



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 09/05/17**

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

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

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

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

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

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

nb0814/0830

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 09/05/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS0800010

CASE NAME: MARY MARGARET ROWE

HEARING:

Accounting Review

COUNSEL:

ETHANAC ROADINVESTORS, A LIMIT

JOHN M BYLSMA

JOHN M BYLSMA

MARY MARGARET ROWE

(TP )...DENNIS K HASTY

(PET)...ALLARD, SHELTON &

(PET)...KEITH S WALKER

(DEC)...

**CCP170.6 filed as to CYNTHIA LUDVIGSEN**  
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Second Status Report entered 036/04/16; accounting now due.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500951

CASE NAME: CHARMIAN PATRICIA GOULD

HEARING:

Probate status report filed.

COUNSEL:

CHARMIAN PATRICIA GOULD (DEC)...  
SCOT MCKONE (PET)...IGNAZIO FICARA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report filed 06/07/17 by Executor. Scot McKone [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 the IRS is still reviewing the tax return filed for the estate. The closing date for review of the return by the IRS is expected to be 11/22/17. After 11/22/17, the return will be accepted as filed and no further action will be necessary on behalf of the estate.
2. Petitioner requests an additional 8 months to close the estate. Suggest 12 months.
3. ~Proposed Order 06/07/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **06/19/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/05/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600423

CASE NAME: MTR OF JOYCE LOUISE MOORE

HEARING:

Accounting Review

COUNSEL:

JOYCE LOUISE MOORE

(DEC)...

LIZA S MARTINEZ

(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by LIZA S MARTINEZ is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 06/28/16, full authority, no bond.
2. No accounting or status report of administration. **Receipts and purported accounting along with status report on LA form filed. Need proper accounting to comply with Pr. C. §1060 et seq.**

RECOMMENDATION:

Need proper accounting.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601211

CASE NAME: DONNA LEE JEWITT  
HEARING:  
Hearing Re: PRELIMINARY DISTRIBUTION OF ESTATE

COUNSEL:

DONNA LEE JEWITT (DEC)...  
NOAH B BENTON (PET)...KYLE A PATRICK

GENERAL INFORMATION:

Ex Parte orders granted 08/16/17.

THIS CASE IS SET FOR HEARING ON Petition for Preliminary Distribution of Estate by Administrator, Noah B. Benton, Esq. ["Petitioner"].

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

1. Decedent left an estate plan with a pour-over will leaving the entirety of her estate to The Donna Lee Jewitt Trust dated 03/22/13 ["Trust"]. Petitioner is the Successor Trustee of the Trust. Petitioner, as Successor Trustee of the Trust, consents to the Petition for Preliminary Distribution.
2. Final Inventory and Appraisal reflects total of \$380,342.63 in securities.
3. Petitioner requests authority, as Administrator of the Estate, to make a partial distribution in the amount of \$120,000 to the Trust which equals to 31.5504% and costs of this proceeding to be paid by the estate.
4. The aggregate of all property distributed under such a petition shall not exceed 50% of the net value of the estate. Net value is calculated as all inventory and appraisals minus all creditors' claims and lien and encumbrances recorded or known by the personal representative. Pr.C. § 11623(a)(2).
5. The property remaining in the Estate after proposed preliminary distribution will be approximately \$260,342.63.
6. ~Proposed Order 07/20/17.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

04/24/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

**SEE ALSO 3C**

HEARING:

Hearing Re: Amended petition for probate filed 05/17/17

COUNSEL:

ANITA RENEE MARTINEZ (PET)...PRO/PER  
LAWRENCE DE LA ROSA HERNANDEZ (DEC)...

See next matter #3C.  
(nb)

Future Hearing:

09/12/17 Hearing re: Amended petition filed on 03/30/17

Superior Court of Calif, County of San Bernardino

Page: 3C ADD ON

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

**SEE ALSO 3B**

HEARING:

OSC re: Dismissal of Petition filed by ANITA RENEE MARTINEZ

COUNSEL:

ANITA RENEE MARTINEZ (PET)...PRO/PER  
LAWRENCE DE LA ROSA HERNANDEZ (DEC)...

GENERAL INFORMATION:

**Set at 08/08/17 hearing. No appearance. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal on SECOND AMENDED** Petition (filed 05/17/17) for Probate, Letters Testamentary with Full Authority under IAEA by Anita Renee Martinez (daughter/executor)

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

1. Second amended petition filed 05/17/17 appears to be identical to the first amended petition filed 03/30/17. Section 5 (7) and (8) is incomplete as to issue of a predeceased child. Need verified supplement.
2. Petition does not include a copy of decedent's will dated 02/18/16. Need same.
3. Need receipt for lodging of original will.
4. Will waives bond. Alternatively, require \$296,000 bond.
5. Need Notice of Petition to Administer Estate with proof of service (form DE-121).
6. Need Proof of Publication.
7. Proof of Subscribing Witness filed 03/30/17 is signed by a notary. Need proper Proof of Subscribing Witness, signed by a subscribing witness.
8. ~Proposed form Order/Letters: 03/30/17

RECOMMENDATION:

Need to clear notes. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **10/16/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

Future Hearing:

09/12/17 Hearing re: Amended petition filed on 03/30/17

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Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700083

CASE NAME: PATRICIA ANNETTE REDFERN

HEARING:  
Hearing Re: BOND REVIEW

COUNSEL:  
PATRICIA ANNETTE REDFERN (DEC)...  
STEVEN REDFERN (PET)...PRO/PER  
SUZETTE A WHITE (PET)...PRO/PER  
SUZETTE A WHITE (TP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SUZETTE A WHITE is GRANTED

:

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Bond Review

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

1. Matter set at 08/01/17 hearing on appointment, wherein, the Court ordered bond in the amount of \$65,000..
2. No bond posted. Need same.

RECOMMENDATION:  
Need proof of bond.  
(nb)

Future Hearing:  
10/09/18 Accounting Review.

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



Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

**SEE ALSO 4B, 4C**

HEARING:

Order to Show Cause RE: Granting Limited Powers to Barbara Beaumont

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP  
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Granting Limited Powers to Barbara Beaumont.

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

1. Matter set at hearing held on 08/08/17, wherein, Counsel indicated a supplemental has been filed and states his client is seeking limited powers due to adjacent property owner seeking a quiet title.
2. Notice given.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

11/09/17 Petition for instructions and for an order etc.

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

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

**SEE ALSO 4A, 4C**

HEARING:

OSC re: Waiver of Petition to Administer by Surviving Spce filed  
by BARBARA A BEAUMONT

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP  
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Waiver of Petition to Administer by  
Surviving Spouse.

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

1. Matter set at hearing held on 08/08/17, wherein, Counsel informed the Court that there is a surviving spouse they have been trying to contact with no luck.
2. Court ordered petition to be served and filed by 08/29/17. **Notice given.**

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

11/09/17 Petition for instructions and for an order etc.

Superior Court of Calif, County of San Bernardino

Page: 4C ADD ON

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700463

CASE NAME: MTR OF ROBERT WARREN HAVEY

**SEE ALSO 4A, 4B**

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:

BARBARA A BEAUMONT (PET)...ALBREKTSON & SHUMATE, LLP  
ROBERT WARREN HAVEY (DEC)...

GENERAL INFORMATION

**Continued from 08/08/17. Counsel indicates a supplemental has been filed and states his client is seeking limited powers due to adjacent property owner seeking a quiet title. Counsel also informs the Court that there is a surviving spouse they have been trying to contact with no luck. Court orders petition to be served and filed by 08/29/17. Robert W. Harvey ordered to appear in court. Appearance by CourtCall approved.**

THIS CASE SET FOR HEARING ON Petition for **Ancillary** Letters of Administration with full authority under IAEA by Barbara Beaumont, daughter.

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

1. Petitioner seeks no bond; as there will be an adverse possession claim. Estate value is \$1,000 in real property. Alternatively, petitioner requests limited authority.
2. Petitioner appears to be step-daughter. **Supp. (08/07/17) indicates petitioner alleges she is a child under the Family Code §§7630, 7611(d) and Pr. C. § 6453.**
3. Spouse appears to have higher priority; however, no objections or competing petitions filed. Petitioner alleges that spouse has not returned any of her phone calls.
4. **Objection filed** in the form of a declaration by **decedent's son, Robert W. Havey. Supp. (08/07/17) indicates objections have to do with title to property and a contested hearing should not be necessary. Alternatively, the Court could limit Petitioner's powers to some extent so that a contested hearing would not be necessary.**

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

5. **Second declaration by Robert W. Harvey (son) filed stating court should not grant this Petition as this property is not owned by decedent; was purchased at auction by himself; is not an asset of this estate; and the Petitioner has stated that this parcel of land is the only asset in the estate.**
6. ~Proposed Form Order: 05/12/17.

