribution by creditor Department of State Hospitals, filed 11/18/16. However, objection appears moot as settlement was entered.
4. Response to Objection filed by Martha Marie Brock on 11/23/16.
5. **Notice of Settlement re CIVDS1616806 filed 07/28/17.**
6. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **08/29/18**.

(lc/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501037

CASE NAME: CLARE IRENE BLOXHAM

HEARING:

Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/FULL IAEA

COUNSEL:

MALCOLM VICTOR SMITH	(PET)...CRAIG E WILSON
CLARE IRENE BLOXHAM	(DEC)...
SANDRA SPACHTHOLZ	(PET)...CRAIG E WILSON
LIBERTY MUTUAL INSURANCE	(TP)...

GENERAL INFORMATION

Letters of special administration issued to Sarah Spachtholz on 04/17/17; \$464,000 bond.

THIS CASE SET FOR HEARING ON **Successor** Petition for Probate, Letters Testamentary with Full Authority under IAEA by Sandra Spachtholz, named alternate executor/friend.

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

1. Letters Testamentary issued to Malcolm Smith, brother, on 03/09/16, no bond. Malcolm passed away on 09/21/16 creating a vacancy as personal representative.
2. Will waives bond. The estate consists of \$430,697 in personal property. JTD
3. Section 5 is incomplete as to whether there is issue of a predeceased child or not. Does court wish to clarify on record or in alternative; Need verified supplement.
4. Petitioner is not listed in section 8 of the petition; however, it is clear that petitioner is the alternate named executor. Does Court wish to require verified supplement? JTD
5. ~Proposed Form Order: 06/06/17

RECOMMENDATION

Need to clear note 3. Court's discretion re note 4 and bond. If approved, set Accounting/Status Review for **10/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc)

Future Hearing: 10/04/17: Accounting Review, OSC Re: Why Administration Should not be Suspended, 11/29/17: Hearing Re: Final Discharge

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 for clarification of the notes only - no legal or procedural advice will be given.

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600180

CASE NAME: MARLIN DELAINE SPEARS

SEE ALSO 6

HEARING: Petition for PARTITION OF DECEDENT'S REAL PROPERTY AND FOR ACCOUNTING

COUNSEL:

DELAINA M SPEARS	(PET)...SANFORD H. MARGOLIN
MARLIN DELAINE SPEARS	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...
ZUMBRUNN LAW CORPORATION	(PRO/PER)

GENERAL INFORMATION

Continued from 02/08/17 and 04/26/17. Correct venue is Contra Costa County, but that settlement negotiations are underway and requests petition remain open in this matter pending settlement.

THIS CASE SET FOR HEARING ON Petition for Partition of Decedent's Real property and For Accounting Pr.C. § 850.

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

1. Petitioner, Delaina Spears/administrator, seeks an order approving partition of real property and division of the proceeds according to ownership.
2. Petitioner brings petition as a Pr.C. § 850; however, it appears to be Pr.C. § 9823 which must be brought in a separate civil action. Venue for a civil action is the county where the property is located. (CCP §872.110(b)(1).) Pr.C. § 11950(b) allows the non-beneficiaries to consent to the partition being heard in the probate court.
3. Petitioner alleges that respondents Randolph Spears Jr and Dennis Spears, brothers of decedent, each own 1/3rd interest in the real property along with decedent as tenants in common.
4. Petitioner requests fees to be divided between respective parties. Petitioner alleges that partitioning the real property for sale is more equitable than division in kind.
5. Need notice of hearing and proof of service to respondents and Marline Spears Jr, and to those who requested special notice.

RECOMMENDATION

Need notice.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600180

CASE NAME: MARLIN DELAINE SPEARS

SEE ALSO 5

HEARING:

Accounting Review

COUNSEL:

DELAINA M SPEARS	(PET)...	SANFORD H. MARGOLIN
MARLIN DELAINE SPEARS	(DEC)...	
STATE OF CALIFORNIA FRANCHISE	(TP)...	
ZUMBRUNN LAW CORPORATION	(PRO/PER)	

GENERAL INFORMATION

Hearing was reset from 06/21/17 to trail other matters.

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 Delaina Spears, daughter, on 04/13/16 full authority, no bond.
2. Final Inventory and Appraisal filed 01/03/17.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600349

CASE NAME: MTR OF CARMEN RIVERA

HEARING:
Accounting Review

COUNSEL:

CARMEN RIVERA (PET)...GREGORY L ZUMBRUNN
CARMEN RIVERA (DEC)...
DEPARTMENT OF HEALTHCARE SERVICES (AGN)...

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 Carmen Rivera, daughter on 07/11/16; full authority, no bond.
2. Final Inventory and Appraisal 11/21/16.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report. .

