



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 08/24/17

All corrections/supplements addressing these notes should be filed by 08/17/17.

Later-filed documents might not be reviewed prior to the hearing and could result in a continuance of your case. Updates to these notes *typically* will be posted three court days prior to the hearing.

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.

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 08/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

HEARING:

Accounting Review

COUNSEL:

BRYAN STEWART

(PET)...LEAH L DIXON

BRYAN STEWART

(PET)...PRO/PER

DAVID STEWART

(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 Bryan Stewart on 04/06/11; full authority, no bond.
2. Previous status report approved on 09/17/14. Need order.
3. Most recent status report filed on 01/17/17 was taken off calendar after 2 continuances as the requested 3 months had past.
4. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting and order

(ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 08/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501141

Vacated

CASE NAME: MTR OF H.H. HILL

HEARING:

FIRST & FINAL REPORT OF EXECUTOR ON WVR OF Account and Report of
SHARON J BLINCI and Petition for allowance of fees filed.

COUNSEL:

H H HILL (DEC)...
SHARON J BLINCI (PET)...KAREN J LA MADRID

(lc)

Future hearing dates: 10/04/17 Accounting review.

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 08/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501172

CASE NAME: ARTHUR K OLSEN

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report
of ROBERT OLSEN and Petition for allowance of fees filed.

COUNSEL:

ARTHUR K OLSEN (DEC)...
ROBERT OLSEN (PET)...STEVEN A SMALL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Wavier of Final Account, Distribution and Petition for Allowance of Fees by Robert Olsen, son.

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

1. Petitioner is sole heir, waives accounting and statutory compensation.
2. Attorney requests statutory fees of \$5,290. Ok as it appears the real property sold.
3. No proposed order. Submit after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **08/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601061

CASE NAME: JOHN ERWIN WEHNER

HEARING:

FIRST AND FINAL Account and Report of CARL G EHMANN and Petition
for allowance of fees filed.

COUNSEL:

CARL G EHMANN (PET)...PRO/PER
JOHN ERWIN WEHNER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Carl Ehmman, executor.

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

1. Petitioner requests statutory fees of \$6,022.26. Ok.
2. Petitioner/attorney seeks extraordinary fees of \$3,195 for 21.3 hours at \$150 per hour. Itemized [Acct. 06/01/17LFpg26-27]. JTD
3. Petitioner/attorney seeks extraordinary fees of \$570 for 38 hours at \$15 per hour re coin collection. Itemized [Acct. 06/01/17LFpg28]. JTD
4. Petitioner seeks a reserve of \$1,200.
5. ~Proposed Order: 06/01/17.

RECOMMENDATION

RFA subject to Court's discretion re fees. If approved, set hearing on the filing of receipts
and final discharge for **08/30/18**.

(lc)

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

DATE: 08/24/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700543

CASE NAME: MTR OF RITA L. GLEASON

HEARING:

Petition to determine succession to Real Property

COUNSEL:

CATHERINE BLACKWELL GLEASON	(PET)...PRO/PER
ERIC M. MCGARRY GLEASON	(PET)...PRO/PER
KAREN GLEASON	(PET)...PRO/PER
MICHAEL DANIEL GLEASON	(PET)...PRO/PER
RICHARD RYAN GLEASON	(PET)...PRO/PER
RITA L. GLEASON	(DEC)...
RITA LOUISA GLEASON STIEHL	(PET)... STEVEN W. DELAT
VIRGINIA CARROLL GLEASON WHITE	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Karen, Catherine, Eric and Michael Gleason, grandchildren; Rita Gleason Stiehl, Virginia Gleason White and Richard Gleason, children.

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

1. Petitioners seek 100% Interest in decedent's 100% interest per will, 1/7 each, in 2 lots of unimproved real property; one is in San Bernardino County and one is in Kern County.
2. Proposed Form Order: 06/08/17

RECOMMENDATION

RFA.

(ww)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600052

CASE NAME: HOMER N. SILACCI

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of STEVE COX

COUNSEL:

HOMER N SILACCI
STEVE COX

(CEE)...MITCHELL I ROTH
(PET)...FRANKLIN S ADLER

GENERAL INFORMATION

Continued from 04/27/17, 06/01/17 and 07/20/17. Court read and considered report of Counsel Roth. Conservator to file declaration re all aspects of the sale of Fontana property by 07/27/17. Declaration to include purchase contract, counter-offers, escrow instructions and closing statement. Steven cox and Franklin Alder to be present.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Steve Cox, friend appointed conservator of the person and estate on 09/22/16, \$350,000 bond.
2. Determination of Conservatee's Appropriate Level of Care form filed 05/31/17.
3. Need declaration re purchase of Fontana property.
4. Notification of Conservatee's rights filed 05/31/17; however, need notice to Denise Lavigne.
5. Need Care Plan in accord with Pr.C.§2352.5.
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.

RECOMMENDATION

Need to clear notes 3-8.