RECOMMENDATION; Matter is contested.

Court's discretion re bond. If approved, set Accounting/Status Review for **10/16/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

Future Hearing:

11/09/17 Petition for instructions and for an order etc.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 09/05/17      TIME: 9:30      DEPT: S35P  
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CASE#: BC BS83

CASE NAME: IN THE MATTER OF JAMES E JONES

HEARING:

TWELFTH REPORT AND Account and Report of JANET E JONES and  
Petition for allowance of fees filed.

COUNSEL:

JAMES E JONES

(CEP)...PRO/PER

JANET E JONES

(CPE)...DEBRA S POPINEAU

See Confidential notes in "J" Drive.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SHELLY MARIE BURLESON

COUNSEL:

ASHLEIGH FAYE MIRANDA (CEE)...  
SHELLY MARIE BURLESON (GPE)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Shelley Burelson appointed Conservator of the person on 01/31/17.
2. Need Notification of Conservatee's rights per Pr. C. §1830(c).
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need Care Plan in accord with Pr. C. §2352.5.

#### RECOMMENDATION

Inquire status.

(lh)

Future Hearing:

04/10/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700100

CASE NAME: JOE BAUTISTA

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

BERONICA BAUTISTA (CPE)...PRO/PER  
JOE BAUTISTA (CEP)...JACK B OSBORN  
MIGUEL BAUTISTA GONZALEZ (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JOE BAUTISTA is GRANTED

GENERAL INFORMATION:

Ex Parte orders denied on 03/29/17.

**Continued from 05/02/17. Jack B. Osborn appointed. Petitioner withdraws request for estate powers and wished to proceed on person only. Court deems IRC report is not required on this case. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person only, by parents, Beronica and Joe Bautista.

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

1. Proposed Conservatee reaches the age of majority on 06/24/17.
2. Section 1 to petition does not indicate the type or scope of powers being requested. Need verified supplement.
3. Section 9d as to adherent of a religion that relies on prayer alone for healing is incomplete. Need verified supplement.
4. Section 11 to petition does not include petitioners. Need verified supplement.
5. Proposed conservatee is developmentally disabled. **Report by court-appointed attorney, Jack Osborn, filed.**
6. Medical Capacity Declaration filed 03/22/17.
7. Need return of Citation.
8. Court Investigator Report filed.
9. List of Required Contacts does not include petitioners. Need complete form.
10. Need Certificates of Completion re Conservatorship Class.
11. ~Proposed Form Order/Letters 03/22/17.

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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

**RECOMMENDATION:**

Need to clear notes. If approved, set hearing for Compliance Review for **04/10/18** 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.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700273

CASE NAME: MTR OF CHRISTOPHER M KEISER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CHRISTOPHER M KEISER (CTP)...

KELLY L KEISER (CP)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Kelly Keiser, mother

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

1. As proposed conservatee is developmentally disabled, it appears a limited conservatorship is appropriate. Does Court wish to deem petition a petition for limited conservatorship?
2. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
3. As proposed conservatee is developmentally disabled and 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
- 4. Capacity Declaration filed.**
5. Petitioner does not request medical powers; however, indicates medical treatment in section 9. Need verified supplement clarifying request for medical powers.
6. Need Court Investigator report.
7. Need return of Citation.
8. Need Notice of Hearing and Proof of Service.
9. Proof of Completion of Conservatorship Training Class filed 08/01/17.
10. ~Proposed Form Order:07/17/17

#### RECOMMENDATION

Need to clear notes 5-7. If approved, set hearing for Compliance Review for **04/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh/nb)

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

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700281

CASE NAME: ASHLEY DARLENE BIEN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ASHLEY DARLENE BIEN	(CEE)...
DARLENE TRACY BIEN	(PET)...PRO/PER
RYAN P MEDINA	(PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Darlene Bien (mother) and Ryan Medina (uncle) to appoint Darlene Bien

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

1. Petitioner seeks medical powers. Capacity Declaration filed 07/20/17.
2. As proposed conservatee is developmentally disabled, it appears a limited conservatorship is appropriate. Does Court wish to deem petition a petition for limited conservatorship?
3. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
4. As proposed conservatee is developmentally disabled and 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
5. Petition requests Darlene Bien be appointed conservator [See petition, 07/20/17, LFpg2]. Need verified supplement clarifying if Ryan Medina is requesting to be co-conservator?
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need return of Citation.
8. **Proof of service affixed to Notice of Hearing, section 4a is incomplete. Need proper service.**
9. **Court Investigator report filed.**
10. ~Proposed Form Order: 07/20/17

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## RECOMMENDATION

Need to clear notes 5-8. If approved, set hearing for Compliance Review for **04/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh/nb)

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

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS01913

CASE NAME: MTR RE GUY G STOBART

HEARING:

FIFTH Account and Report of VERLENE CAMERON and Petition for allowance of fees filed.

COUNSEL:

GUY G STOBART	(CEP)...EDWARD B FISCHER
GUY G STOBART	(PRO/PER
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
ROBIN L SANCHEZ	(CPE)...PRO/PER
TONY SANCHEZ	(CPE)...PRO/PER
US DEPT OF VETERANS AFFAIRS (TP )	...ALAN K ACHEN
VERLENE CAMERON	(CE )...JOHN D MICKUS
VERLENE CAMERON	(CPE)...JOHN D MICKUS

GENERAL INFORMATION:

**Continued from 05/09/17 at request of counsel. Notice by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Fifth Account Current; Petition for Fees; and for Reduced Bond by Conservator of the Person and Estate, PPF, Verlene Cameron ["Petitioner"].

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

1. Accounting covers 02/01/16 to 01/31/17.
2. Assets on hand: \$90,603.44 consisting of cash.
3. Current bond of \$177,100. Petitioner requests bond be reduced in the amount of \$17,600 for a total bond of \$159,500. Appears sufficient. JTD.
4. Petitioner requests fees in the amount of \$3,281.25 for 26.75 hours billed at \$125/hr. Itemized [LF, pgs. 22-23]. JTD.
5. Attorney requests fees of \$2,555 for 10.80 hours billed at \$350/hour for attorney time and \$105/hour for paralegal time. Itemized [LF, pgs. 25-26]. JTD.
6. Petitioner alleges the current bond of \$154,000 is insufficient and requests a bond increase by \$23,100 for a total bond of \$177,100. Appears adequate. JTD.
7. **Report by court-appointed counsel, Edward B. Fishel, filed.**
8. Notice given.

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

9. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion re: fees and bond. If approved, Court to set the next hearing re Accounting Review for **03/27/18** or a biennial Accounting Review for **03/26/19** per Pr.C.§2620(a). Any account to be filed at least 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS8012

CASE NAME: IN THE MTTR OF JAMES JAMES JR

HEARING:

FIFTH CURRENT Account and Report of CHRISTIE DAVIDSON and  
Petition for allowance of fees filed.

COUNSEL:

CHRISTIE DAVIDSON	(CPE)...HORSPPOOL & HORSPPOOL
JAMES JAMES JR	(CEP)...PRO/PER
MELODIE Z SCOTT	(CPE)...J. DAVID HORSPPOOL

## CCP170.6 filed as to CYNTHIA A LUDVIGSEN

Request for Waiver of Court Fees and Costs filed by JAMES JAMES JR and Christie Davidson GRANTED  
Fee waiver amount due \$1380  
\$450.00 for CI fees on 07/11/14  
\$465.00 for 4<sup>th</sup> accounting on 07/06/15  
\$465.00 for 5<sup>th</sup> accounting on 07/28/17

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fifth Account Current and Petition for Fees by  
Successor Conservator of the Person and Estate, Christie Davidson ["Petitioner"].

