



First Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 08/28/17

All corrections/supplements addressing these notes should be filed by **08/21/17**. 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.

08/02 WW/nb0808

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300511

CASE NAME: RUTH ELLA JEFFERY

HEARING:

Accounting Review

COUNSEL:

JUDITH A SHUFORD	(PET)...KEITH S WALKER
RUTH ELLA JEFFERY	(DEC)...
ELLA JACOBS	(PET)...GILBERT M GUTIERREZ
GUY JACOBS	(OBJ)...GILBERT M GUTIERREZ

GENERAL INFORMATION

Continued from **12/03/15**. Counsel reports property has sold. Notice to be given by Mr. Walker.

Continued from **02/16/16** at request of counsel to file status report. Nothing new filed.

Continued from **04/12/16** at request of counsel to clear notes. Counsel to file motion to enforce settlement agreement.

Continued from **06/06/16**. No appearances. Judith Shuford needs to file an accounting for the special administrator. Court orders Attorney Keith Walker and Judith Shuford to personally be present at the next hearing. Notice by Judicial Assistant.

Continued from **08/15/16, 10/17/16, 01/30/17** and **06/05/17** at request of counsel.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Letters of Special Administration issued to Judith Shuford on 06/25/13.
2. It appears court is seeking an accounting from special administrator.

RECOMMENDATION

Inquire status.

(lc/nb/dl/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500671

CASE NAME: JOULAN LU

HEARING:

FINAL Account and Report of WENSHENG XU and Petition for allowance of fees filed.

COUNSEL:

WENSHENG XU (PET)...FEI PANG
JOULAN LU (DEC)...

GENERAL INFORMATION:

Continued from 06/26/17 for review of supplement filed 06/22/17. Counsel indicates an amended final accounting may be filed. Court notes amended final accounting to be filed by 07/28/17.

THIS CASE IS SET FOR HEARING ON Final Accounting and Report of Personal Representative, Wenshen Xu ["Petitioner"].

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

1. No compensation is requested.
2. Need Summary of Account.
3. Need supporting schedules.
4. Need findings re: known creditors; there are two (2) creditor's claims from Capital One and American Medical Response filed on 08/11/15 and 11/02/15, respectively. However, there are no allowances or rejection notices in the file regarding these claims. Need verified supplement confirming status of these claims.
5. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. (Pr. C. § 1064 (a)(4). Need verified supplement.
7. **Unconformed Notice of Hearing, affixed to supplement filed 06/22/17, does not include parent(s) of minors or creditors, American Medical Response; or Capital One; and does not give 15 days' notice. Need proper service.**
8. Decedent died intestate with 2 minor children (12 & 6) who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is

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.

separate property of decedent. Does Court wish to appoint counsel for minors?
JTD.

RECOMMENDATION:

Need complete, proper accounting to comply with Pr. C. § 1060 et seq., to be set on first check calendar no sooner than **10/16/17** or thereafter. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600010

CASE NAME: MICHAEL SLOAN LOGAN

HEARING:
Accounting Review

COUNSEL:

LISA DELATORRE (PET)...BETTY S CHAIN
MICHAEL SLOAN LOGAN (DEC)...
BASELINE FINANCIAL SERVICES (PET/TP)...PAUL R KRAFT

GENERAL INFORMATION

Continued from 07/10/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Lisa DeLaTorre, limited authority, no bond on 05/02/16. Lisa DeLaTorre's administrative powers were suspended on 08/22/16 and reinstated on 02/08/17.
2. No accounting or status report of administration has been filed.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600051

CASE NAME: DARLENE SUE WEST

HEARING:
Accounting Review

COUNSEL:

BONNIE L MAROWITZ	(PET)...JASON L GAUDY
DARLENE SUE WEST	(DEC)...
REBECCA L WEST	(PET)...ELISABETH KEMPE-OLINGER

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 Rebecca West, step-daughter, on 06/20/16, limited authority, \$36,000 bond.
2. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600412

CASE NAME: ARTHUR G. RUIZ

HEARING:
Accounting Review

COUNSEL:

LAURA DIAZ (PET)...MATTHEW ALDEN
ARTHUR G. RUIZ (DEC)...
ADVANCE INHERITANCE, LLC (TP)...JAMES L LEESTMA
CALIFORNIA VICTIM COMPENSATION

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 Laura Diaz, daughter on 06/21/16; full authority, \$20,000 bond.
2. Need 1st accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601221

CASE NAME: THE DEMMITT TRUST

SEE ALSO 15

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

KAREN WHITNEY
THE DEMMITT TRUST, AS AMENDED
RONALD DEMMITT

(PET)...DANIEL G. MCMEEKIN
(TRU)...
(PET)...GREGORY T ANNIGIAN

No notes – Status Conference.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700550

CASE NAME: MTR OF CHRISTOPHER DOUGLAS BROWN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

PAMMY C BROWN (PET)...PRO/PER
CHRISTOPHER DOUGLAS BROWN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Pammy C. Brown ["Petitioner"].

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

1. Petitioner requests a determination of property passing to the surviving spouse as community property. Specifically, real property in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interests acquired – with community funds, etc? Need verified supplement to include copy of vesting document.
2. Section 6 is incomplete as to who survived decedent. However, petition [LF, p. 3] alleges decedent was an only child. Parents and grandparents are deceased..
3. Need Notice of Hearing with proof of service to uncle, Joseph Smith.
4. ~Proposed Form Order 05/30/17.

RECOMMENDATION:

Need to clear notes then Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700551

CASE NAME: GEORGE BRIAN KOVALSKY

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY

COUNSEL:

DIANE MARIE KOVALSKY (PET)...PRO/PER
GEORGE BRIAN KOVALSKY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Diane Kovalsky, spouse

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

1. Will waives bond. Net value of the estate consists of \$418,700 in real/personal property.
2. Section 8 of the petition fails to list Matthew Kovalsky and Debra Kovalsky aka Edge who are mentioned in the will. Need verified supplement.
3. Notice to Petition to Administer Estate and proof of service filed on 06/21/17; however the hearing date is incorrect. Need corrected notice.
4. Proof of publication filed on 07/17/17; however, the hearing date in the notice is incorrect. Need corrected publication.
5. ~Proposed Form Order: 06/05/17

RECOMMENDATION

Need to clear notes 2-4. Court's discretion re bond .If approved, set Accounting/Status Review for **11/05/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700552

CASE NAME: MTR OF RUTH LAVINGER

HEARING:

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

COUNSEL:

BILLY NEAL LAVINGER (PET)...COPENBARGER & COPENBARGER
RUTH LAVINGER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full
Authority under IAEA by Billy Lavinger, son.

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

1. Will waives bond. The estate consists of \$186,108.82 in personal property.
2. The petition is incomplete as follows:
 - a. Section 3g1 of the petition is not completed as to appointment of executor.
Does Court wish for a verified supplement to be filed? JTD
 - b. Section 5 is incomplete as to whether there is no spouse due to divorce,
death, or never married; however it is clear by section 7 that the spouse is
deceased. Does court wish to clarify on record or in alternative; need verified
supplement.
3. ~Proposed Form Order: 05/31/17

RECOMMENDATION

Court's discretion re note 2 and bond. If approved, set Accounting/Status Review for
11/05/18. Any accounting to be filed 30 days in advance local rule 20-901. Note
requirements of local rule 20-908.

(ww)

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: RPR RS02181

CASE NAME: ***MF** BRUNO CEJA JR.

HEARING:

Hearing re Final Discharge

COUNSEL:

MONICA M CEJA	(PET)...MARK J TUNDIS
BRUNO CEJA JR	(DEC)...
JOE SANCHEZ	(SPA)...L.DOMINIC CHACON
MELINDA A MILLER	(PET)...ALLARD, SHELTON & O'CONNOR
JESSIE C VELARDE	(OBJ)...ALLAR, SHELTON & O'CONNOR
ROBERT L KERN	(PRO/PER)
VICTIM COMPENSATION AND GOVERNMENT CLAIMS (PRO/PER)	

XREF: RPRRS02843

GENERAL INFORMATION

Continued from **03/02/11 - 06/26/12**. No appearance on 06/26. Keith Walker ordered to personally appear. Continued from 07/31/12, - 08/28/14.