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600384

VACATE

CASE NAME: MTR OF NANCY ANNE RYTHER

HEARING:
Accounting Review

COUNSEL:

MARY CHRISTINE MUNSEY (PET)...RICHARD J HASSEN
NANCY ANNE RYTHER (DEC)...
APPROVED INHERITANCE CASH, INC (TP)...PRO/PER
AMY YORK GARRETT (AMY YORK GARRETT)
INHERITANCE FUNDING COMPANY INC (STEVEN D SCHROEDER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

First and Final Account filed 08/17/17.

Future hearing date: 11/20/17 – First and Final Account

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS PETITION TO
COMPEL ACCOUTNING ETC

COUNSEL:

RUTH ANITA BELL	(PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON	(PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST	(TRU)...
CHRISTINA BROWN	(PET)...MARIELLEN ROSS

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Currently under review by legal research

(LR)

30 Days' notice filed. Court to inquire if real property has an encumbrance, if so require notice to mortgage company.

Future Hearing: 9/13/17: 1st Account & Report

Superior Court of Calif, County of San Bernardino

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

HEARING:
Hearing Re: STATUS OF MEDIATION

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO (TRU)...	
NORA J MORALES	(PET)...SKAPIK LAW GROUP
HELLEN BUSH	(PET/INT)...PRO/PER

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 on 07/10/17 The Court, once again, orders John Lambrecht and Mr. Salgado to disclose all property taken. Written disclosure signed under the penalty of perjury to be filed and served by 7/21/17. If disclosure not filed and served by 7/21/17, a motion for contempt to be filed. Request to order all property in the Barstow storage unit transferred to a Long Beach storage unit was denied. Arrangements for that transfer may be made by agreement of the parties. Contents of the Las Vegas storage unit remain frozen. Mediation briefs to be filed a week prior to mediation

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing: 10/16/17: Petition in Intervention & for Dec Relief

Superior Court of Calif, County of San Bernardino

Page: 10A add-on

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

DATE: 08/23/17 TIME: 8:30 DEPT: S37P

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

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 08/23/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700090

CASE NAME: CAROLINA MEJIA

HEARING: Petition for Appointment of Conservator

COUNSEL:

YOLANDA R MEJIA (CP)...PRO/PER

CAROLINA MEJIA (CTP)...PRO/PER

GENERAL INFORMATION

Continued from 05/02/17 for IRC intake procedure.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Yolanda Mejia, maternal aunt.

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

1. Proposed conservatee is developmentally disabled. Letter filed 04/21/17 re intake procedure timeline. **Need** report.
2. Petitioner seeks medical powers. Capacity Declaration filed 03/17/17.
3. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
4. Petitioner requests powers under Pr. C §2351.5 to fix residence, access confidential records, control right to contract, consent to medical declaration.
5. Petitioner seeks civil rights not be limited without court order. JTD
6. Proposed conservatee is developmentally disabled. Report of Counsel Moore filed in court on 05/02/17 (per minute order); however, is not available in LF.
7. Citation returned served.
8. Court Investigator report filed 04/26/17.
9. Certificate of Completion of the Conservatorship Training Class filed 04/06/17.
10. See Confidential Screening Form filed 03/17/17.
11. Due Diligences Declarations filed ibn 04/18/17 re mother, father and paternal grandparents. JTD.
12. ~Proposed Form Order: 03/17/17.

RECOMMENDATION

Need to clear note 1, then Court's discretion. If approved, set hearing for Compliance Review for **03/28/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (lh/nb/lc)

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

DATE: 08/23/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600009

CASE NAME: LARRY WRIGHT JR

HEARING:

WAIVER OF Account and Report of GLORIA BLAKELY-JONES and Petition for allowance of fees filed.

COUNSEL:

GLORIA BLAKELY-JONES (CPE)...GREGORY L ZUMBRUNN
LARRY WRIGHT JR (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Waiver of Account per Pr.C. § 2628 by Gloria Blakely-Jones, mother.

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

1. Accounting period 03/09/16 – 04/30/17.
2. Petitioner waives conservator fees.
3. Court to inquire if a court has jurisdiction of the SNT (with Center for SNT administration) and whether accountings are being reported.
4. Petitioner states that estate qualifies for a waiver per Pr.C. § 2628. There are \$0 assets on hand.
5. Notice of hearing and proof of service is filed; however, petitioner does not indicate that conservatee was served with a copy of the accounting per local rule 20-1406(e).
6. ~Proposed Order: 07/10/17.

RECOMMENDATION

Need to clear note 5. If approved, set Accounting/Status Review for **07/25/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/23/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700272

CASE NAME: MTR OF LLOYD H DODD, JR

SEE ALSO 14

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 notes on next page.
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/23/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700272

CASE NAME: MTR OF LLOYD H DODD, JR

SEE ALSO 13

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.

Continued from 08/14/17 for counsel to look into the two paid professional fiduciaries, Janice Case and Donna Kulleck, suggested by Consuelo Dodd. Notice to be given by Mr. Roth.

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- Alternately, 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.
- 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 **03/28/18** 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 **10/31/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)