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

1. Accounting period 04/01/15 to 03/31/17.
2. Assets on hand \$1,092.16 in cash.
3. Current bond of \$35,000. Sufficient.
4. Petitioner requests fees of \$7,006.50 to be paid in monthly payments as there are insufficient funds to pay fees. Billed at various rates \$60-\$95/hour for a total of 91.2 hours. Itemized [07/28/17 Accounting LF p.20-65]. JTD.
5. Attorney requests fees of \$1,785.00 to be paid in monthly payments as there are insufficient funds to pay fees. Billed at \$350/hour for 5.10 hours' attorney time. Itemized [07/28/17 Accounting LF p.66-67]. JTD.
6. ~Proposed order 07/28/17

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **05/29/18** (if one year) or **05/28/19** (if two years). Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA/PG**

-----  
DATE: 09/05/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS0800976

CASE NAME: KATE KATHLEEN BIRGERS

HEARING:

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

COUNSEL:

BRILLE INSTITUTE OF AMERICA,  
KARIN E HORSPOOL  
KATE KATHLEEN BIRGERS  
PUBLIC ADMINISTRATOR  
SANDRA LINDER-MUNOZ

(PRO/PER  
(TP )...KARIN E HORSPOOL  
(DEC)...  
(PET)...CRAIG M PARKER  
(PET)...

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; Petition for Fees; and for Surcharge of Bond of prior Administrator by Successor Administrator, Public Guardian ["Petitioner"].

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

1. Accounting period 04/26/08 to 04/24/17.
2. Assets on Hand \$874.49 in cash.
3. Statutory fees of \$280.01 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 8 hours' time. Generally described [LF, p. 24]. JTD.
5. Attorney requests extraordinary fees of \$630 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 1.8 hours' attorney time. Itemized [LF, p. 26].
6. Petitioner indicates as the Estate is insolvent and there are insufficient funds to pay all of the commissions and fees, both ordinary and extraordinary, said remaining funds will be distributed proportionately between Petitioner and Petitioner's Attorney.
7. Petitioner requests authority to withhold the sum of \$500 as a reserve. JTD.

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



8. Petition alleges prior Administrator, Sandra Linder-Munoz, allowed decedent's real property located in Yucca Valley, to be lost to foreclosure. Petitioner requests that the Court enter an Order surcharging the bond of the former Administrator in the amount of \$20,000. JTD.
9. ~Proposed Orders x2; 06/07/17 & 07/10/17

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge for **09/11/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1200415

CASE NAME: MAURICE M BENWARE

HEARING:  
Accounting Review

COUNSEL:

MAURICE M BENWARE	(DEC)...
NIEKA M BENWARE	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(SA )...COUNTY COUNSEL
RONDA BENWARE	(PET)...ASHTON R WATKINS
WELLS FARGO BANK, N.A.	(PET)...MARY JEAN PEDNEAU

**XREF: CIVRS1203055**

GENERAL INFORMATION:

Public Administrator appointed Successor Administrator on 10/27/15.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Successor Administration issued 11/09/15, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/05/17 TIME: 10:00 DEPT: S35P  
-----

CASE#: PRO PS1300300

CASE NAME: MILDRED SERRENA WHEELER

HEARING:

First and Final Account and Report of PUBLIC ADMINISTRATOR and  
Petition for allowance of fees filed.

COUNSEL:

BOBBIE BROOKS	(PET)...PRO/PER
DEMARRIO D BROOKS	(PET)...BRYAN C HARTNELL
DUANE P. BOOTH	(TP )...DUANE P BOOTH
EUGENIA WOODS	(PET)... GILBERT A DIAZ
MILDRED SERRENA WHEELER	(DEC)...
PUBLIC ADMINISTRATOR	(SA )...CRAIG M PARKER
THADDIS BROOKS	(PET)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by BOBBIE BROOKS is GRANTED  
Fee waiver amount due \$465.00 FOR SUMMARY OF ACCOUNTING ON 10/11/14

Request for Waiver of Court Fees and Costs filed by THADDIS BROOKS is GRANTED  
Fee waiver amount due \$465.00 for filing fees on 01/05/16

Request for Waiver of Court Fees and Costs filed by PUBLIC ADMINISTRATOR is GRANTED  
Fee waiver amount \$555.00 paid on 02/27/17

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Successor Administrator, Public Administrator ["Petitioner"].

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

1. Accounting period 11/25/99 to 05/15/17.
2. Assets on Hand \$375,135.33 consisting of \$255,135.33 in cash and \$120,000 in a 50% interest in real property.
3. Statutory fees of \$12,223.30 requested. Calculated.
  - a. Duane P. Booth, attorney for former administrator to receive \$3,055.82 as his portion, and;

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

- b. Craig M. Parker to receive \$9,167.48.
- 4. Petitioner requests extraordinary fees of \$960 for services rendered in connection with the sale of real properties. Billed at \$60/hour for a total of 16 hours' time. Generally described [LF, pgs. 57-58]. JTD.
- 5. Attorney requests extraordinary fees of \$2,030.00 for services rendered in connection with the sale of real properties. Billed at \$350/hour for a total of 5.8 hours' attorney time. Itemized [LF, p. 59].
- 6. Petitioner requests authority to withhold the sum of \$5,000 as a reserve.
- 7. ~Proposed Order 06/06/17

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge for **09/11/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1300748

CASE NAME: Leatha Laverne Wilson

HEARING:

FIRST AND FINAL Account and Report of SAN BERNARDINO COUNTY  
PUBLIC ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

LEATHA LAVERNE WILSON (DEC)...  
SAN BERNARDINO COUNTY PUBLIC A (PET)...CRAIG M PARKER

**XREF: SCSS02630**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Administrator w/WA, Public Administrator ["Petitioner"].

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

1. Accounting period 03/19/10 to 03/27/17.
2. Assets on Hand \$50,379.46 in cash.
3. Statutory compensation of \$3,308.51 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 8 hours' time. Generally described [LF, p.21]. JTD.
5. Attorney requests extraordinary fees of \$812.50 for services rendered in connection with the sale of real property. Billed at \$325/hour for a total of 2.5 hours' time. Itemized [LF, p.22]. JTD.
6. Petitioner requests authority to withhold the sum of \$5,000.
7. ~Proposed Form Order 06/08/17.

RECOMMENDATION:

Court's discretion. If approved, Court to set next hearing for final discharge on **09/11/18**.  
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIP DS1700072

CASE NAME: IN RE JOEY LOPEZ

HEARING:

Hearing Re: Proof of Funding/Bond/Filing of SNT

COUNSEL:

JOEY LOPEZ

(MIN)...BALABAN & SPIELBERGER, LLP

LUPE LOPEZ

(PET)...BALABAN & SPIELBERGER, LLP

Currently under review by Legal Research.  
(LR)

Future Hearing:  
11/13/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

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DATE: 09/05/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS0700035

**Vacate**

CASE NAME: KIERRA FALCON

HEARING:

Accounting Review

COUNSEL:

LOIS LEFLAR

(PET)...RANDOLPH M SHARON

LOIS LEFLAR

(STE)...PRO/PER

PFF BANK & TRUST

(PET)...RANDOLPH M SHARON

Waiver of Account forwarded to department for signature on 08/23/17. Next Accounting review already set for 09/11/18

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS0701036

CASE NAME: MARIA ANNA SCHULTZE

HEARING:  
Accounting Review

COUNSEL:

LUCIEN SCHULTZE	(PET)...GREGORY L ZUMBRUNN
MARIA ANNA SCHULTZE	(DEC)...
RICHARD SCHULTZE	(OBJ)...DIANA J CARLONI
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 04/04/17** at request of counsel.

**Continued from 04/25/17** at request of counsel. Notice to be given by Attorney Diana Carloni.

**Continued from 07/11/17 at request of counsel. A new stipulation is being circulated.**

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 11/08/16.
2. Need Final Account

RECOMMENDATION

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.  
(lh/nb/lh/nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500044

CASE NAME: BEVERLY J WALKER

HEARING:  
Accounting Review

COUNSEL:  
BEVERLY J WALKER (DEC)...  
GEORGE H WALKER, JR. (PET)...PRO/PER

#### GENERAL INFORMATION

Continued from **06/15/16**. No appearance. Court suspends the administrator and refers this case to the public administrator. Notice by Judicial Assistant.

Continued from **06/28/16**. Court appoints the public administrator as the temporary administrator. Public Administrator to submit orders and letters to the court for approval and signature.

Continued from **09/13/16**. George Walker Jr has not appeared nor filed an accounting as ordered. Citation issued to: George Walker Jr who is cited and required to appear.

Continued from **11/22/16**. Public Administrator is still investigating.

Continued from **02/07/17 and 04/18/17** at request of Counsel.