Continued from 10/09/14 for final discharge to be filed. Related action RPRRS02843 to be advanced and continued to trail this matter.

Continued from **01/08/15 and 04/16/15** (No appearance). Citations issued for Melinda Miller and Monica Ceja.

Continued from **06/25/15**. Bench warrant ordered to issue with bail set at \$25,000 and held to 10/08/15. Melinda Miller ordered to be present.

Continued from **10/8/15** (coverage in S55). Counsel reported that Melinda Miller was present at prior hearing although the minutes do not reflect that and a bench warrant was issued and held at the prior hearing. Bench warrant remained held. Melina Miller ordered to be present at next hearing unless counsel supplies a transcript showing that she was present.

Continued from **12/10/15**. Bench warrant recalled.

Continued from **06/09/16** to file required documents.

Continued from 08/15/16, 10/17/16, 01/30/17 and 06/05/17 at request of counsel.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Order for final distribution approved on 02/24/10.
2. Need receipts. There appears to be 37 beneficiaries and a claim from Victim's Compensation Board.
3. Need to submit Ex Parte Petition for Final Discharge and Order.
- 4. Need return of citation for Melinda Miller.**
5. Citation returned served as to Monica Ceja.

RECOMMENDATION

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.
(cbr/vet/gls/vet/gls/cbr/gls/nb/lc/ds/lc/nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: RPR RS02843

CASE NAME: FELIPA C CEJA

HEARING:
Hearing re Final Discharge

COUNSEL:
MELINDA A MILLER (PET)...ALLAR, SHELTON & O'CONNOR
FELIPA C CEJA (DEC)...

CCP170.6 filed as to CYNTHIA LUDVIGSEN
X REF RPR RS02181

GENERAL INFORMATION

Continued from **8/20/09 many times to 06/26/12**. No appearance on 06/26. Keith Walker ordered to personally appear. Notice given by judicial assistant.
Continued from **07/31/12 many times to 06/25/15, 10/08/15, 12/10/15, 03/10/16, 06/09/16, 08/15/16, 10/17/16, 01/30/17 and 06/05/17**.

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

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

1. Order for Final Distribution granted 8/20/08.
2. Need to file receipt and submit final discharge declaration/order.
3. Citation returned SERVED as to Melinda Miller on 06/24/15.
4. Court to review declaration filed 07/03/14 by Attorney Walker.

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.
(gls/vet/smj//vet/gls/vet/gls/vet/lc/gls/vet/gls/nb/lc/nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 08/28/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS07243

CASE NAME: MTR OF MAGGIE BROWN

HEARING:
Hearing re Final Discharge

COUNSEL:
PATRICIA BROWN (PET)...BRYAN C. HARTNELL
MAGGIE BROWN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final Account and Report by Patricia Brown approved on 06/20/16.
2. Need receipts from Donna Brown, Karen Demory, Paul Brown, Cedric Brown, Brandn "Bill" Swayne, Brian Swayne, Bezeairlu Brown, Clifford Brown, Delories, Swayne and Patricia Brown.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 08/28/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 14

HEARING:

Motion Re: NTC OF MTN & MTN TO QUASH DEPOSITION Filed by
Petitioner WILLINE GAUDREAU, STEVEN GARUDRAU, ROBERT GAUDREAU,
KATHRYN GAUDREAU, CAROL KILLEN, STEPHANIE GAUDREAU

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN LLP
STEVEN GARUDRAU
ROBERT GAUDREAU
KATHRYN GAUDREAU
CAROL KILLEN
BILL GAUDREAU
STEPHANIE GAUDREAU
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)
JAY GAUDREAU

Currently under review by Legal Research.
(LR)

Future Hearings:

9/26/17: Hearing Re: Verified First Amended Petition, Accounting by Willine Gaudreau,
10/24/17: Petition for Preliminary Injunction Enjoining Trustee Sale, 5/22/18: Readiness
Calendar, Petition for Lack of Capacity Undue Influence Etc, 6/18/18: Court Trial, Petition
for Lack of Capacity Undue Influence Etc

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 08/28/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

SEE ALSO 13

HEARING:

Motion Re: BANK OF AMERICA CORPORATION Filed by Petitioner
WILLINE GAUDREAU, STEVEN GARUDRAU, ROBERT GAUDREAU, KATHRYN
GAUDREAU, CAROL KILLEN, STEPHANIE GAUDREAU

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN LLP
STEVEN GARUDRAU
ROBERT GAUDREAU
KATHRYN GAUDREAU
CAROL KILLEN
BILL GAUDREAU
STEPHANIE GAUDREAU
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)
JAY GAUDREAU

Currently under review by Legal Research.
(LR)

Future Hearings:

9/26/17: Hearing Re: Verified First Amended Petition, Accounting by Willine Gaudreau,
10/24/17: Petition for Preliminary Injunction Enjoining Trustee Sale, 5/22/18: Readiness
Calendar, Petition for Lack of Capacity Undue Influence Etc, 6/18/18: Court Trial, Petition
for Lack of Capacity Undue Influence Etc

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601221

CASE NAME: THE DEMMITT TRUST

SEE ALSO 6

HEARING:

Hearing Re: PETITION FOR (CROSS-COMPLAINT) TO REMOVE, ETC

COUNSEL:

KAREN WHITNEY

THE DEMMITT TRUST, AS AMENDED

RONALD DEMMITT

(PET)...DANIEL G. MCMEEKIN

(TRU)...

(PET)...GREGORY T ANNIGIAN

Currently under review by Legal Research.
(LR)

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 08/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300295

CASE NAME: CLAUDE L. GILES

HEARING:

Petition for ATTORNEY FEES FILED BY GUARDIAN AD LITEM FOR
CLAUDE GILES

COUNSEL:

KARON A SPIGNER

(CPE)...BRIAN C MILES

CLAUDE L. GILES

(CEP)...JENNIFER M DANIEL/
MATTHEW SHEASBY (GAL)

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JEFFALYN A GILES

(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Matthew Sheasby, Esq.

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

1. Petitioner Matthew Sheasby, Esq was appointed GAL for Claude Giles on 12/22/14.
2. Petitioner requests fees of \$4,940 for 14.2 hours, plus 1 hour of additional anticipated attorney services at \$325/hour. Itemized [Petition, 07/14/17, LFpg6-7].
3. Petitioner alleges there is a balance of \$4,073.00 due for legal services rendered on behalf of the Guardian ad Litem in 2015. However, itemization is not available as no invoices are available, and the exact nature of legal services rendered during that period is unascertainable [Petition, 07/14/17, LFpg3] JTD.
4. Prayer does not include authorization for payment of outstanding balance of \$4,073.00 Need verified supplement.
5. Notice filed on 07/19/17 does not include conservatee. Need proper service.
6. ~Proposed Order: 07/14/17

RECOMMENDATION

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

(lh)

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700271

CASE NAME: MURRY NEAL BOULTON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

EUGENIA PARKER-BOULTON (PET)...SCHWARTZBERG& LUTHER, APC

MURRY NEAL BOULTON (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Eugenia Parker-Boulton (mother)

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

1. Proposed conservatee is developmentally disabled. It appears a limited conservatorship is appropriate. Does Court wish to require an amended petition?
2. As this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
3. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 07/14/17 is incomplete at item #4a is to date physician saw proposed conservatee. Need completed form.
5. Need Court Investigator report.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Confidential Screening form is incomplete at item #13. Need completed form.
8. Need return of Citation.
9. Need Notice of Hearing and Proof of Service.
10. ~Proposed Form Order: 07/14/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **04/02/18** 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)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS01501

CASE NAME: MATTER OF JAMES K ROGERS

HEARING:

Accounting Review

COUNSEL:

DIANE R ROGERS

(CPE)...J. DAVID HORSPOOL

JAMES KENNETH ROGERS

(CEP)...