(lc/ww/lc)

Future Hearing: 11/30/17 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600353

CASE NAME: MTR OF JESSICA L DRYDEN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LEAH M DRYDEN

COUNSEL:

JESSICA L DRYDEN (CEE)...PRO/PER
LEAH M DRYDEN (CPE)...SHEELA A STARK

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Leah Dryden, mother, appointed limited conservator of the **person only** on 01/12/17.
2. Care Plan in accord with Pr.C.§2352.5 filed on 03/08/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 03/08/17.
4. Determination of Conservatee's Appropriate Level of Care form GC-355 filed on 03/08/17; however the date the determination was made is missing. Court's discretion

RECOMMENDATION

Court's discretion re note 4.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700142
CASE NAME: MTR OF JOSE ALVINO MARTINEZ

SEE ALSO 9

HEARING: Hearing Re: OSC RE DISMISSAL

COUNSEL:

AMBER JOHNSON	(CPE)...PRO/PER
GOLDIE MARTINEZ	(CPE)...PRO/PER
JOSE ALVINO MARTINEZ	(CEP)...DUANE P BOOTH

GENERAL INFORMATION

Continued from 06/01/17 at request of Court to clear probate notes. Attorney Duane Booth is appointed counsel.

OSC set on 07/20/17 when there was no appearance by petitioners. Petitioner will be dismissed if no appearance.

THIS CASE SET FOR HEARING ON **OSC re Dismissal on** Petition for Appointment of Conservator person and estate by Amber Johnson (step-granddaughter) and Goldie Martinez (spouse)

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

1. Petitioner requests no bond due to small estate valued at \$12,992. Alternatively, does Court wish to require minimum bond of \$20,000? JTD
2. Petitioner seeks dementia powers. Report of Counsel Booth filed 07/06/17.
3. Petitioner seeks medical powers. Need Capacity Declaration with dementia attachment.
4. Petition item #6 is incomplete as proposed co-conservator, Goldie Martinez, is the legally separated spouse [Petition, 4/10/17, LF,pg7]. Need verified supplement.
5. Need Certificate of Completion of the Conservatorship Training Class.
6. Need Notice of Hearing and Proof of Service by mail as to Harmony Almansa, step-granddaughter.
7. Need return of Citation.
8. Court Investigator report filed 05/25/17.
9. No proposed form Order.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 3-7. If approved, set hearing for Compliance Review for **03/29/18** for the filing of the required documents and hearing re Accounting Review for **11/01/18**. Any accounting to be filed 30 days in advance.

(lh/lc/lh/lc)

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.

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700142

CASE NAME: MTR OF JOSE ALVINO MARTINEZ

SEE ALSO 8

HEARING:
Petition for Appointment of Conservator

COUNSEL:

AMBER JOHNSON	(CPE)...PRO/PER
GOLDIE MARTINEZ	(CPE)...PRO/PER
JOSE ALVINO MARTINEZ	(CEP)...DUANE P BOOTH

See notes on matter 8.

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700263

CASE NAME: MTR OF MIKE HERNANDEZ JR

SEE ALSO 11

HEARING:

Petition for EXCLUSIVE AUTHORITY TO GIVE CONSENT FOR MEDICAL
TREATMENT

COUNSEL:

DELFINA SALSBERRY (CP)...FRANK J PRAINITO
MIKE HERNANDEZ JR (CTP)...WALTER T. MOORE

See notes on matter 11.

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 08/24/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700263

CASE NAME: MTR OF MIKE HERNANDEZ JR

SEE ALSO 10

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DELFINA SALSBERY (CP)...FRANK J PRAINITO
MIKE HERNANDEZ JR (CTP)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Delfina Salsberry (daughter)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 07/12/17.
2. Petitioner seeks dementia powers. Need report of Counsel Walter Moore.
3. Need Certificate of Completion of the Conservatorship Training Class.
4. Need Court Investigator report.
5. Need return of Citation.
6. Petitioner was appointed health care agent. See Durable Power of Attorney for Health Care [petition, 07/12/17,LFpgs13-18].
7. ~Proposed Form Order: 07/12/17

RECOMMENDATION

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **03/29/18** 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)

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

DATE: 08/24/17 TIME: 11:00 DEPT: S35P

CASE#: PRO PS1700431
CASE NAME: ANIL KUMAR TYAGI
HEARING: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ANIL KUMAR TYAGI (DEC)...
MICHAEL C MADDUX (SA)...MICHAEL C MADDUX
SYED SAJJAD HUSSAIN (PET)...UGO HARRIS P. EJIKE, ESQ.

GARPS1700256 (*Nilesh Tyagi, child*); ***CIVDS1502449*** (*Hussain v Tyagi*) ***CIVDS1509580***
(*Hussain v Sharma*)

GENERAL INFORMATION

Letters of special administration issued to Michael Maddux, attorney, on 05/08/17.

Continued from 07/26/17; specially set to be heard with GARPS1700256.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Syed Sajjad Hussain creditor for Michael Maddux, attorney or Public Administrator.