**Continued from 06/27/17. Court orders George Walker Jr to personally be present in court, unless a written report of administration has been filed by 08/04/17. If it has been filed the court will allow George Walker Jr. can appear by Court Call, but if it is not filed, he is ordered to appear in person. Attorney Craig Parker to submit written order. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review (re George H. Walker, Jr.)

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

1. Letters of Administration issued 4/8/15, no bond.
2. Partial inventory & appraisal filed prematurely on 1/21/15.
  - a. Need account statements confirming date of death balance per Local Rule 20-908.
  - b. Need appraisal of non-cash items by the probate referee
  - c. Need final I&A.
3. Need an accounting or status report.

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

4. Declaration re No Asset Estate filed 09/27/16 by PA.
5. Need return of citation. **Affidavit of Unsuccessful Service filed 11/10/16.**

**RECOMMENDATION:**

Need to clear notes.

(sa/nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500825

CASE NAME: MYRL MARLENE STALLINGS

**SEE ALSO 6**

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner  
DARRELL L. STALLINGS, ALICIA MAE STALLINGS

COUNSEL:

ALICIA MAE STALLINGS (PET)...CHRISTOPHER JAMES MURTAGH  
DARRELL L. STALLINGS (PET)...CHRISTOPHER JAMES MURTAGH  
DEPARTMENT OF HEALTH CARE SERV (TP)...  
MYRL MARLENE STALLINGS (DEC)...

GENERAL INFORMATION:

**Continued from 06/20/17 for proper notice.**

THIS CASE IS SET FOR HEARING ON Motion to Be Relieved as Counsel by Attorney Christopher James Murtagh ["Petitioner"].

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

1. Petitioner is presently counsel of record for Darryl & Alicia Stallings. Attorney makes this motion to be relieved as counsel under Code of Civil Procedure § 284(2) and alleges the attorney-client relationship has broken down beyond the point of repair due to Petitioners refusal to communicate and to attend prearranged meetings with counsel..
2. **Proof of service affixed to notice filed 06/22/17, Section 4a, does not include date of mailing. Need proper service.**
3. ~Proposed Form Order 03/30/17.

RECOMMENDATION:

Require proper service then Court's discretion.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500825

CASE NAME: MYRL MARLENE STALLINGS

**SEE ALSO 5**

HEARING:

Accounting Review

COUNSEL:

ALICIA MAE STALLINGS (PET)...CHRISTOPHER JAMES MURTAGH  
DARRELL L. STALLINGS (PET)...CHRISTOPHER JAMES MURTAGH  
DEPARTMENT OF HEALTH CARE SERV (TP )...  
MYRL MARLENE STALLINGS (DEC)...

GENERAL INFORMATION:

Continued from **01/23/17** at request of counsel.

Continued from **03/27/17**. Counsel states that he has not had cooperation with his clients and filed a motion to withdraw which is set for 06/20/17. Court will also set an OSC re removal and possible appointment of Public Administrator. Attorney Murtagh to give notice to his clients.

**Continued from 06/20/17. Court suspends the powers of Alicia Stallings and Darrell Stallings. Attorney Christopher Murtagh to submit order. Public Administrator is appointed successor administrator. Attorney Parker to submit order and letters.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 10/13/15, full authority, no bond.
2. Need final inventory and appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500950

CASE NAME: MARTHA JANE LUTZ AKA MARTHA J. LUTZ

HEARING:  
Accounting Review

COUNSEL:

KELLY PAVESE	(PET)...PRO/PER
MARTHA JANE LUTZ	(DEC)...
PUBLIC ADMINISTRATOR	(SA )...CRAIG M PARKER

GENERAL INFORMATION:

Continued from **03/20/17**. No appearance. The Court continues one day for the PA to be present for possible successor appointment.

**Continued from 03/21/17**. Kelly Pavese requests a continuance as she wishes to retain counsel. If counsel is not present on her behalf at the next hearing the court will consider appointing the Public Administrator.

Continued **04/11/17**. Court suspends powers of the administrator, Kelly Pavese. Public Administrator is appointed successor administrator. Citation issued to Kelly Pavese who is cited and required to appear on 06/20/17 and show cause why FTA/Failure to file an accounting. Clerk's office to give notice.

**Continued from 06/20/17. Court orders Kelly Pavese to personally be present at the next hearing.**

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 01/14/16 to Kelly Pavese, full authority, no bond. Letters issued 05/01/17 to Successor Administrator, Public Administrator.
2. **Order and Letters by PA as Successor Administrator filed.**
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.  
(nb/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600454

CASE NAME: MTR OF ALEJANDRA CASTILLO

HEARING:  
Accounting Review

COUNSEL:

ALEJANDRA CASTILLO (DEC).  
DEUTSCHE BANK NATIONAL TRUST C (TP )...WRIGHT, FINLAY & ZAK  
ELAINE ARIAS MONTES (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Letters of Administration issued to Elaine Montes, daughter on 06/28/17; full authority, no bond.
2. Partial Inventory and Appraisal filed 11/03/16. Need final inventory and appraisal with supporting bank/financial statements per Local Rule 20-908.
3. Waiver of accounting filed 12/08/16 by all heirs. However, notwithstanding said waiver, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1).
4. Need accounting or next status report.

RECOMMENDATION

Inquire status.  
(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600754

CASE NAME: MTR OF GLORIA DAVIS

HEARING:

Hearing Re: STATUS OF LAWSUIT/BOND

COUNSEL:

CARLA GOMEZ (PET)...WILLIAM K SWEENEY  
GLORIA DAVIS (DEC)...

#### GENERAL INFORMATION

**Continued from 07/11/17. Counsel represents underlying litigation was dismissed including wrongful death action. Counsel further represents petitioner has not been cooperative. The Court orders Carla Gomez to appear at the next hearing.**

THIS CASE IS SET FOR HEARING ON Status of Lawsuit/Bond

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

1. Matter set on 09/20/16, Court appointed Carla Gomez administrator with full authority, no bond. Letters issued 09/20/16.
2. Decedent's estate has no assets. Probate was initiated for the purpose of recovering damages for decedent in a wrongful death action filed in Los Angeles County Superior Court, case number BC617276.
3. Administrator submitted a Request for Dismissal on 02/10/17, which was returned by the Court on 02/14/17 due to issuance of Letters. If estate has no assets, need to file proper petition to terminate for lack of assets per Pr. C. §12251.

#### RECOMMENDATION

Inquire status.  
(lh/nb)

Future Hearing:

10/25/17 Accounting Review.

11/02/17 Petition for termination of further etc.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600760

CASE NAME: MTR OF MITCHELL WALLACE SUMMERS

HEARING:

FIRST AND FINAL Account and Report of MITCHELL JEFFREY SUMMERS  
and Petition for allowance of fees filed.

COUNSEL:

MITCHELL JEFFREY SUMMERS (PET)...SMITH & CARRIGAN LAW GROUP  
MITCHELL WALLACE SUMMERS (DEC)...

**X-REF: VFLVS032179**

GENERAL INFORMATION:

**Continued from 07/11/17. Counsel to provide bank and financial documentation before next hearing.**

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

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

1. All heirs waive accounting.
2. Accounting period 05/21/16 to 04/0/17.
3. Assets on Hand \$302,202.21 in cash.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$15,885.68. Calculated.
6. Petitioner requests authority to withhold \$1,200 as a reserve for closing costs.
7. Bank/financial statements do not support date of death balances reflected on inventory and appraisal filed 04/17/17 or closing balance per Local Rule 20-908. Need same. **Declaration by Attorney Carrigan alleges requested statements from financial institutions have been requested to no avail. JTD.**
8. **Proof of Service filed 7/12/17. However, Need Notice of Hearing with proof of service.**

Proposed Order 07/10/17 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 or address reserve.

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



## RECOMMENDATION

Need to clear note 7-8 then Court's discretion. If approved, set next hearing for receipts and final discharge for **09/11/18**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601176

CASE NAME: MTR OF LAWRENCE MICHAEL SHINTON

HEARING:

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

COUNSEL:

RENEE SHINTON (PET)...THOMAS SHINTON  
LAWRENCE MICHAEL SHINTON (DEC)...

#### GENERAL INFORMATION

Continued from **01/31/17**.

Continued from **04/18/17**. No appearance. Court notes this petitioner lives outside of the state.