RICHARD ROGERS

(CPE/SC)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from 07/10/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 4th Account for Richard Rogers, father, approved on 10/03/16.
2. Need 5th Account beginning with 04/18/16.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS02281

CASE NAME: MATTER OF JESSIE VELASQUEZ

HEARING:

Accounting Review

COUNSEL:

MARY ANN VELASQUEZ

(SC)...JOHN M RAGER

JESSIE VELASQUEZ

(CEP)...C L FARRELL

RUTH L HENRICKS

(CPE)...HARTNELL LAW GROUP

C L FARRELL

(TP)...LAW OFFICES OF C L FARRELL PC

GENERAL INFORMATION

Conservatee passed away on 04/14/16.

Continued from 11/28/16, 03/06/17, 05/01/17 and 06/12/17 Court notes there will be no further continuances permitted; court notes that if the accounting is not filed by 07/28/17 the Court will consider setting osc re surcharge.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ruth Henricks, PPF, appointed as conservators of person and estate, on 07/16/03 \$65,000 bond.
2. Ex-Parte Petition to Dispense with Accounting and Order entered 04/22/15.
3. Notice of death of conservatee filed on 08/31/16.
4. Need final accounting to include pre and post death accounting periods.

RECOMMENDATION:

Inquire status of accounting. Court's discretion on setting OSC hearing.

(nb/lh/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: CON DS1000230

CASE NAME: STEPHEN RIDDLE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
STEPHEN RIDDLE

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 09/19/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fifth Account entered 11/01/16 for period 07/01/15 to 06/30/16.
2. Need Sixth Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700008

CASE NAME: MTR OF MICHAEL GIBSON

HEARING:

SIXTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MICHAEL GIBSON (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 12/31/17.

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

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

1. Accounting period 10/30/13 to 09/30/15.
2. Assets on hand \$11,259.34 consisting of \$203.73 in cash and pre-need burial trust.
3. Public Guardian requests compensation of \$3,088.00. For the period 07/01/14 to 09/30/15, approving and allowing the sum of \$2,000, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
4. Disbursements – Schedule C [LF, p. 22] includes \$19.27 reimbursed for postage that is normally considered overhead. JTD.
5. County Counsel request fees of \$1,588.00. For the period 07/01/14 to 09/30/15, approving and allowing the sum of \$1,000, deferred until such time as the conservatorship estate has sufficient funds for such purpose.
6. ~Proposed Order 03/28/17.

RECOMMENDATION:

Court's discretion re note 4. If approved, Court to set next **LPS** hearing re Accounting Review for **11/27/17**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700119

CASE NAME: MTR OF ALEXANDER SCHERT

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ALEXANDER W SCHERT (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire 07/10/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order settling First Account and Report entered 01/30/17for accounting period 06/14/13 to 06/30/14.
2. Need Second Account Current or Waiver.

RECOMMENDATION:
Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800301

CASE NAME: CHRISTOPHER POSADAS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

CHRISTOPHER POSADAS

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

VACATE – Ex Parte Order that Conservator no present third account forwarded to dept. S35 for signature.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400092

CASE NAME: ALAN D JOHNSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

ALAN D JOHNSON

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 04/29/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order approving first account and report entered 08/29/16 for period 04/04/14 to 05/19/15.
2. Conservatee passed away on 12/16/16.
3. Need Second and Final Accounting for pre-death and post-death accounting periods per Pr. C. §2620.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 25

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01755

VACATED

CASE NAME: MTR OF PETRA SORIA

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

PETRA SORIA

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

FUTURE HEARING DATES:

06/25/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 26

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02756

CASE NAME: MATTER OF CAROLYN CONSTANTINE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

CAROLYN CONSTANTINE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 04/15/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Eighth Account entered 09/07/16 for period 07/01/15 to 05/31/16.
2. Proof of Service of Petition for Order that Conservator not Present Account filed 07/20/17; however, ROA does not reflect petition having been filed as of date of review. Need same.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02773

CASE NAME: MATTER OF ELIZABETH BARELA

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
ELIZABETH BARELA

(CPE)...COUNTY COUNSEL
(CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/10/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Tenth Account entered 02/14/17 for period 07/01/15 to 06/30/16.
2. Need 11th Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 28

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03163

CASE NAME: MTR RE KIMBERLY EWERS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

KIMBERLY EWERS

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 06/23/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account Current entered on 07/18/16 for period 05/30/14 to 06/30/15.
2. Need Second Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 29

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3947

CASE NAME: IN THE MATTER OF HOWARD KELVIN BOARD

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MELVIN L FRIEDLAND	(PET)...MELVIN L FRIEDLAND
HOWARD BOARD	(CEP)...HARTNELL LAW GROUP

XREF: CIVDS1105574 (COSB v. Ramirez)

GENERAL INFORMATION:

Continued from 06/26/17 to clear notes re receipt from SSA.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Sixth and Final Accounting entered 06/20/16.
2. Need receipt from Social Security Administration.
3. Ex-parte Petition/order for final discharge returned for corrections.

RECOMMENDATION:

Need to clear notes 2-3. Inquire status.

(nb/lh)

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5512

CASE NAME: IN THE MATTER OF CLAUDIA SANDERS

HEARING:

TWENTY-NINTH AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CLAUDIA SANDERS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Conservatee died on 06/15/14.

Continued from 06/26/17. Court clears probate note 6 re notice to department of health services; court finds that department of health services knows of the proceedings- probate note 6 is cleared on the record.

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

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

1. Accounting period covers 04/23/14 to 03/16/15 (pre & post death periods).
2. Assets on Hand \$1,843.47 in cash.
3. Public Guardian and County Counsel request compensation and fees of \$650.00.
4. Property on Hand at Beginning of account period, reflected on Summary of Account [LF, p. 11] does not begin with assets on hand at end of prior account period. Need corrected Summary of Account.
5. Petitioner requests authorization allowing payment of the remaining balance in the estate to the CA Dept. of Health Services.
6. Proposed Order 02/02/17 reflect incorrect starting balance and discharges upon filing of documents instead of upon entry of final discharge order.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approves, set next hearing for receipts and final discharge for **07/02/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 31

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5677

CASE NAME: IN THE MATTER OF MAX ERNEST MANIG

HEARING:
Accounting Review

	COUNSEL:	
PUBLIC GUARDIAN		(CPE)...COUNTY COUNSEL
MAX E MANIG		(CEP)...HARTNELL LAW GROUP
BRYAN C HARTNELL		(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire 03/17/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 15th Account entered 06/30/17 for period 07/31/14 to 08/31/15.
2. Need 16th Account Current or Waiver.

RECOMMENDATION:
Inquire status.
(lh)

Future Hearing: 10/30/17: 2nd Account & Report of Public Guardian of SNT & Petition for Allowance of Fees

Superior Court of Calif, County of San Bernardino

Page: 32

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

DATE: 08/28/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS9191

CASE NAME: MTR OF KARENE O'DONNELL-STEVENSON

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
KARENE O'DONNELL-STEVENSON (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire **08/12/17**.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 21st Account entered 04/10/17; account or waiver of account now due beginning 02/01/16.

RECOMMENDATION:
Inquire status.

(nb/lh)

/// Check minutes from 08/11/17 Petition to Re-Establish Conservatorship

Superior Court of Calif, County of San Bernardino

Page: 33

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **MISC.**

DATE: 08/28/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1501083

CASE NAME: KENNETH AARON RAINS

SEE ALSO 34

HEARING:

Hearing Re: COURT TRIAL (FIRST DAY OF TRIAL)

COUNSEL:

TERRY ANDERSON

(PET)...TREVOR D MARTIN

KENNETH AARON RAINS

(DEC)...

BARBARA MOORE

(PET)...LINDA ROBERTS ROSS

SHELLIE DINNAUER

(PET)...LINDA ROBERTS ROSS

Court trial –no notes—JTD

(lh)

Future Hearings: 8/29/17-9/01/17: Court Trial

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

DATE: 08/28/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1501083

CASE NAME: KENNETH AARON RAINS

SEE ALSO 33

HEARING:

Hearing Re: Petition for WILL CONTEST AND PETITION FOR REVOCAT

COUNSEL:

TERRY ANDERSON	(PET)...TREVOR D MARTIN
KENNETH AARON RAINS	(DEC)...
BARBARA MOORE	(PET)...LINDA ROBERTS ROSS
SHELLIE DINNAUER	(PET)...LINDA ROBERTS ROSS

GENERAL INFORMATION:

Terry Anderson appointed Special Administrator on 04/21/16, no bond.