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

1. Petitioner supplements petition on 07/21/17 as a sole petitioner as opposed to Syed Sajjad (prior petitioner). Court to clarify who now is actual petitioner. If Syed remains petitioner need dated signature by Syed.
2. Petitioner requests no bond as attorney and/or Public Administrator does not require bond. Supplement does not mention Public Administrator.
3. Section 8 does not list Nilesh Tyagi, alleged child under GARPS1700256. Need verified supplement.
4. Notice of related cases filed 07/21/17 CIVDS1502449, CIVDS1509580 Decedent passed away during litigation.
5. Proof of publication filed indicates proposed administrator Michael Maddux is pro per; however, Attorney Ejike listed is no longer counsel. JTD if new publication required.
6. Proposed Form Order: 07/21/17; however, prior counsel/petitioner is in caption.

RECOMMENDATION

Need to clear note 3, no bond. If approved, set Accounting/Status Review for **10/03/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 08/24/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1501072

CASE NAME: WERNER LEE WEINMEISTER

VACATED

HEARING:

Hearing Re: COURT TRIAL (FOURTH DAY)

COUNSEL:

DAVID WEINMEISTER (PET)... SUSAN E. CLARK

REAGENE YOUNG (PET)...IGNAZIO FICARA

WERNER LEE WEINMEISTER (DEC)...

Future Hearing: 08/25/17 *Court Trial*

Superior Court of Calif, County of San Bernardino

Page: 1

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: CIV RS1400249

CASE NAME: MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON

HEARING:

Hearing Re: OSC re Settlement

COUNSEL:

ARROWHEAD CREDIT UNION (CC)...KNAPP, PETERSEN &
DAVINA MICHELLE PATTERSON (DEF)...PRO/PER
MERCEDES MURRAY AND MONICA MUR (PLA)...OSBORN LAW

XREF: PROPS1300718

GENERAL INFORMATION

Continued from 05/18/17 and 07/13/17 Counsel stated an application for good faith settlement was filed 04/21/17. Court approved settlement. Counsel advised to submit a stip regarding attorney's fees with an explanation as to why attorney fees are reasonable.

THIS CASE SET FOR HEARING ON OSC re Settlement

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

1. Matter set on 03/30/17 when parties stated they are in negotiations in the civil matter.

RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300114

CASE NAME: BENSON HON FONG

HEARING:

Hearing re Final Discharge

COUNSEL:

BENSON HON FONG	(DEC)...
DONNASUE SMITH ORTIZ	(DONNASUE ORTIZ
GLADSTONE CARE AND REHABILITAT	(TP)...SANDERS REHASTE
VICKI OPUNUI FARMER	(PET)...CHO, SHEASBY, CHUNG &

XREF: CONPS1100305 (*Benson Hon Fong*), **GARRS1300004**(*Jordan Fong*)

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 Vickie Farmer approved on 08/18/16. Amended order rejected by examiner on 07/27/17. Need actual cash assets stated.
2. Need receipts for Jordan, Matthew and Geoffrey Fong.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b) once amended order is approved.

RECOMMENDATION

Inquire status of receipts and discharge.

(lc)

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401040

CASE NAME: KATHLEEN MARIE MYERS

HEARING: FIRST AND FINAL Account and Report of ZACHARIAH J MYERS and
Petition for allowance of fees filed.

COUNSEL:

KATHLEEN MARIE MYERS (DEC)...
ROBERTA L TAYLOR (TP)...ROBERTA L TAYLOR
ZACHARIAH J MYERS (PET)...DIANA J CARLONI

GENERAL INFORMATION

Continued from 07/06/17.

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

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

1. Petitioner and counsel seek statutory fees of \$7,652.30 each.
 - a. Need proper calculation with gains/losses/receipts per Pr.C. § 10800(b).
 - b. Counsel Taylor and Carloni to share fees; however, percentage not stated per Pr.C. § 10814. Need same.
2. Petitioner alleges in report Inventory and Appraisal on 06/08/15 is \$217,600; however, it appears to be \$223,515.04. Need verified supplement.
3. Petitioner seeks reimbursement of costs to former Counsel Roberta Taylor of \$945.50. Need itemization.
4. Need all accounting schedules.
5. Attorney seeks reimbursement of costs for filing fee of \$465.
6. Petitioner seeks a reserve of \$500.
7. Pool business was lost as no buyers were acquired.
8. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 1-4. If approved, set hearing on the filing of receipts and final
discharge for **08/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500164

CASE NAME: JULIO B. VARELA

HEARING:
Accounting Review

COUNSEL:
JEANETTE OTT (PET)...LAYNE A BARTHOLOMEW
JULIO B VARELA (DEC)...
LORETTA SCHMIDT (PET)...LAYNE A BARTHOLOMEW

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 co-administrators Loretta Schmidt and Jeanette Ott, daughters on 04/02/15, full authority, no bond.
2. Previous status report approved on 08/26/16
3. Need final Inventory and Appraisal
4. Need accounting or status report.

RECOMMENDATION

Need to clear note 3 & 4.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500644

CASE NAME: MTR OF IRWIN MATSUMOTO TRUST

HEARING:
Accounting Review

COUNSEL:
INLAND COUNTIES REGIONAL CENTE (PET)...LAYNE A BARTHOLOMEW
IRWIN MATSUMOTO (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2nd Account for IRC master trust approved on 10/06/16
2. Need 3rd Account beginning with 06/01/16.