**Continued from 06/27/17. No appearances. Notice by Judicial Assistant.**

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

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

1. Will waives bond, and Petitioner is sole beneficiary of Will. Court has discretion to require bond per Pr. C. § 8481(b). If bond is required, estimated net value of assets is \$105,000. Court to note executor's confidential information JTD
2. Need spousal election, since property could pass by spousal petition.
3. Proof of Holographic Instrument filed.
4. **Notice of Petition to Administer Estate and proof of mailed filed 06/09/17 is incomplete at section 4b. Need complete proof of mailed service.**
5. ~Proposed Form Order: 11/23/16

#### RECOMMENDATION

Need to clear notes 2 & 4. Court's discretion re bond. If approved, set Accounting/Status Review for **09/04/18**. Any accounting to be filed 30 days in advance local rule 20-901.

Note requirements of local rule 20-908.

(lh/jm/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700136

CASE NAME: MTR OF NATHAN X PEREZ-VENEGAS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANA PEREZ (PET)...PRO/PER  
NATHAN X PEREZ-VENEGAS (DEC)...

Request for Waiver of Court Fees and Costs filed by DIANA PEREZ is GRANTED

GENERAL INFORMATION:

Continued from **04/18/17**. Matter is continued for the petitioner to seek legal advice. The father, Robert Venegas, to file written objections.

**Continued from 06/27/17 for PA to investigate.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Diana Perez (mother)

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

1. Bond waived by sole heir/petitioner. Estimated net value of estate is \$16,897. JTD
2. Need Proof of Publication.
3. ~Proposed form Order: 02/10/17

RECOMMENDATION:

Need to clear note 2. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **09/04/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700235

CASE NAME: CHARLES HENRY BERGENER

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

CHARLES HENRY BERGENER (DEC)...  
JENNIFER LYNN BERGENER (PET)...MERHAB ROBINSON, JACKSON &

GENERAL INFORMATION:

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

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

1. Matter set at 08/07/17 hearing, wherein, the Court required bond in the amount of \$100,000.'
2. Need proof of bond.
3. Need letters.

RECOMMENDATION:

Need to clear notes 2 & 3.

(nb)

Future Hearing:

10/15/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700425

CASE NAME: MTR OF ELEANOR D GEORGE

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

ELEANOR D GEORGE

(DEC)...

MELVIN GEORGE

(PET)...MICHAEL C. MADDUX

SURETEC INSURANCE COMPANY

(TP )...

Request for Waiver of Court Fees and Costs filed by MELVIN GEORGE is GRANTED

**VACATE** – bond filed and letters issued.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700460

CASE NAME: JEFFREY RICHARD SMITH

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

JEFFREY RICHARD SMITH      (DEC)...

MICHAEL D SMITH      (PET)...VARNER & BRANDT

**VACATE** – bond filed and letters issued.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700475

CASE NAME: MTR OF RAYMOND LEON ESCARZAGA SR

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

BARBRA CONTRERAS

RAYMOND LEON ESCARZAGA SR

(PET)...RYAN MICHAEL DARLING

(DEC)...

GENERAL INFORMATION:

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

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

1. Matter set on 08/07/17, wherein, Court required bond of \$100,000.
2. Need bond.
3. Need letters.

RECOMMENDATION:

Need bond and letters.

(nb)

Future Hearing:

10/15/18 Accounting Review.

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

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700476

CASE NAME: MTR OF JUAN JOSE CUEVAS 2015 TRUST

HEARING:  
FIRST ACCOUNT CURRENT AND REPORT OF TRUSTEES PTN  
FOR ITS SETTLEMENT; FOR TRUSTEE AND ATTY FEES

COUNSEL:

DAWN MILLS	(PET)...TAMILA C JENSEN
JUAN JOSE CUEVAS	(TRU)...
NORINE BOEHMER	(PET)...TAMILA C JENSEN
SUSAN GHORMLEY	(PET)...TAMILA C JENSEN

**X-REF: CONPS1200063**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Successor Co-Trustees, Norine Boehmer, Dawn Mills and Susan Ghormley ["Petitioners"-PPF's].

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

1. Accounting period 04/25/16 to 03/31/17.
2. Assets on Hand \$6,041,358.47 consisting of \$587,083.98 in cash and \$5,454,263.49 in securities and Workers Compensation Claim.
3. Current bond of \$3,006,819. Petitioner requests bond be reduced by \$2,172,456 for a total bond of \$834,363.00 and not include non-cash assets. Appears sufficient if Court decides to not include non-cash assets. JTD.
4. Petitioners request ratification of disbursed funds, totaling \$5,150.00, to Beneficiary, or on his behalf.
5. Co-Trustees request payment for their services in the amount of \$3,683.50 for 41.60 hours' service. Billed at various rates not exceeding \$160/hour. Generally described [LF, pgs. 33-40]. Rate exceeds community rate of \$135/hour. JTD.
6. Attorney requests fees of \$3,165.50. Billed at \$400/hour for 2.60 hours' attorney time and \$195/hour for 10.90 hours' paralegal time. Itemized [LF, pgs. 43-44]. JTD.
  - a. Paralegal rate exceeds community rate of \$150/hour.
7. Torey Pines Bank Account should end in "0."

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



8. During this accounting period, petitioner paid for case manager expenses totaling \$7,082.07. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c) by Claudia Ordonez.
9. Need Notice of Hearing with proof of service.
10. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 8-9 then Court's discretion re fees & bond. If approved, set next hearing on Accounting Review for **05/29/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

**Future Hearing:**

09/12/17 Petition for transfer trust proceedings to Los Angeles County

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700534

CASE NAME: JOHNNY HERMOSILLA

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DECI HERMOSILLA	(PET)...JAMES E NEWNHAM
IAN HERMOSILLA	(PET)...JAMES E NEWNHAM
JOHNNY HERMOSILLA	(DEC)...
REMEDIOS C ABARO	(TP )...LENITA A SKORETZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Ian and Deci Herмосilla, son/daughter

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

1. All heirs waive bond. Estate value \$250,000 with \$5,000 in personal property.
2. Court to review sticky note on petition, LF p. 2.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication.
5. ~Proposed Form Order: 05/31/17

RECOMMENDATION

Need to clear notes 3 - 4. Court's discretion re bond. If approved, set Accounting/Status Review for **11/13/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700675

CASE NAME: MARILYN LOUISE DELASHMUTT

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANNA L THOMPSON

(PET)... STEPHEN WORKMAN

MARILYN LOUISE DELASHMUTT

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Dianna Thompson, daughter

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

1. All heirs waive bond. Net estate value \$591,264 with \$9,000 in personal property.
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication.
4. Need Proposed Form Order:

#### RECOMMENDATION

Need to clear notes 2 - 4. Court's discretion re bond. If approved, set Accounting/Status Review for **11/13/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700695

CASE NAME: HAZEL L GANTHER-GREEN

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

HAZEL L GANTHER-GREEN (DEC)...  
JOLIE A CLANTON (PET)...HORSPOOL & HORSPOOL

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jolie Clanton, daughter

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

1. Bond requested in the amount of \$80,000; however, net value of the estate consists of \$160,000 in real property. Suggest bond of \$160,000. JTD
2. Notice filed 07/17/17 does not indicate IAEA powers are being requested at Section #5. Need proper notice.
3. ~Proposed Form Order: 07/13/17

#### RECOMMENDATION:

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **11/13/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300204

CASE NAME: Carly Suzanne Peralta

HEARING:

RE CONSERVATORSHIP Account and Report of DEBRA LEE ESPINOZA and  
Petition for allowance of fees filed.

COUNSEL:

CARLY SUZANNE PERALTA	(CEP)...JENNIFER M DANIEL
CARLY SUZANNE PERALTA	(DEC)...
DEBRA LEE ESPINOZA	(CP )...PRO/PER
DEBRA LEE ESPINOZA	(CPE)...ARLIN
DEBRA LEE ESPINOZA	(CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by DEBRA LEE ESPINOZA GRANTED  
Fee waiver amount due \$465.00 for filing petition for appointment etc. on 08/08/13

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account by Conservator of the  
Person and Trustee of SNT, Debra Lee Espinoza ["Petitioner"-mother].