Terry Anderson appointed Administrator w/Will Annexed on 07/14/16, limited authority, no bond.

Continued from 10/24/16 at request of counsel as no agreement has been reached by the parties.

THIS CASE IS SET FOR HEARING ON Will Contest and Petition for Revocation of Probate of Purported Will by Shellie Dinnauer & Barbara Moore.

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

1. Proof of Service of Summons with affixed notice and acknowledgment of receipt filed 08/19/16 as to Terry Anderson, only. Need proof of summons as to father, Aaron Rains, per Pr. C. § 8271.
2. Shellie Dinnauer and Barbara Moore ["Contestants"] are Decedents sister and mother, respectively; persons interested in Decedent's estate; and contest admission of Decedent's purported will to probate in that the Decedent allegedly wrote a holographic will dated [LF, p.] 10/30/15, wherein, Decedent is alleged to have bequeathed his entire estate to Respondent, Terry Anderson.
3. Contestants maintain the probate of the document dated 10/30/15 purporting to be Decedent's will should be revoked on the following grounds; Undue influence over the Decedent as Respondent was caregiver to the decedent at the time the purported document is alleged to have been executed; incapacity due to the effects of narcotic medications; that the document purporting to be the holographic will is

not a document prepared and signed by the Decedent and the purported signature is not that of the decedent.

4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 1 then set for evidentiary hearing.

(nb)

Future Hearings:

08/29/17-9/01/17: Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100540

CASE NAME: ESTATE OF LILLIAN MORENO MALDONADO

HEARING:

Hearing re Final Discharge

COUNSEL:

ADRIAN MALDONADO

(PET)...BRYAN C HARTNELL

LILLIAN MORENO MALDONADO

(DEC)...

GENERAL INFORMATION:

Continued from 12/05/16, 02/27/17, 04/10/17 and 06/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON final discharge

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

1. Order Settling First and Final Account entered 12/28/15.
2. No receipt required. Sole heir.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200860

VACATED

CASE NAME: ALFRED JOHN PEARCE

HEARING:

Hearing re Final Discharge

COUNSEL:

DAVID PEARCE (PET)...PRO/PER

ALFRED JOHN PEARCE JR. (DEC)...

SHARON PEARCE (PET)...SELTERS & SELTERS

VICTIMS COMPENSATION AND GOVERNMENT CLAIMS (TP)...

Order for final discharge entered 08/03/17.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600774

CASE NAME: JANET LOUISE LAROCQUE

HEARING:

WAIVER OF Account and Report of CHRISTINA POE and Petition for allowance of fees filed.

COUNSEL:

CHRISTINA POE (PET)...JOSEPH HUNSUNG LEE
JANET LOUISE LAROCQUE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator w/WA, Christina Poe ["Petitioner"].

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

1. Beneficiaries waive bond.
2. Accounting period 10/31/15 to 06/30/17.
3. Assets on Hand \$535,723.04 consisting of \$65,723.01 in cash and remaining in real property.
4. Petitioner waives statutory and extraordinary compensation.
5. Attorney requests statutory fees of \$13,714.46. Calculated.
6. Petition does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614.
7. Need full legal description for real property per Local Rule 20-610 via verified supplement.
8. Need addresses of beneficiaries receiving real property via verified supplement.
9. Petitioner requests exoneration of bond upon filing of receipts. However, bond is not exonerated until entry of a final discharge order.
10. Proposed Order 07/21/17 does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614; exonerates bond; and does not include addresses of beneficiaries receiving real property.

RECOMMENDATION

Need to clear notes 6-8 then Court's discretion. If approved, set next hearing for receipts and final discharge for **09/10/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600996

CASE NAME: ROBERTA NICASIO

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

ELIZABETH SALGADO	(PET)...	PRISCILLA HERNANDEZ
ROBERTA NICASIO	(DEC)...	
MINOR CHILDREN	(BEN)...	

GENERAL INFORMATION:

Continued from **11/28/16**. Court appoints Attorney Donn sue Ortiz as the GAL for the minor heirs.

Continued from **02/06/17, 04/10/17 and 06/19/17**.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Elizabeth Salgado, daughter

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

1. All heirs waive bond. However, need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111. Alternatively, require bond of \$121,000.
2. Duties and liabilities is missing telephone number of petitioner. Need same.
3. Notice of Petition to Administer Estate with proof of service filed on 06/16/17; however the date of mailing and date of signature cannot be a date in the future as 12/28/17 has not occurred. Need corrected notice.
4. The petition does not address whether full or limited authority is being requested; however, it is checked as **full** on the order. Court may wish to clarify on record, or in alternative need verified supplement.
5. **Report of GAL Donnasue Smith Ortiz filed on 06/15/17.**
6. ~Proposed Form Order 10/05/16.

RECOMMENDATION:

Need to clear notes 1-3. Court's discretion re: bond and note 4. If approved, set future hearing for Accounting/Status Review on **11/05/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb/lh/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700254

CASE NAME: RICHARD BEN L'ITALIEN

HEARING:

OSC re: Dismissal of Ptn for Letters of Administration filed by
ROBERT L GARCIA

COUNSEL:

ROBERT L GARCIA (PET)...PRO/PER
RICHARD BEN L'ITALIEN (DEC)...

GENERAL INFORMATION:

Continued from 06/19/17. No appearance. Court sets matter for OSC re dismissal of petition for failure to prosecute. Notice given by Judicial Assistant

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** of Petition for Letters of Administration with full authority under IAEA by step-father, Robert L. Garcia ["Petitioner"].

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

1. Petition alleges all heirs waive bond. Need Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111, by surviving spouse, Jessica L'Italien. Estimated estate valued at \$180,000.
2. Need proof of publication.
3. Question whether decedent was survived by biological father or relatives to the second degree for notice purposes? Need verified supplement.
4. Need Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 03/22/17.

RECOMMENDATION:

Court's discretion re OSC.

Need to clear notes 1-4 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **09/10/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700514

CASE NAME: BYRON ACUNA

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ERWIN ALAN ACUNA (PET)...BANKS GARCIA & JANIS
BYRON ACUNA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Erwin Acuna, son/nominee

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

1. All heirs waive bond. The estate consists of \$250,000 of which \$100,000 is personal property.
2. The petition for probate is on an outdated form. JTD.
3. ~Proposed Form Order: 05/24/17

RECOMMENDATION

RFA subject to court's discretion re bond and note 2. If approved, set Accounting/Status Review for **11/05/18**. 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: 7

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700515

CASE NAME: Gladys May Schlinkert

HEARING:

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

COUNSEL:

JACK E SCHLINKERT (PET)...THE ELDER & DISABILITY LAW FIR
GLADYS MAY SCHLINKERT (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full
Authority under IAEA by Jack Schlinkert, son/executor

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

1. Will waives bond and all beneficiaries waive bond. The estate consists of
\$292,000 in real property.
2. Need proof of publication
3. ~Proposed Form Order: 05/24/17

RECOMMENDATION

RFA subject to note 2. Court's discretion re bond. If approved, set Accounting/Status
Review for **11/05/18**. 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: 8

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

DATE: 08/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION
WITH WILL ANNEXED

COUNSEL:

ANGELICA GUERRA
NATALIA GUERRA

(PET)...E. MARIE HENNING
(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of Will, Letters of Administration with Full Authority under IAEA by Angelica Guerra (nominee/great-granddaughter)

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

1. Will waives bond; however, not as to petitioner Angelica Guerra. Suggested bond \$138,000 based on estimated net value of real property. JTD
2. Petitioner seeks appointment as executor in item 2b of petition; however she is not a named executor. Need verified supplement clarifying appointment.
3. Need Notice of Petition to Administer Estate with proof of service (form DE-121).
4. Need Proof of Publication.
5. Need Receipt of will lodged with court.
6. ~Proposed form Order/Letters: 07/12/17

RECOMMENDATION:

Need to clear notes 2-5. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **11/05/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

CONSERVATORSHIPS

DATE: 08/28/17 TIME: 8:35 DEPT: S36P

CASE#: CON PS1300305

CASE NAME: FRANK JOSEPH ROCCO

SEE ALSO 10 11

HEARING:

Motion Re: RECONSIDERATION;AND MEMO OF POINTS AND AUTHORITIES *

Filed by Petitioner KERRI BOOKER

COUNSEL:

KERRI BOOKER

(CPE/CE)...FERNANDO J BERNHEIM

FRANK JOSEPH ROCCO

(CTE/CEE)...