RECOMMENDATION

Inquire status of accounting.
(ww)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700355

CASE NAME: MARY JO GANT

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MARY JO GANT (DEC)...
RICHARD E GANT (PET)...MICHAEL C MADDUX

GENERAL INFORMATION:

Continued from 07/13/17 to clear probate notes.

THIS CASE SET FOR HEARING ON **Amended** [04/14/17] Petition for Letters of Administration with full authority under IAEA by Richard Gant, son.

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

1. All heirs waive bond. Value of estate TBD. Need bond waivers for Stephanie and Kendall Gant.
2. As the renunciation and disclaimer [Lf04/14/17 pg4] appears to be ambiguous as to all property of estate and whether they are assigning interest, court to clarify if there are issues of disclaimant(s).
3. Section 7 indicates pre-deceased spouse; however, court to clarify as section 7 shall not be completed if decedent had issue.
4. ~Proposed Form Order: 04/14/17.

RECOMMENDATION

Need to clear note 1, court's discretion re notes 2-3 and bond. If approved, set Accounting/Status Review for **11/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700356

CASE NAME: RICHARD DONALD LARSEN

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY WITH
FULL AIAE

COUNSEL:

RHONDA K ANDERSON (PET)...ALBREKTSON & SHUMATE, LLP
RICHARD DONALD LARSEN (DEC)...

GENERAL INFORMATION:

Continued from 07/13/17

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Rhonda Anderson, executor/daughter.

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

1. Will waives bond. Estate consists of \$343,034.24 in personal property.
2. Trustee is not listed in section 8 of petition. Need verified supplement and notice to Trustee.
3. Will conditionally incorporates Trust. Copy of trust attached to petition.
4. ~Proposed Form Order: 04/14/17.

RECOMMENDATION:

Need to clear note 2, Court's discretion re bond. If approved, set Accounting/Status Review for **11/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700505

CASE NAME: MTR OF DEBORAH SUE BYRNE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

DEBORAH SUE BYRNE (DEC)...
JENNIFER SPENCER (PET)...ZIEBOLD LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Jennifer Spencer, daughter/trustee/executor

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

1. Petitioner, as trustee, seeks 100% interest in decedent's interest in real property per the will and dissolution judgment.
2. The Inventory and Appraisal states value of \$750,000 and is not clear as to the exact amount sought. Need Inventory and Appraisal indicating the amount sought via this petition.
3. Notice of hearing filed on 06/05/17; however the date of mailing on the proof of service is blank. Need same.
4. Matter referred to legal research.
5. ~Proposed Form Order: 06/05/17

RECOMMENDATION

Need to clear note 2 & 3.

(ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 08/24/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700506

CASE NAME: RICHARD KENNETH GLANDER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MARIA CASTELLANOS (PET)...PRO/PER
RICHARD KENNETH GLANDER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Maria Castellanos, spouse.

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

1. Statutory bond amount is being requested. The estate consists of \$900,000 in real property. Petitioner does not know the amount of possible encumbrances. JTD
2. The petition for probate is on an outdated form. Court's discretion.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Duties and liabilities filed, however, the telephone number for the proposed personal representative is missing and the Court address is incorrect. Need same.
5. Need proof of publication.
6. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 3-5. Court's discretion re bond amount and note 2. If approved, set Accounting/Status Review for **11/01/18**. 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: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIP

DATE: 08/24/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500134

Vacated

CASE NAME: MTR OF MANUEL MORALEZ

HEARING:

Hearing re Final Discharge

COUNSEL:

CHARLOTTE MORALEZ (CPE)...MITCHELL I ROTH

MANUEL MORALEZ (CEP)...

Final discharge filed.

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

DATE: 08/24/17 TIME: 9:30 DEPT: S36P

CASE#: RC RS00386

CASE NAME: ELIZABETH ANDERSON

SEE ALSO 12, 13

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL 000100 Filed by 0001-0003

COUNSEL:

ELIZABETH ANDERSON (PCE)...MARK J. ANDREW FLORY
KENT ANDERSON (PCR)...CHRISTOPHER A POULOS
LINDA ANDERSON (PCR)...CHRISTOPHER A POULOS

GENERAL INFORMATION

Continued from 07/13/17.

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Christopher Poulos.

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

1. Petitioner, Christopher Poulos, seeks to be removed as counsel for Kent and Linda Anderson Conservators. Petitioner alleges that the Andersons have been non-responsive to multiple attempts to contact them.
2. Declaration in support is not on mandatory judicial council form MC-052. Need same.
3. Notice of Hearing and proof of service filed. However, need compliance with Rules of Court, rule 3.1362(d), including service of Notice of Motion, Declaration and Proposed Order.
4. ~Proposed Form Order: 05/31/17.

RECOMMENDATION

Need to clear notes 2 & 3.

(lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 08/24/17 TIME: 9:30 DEPT: S36P

CASE#: RC RS00386

CASE NAME: ELIZABETH ANDERSON

SEE ALSO 11, 13

HEARING:

Order to Show Cause RE: Suspension of Conservator (Failure to File)

COUNSEL:

ELIZABETH ANDERSON (PCE)...MARK J. ANDREW FLORY
KENT ANDERSON (PCR)...CHRISTOPHER A POULOS
LINDA ANDERSON (PCR)...CHRISTOPHER A POULOS

GENERAL INFORMATION

Continued from 12/01/16 and 02/02/17. Neither conservators nor Counsel appeared. Court suspended powers of Conservators and ordered Christopher Poulos and his clients to appear. Linda and Kent Anderson to personal appear.

Continued from 03/23/17. Attorney Flory indicated he cannot locate his client. OSC set on **05/18/17** when there was no appearance. Kent and Linda Anderson are ordered to personal appear at next hearing. Attorney Flory has located his client in a board/care center in Ontario. Public Guardian notified of possible appointment.

Continued from 07/20/17 Public guardian has not received a copy of the file yet.

THIS CASE SET FOR HEARING ON **OSC re Suspension of Conservator/FTF/**
Accounting review.

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

1. Previous account for Linda and Kent Anderson, parents, dispensed Account approved on 05/29/15.
2. Need next Account/waiver beginning with 10/02/14.

RECOMMENDATION

Court's discretion re OSC. Inquire status. No bonding company to notice.
(lc/ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/24/17 TIME: 9:30 DEPT: S36P

CASE#: RC RS00386

CASE NAME: ELIZABETH ANDERSON

SEE ALSO 11, 12

HEARING:

Accounting Review

COUNSEL:

ELIZABETH ANDERSON (PCE)...MARK J. ANDREW FLORY

KENT ANDERSON (PCR)...CHRISTOPHER A POULOS

LINDA ANDERSON (PCR)...CHRISTOPHER A POULOS

See notes on previous matter #12.

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

DATE: 08/24/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS02136

CASE NAME: MTR OF MICHAEL LYNN MC NABB

HEARING:
Accounting Review

COUNSEL:

JEFFREY C. MCNABB	(CPE)...LESLIE BARNETT, ESQ.
MARSHA M BUCK	(CPE)...LESLIE BARNETT, ESQ.
MICHAEL LYNN MC NABB	(CEP)...MARK J. FLORY
MICHAEL MCNABB	(CEP)...

GENERAL INFORMATION

Continued from **05/04/17 and 07/06/17 additional time needed to file accounting.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 8th Account of Jeffrey McNabb and Marsha Buck, siblings, approved on 08/04/16.
2. Need 9th Account beginning with 03/01/16.

RECOMMENDATION

Inquire status of accounting.

(lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

Readiness Calendar

DATE: 08/24/17 TIME: 8:29 DEPT: S37P

CASE#: PRO PS0700067

CASE NAME: MICHAEL JONAS EVANS

HEARING:

Readiness Calendar

COUNSEL:

CARLENA J HARRIS

COLUMBIA PICTURES INDUSTRIES,

MICHAEL JONAS EVANS

TAMMIE J EVANS

(PET)...PRO/PER

(TP)...HOFFMAN, SABBAN &

(DEC)...

(PET)...DENNIS J HEALEY

Readiness—no notes--JTD

Superior Court of Calif, County of San Bernardino

Page: 2

San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: FAM SS904168

CASE NAME: GILBERT S ESPINOZA -N- ESMERELDA ESPINOZA

HEARING:

Motion Re: NTC OF MTN AND MTN TO BE RELIEVED AS COUNSEL Filed
by Petitioner YOLANDA R GARZA

COUNSEL:

ESMERELDA ESPINOZA	(RES)...H WILLIAM EDGAR
GILBERT S ESPINOZA	(PET)...PRO/PER
YOLANDA R GARZA	(PET)...YOLANDA R GARZA

XREF: SBFSS88708 (*Espinoza V Esmeralda Bahamon; dismissed*)

GENERAL INFORMATION

Continued from 04/06/17. Counsel reported that she has been getting cooperation and is waiting to be supplied with a copy of the judgment.

Continued from 06/15/17. No appearance. Petitioner to be present.

THIS CASE SET FOR HEARING ON Motion to be relived as Counsel by Yolanda Garza.

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

1. Petitioner, Yolanda Garza, seeks to be relieved as GAL for Gilbert Espinoza. Petitioner alleges Mr. Espinoza is unable to assist me or provide me with information. Declaration not signed. **Need same.**
2. Need proof of service of Notice of Hearing re compliance with Rules of Court, rule 3.1362(d), including service of Notice of Motion, Declaration and Proposed Order. **Docs filed on 03/28/17; however, not available for review in LF by examiners folder view. Clerk's office was notified.**
3. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 1-2.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400258

CASE NAME: JUDY ANN REITZ

SEE ALSO 4

HEARING:

Hearing Re: SANCTIONS FOR FAILURE TO FILE ACCTG TIMELY

COUNSEL:

JUDY ANN REITZ

(DEC)...