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

1. Need executed copy of Special Needs Trust [SNT] per Local Rule 20-1502.
2. Accounting period covers 01/01/16 to 12/31/16. However, Special Needs Trust order was entered on 03/25/16. Does Court wish to require an amended accounting? JTD.
3. Assets on Hand \$283,834.25 consisting of \$3,777.88 in cash, vehicle with carry value of \$36,000 and remaining in securities.
4. No current bond. Suggest bond of \$373,000 (includes recovery costs). JTD.
5. Compensation or reimbursement is not requested.
6. Need further clarification via verified supplement as to the following:
  - a. Coach in the amount of \$685.80;
  - b. Sunglass Hut for \$432.00;
  - c. Nation's Recovery-collection Ethan Allen for \$4,788.46;

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

- d. Hyatt Resort for \$4,552.76;
- e. In Branch cash withdrawals totaling \$3,000.
- 7. Conservatee/Beneficiary residence during account period is not stated as required per Local Rule 20-1406(a). Need verified supplement.
- 8. Need bank/investment statements verifying beginning and closing amounts per Local Rule 20-908.
- 9. Last CI Report filed 09/25/14.
- 10. Need Notice of Hearing with proof of service.

**RECOMMENDATION:**

Need to clear notes then Court's discretion re bond. If approved, set next hearing for Accounting Review on **02/26/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400366

CASE NAME: Maria Teresa Bitner

HEARING:

SECOND Account and Report of DENNIS BITNER and Petition for allowance of fees filed.

COUNSEL:

DENNIS BITNER	(CPE)...CRAIG M PARKER
MARIA TERESA BITNER	(CEP)...MITCHELL I ROTH
SURETEC INSURANCE COMPANY	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees by Conservator of the person and estate, Dennis W. Bitner [Petitioner].

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

1. Accounting period 04/01/16 to 04/28/17.
2. Assets on Hand \$97,897.60 consisting of \$95,743.45 in cash and \$2,154.15 in personal property.
3. Petitioner waives compensation for this account period.
4. Attorney requests fees of \$2,065.00. Billed at \$350/hour for 5.90 hours' attorney time. Itemized [LF, p. 16]. JTD.
5. Current bond of \$116,000. Appears sufficient.
6. ~Proposed Order 06/15/17

RECOMMENDATION:

Court's discretion. If approved, set hearing on the next Accounting Review for **06/26/18** (if one year) or **06/25/19** (if two years). Account to be filed 30 days' in advance of hearing.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/05/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1500044

CASE NAME: ELLEN H. MANULLANG

HEARING:

Hearing Re: Proof of Additional Bond

COUNSEL:

ELLEN H MANULLANG      (CEP)...

SANDRA TOBING      (CPE)...JAMES B CHURCH & ASSOCIATES

**VACATE** – bond filed.

(nb)

Future Hearing:

07/31/18 Accounting Review.



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1600104

CASE NAME: IN THE MATTER OF COREY CAPECE

HEARING:

Accounting Review

COUNSEL:

COREY CAPECE

(CTE)...

FRANK CAPECE

(PET)...MELINDA S. BELL

TERRI CAPECE

(PET)...MELINDA S. BELL

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Frank and Terri Capece, (parents) appointed conservators of the estate of Corey Capece on 07/19/16, limited conservatorship, no bond.
2. Need 1<sup>st</sup> Account beginning 07/19/17.

#### RECOMMENDATION

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600234

CASE NAME: MTR OF ROBERT M ESTRADA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of STEVE ESTRADA

COUNSEL:

ERNESTINA DELGADO	(CP )...LAYNE A BARTHOLOMEW
ROBERT M ESTRADA	(CTP)...
STEVE ESTRADA	(CP )...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

Order appointing Steve Estrada and Ernestina Delgado limited co-conservators of the person entered 12/31/16.

**Continued from 07/18/17. No appearance. Statement of Care Plan has not been filed. Notice given by Judicial Assistant.**

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

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

1. Notification of Conservatee's Rights filed.
2. Need Statement of Care Plan in accord with Pr.C.§2352.5.
3. Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

Need to clear note 2.

(nb/lh)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700224  
CASE NAME: MTR OF MELISSA G BATTEAU

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

MAE ELLA BATTEAU (CP )...PRO/PER  
MARK ALAN BATTEAU (CP )...PRO/PER  
MELISSA G BATTEAU (CTP)...JEANNE KENNEDY

GENERAL INFORMATION

Ex Parte orders granted 07/05/17.

**Continued from 07/18/17. Oral motion made to grant a temporary conservatorship with medical powers was granted by Court. Mae Ella and Mark Alan Batteau appointed Temporary Co-Conservators.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by mother, Mae Ella Batteau and brother, Mark A. Batteau ["Petitioners"].

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

- 1 No bond – person only.
- 2 Petitioners seek medical powers. Need Medical Capacity Declaration.
- 3 Need return of Citation.
- 4 Need Certificates of Completion re: Conservatorship Class.
- 5 Need Notice of Hearing and proof of service.
- 6 Report of Counsel, Jeanne Kennedy, filed 07/14/17.
- 7 Court Investigator's Report filed 07/14/17.
- 8 ~Proposed Form Order/Letters 06/14/17

RECOMMENDATION:

Need to clear notes 2-5. If approved, set hearing for Compliance Review for **04/10/18** 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

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS00435

CASE NAME: FREDESVINDA THORNE

HEARING:

SEVENTH Account and Report of ARTHUR A CAPPILLA and Petition for allowance of fees filed.

COUNSEL:

ARTHUR A CAPPILLA (CPE)...BARBARA E BOWERSOCK  
ARTHUR A CAPPILLA (CPE)...JOHN D MICKUS  
ARTHUR A CAPPILLA (PET)...JOHN D MICKUS  
FREDESVINDA THORNE (CEP)...

GENERAL INFORMATION:

Continued from **05/09/17**. Court would like a supplement filed to address the age of the daughter and college information. The court is requesting that the Court Investigator do their investigation and report by the next hearing if they are able since it's past due. The court will also like the CI to address the issue of the daughter and her college and the monies she is receiving. Referred to Court Investigator for investigation and report.  
**Continued from 07/18/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Seventh Account Current and Report of Conservator of the Person and Estate/PPF, Arthur A. Cappilla; for Reduced Bond; for Approval of Fees and Periodic Payments of Fees; and for Authorization to Continue Support of Daughter who is no longer a minor.

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

1. Accounting covers 12/03/14 to 12/02/16.
2. Assets on hand: \$28,933.37 (cash)
3. Current bond in the amount of \$90,500. Petitioner requests a reduction in bond of \$8,000 for a total bond of \$82,500. Appears sufficient. JTD
4. Petitioner has been providing monthly support to the conservatee's daughter, Gloria Thorne, in the amount of \$500/month pursuant to court approval. Petitioner requests that the support authorization continue. **Supp. (07/13/17) indicates**

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

**conservatee's only daughter is 27 years old; attends Redlands University; and taking courses toward a Ph. D.**

5. Petitioner requests fees of \$7,185.00, of which \$6,000 has been paid in periodic payments, however, due to the size of the estate, petitioner is accepting \$6,000 as full payment of his fees for this accounting period. Fees are billed at various rates for various services not exceeding \$125/hour. Itemized [LF, pgs. 26-28]. JTD
6. Petitioner requests authority to continue periodic payments of compensation for services at the rate of \$250/month for a period not exceeding 30 months commencing 01/01/17. JTD
7. Attorney requests fees of \$4,060.00, however, in view of the small estate, attorney reduces his fee request to \$3,000. Billed at \$350/hour for 10.70 hours' attorney time and \$105/hour for 3.0 hours' paralegal time. Itemized [LF, pgs. 30-31]. JTD.
8. CI report filed.
9. Notice given.
10. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Court's discretion. If approved, set next accounting review for **02/06/18** (if one year) or **02/05/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17      TIME: 9:30      DEPT: S36P  
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CASE#: SC SS02116

CASE NAME: MTR OF MARY VIRGINIA SALAZAR

HEARING:

Accounting Review

COUNSEL:

MARY VIRGINIA SALAZAR

(CEP)...DONNASUE ORTIZ

RUBEN J. JUAREZ

(CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MARY VIRGINIA SALAZAR is GRANTED

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Ex Parte to Dispense with Accounting and Order entered 10/23/15; accounting or waiver of account now due.
- 2 No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS02736

CASE NAME: MTTR OF WAYNE ALLAN DORRANCE

HEARING:  
Accounting Review

COUNSEL:

ARLENE DEYOUNG (CPE)...PRO/PER  
ARLENE DEYOUNG (PET)...HARTNELL, LISTER & MOORE  
WAYNE ALLAN DORRANCE (CEP)...LENITA A SKORETZ

Request for Waiver of Court Fees and Costs filed by ARLENE DEYOUNG is GRANTED

GENERAL INFORMATION

**Continued from 07/11/17. No appearance. Court notes Bryan Hartnell previously substituted out of this case. Arlene DeYoung is ordered to appear at the next hearing. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on 4<sup>th</sup> waiver of account entered 10/13/15 for period 01/05/13 to 06/30/15.
2. Need accounting or waiver.