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300305

CASE NAME: FRANK JOSEPH ROCCO

SEE ALSO 9 11

HEARING:

First and final Account and Report of KERRI BOOKER and Petition
for allowance of fees filed.

COUNSEL:

KERRI BOOKER

(CPE/CE)...FERNANDO J BERNHEIM

FRANK JOSEPH ROCCO

(CTE/CEE)...

See next matter #11.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300305

CASE NAME: FRANK JOSEPH ROCCO

SEE ALSO 9 10

HEARING:

Hearing Re: FIFTH AMENDED FIRST AND FINAL ACCOUNT AND RPT

COUNSEL:

KERRI BOOKER (CPE/CE)...FERNANDO J BERNHEIM
FRANK JOSEPH ROCCO (CTE/CEE)...

GENERAL INFORMATION

Kerri Booker appointed temporary Conservator person and estate on 12/10/13.

Conservatee died on 03/10/14.

Continued from **01/27/15, 03/03/15 and 05/05/15**. Counsel to address what the assets are currently in the estate and who the administrator of the estate will be.

Continued from **07/07/15 and 10/06/15** at request of counsel. Notice to be given by Attorney Fernando J Bernheim.

Continued from **12/15/15** for review of second amended account.

Continued from 02/23/16. Rosalie Rocco and Corin Hayes signed a release of interest.

Court deems this sufficient and will not require assignments from them. Matter is continued for an amended accounting to be filed.

Continued from **06/30/16, 10/26/16 and 01/04/17**. Patrick Wright as referee. Counsel to file an accounting for the temporary conservatorship.

Continued from 06/12/17. Non-appearance by the Attorney Fernando Bernheim.

Court imposes sanctions of \$250.00 as to Fernando Bernheim. Court orders payment to be made by the next hearing. The court may refer the matter to the Public Guardian if the accounting isn't cleared by the next hearing and appearance by counsel. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON **Fifth Amended (04/05/17)** First and Final Account for temporary Conservator Kerri Booker, sister.

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

1. Accounting period 12/10/13 – **12/10/15. Conservatee passed away on 03/10/14.**
2. Assets on hand is reflected as \$216,538 consisting of \$5,833.15 in cash and remaining in real and personal property. However, real property lost to foreclosure is not included as a loss on Summary of Account [LF, p. 8 to amended account filed

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.

- 04/05/417]; not reflected on any schedule(s); and should not be included as an asset on hand.
3. Petitioner waives compensation and waives accounting as she alleges she is sole heir (**see note 5**).
 4. Attorney does not request compensation.
 5. CI fees outstanding in the amount of \$230.70.
 6. Petition indicates personal property was transferred per Conservatee's wishes. Petitioner is allegedly sole heir; however, conservatee was survived by parents and a spouse. Petitioner is allegedly sole heir as mother and former spouse signed disclaimers of interest. Court to inquire whether conservatee's father is alive.
 7. Inventory and Appraisal filed 03/29/17, Attachment 2 [LF, p6] does not specify whether property is community or separate property and does not include license plate numbers.
 8. Petitioner requests bond in the amount of \$20,000 be exonerated upon filing of ex parte petition. However, this Court does not normally exonerate bond until the filing of receipts and entry of an Ex Parte Final Discharge Order.
 9. Petition indicates Conservatee has real property located in Ontario, CA, which was foreclosed on and sold by the bank. **Trustee's deed filed. [supp. 12/28 LFpg10].**
 10. Proposed Order received 02/27/15 indicates discharge and bond exoneration will be effective upon filing of receipt. Need corrected order to reflect discharge and exoneration upon entry of Ex Parte Petition for Discharge Order.

RECOMMENDATION:

Need to clear notes 2, 5 & 7. If approved, set hearing on the filing of receipts and final discharge for **09/10/18**.

(lc/nb/lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200195

CASE NAME: CATHY GARCIA

HEARING:

Hearing Re: Status on Special Needs Trust

COUNSEL:

EUSEBIA GARCIA

(CP)...PRO/PER

CATHY GARCIA

(CTP)...

No notes – Status
(lh)

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

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700135

CASE NAME: MTR REGINALD SHALESKI

HEARING:
Petition for Appointment of Conservator

COUNSEL:

CAROLE D JARICH	(CPE)...GEORGE F DICKERMAN
REGINALD SHALESKI	(CEP)...EDWARD B FISCHEL
LISA ANNE METZGER	(TP)...WILLIAM J BRUNICK

GENERAL INFORMATION

Ex Parte orders granted 04/20/17.

Continued from 06/12/17. Matter is continued for notice to Veterans Affairs to be given timely and Conservator Training Course to be completed. Referred to Court Investigator for investigation and report. Court is requesting the CI meet with Reginald Shaleski, Carole Jarich and Lisa Metzger.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by sister and nominee, Carole D. Jarich ["Petitioner"].

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

1. Petitioner has been nominated by Conservatee.
2. Section 4c to petition [LF, p5] re whether conservatee is a member of a federally recognized Indian tribe is blank. Need verified supplement.
3. Petitioner requests bond in the amount of \$561,000 be fixed (includes recovery). Appears sufficient.
4. Petitioner seeks Pr. C. § 2351-2358 powers to establish the residence of the conservatee.
5. Report by court-appointed counsel, Edward Fischel filed 06/08/17.
6. Court Investigator's Special Report filed 05/30/17. **Need CI report per 6/12/17 M/O.**
7. Notice of Hearing and proof of service as to Veteran's Affairs filed 06/14/17; however, a copy of petition was served with Notice. **Need proper service.**
8. Post move notice indicates Conservatee now resides in Riverside County. Suggest transfer to Riverside County. If granted, Court to set control date.
9. Proof of Completion of Conservatorship Class filed 07/06/17.
10. Return of Citation filed 06/07/17.

11. ~Proposed Form Order/Letters 04/13/17.

RECOMMENDATION:

Need to clear notes 6-7, \$561,000 bond. If approved, set hearing for Compliance Review for **04/02/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); 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 **11/05/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700140

CASE NAME: MTR OF JOSE MANUEL GARCIA SOTO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARICELA GARCIA (CP)...PRO/PER
JOSE MANUEL GARCIA SOTO (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION:

Continued from 06/19/17. Sherri L Kastilahn is appointed for Jose Manuel Garcia Soto.

Court relieved Counsel Sherri Kastilahn as parties speak Spanish. Attorney Jeanne Kennedy appointed for Jose Manuel Garcia Soto on 07/27/17.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother.

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

1. Proposed conservatee appears to be a minor (age 17). Court to inquire age of majority.
2. Proposed conservatee is developmentally disabled. Need report of Counsel Jeanne Kennedy.
3. Medical Capacity Declaration, sections 1-2 re physician's name and address is incomplete. Need complete form.
4. Need Inland Regional Center Report.
5. Need Certificate of Completion re Conservatorship Class.
6. Notice of Hearing does not include IRC. Need proper service.
7. No bond – person only
8. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the

right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.

9. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
10. Citation returned SERVED.
11. Court Investigator Report filed.
12. ~Proposed Form Order/Letters 004/17/17.