KEVIN W WALK

(PET)...JACK B OSBORN

GENERAL INFORMATION

Continued from 06/16/16, 08/25/16, 11/03/16, 01/19/17, 04/13/17 and 06/15/17.

OSC set on 06/15/17. Last continuance. Kevin Walk ordered to be present (may appear by CourtCall).

THIS CASE SET FOR HEARING ON **OSC re Sanctions for FTF/Accounting** review/Status.

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

1. Letters of Administration issued to Kevin Walk, nephew, on 06/25/14; full authority, no bond.
2. Previous status report approved on 12/24/15.
3. Need accounting or next status report.

RECOMMENDATION

Court's discretion re OSC. Inquire status of accounting. No bonding company to notice. (lc/ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400258

CASE NAME: JUDY ANN REITZ

SEE ALSO 3

HEARING:
Accounting Review

COUNSEL:

JUDY ANN REITZ (DEC) ...
KEVIN W WALK (PET) ... JACK B OSBORN

See notes on previous matter.

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400658

CASE NAME: MARGARET SCHWARZ

HEARING:

FIRST AND FINAL Account and Report of HELEN DUVERNAY and
Petition for allowance of fees filed.

COUNSEL:

HELEN DUVERNAY (PET)...BANKS GARCIA & JANIS
MARGARET SCHWARZ (DEC)...

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION

Continued from 06/15/17 for supplement review.

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Hellen DuVernay, Sister/Trustee.

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

1. Petitioner waives statutory compensation.
2. Attorney requests statutory fees of \$9,528.58. Ok
3. Attorney requests reimbursement of costs totaling \$1,138. Itemized [Acct. 04/06 LFpg 6].
4. Petitioner requests a reserve of \$1,100.
5. Notice of hearing and proof of service [page 18] attached to supplement filed 06/07/17. Does court wish to require petitioner to file notice separately? JTD
6. No proposed order. Submit after hearing.

RECOMMENDATION

RFA subject to note 5. If approved, set hearing on the filing of receipts and final discharge for **08/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600387

CASE NAME: MTR OF MARK G H EAGLETON

HEARING:
Accounting Review

COUNSEL:

ABIGAIL EAGLETON	(PET)...DIANA J CARLONI
MARK G H EAGLETON	(DEC)...
SUMMIT	(TP)...THOMAS W DOMINICK

XREF CIVDS1700232 (Summit Valley V Eagleton) & CIVDS1700233 (Sycip V Eagleton)

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 Abigail Eagleton, spouse, on06/16/16, limited authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Need to clear note 2 & 3

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600447

CASE NAME: TERRI A CLARK

HEARING:

WAIVER OF FIRST AND FINAL Account and Report of KENDALL E BONNER
and Petition for allowance of fees filed.

COUNSEL:

KENDALL E BONNER (PET)...JANE LEE
TERRI A CLARK (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Kendall Bonner, Trustee/daughter.

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

1. All beneficiaries waive accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$14,800. Need Inventory and Appraisal before can confirm fees are accurate.
4. Need final Inventory and Appraisal with property appraised by probate referee.
5. ~Proposed Order: 06/07/17.

RECOMMENDATION

RFA subject to note 4. If approved, set hearing on the filing of receipts and final discharge for **08/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700548

CASE NAME: MTR OF THE GARY W BUNTING 2008 REVOCABLE TRUST

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

NATALIE BLICKENSTAFF (PET)...JENNIFER M DANIEL
THE GARY W BUNTING 2008 REVOCA (TRU)...

THIS CASE SET FOR HEARING ON: Proof of Bond.

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

1. Natalie Blickenstaff, PPF, appointed Successor Trustee of the Gary W. Bunting 2008 Revocable Living Trust and of the Jonathan Gabriel Bunting Special needs Trust on 06/15/17; \$100,000 bond.
2. Need proof of bond.

RECOMMENDATION:

Inquire status of bond.

(cs)

Future Hearing: 09/13/18 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700558

CASE NAME: Inland Counties Master Trust fbo Brenda L & Karen

HEARING:

Petition for to Modify Trust; Petition for Instructions

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (PET)...LAYNE A BARTHOLOMEW
INLAND COUNTIES MASTER TRUST F (TRU)...

Currently under review by legal research

(LR)

NOTICE:

1. As this is a modification; need notice of hearing with proof of service to Brenda and Karen Held, including notice to the three state agencies per Pr.C. §§ 3604(a)(2), 3602(f), and 3611(c); Department of Health Services, Director of State Hospitals and Director of Developmental Services.
2. It is not clear who the remainder beneficiaries are.

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700568

CASE NAME: MTR OF JAMES VERNON STRZYZEWSKI

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL AUTHORIZATION TO
ADMINISTER UNDER IAEA

COUNSEL:

JAMES VERNON STRZYZEWSKI

(DEC)...

MARLA STUART

(PET)...MARC S. DROBNY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Marla Stuart, sister

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

1. Sole heir waives bond. The estate consists of \$1,322,600 of which \$56,700 is personal property.
2. Petitioner's signature is not dated on the petition. Need same. Alternatively, does court wish to verify on record.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication
5. No Form Order Provided- Order to be submitted after hearing.