RECOMMENDATION

Inquire status.  
(lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1300898

CASE NAME: Chia Hsin Huang

HEARING:

SECOND Account and Report of ALEX HUANG and Petition for allowance of fees filed.

COUNSEL:

ALEX HUANG (PET)...LAW OFFICES OF YVONNE HS U  
CHIA HSIN HUANG (DEC)...  
J DAVID HORSPOOL (PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

Continued from **01/10/17** at request of counsel. Notice to be given by Ms. Park.  
Continued from **03/14/17** at request of Court for recently filed supplement to be reviewed.  
Notice waived.  
Continued from **05/16/17** at request of counsel. Notice to be given by Mr. Park  
**Continued from 07/18/17 at request of counsel. Notice to be given by Chun Kyong Park.**

THIS CASE IS SET FOR HEARING ON **Amended** (03/03/17) Second Account and Petition for Fees.

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

- 1. First accounting approved on 10/15/15. Proposed Order Approving First Account affixed to supp. filed 07/12/17 [LF, p5] is not complete in and of itself. Local Rule 20-614. Need proper order to include accounting period; balance; and description of the assets on hand, specifically noting the amount of cash included in said balance. LR 20-614c.**
- 2. Accounting period 05/06/15 to 05/31/16.**
- 3. Assets on Hand \$985,387.67 (carry value) consisting of real property and interests in several partnerships that own real property. However, beginning assets on hand do not match ending assets on hand of prior, first accounting period of \$1,522,462.36. Supp. (07/12/17, LF, pgs. 6-11] includes amended schedules for first accounting period (that has previously been approved) to reflect Assets on Hand at Beginning of Account period of \$985,387.67. As an Order**

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



**Approving First Account has not been entered, does court wish to allow first account period information to be intermingled with this second account? JTD.**

- 4. Amended Final Inventory and Appraisal affixed to amended accounting filed 03/03/17 [LF, p. 12].**
- 5. Statutory compensation will be requested at close of probate.**
6. Petitioner requests costs advanced of \$31,197.99 for first accounting period and **\$11,160.76 for the second account period [supp. filed 07/12/17, LF, p. 14]** when funds become available. **Expenses carried over from last account itemized. See supp. [filed 07/12/17, LF, pgs. 10-11]. Does Court wish to allow costs during, both, first and second accounting periods? JTD.**
7. Petitioner alleges the expenses incurred by the Petitioner in administering the Estate total \$30,840.75, as of 10/01/16, and have been advanced by Petitioner as there are currently no liquid assets. **However, itemization affixed to supp. filed 07/12/17 [LF, p. 14] reflects expenses incurred during second accounting period totaling \$11,160.76. JTD.**
8. Petitioner states there are talks with a solar farm developer to sell the property at 48050 North 110<sup>th</sup> Street West, Lancaster, CA, 93536 in order to satisfy the liabilities of the estate.
9. Notice given.

**RECOMMENDATION:**

Need to clear notes. This accounting should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. If approved, set next Accounting Review for **01/16/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.  
(nb)

Superior Court of Calif, County of San Bernardino

Page: 1A ADD ON

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400897

CASE NAME: Faye Quesada Carrera

HEARING:

Hearing Re: RPT OF SALE AND PTN FOR ORDER CONF SALE

COUNSEL:

BRYAN C. HARTNELL Esq	(HARTNELL LAW GROUP
CORINNE C. GARCIA	(PET)...MARK J. ANDREW FLORY
CORRINE C GARCIA	(PET)...JACK B OSBORN
FAYE QUESADA CARRERA	(DEC)...
JANET VASQUEZ	(TP )...ELISABETH KEMPE-OLINGER

Address: 640 N. 2nd Street, Colton, CA 92324

Appraised Value: \$265,000

Sale price: \$268,000.

First overbid: \$281,900.

Deposit: **\$6,700 - Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 5% = \$13,400.00

Additional bond: Current bond of \$20,000. Proceeds to be deposited in a blocked account.

Reason for Sale: Necessary to pay devise and expenses of administration.

Exposure to Market: Listed with real estate broker and on MLS.

Notice: Given. **Need proof of publication and posting by clerk's office.**

Future Hearing Dates: 01/31/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500567

CASE NAME: DONALD E. ESSEX

HEARING:

Probate status report filed.

COUNSEL:

DONALD E ESSEX	(DEC)...
JOHN L GORDON	(PET)...KEVIN STAPLETON
KEMP & ASSOCIATES, INC.	(LAURA WOODWARD
STUART A SMITH	(HARTNELL LAW GROUP
W.C. COX AND COMPANY, AN ARIZO	(TP )...LAYNE A BARTHOLOMEW

#### GENERAL INFORMATION

**Continued from 03/07/17 at request of counsel to complete sale of real property and final account.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to John Gordon, nominee, on 11/03/15; full authority, \$1.1M bond.
2. Final Inventory and Appraisal filed 11/08/16.
3. **Status Report filed 12/14/16.** Administrator requests an additional 6 months to complete sales of 4 real properties, and to complete the final account.
4. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Court's discretion. If approved, set next Accounting Review for **09/05/17**. Any account to be filed 30 days before hearing. Note requirements of local rules.

(lc/lh/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600028

CASE NAME: MTR OF MARTY LANE

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WVR OF Account and Report of  
PAUL LANE and Petition for allowance of fees filed.

COUNSEL:

MARTY LANE (DEC)...  
PAUL LANE (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **AMENDED** [08/28/17] Petition for Final  
Distribution upon Waiver of Account and for Fees by Executor, Paul D. Lane ["Petitioner"].

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

1. All beneficiaries waive accounting.
2. **Inventory and Appraisal filed 08/28/17, section 3 is incomplete; includes items on Attachment 1 that should be on Attachment 2 which need to be appraised by Probate Referee. Need corrected final inventory with supporting bank statements to support date of death balances per Local Rule 20-908.**
3. Accounting period 12/15/15 to 07/31/17.
4. Assets on Hand \$73,491.56.
5. Statutory compensation waived per supplement filed 08/28/17 [LF, p.3].
6. **Need findings re sole and separate property.**
7. Proposed Order 08/28/17 does not include findings re sole and separate property; should indicate petitioner and Cheryl Harvey to receive all unknown or discovered property; and does not include 3 lines of content before signature line.

RECOMMENDATION

Need to clear notes 2 & 6. If approved, set next hearing for receipts and final discharge for **09/25/18**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 09/05/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1600188

CASE NAME: MARIA ALCALA

HEARING:

Accounting Review

COUNSEL:

DOMINGO GONZALEZ      (PET)...PRO/PER

MARIA ALCALA      (DEC)...

Request for Waiver of Court Fees and Costs filed by DOMINGO GONZALEZ is GRANTED

#### 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 Domingo Gonzalez, on 06/28/16; **limited** authority, no bond.
2. Need Final Inventory and Appraisal.
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601008

CASE NAME: MTR OF KAMRAN SHAHNAZI

HEARING:

first and final Account and Report of GUAY P WILSON and Petition  
for allowance of fees filed.

COUNSEL:

GUAY P WILSON (PET)...GUAY P WILSON  
KAMRAN SHAHNAZI (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Executor, Guay P. Wilson ["Petitioner].

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

1. Accounting period 08/25/16 to 05/23/17.
2. Assets on Hand \$110,395.48 in cash.
3. Statutory fees of \$8,957.00 requested. Calculated.
4. ~Proposed Order 06/16/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for final discharge for on **09/11/18**.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601288

CASE NAME: BENJAMIN LENIN FAJARDO LIVING TRUST

HEARING:

Hearing Re: CORRECT CLERICAL MISTAKE

COUNSEL:

LISA MARIE OVERSON	(PET)...SHEASBY AND ASSOCIATES
LISA MARIE OVERSON	(PLA)... LIDDLE & LIDDLE
LUCILLE SOTO	(DEF)...CURTIS R AIJALA
THE BENJAMIN LENIN FAJARDO LIV	(TRU)...