RECOMMENDATION:

Court to appoint counsel then need to clear notes 1-6. If approved, set hearing for Compliance Review for **04/02/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700246

CASE NAME: MTR OF NANCY MOLINA

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

MARIA G SALGADO

(CP)...PRO/PER

NANCY MOLINA

(CTP)...BROWN WHITE & OSBORNE, LLP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Conservatorship Management Conference for Limited Conservatorship, person only

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

1. Maria Salgado (mother) appointed limited conservator of the person of Nancy Molina, by Superior Court of Riverside County.
2. Matter was transferred from Riverside County as the conservatee resides and intends to continue to reside in Ontario, CA, San Bernardino County.
3. Last Court Investigator report filed on 05/18/17.
4. Does Court wish to request an IRC report?
5. Notice of Conservatee's Rights was filed 08/15/14, Determination of Conservatee's Level of Care was filed 10/31/14; however, it does not appear a Care Plan was ever filed. Need same.
6. Need amended Letters to reflect this county.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 08/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700274

CASE NAME: MARY DONLEY

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IRENE DONLEY-KIMBLE (PET)...HORSPPOOL & HORSPPOOL
MARY DONLEY (CEE)...

GENERAL INFORMATION

Ex parte orders granted on 07/24/17. Irene Donley-Kimble appointed Temporary Conservator of the person and estate, \$50,000 bond. Referred to Court Investigator for investigation and report.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Irene Donley-Kimble (daughter)

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

1. Temporary bond and Letters have not issued. Need same.
2. If general petition is approved, need \$50,000 bond for general conservatorship. Bond to be reviewed upon receipt of proposed conservatee's distribution from deceased husband's estate in WA.
3. Petition indicates proposed conservatee previously resided in her home in Seattle, Washington, which will be sold as part of her deceased husband's estate pending in Washington. Proposed conservatee is to be placed in an memory care facility. Need verified supplement clarifying when proposed conservatee was moved to California.
4. Petitioner alleges to be the agent under Power of Attorney for proposed conservatee. Need copy of Power of Attorney via verified supplement.
5. Petitioner seeks medical powers. Need Capacity Declaration.
6. Petitioner seeks dementia powers. Need appointment of counsel for report.
7. Need Certificate of Completion of the Conservatorship Training Class.
8. Need Court Investigator report.
9. Notice of Hearing and proof of service filed 07/19/17; however, a copy of petition was not served with notice. Need proper service per Pr. C. §1822.
10. Need return of Citation.
11. ~Proposed Form Order: 07/17/17

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.**

RECOMMENDATION

Need to clear notes 2-10. If approved, set hearing for Compliance Review for **04/02/18** for the filing of the required documents and hearing re Accounting Review for **11/05/18**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900650

CASE NAME: LINN WEISS DERICKSON

HEARING:

Hearing Re: FIRST AMENDED ACCOUNTING/ACCOUNTING REVIEW

COUNSEL:

LINN W DERICKSON JR	PET)...RICHARD G ANDERSON
LINN WEISS DERICKSON	(DEC)...
G. MITCHELL LIPPERT	(PET)...THOMAS W DOMINICK
JANET WHELAN	(APP)...ROBERT L KERN
MARY SUE DERICKSON	(OBJ)...KIBRE & HORWITZ LLP
JUDITH A HUGHES	(ALLAR, SHELTON & O'CONNOR)
KEITH S WALKER	(ALLAR, SHELTON & O'CONNOR)
UNITED STATES OF AMERICA	(THOMAS M WRIGHT).
JANET BENNINGHOFF	(HARTNELL LAW GROUP)
MARY SUE DERICKSON	(KIBRE & HORWITZ LLP)
AMERICAN CONTRACTORS INDEMNITY	(PRO/PER)

CCP170.6 FILED AS TO CYNTHIA LUDVIGSEN

XREF: FAMRS702581(Linn Derickson -v- Mary S Derickson)

GENERAL INFORMATION

Continued from 12/08/15, 05/09/16, 11/07/16 and 04/06/17. Court and Counsel agree this hearing should be a hearing on the amended first accounting. Written objections to that accounting are to be filed and served by 5/15/17 and any reply thereto to be filed by 6/16/17. The Court orders an amended accounting be filed by 7/28/17. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **Amended (07/28/17)** First Account and Petition for Fees by son, Linn W. Derickson, Jr. ["Petitioner"].

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

1. Accounting period 08/13/09 to **06/30/17**.
2. Assets on Hand **\$3,336,774.21**, consisting of cash in amount of **\$236,774.21 in cash and remaining in real properties and ongoing business.**

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.

3. No compensation requested.
4. Petition indicates the estate is not in a condition to be closed at this time as there are tax returns which must be completed, along with estate proceedings in the State of Ohio and State of Indiana, all of which cannot be completed until proceedings are concluded. Further, the estate is obligated, pursuant to the settlement agreement reached in the dissolution proceedings to pay Mary Sue Derickson certain sums of money over the next 3 years. **Also at this time, Janet Whelan has filed an Appeal in this matter with regard to the Court's Order and Finding re: Determination of Entitlement to Estate Distribution which is currently pending.**
5. **Objections filed 05/15/17 by Janet Whelan.**
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION: Matter is contested.

Need to address note 5. If approved, set next hearing for Accounting Review for **08/27/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules. (vet/dl/lc/nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500518

CASE NAME: MTR OF RUBEN QUEZADA ALVARADO

HEARING:
Accounting Review

COUNSEL:

GARY G QUEZADA SR (PET)...RONALD W ASK
RUBEN QUEZADA ALVARADO (DEC)...

GENERAL INFORMATION:

Continued from 06/19/17. Hearing continued for notice to be given.

THIS CASE IS SET FOR HEARING ON Status Report (filed 12/13/16) by Administrator, Gary G. Quezada ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as he is attempting to negotiate a buy-out of the Ojai property and if unsuccessful, intends to file a partition action, to force the sale of the property, to obtain the proceeds owed to the estate. Further, petitioner indicates he has commenced a probate action in LA County of his late brother's estate in order to seek restitution from his estate for promissory notes owed to this estate amounting to at least \$100,00.
2. Petitioner does not request a specific time in which to close estate. Suggest 12 months.
3. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for Accounting Review on **12/12/17**.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700270

CASE NAME: THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG

HEARING:

Hearing Re: RECEIPT OF BOND/DECLARATION

COUNSEL:

BRANDY MOODY (PET)...FARHAT LAW FIRM, APC
THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG (TRU)...
MINOR CHILDREN (MIN)...LENITA A SKORETZ

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond/Declaration.

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

1. Matter set at 06/19/17 hearing, wherein, the Court ordered that petitioner file a bond in the amount of \$75,000 or that net proceeds from sale remain in escrow account pending further order of the Court. Need same.
2. Counsel to decide how they will proceed protecting minors' money; whether it be by trust, blocked account, etc. Need same.
3. Notice to be given by Ms. Farhat.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

07/23/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700570

CASE NAME: MTR OF PAULA HENDRICKS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

ROSS HENDRICKS (PET)...THE WERNER LAW FIRM
PAULA HENDRICKS (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner is sole heir and waives bond. Net value of the estate consists of \$90,014.64 in real property.
2. ~Proposed Form Order: 07/12/17

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **11/05/18**. 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: 5

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700577

CASE NAME: MARGARET GLENNA HARRIS

HEARING:
Petition for LETTERS OF ADMINISTRATION

COUNSEL:

MARGARET G REED (PET)...HAROLD CHRISTOPHER HERITAGE
MARGARET GLENNA HARRIS (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner is sole heir and waives bond. Net value of the estate consists of \$128,299.31 in real/personal property.
2. Notice to administer estate filed on 06/29/17; however the case number is inaccurate as the case number is PROPS1700577 and not PROPS170057789. Need corrected notice.
3. Proof of publication filed on 07/26/17; however, it has the same inaccurate case number as the notice. Need corrected publication.
4. ~Proposed Form Order: 06/13/17

RECOMMENDATION

Need to clear notes 2 & 3. Court's discretion re bond. If approved, set Accounting/Status Review for **11/05/18**. 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: 6

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700578

CASE NAME: ELIZABETH SPROUL ANDREWS

HEARING: Petition for LETTERS OF ADMINISTRATION

COUNSEL:

LISA ANDREWS (PET)...PRO/PER
ELIZABETH SPROUL ANDREWS (DEC)...