RECOMMENDATION

Need to clear notes 2-4. Court's discretion re bond. If approved, set Accounting/Status Review for **11/01/18**. 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: 11

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

DATE: 08/24/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700569

CASE NAME: JOSEPH CHRISTOPHER BASILE, JR

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

JOSEPH CHRISTOPHER BASILE III (PET)...HORSPPOOL & HORSPPOOL
JOSEPH CHRISTOPHER BASILE JR (DEC)...

XREF: PROPS1600536 (Joseph Christopher Basile J)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Joseph Christopher Basile, III, son

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

1. Petitioner requests no bond as the estate contains real property with negative equity of \$45,000.
2. Section 2c as the IAEA powers is blank; however it is clear from the petition caption that full authority is being requested. JTD
3. Section 5a 3 & 4 are not addressed as to whether there was a registered domestic partner but it is clear that decedent was married at the time of death. JTD
4. ~Proposed Form Order: 06/09/17

RECOMMENDATION

RFA subject to Court's discretion re notes 2 & 3 and bond. If approved, set Accounting/Status Review for **11/01/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 08/24/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601107

CASE NAME: JACK E BIRKINSHAW TRUST OF 2009,DATED MARCH 12,200

SEE ALSO 13

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST TO
CONFIRM ASSESTS OF TRUST ETC

COUNSEL:

ERLINDA CAMERON

(PET)...ROBERT F SCHAUER

ISRAEL GARCIA

(OBJ)...SERGIO A WHITE

JACK E BIRKINSHAW TRUST OF 200

(TRU)...

XREF: CIVDS1413193 (*Cameron V Garcia Et al*)

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 08/24/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1601107

CASE NAME: JACK E BIRKINSHAW TRUST OF 2009,DATED MARCH 12,200

SEE ALSO 12

HEARING:
Trial Setting Conference

COUNSEL:

ERLINDA CAMERON	(PET)...ROBERT F SCHAUER
ISRAEL GARCIA	(OBJ)...SERGIO A WHITE
JACK E BIRKINSHAW TRUST OF 200	(TRU)...

XREF: CIVDS1413193 (*Cameron V Garcia Et al*)

TSC—no notes--JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 08/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400317

CASE NAME: MTR OF KNUD ANDERSEN

HEARING: FIRST Account and Report of JENS ANDERSEN and Petition for allowance of fees filed.

COUNSEL:

JENS ANDERSEN	(CPE)...MATTHEW E SHEASBY
KNUD ANDERSEN	(CEP)...E JOAN NELMS
KNUD ANDERSEN	(PET)...JAMES B CHURCH

GENERAL INFORMATION

Continued from 02/23/17 and 05/11/17.

THIS CASE SET FOR HEARING ON 1st Account Current and Petition for Allowance of Fees by Jens Andersen, son.

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

1. Accounting period 11/20/14 – 05/31/16.
2. Assets on hand \$753,882.74 of which \$150,228.65 is cash.
3. Attorney requests fees of \$16,101.85 at \$300 an hour. Itemized [Sup.12/12 LFpg4-31]. Need hours totaled.
4. Beginning balance does not match Inventory and Appraisal values. Need corrected accounting or Inventory and Appraisals.
5. Inventory and Appraisals filed do not have full legal descriptions. Need same.
6. Need bank statement that covers 05/31/16. Last statement appears to be 05/23/16 [Con.12/12 LFpg215].
7. Disbursements indicate \$315 in overdraft charges [Acct.12/12 LFpg16-17]. Question why the overdraft fees and why petitioner should not be liable? Need verified supplement.
8. Disbursements indicate several credit card payments, one of which is \$8,715.81 to Bank of America [Acct.12/12 LFpg16-17]. Question if these credit cards were paid and closed or are they a continuing liability? Need verified supplement.
9. Question the reimbursement of \$945 to Anelise Andersen? Need verified supplement.
10. Petitioner paid Arnie Muderspach, Teresa McKinney, Elsie Muderspach, Anelise Andersen, Jorgen Anderson and American Companion Care for caregiver services.

Need verified declaration that payment was received for the dates services were provided per local rule 20-1406(c).

11. Conservator completed the Saticoy Property transaction whereby a 1st Deed of Trust was secured for \$450,000, which conservatee received monthly interest.

Conservatee was also paid a lump sum of \$208,794.88.

12. Current bond is \$507,000.

13. ~Proposed Order: 12/12/16.

RECOMMENDATION

Need to clear notes 3-10. If approved, set hearing on the next accounting review for **10/26/17** (if one year) or **8/30/18** (if two years). Accounting to be filed 30 days in advance.

(lc)

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

DATE: 08/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700099

CASE NAME: Savannah Amber Kirk

SEE ALSO 16

HEARING: OSC re: Dismissal

COUNSEL:

EUGENE KIRK	(PET)...PRO/PER
MIRIANNE KIRK	(PET)...PRO/PER
SAVANNAH AMBER KIRK	(CEP)...LENITA A SKORETZ

GENERAL INFORMATION

Ex Parte orders entered 03/29/17. Court orally amends petition for conservatorship of person only. Mirianne Kirk and Eugene Kirk appointed temporary conservators.