GENERAL INFORMATION

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

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

1. All heirs waive bond. The estate consists of \$250,000 in real property; however, the filed Inventory and Appraisals show \$254,000 in real property.
2. Section 2a of the petition requests that the decedent's will and codicils be admitted to probate but petition is for letters of administration. Court to clarify if there is a will.
3. Section 5 is incomplete as to whether there is or is not a spouse. Does court wish to clarify on record or in alternative; need verified supplement.
4. Notice to Petition to Administer Estate and proof of service filed on 06/30/17; however the proof of service is incomplete as to the date it was mailed and the place it was mailed from. Need corrected notice.
5. Need proof of publication
6. ~Proposed Form Order: 06/13/17

RECOMMENDATION

Need to clear notes 4 & 5. Court's discretion re bond and notes 2 & 3. If approved, set Accounting/Status Review for **11/05/18**. 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: 7

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700631

CASE NAME: MARIE LEMMONS LIVING TRUST, DATED JUNE 2012

SEE ALSO 10 11

HEARING:

Hearing Re: PETITION TO APPOINT CHRISTIE DAVIDSON ADAMS

COUNSEL:

HOLDEN BOEHM	(PET)...KEYSTONE LAW GROUP
SHAANA BOEHM	(PET)...KEYSTONE LAW GROUP
NICOLAS BOEHM	(PET)...KEYSTONE LAW GROUP
MARIE LEMMONS LIVING TRUST	(TRU)...

XREF: PROPS1700217(Living Trust of Marie Lemmons)

Currently under review by Legal Research.
(LR)

Notice:

Need Notice of Hearing with proof of service to William R. Boehm, purported Successor Trustee in his individual capacity; J. David Horspool, Attorney for William R. Boehm; Camil Boehm, grandchild, contingent beneficiary; Jane Lemmons, Treasurer of the Gates of Spain Mobile Home Park; Irene Conejo; and Christie M. Davidson Adams (PPF).

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS05470

CASE NAME: ALEXIA MARQUEZ SETTLEMENT TRUST

HEARING:
Accounting Review

COUNSEL:

MELODIE Z SCOTT (PET)...HORSPOOL & HORSPOOL
ALEXIA MARQUEZ SETTLEMENT TRUST(TRU)...
PACIFIC WESTERN BANK (TP)...HEMAR, ROUSSO & HEALD, LLP

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

GENERAL INFORMATION:

Continued from 06/19/17. Court orders that the order on 11th accounting be filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order settling 11th account current and report of trustee was filed on 01/23/17.
Further order on 11th account current returned for corrections on 01/26/17. Does Court wish to require an amended order that contains the information from the minute order of 01/23/17? JTD
2. 11th accounting of trustee, Melodie Scott, approved on 01/23/17.
3. 12th account now due beginning 01/01/16.

RECOMMENDATION:

Inquire status of accounting and Court's discretion re note 1.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/28/17 TIME: 8:30 DEPT: S37P

CASE#: VPR VS003090

CASE NAME: ESTATE OF DOROTHY M PATRICK

HEARING:

Accounting Review

COUNSEL:

LISA DIANE HOFFMAN

(PET)...HARTNELL LAW GROUP

DOROTHY M PATRICK

(DEC)...

JEANNE E. KENNEDY

(TP)...CALDWELL, KENNEDY & PORTER

GENERAL INFORMATION:

Continued from **04/14/16**. Counsel to subpoena someone from the Assessor's Office to be present at the next hearing date of 10/17/16.

Continued from 10/17/16, 12/19/16, 03/27/17 and 06/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 6th Report of Status of Administration by Lisa Hoffman, executor, approved on 04/14/16.
2. Need accounting filed.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 08/28/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700217

CASE NAME: MTR OF LIVING TRUST OF MARIE LEMMONS

SEE ALSO 7 11

HEARING:

Hearing Re: STATUS OF MEDIATON/DISCOVERY

COUNSEL:

HOLDEN BOEHM	(PET)...KEYSTONE LAW GROUP
SHAANA BOEHM	(PET)...KEYSTONE LAW GROUP
NICOLAS BOEHM	(PET)...KEYSTONE LAW GROUP
LIVING TRUST OF MARIE LEMMONS	(TRU)...
WILLIAM BOEHM	(TP)...DAVID J HORSPOOL

XREF: PROPS1700631(Marie Lemmons Living Trust, Dated June 2012)

No notes – Status/Discovery
(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 08/28/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700217

CASE NAME: MTR OF LIVING TRUST OF MARIE LEMMONS

SEE ALSO 7 10

HEARING:

Petition for TO DETERMINE THE VALIDITY OF THE PURPORTED LIVING
TRUST OF MARIE LEMMONS ETC

COUNSEL:

HOLDEN BOEHM	(PET)...KEYSTONE LAW GROUP
SHAANA BOEHM	(PET)...KEYSTONE LAW GROUP
NICOLAS BOEHM	(PET)...KEYSTONE LAW GROUP
LIVING TRUST OF MARIE LEMMONS	(TRU)...
WILLIAM BOEHM	(TP)...DAVID J HORSPOOL

XREF: PROPS1700631(Marie Lemmons Living Trust, Dated June 2012)

Currently under review by Legal Research.
(LR)

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

HEARING:

Petition for ATTORNEY FEES FILED BY GUARDIAN AD LITEM FOR
MARIA DE JESUS EQUI

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)...JACK B OSBORN
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...MATTHEW E. SHEASBY
COSME EQUIHUA	(PRO/PER)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Matthew E. Sheasby, ESQ

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

1. Petitioner Matthew E Sheasby, Esq. was appointed Guardian ad Alitem for Maria De Jesus Equiha on 10/22/13.
2. Petition requests attorney fees of 54.8 hours at \$350 per hour totaling \$25,823.48, plus \$700 for 2 hours of additional anticipated attorney time. [Petition,07/14/17,LFpg4].
3. Declaration in Support of petition filed 07/14/17.
4. ~Proposed Order: 07/14/17

RECOMMENDATION

Court's discretion.

(lh)

Future Hearings:

9/14/17: 3rd Account & Report, 6/19/18: Hearing Re: Accounting Review for Ms. Millan

03/06/18: Accounting Review

06/19/18 Accounting Review for Ms. Millan

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600108

CASE NAME: MARCUS ANTHONY PARMA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SUZETTE J PARMA

COUNSEL:

SUZETTE J PARMA

(CP)...PRO/PER

MARCUS ANTHONY PARMA

(CTP)...JENNIFER M DANIEL

XREF: SCVSS95050 (In Re: Salazar)

GENERAL INFORMATION

Continued from **03/06/17**. Court orders Suzette J. Parma to file a report with San Bernardino Police regarding the lost money. Suzette J. Parma is also to file a report with Omni-Trans today 3/6/17. Suzette Parma is ordered to repay the \$9011.77 at the rate of \$100 a month until paid in full. Payment need to be mailed to Ms. Daniel's office, check or money order no cash. Payments to start on April 10th 2017.

Continued from 06/19/17. Final Inventory and Appraisal to be filed.

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

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

1. Suzette J. Parma, mother, appointed Limited Conservator of the person and estate, on 12/29/16 (amended), no bond
2. Notification of Conservatee's Rights filed 02/23/17; however the proof of service is incomplete as to the date mailed. Need corrected notice.
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).
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

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.**

RECOMMENDATION:

Need to clear notes 2-7. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655

(nb/ww)

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

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600168

CASE NAME: MTR OF JESSE CHARLES WHITE

HEARING:

Petition for APPOINTMENT OF PROBATE CONSERVATOR OF THE PERSON
AND ESTATE

COUNSEL:

LINDA CHARLENE WHITE (PET)...LAW OFFICES OF LINDA ROBERTS-R
JERRY ALLEN WHITE (PET)...LAW OFFICES OF LINDA ROBERTS-R
JESSE CHARLES WHITE (PCE)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from **08/15/16** at request of counsel. Mitchell I Roth appointed. Notice by
Judicial Assistant.

Continued from 10/31/16. Return of citation waived as proposed conservatee is present
in court this morning. Further appearances waived. Ex parte request to authorize doctor to
complete capacity declaration is approved. Ex parte petition for temporary
conservatorship may be filed to authorize petitioners to arrange medical treatment.
Notice to be given by Ms. Roberts-Ross.

Continued from **01/09/17**. OSC re Sanctions set for failure to obtain Capacity Declaration.
If Capacity Declaration is filed by 3:00pm on 1/25/17, the hearing will be taken off
calendar.

Continued from **01/30/17**. Matter continued for Ms. Roberts-Ross to have Dr.
Deborah Graham personally served with a citation ordering her to be present on 3/20/17.
Should Dr. Graham fail to appear, a bench warrant may be issued.

Continued from 03/20/17. Deborah Graham is not present as ordered. Citation as well
as minutes from the last hearing were served on Dr. Graham. The Court
issued a bench warrant for Deborah Graham's arrest. Counsel to file an attorney fee
declaration for expenses incurred while attempting to obtain
capacity declaration. Bench Warrant Issued for Deborah Graham. Bail set
at 10,000..MAY NOT FORFEIT. Notice to be given by Ms. Roberts-Ross.

**Continued from 06/12/17. Capacity Declaration has been prepared by IRC doctor but
front page needs to be signed.**

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person and estate, by paternal grandparents.

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

1. Petitioners request bond waived as it consist solely of public benefits and petitioners are already the rep-payees. Court may wish to inquire the necessity of estate powers. Alternatively, bond may be waived per Pr.C.§2628. JTD
2. Petitioners request medical powers and specific orders under §§ 2351-2358. **Capacity Declaration filed 06/21/17; however, form is not dated at signatures. Need completed form.**
3. Proposed conservatee is developmentally disabled. If court determines proposed conservatee is receiving benefits from IRC, need proof of service as to the IRC and Court may request an IRC report. IRC report filed 08/09/16.
4. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship. Report by Counsel, Mitchell I. Roth, filed 10/27/16.
5. Court Investigator report filed 08/08/16.
6. Certificates of Completion of the Conservatorship Training Class filed 10/24/16.
7. Proof of Service of served citation filed 02/21/17.
8. Declaration by Attorney Linda Roberts Ross in support of request for fees filed 05/01/17. Petition alleges as a direct result of Dr. Graham's repeated refusal to complete the court-required Capacity Declaration for Jesse, who is Dr. Graham's patient, her clients have had to incur unnecessary attorney's fees in the sum of approximately \$3,434.00 and court filing fees and service fee costs totaling \$455.00. Billed at \$300 to \$350/hour for attorney time and \$175/hour for paralegal time. Need itemization via verified supplement.
 - a. Paralegal rate exceeds community standards not exceeding \$150/hour. JTD.
9. Declaration of Linda White in support of attorney fees filed 05/01/17.
10. Declaration of Mitchell I Roth re Attorney's Fees Incurred filed 06/01/17.
11. ~Proposed form order:

RECOMMENDATION:

Court's discretion re Sanctions.

Need to clear note 2. If approved, set hearing for Compliance Review for **04/02/18** for the filing of the required documents and hearing re Accounting Review for **11/05/18**. Any accounting to be filed 30 days in advance.

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

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700158

CASE NAME: KEILA BOTHI

HEARING:

Petition for Appointment of Conservator

COUNSEL:

AMERICA BOTHI (PET)...PRO/PER
KEILA BOTHI (CEE)...SANDY L. TURNER

GENERAL INFORMATION:

Continued from 06/19/17. IRC report to be filed. Court grants Court Investigator's request for continuance. Attorney Sandy L Turner appointed Counsel for Keila Bothi. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, America Bothi ["Petitioner"].

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

1. Petition indicates proposed conservatee is 17 years old but also states 18th birthdate is on 03/31/17. Court to confirm age of proposed conservatee.
2. Proposed conservatee is developmentally disabled. Need report of Counsel Sandy Turner.
3. Medical Capacity Declaration filed 04/528/17 is not signed by physician at page one. Need complete capacity declaration.
4. Need return of Citation.
5. Court Investigators Referral Report is not signed. Need same.
6. Need Court Investigator Report.
7. Need Inland Regional Center Report.
8. **Notice of Hearing with proof of service filed 06/06/17 as to Inland Regional Center; however, a copy of petition was not served with notice and only 9 days' notice was given. Need proper service per Pr. C. §1822(e).**
9. Proof of Completion of Conservatorship Class filed 06/15/17.
10. No bond – person only
11. Petitioner requests Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited

conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.

12. Petitioner requests powers to consent or withhold consent to the marriage of, or the entrance into a registered domestic partnership by the limited conservatee and to control limited conservatee's social and sexual contacts and relationships.

13. ~Proposed Form Order/Letters 05/10/17 & 06/06/17.

RECOMMENDATION:

Need to clear notes 1-8. If approved, set hearing for Compliance Review for **04/02/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb/lh)

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

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS717

CASE NAME: IN THE MTTR OF SHAREEN A BRITTAIN

HEARING:

THIRD Account and Report of DAVID L BATES and Petition for allowance of fees filed.

COUNSEL:

CHARLES GRAY	(PET/CP)...PRO/PER
SHAREEN ANN BRITTAIN	(PCE/CEP)...JENNIFER M DANIEL
DAVID L BATES	(PET/TEE)...PATTERSON HANNA & ASSOC
SHAREEN ANN BRITTAIN TRUST	(TRU)...
CONNIE GRAY	(CP)...PRO/PER
JENNIFER M. DANIEL	(PET)...JENNIFER DANIEL

Waiver of Court Fees and Costs filed by CHARLES GRAY is GRANTED
TOTAL FEES WAIVED TO DATE \$355.00

GENERAL INFORMATION:

Continued from 06/19/17 at request of counsel. Notice given by Ms. Miller.

THIS CASE IS SET FOR HEARING ON Third Account Current filed by David L. Bates, CPA/Trustee of the Shareen Ann Brittain Trust

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

1. Accounting covers 01/01/15 to 12/31/16.
2. Assets on hand: \$1,213,578.63 (consisting of securities and one annuity)
3. Petitioner requests the Court ratify, confirm and approve trustee fees totaling \$12,388.25 as set forth above. JTD.
 - a. Petitioner states that he charges the trust for one hour of time each month for administration. Petitioner requests that the court approve trustee fees incurred during this report period totaling \$4,357.50. Billed at up to 2% of the trust estate. Need itemization together with hourly rate for each service provided via verified supplement.
 - b. For annual accounting, other matters and income tax return preparation, fees are paid based on time charges incurred. The Trust "Buys" all services, including Trustee time charges from Bates Coughtry Reiss LLP which allows the Trust to receive the benefit of the Firm's liability policies, with no additional cost

to the Trust. Trustee paid to Bates Coughtry Reiss LLP for services performed \$8,000.75.

4. Petitioner requests the Court ratify, confirm and approve payment of attorneys' fees in the amount of \$19,657.77 for the accounting period. JTD.
 - a. Petitioner paid a total of \$7,090.27 to Patterson Law firm APC for legal services rendered to the Trust over the 2 year period of the account. Invoices affixed [LF, p. 40-56]
 - b. Petitioner paid a total of \$12,567.50 to Attorney Jennifer Daniel for legal services rendered to the Trust over the 2 year period of the account pursuant to judgment entered on 09/28/15.
5. Need bank/financial statements per Local Rule 20-908.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 5 then Court's discretion. If approved, set next accounting period for the SNT for **02/26/18** Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 08/28/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02769

CASE NAME: MTR OF JOHN H MIKEASKY

HEARING:
Accounting Review

COUNSEL:

JOHNNY MIKEASKY (CPE/CP)...JAMES B CHURCH
JOHN H MIKEASKY (CEP/CTP/CEE)...
VISTA PACIFICA ENTERPRISES (PET)...TYLER & WILSON

XREF: SCVSS120419 (*Mikeasky -v- Diamond-Mikeasky*)

GENERAL INFORMATION

Continued from 07/06/17. The Court approved that the accounting would be set for 8-28 if filed on 07/06/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 7th Account of Johnny Mikeasky, son, approved on 05/04/17.
2. Need 8th Account beginning with 02/22/16.

RECOMMENDATION

Inquire status of accounting.

(lc/ww)