Continued from 04/25/17. Parties report they have filed an amended petition on 04/24/17 requesting appointment as conservator of the person only. Petitioners advised probate notes #4, 7 and 9 need to be cleared. Attorney Lenita A Skortez appointed for Savannah Amber Kirk. Continued to 06/27/17.

Continued from 06/08/17. No appearance. Eugene and Mirianne Kirk are ordered to be present at next hearing.

THIS CASE SET FOR HEARING ON **OSC re Dismissal of Amended [04/24/17]** Petition for Appointment of Conservator person **only** by Mirianne and Eugene Kirk (parents)

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

1. Petitioners seek no bond, person only.
2. IRC report filed on 04/20/17.
3. Petitioners seek medical powers. Capacity Declaration filed 03/22/17.
4. Petitioners request "other" orders related to powers, in sum: to access confidential records and papers, to give or withhold medical consent, control right to contract. [Amended petition, 04/24/17, LF pg10] JTD.
5. Need report from Counsel Lenita A Skortez.
6. **Amended petition** filed 04/24/17 appears to be a supplement requesting appointment of person only, medical powers, and clarifying proposed conservatee's status as disabled. Does court wish to deem current amended petition as a supplement? **If not, see notes 7 and 8 regarding notice on amended petition.**

7. Return of Citation with proof of personal service filed 04/25/17. However, need return of Citation with proof of personal service reflecting hearing date of ***amended petition.***
8. Notice of Hearing with proof of service filed 04/24/17. However, need Notice of Hearing and Proof of Service of ***amended petition.***
9. Certificates of Completion of the Conservatorship Training Class filed 04/24/17.
10. Court Investigator report filed.
11. ~Proposed Form Order: 03/22/17

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 5-8. If approved, set hearing for Compliance Review for **03/29/18** for the filing of the required documents and hearing re Accounting Review for **11/01/18**. Any accounting to be filed 30 days in advance.
(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 08/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700099

CASE NAME: Savannah Amber Kirk

SEE ALSO 15

HEARING:

Petition for APPOINTMENT OF PROBATE CONSERVATOR OF THE PERSON
(AMENDED)

COUNSEL:

EUGENE KIRK	(PET)...PRO/PER
MIRIANNE KIRK	(PET)...PRO/PER
SAVANNAH AMBER KIRK	(CEP)...LENITA A SKORETZ

See notes on prior matter 15.

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

DATE: 08/24/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700159

CASE NAME: MTR OF PERISHA T JOHNSON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PERISHA T JOHNSON (CTP)...JAMES B CHURCH
SYLVIA E JOHNSON (CP)...PRO/PER

GENERAL INFORMATION

Continued from 06/15/17. Return of Citation waived by Perisha Johnson's appearance. Court orders IRC to prepare report for the Court. Attorney James B Church is appointed Counsel.

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

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

1. Petitioner seeks orders relating to powers under Pr. C. §2351.5 to fix residence, access confidential records, right to consent/withhold consent to marriage, control right to contract, authority to give consent/withhold consent to medical treatment, right to control social and sexual contacts, make decisions reeducation;. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks Orders relating to estate powers under Pr. C. §1830(b); however, this petition is for conservatorship of the person only, and proposed conservatee's assets consist solely of public benefits of \$854/month. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 05/23/17.
5. Proposed conservatee is developmentally disabled. Need report of Counsel James B. Church.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Need List of Required Contact Information (Local form SB-12224).
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need 30 days' notice and proof of service to Inland Regional Center.
10. CI report filed 06/15/17.
11. ~Proposed Form Order: 05/01/17

RECOMMENDATION

Need to clear notes 5-9. If approved, set hearing for Compliance Review for **03/29/18** 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/lc/lh)

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

DATE: 08/24/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02598

CASE NAME: MTR OF GREGORY YAROSLOW

HEARING:
Accounting Review

COUNSEL:

GREGORY YAROSLOW	(CEP)...
GREGORY YAROSLOW	(PET)...EDWARD B FISCHER &
LAWRENCE A DEAN II	(CE)...SHERRI L KASTILAHN
LAWRENCE DEAN II	(CPE)...SHERRI L KASTILAHN
RITA MCCARTHY	(CPE)...HARTNELL LAW GROUP
RITA Y. MC CARTHY	(CPE)...HARRY J HISTEN
WILLIAM J SIMON	(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. 5th Account for Lawrence Dean II, PPF, approved on 12/08/16
2. Need 6th Account beginning with 06/01/16.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC.

DATE: 08/24/17 TIME: 1:30 DEPT: S37P

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

HEARING:

Court Trial set for ELDER/DEPENDANT ADULT ABUSE of PARK

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

JUDITH KATHLEEN PARK

(RP)...LENITA A SKORETZ

PATRICIA MAE LAWRENCE PARK

(PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

XREF: CONPS1600269 (Patricia Mae Lawrence Park)

Court trial—no notes—JTD