Request for Waiver of Court Fees and Costs filed by LUCILLE SOTO is GRANTED

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700374

CASE NAME: MTR OF EUGENE ANNE O'BRIEN

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

EUGENE ANNE O'BRIEN (DEC)...

RICHARD STEAD (PET)...EDWARD B FISCHER & ASSOCIATES

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.**

***X-ref matter SPRSS06542***

GENERAL INFORMATION:

**Continued from 07/18/17 at request of counsel. Court notes decedent was survived by no next of kin and finds the Public Administrator needs to be noticed.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Richard Stead (friend)

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

1. Petitioner requests Order for funds to be placed in blocked account in lieu of bond. Estimated net value of estate is \$47,224, cash. JTD
2. Petitioner alleges decedent, Eugene A. O'Brien, was the administrator and sole heir to her deceased mother's estate in x-ref matter SPRSS06542, In re: Mary C. O'Brien. An order settling first and final report and distribution was entered 03/10/06 ordering distribution to decedent. However, residual cash assets due to decedent were inadvertently left in a money market account with Community Bank titled Estate of Mary C. O'Brien, which is the sole asset subject to this petition.
3. Petition, item #5, indicates decedent was survived by no next of kin. It appears Public Administrator has priority of Appointment, and the State of California is entitled to escheat.
4. ~Proposed form Order: 04/19/17

**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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



**RECOMMENDATION:**

Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **11/03/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700409

CASE NAME: GILBERT BRIONES JR

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:  
GILBERT BRIONES JR (DEC)...  
KRISTY BRIONES (PET)...GAUDY LAW, INC  
VALERIE BRIONES (PET)...GAUDY LAW, INC

**VACATE** – bond filed on 08/08/17.  
(nb)

Future Hearing:  
09/25/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700417

CASE NAME: MTR OF DAVID BRIAN ROSS

HEARING:  
Hearing Re: RECEIPT OF BOND

COUNSEL:  
DAVID BRIAN ROSS (DEC)...  
JESSEE D ROSS (PET)...MEISSNER, JOSEPH & PALLEY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond.

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

1. Matter set at 07/18/17, wherein, Court ordered a bond in the amount of \$50,000 to be posted.
2. Need bond.
3. Need subsequent letters.

RECOMMENDATION:  
Need bond and letters.  
(nb)

Future Hearing:  
09/25/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700597

CASE NAME: MAXINE DAVISON

HEARING:

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

COUNSEL:

MAXINE DAVISON (DEC)...  
TERRY LYNN DAVISON (PET)...GUAY P WILSON

#### GENERAL INFORMATION

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

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

1. Will waives bond; however executor is a non-resident and the Court may require bond if the proposed personal representative reside outside of California per Pr. C. §8571. Court also has discretion to require bond per Pr.C. §8481(b). Estate value is \$190,000. Does court wish to require minimum bond of \$20,000, or alternatively, based on assets of \$190,000? JTD
2. Notice to Petition to Administer Estate filed 07/25/17; however, Robert Wayne Davison's name is misspelled. JTD
3. ~Proposed Form Order: 06/16/17

#### RECOMMENDATION

RFA subject to note 2, Court's discretion re bond. If approved, set Accounting/Status Review for **11/13/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

-----  
DATE: 09/05/17      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700599

CASE NAME: THE DELORES E DURON REVOCABLE TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSET

COUNSEL:

JAMES M DOIRON

(PET)...JACK B. OSBORN

THE DELORES E DURON REVOCABLE (TRU)...

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

-----  
DATE: 09/05/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0700290

CASE NAME: MTR OF NANCY L KOCHANSKI

HEARING:

Accounting Review

COUNSEL:

BARBARA NAGY (CPE)...CHO, SHEASBY, CHUNG &  
BARBARA NAGY (TEE)...MATTHEW E SHEASBY  
LAYNE A BARTHOLOMEW (PET)...  
NANCY L KONCHANSKI (CEP)...  
NANCY L. KOCHANSKI SPECIAL NEE (TRU)...

Request for Waiver of Court Fees and Costs filed by BARBARA NAGY is GRANTED

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Order Approving Third Account, by Nancy L. Kochansky, entered on 09/26/16; fourth account now due beginning 06/01/15.
2. No account or waiver. Need same.

#### RECOMMENDATION

Inquire status of accounting.

(cs/nb)

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200057

CASE NAME: CRAIG DONVILLE

HEARING: Petition for ORDER FIXING COMPENSATION AND AUTHORIZING  
PAYMENT OF ATTORNEY'S FEES

COUNSEL:

CRAIG DONVILLE	(CEP)..CRAIG M PARKER
CRAIG DONVILLE	(OBJ)...CRAIG M PARKER
LAWRENCE DONVILLE	(CE )...STEPHEN K HALL
LAWRENCE DONVILLE	(CPE)...STEPHEN K HALL
MARCIA L CAMPBELL	(PET)...PRO/PER
VICTORIA DONVILLE	(CE )...STEPHEN K HALL
VICTORIA DONVILLE	(CPE)...STEPHEN K. HALL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Order Fixing Compensation and Authorizing  
Payment of Attorney's Fees

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

1. Petitioner, Craig M. Parker, was hired by Conservatee, Craig Donville as his attorney of record to represent him in this proceeding. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period of 06/26/14 to 07/15/17.
2. Attorney requests fees of \$22,700.00. Billed at \$325/\$350hour for 69.5 hours attorney time. Further petitioner has advanced costs on behalf of the estate in the amount of \$1,365.00. Itemized, LF pgs. 7-11.
3. Petitioner requests a Court order directing and ordering Marcia Campbell, Successor Conservator of the estate of Craig Donville, to pay requested sums.
4. ~Proposed Order: 07/18/17

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 09/14/17 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 09/05/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1500219

CASE NAME: Tonya Smith

HEARING:

Petition for ORDER FIXING COMPENSATION/AUTH ATTY FEES \*

COUNSEL:

INLAND COUNTIES REGIONAL CENTE (PET)...LAYNE A BARTHOLOMEW  
TONYA SMITH (CEE)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Order Fixing Compensation/Auth Atty Fees

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

1. Petitioner, Craig M. Parker, was appointed on 08/17/15. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period of 08/17/15 to 07/24/17.
2. Attorney requests fees of \$3,622.50. Billed at \$350/hour for 10.35 hours' attorney time. Itemized, LF p. 6.
3. Petitioner requests a Court order directing and ordering Inland Regional Center, Trustee of the Special Needs Trust for Tonya Smith, to pay requested sum.
4. ~Proposed Order: 07/25/17

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 05/05/18 Final Discharge



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 09/05/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600068

CASE NAME: IZACK PAUL MONTANO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JESSICA MONTANO

COUNSEL:

IZACK PAUL MONTANO                      (CEP)...WALTER T. MOORE

JESSICA MONTANO                         (CPE)...FRANK O TETLEY

GENERAL INFORMATION

Order appointing Jessica Montano conservator of the person and estate entered 12/13/16,  
no bond.

**Continued from 07/18/17 at request of counsel.**

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

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

1. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
2. Need Statement of Care Plan in accord with Pr.C.§2352.5.
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN

**SEE ALSO 16**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ROBBIN YAN-SINGZON

COUNSEL:

FORTMAN S YAN	(CEP)...WALTER T. MOORE
FORTMAN S YAN	(CPE)...BRYAN C HARTNELL
ROBBIN YAN-SINGZON	(CPE)...BRYAN C HARTNELL

#### GENERAL INFORMATION

Order Appointing Temporary Conservator entered 05/17/16.

Order appointing Robbin Yan-Singzon, Conservator of the person and estate entered 07/27/16, \$20,000 bond.

Continued from **01/31/17** to clear notes.

Continued from **04/18/17**. Robbin Yan-Singzon and Fortman S Yan are ordered to be present at next hearing if required documents are not filed. Notice given by Judicial Assistant.

**Continued from 06/20/17 at request of counsel.**

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

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

1. **Section 4b to proof of service to Notification of Conservatee's Rights filed 02/21/17 is blank. Question whether a conformed copy of the Order Appointing Conservator was sent? JTD.**
2. Statement of Care Plan filed 05/10/17.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. Proof of recordation of letters filed.

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

**RECOMMENDATION:**

Need to clear notes 1, 4-5. 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/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 09/05/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN

**SEE ALSO 15**

HEARING:

Accounting Review

COUNSEL:

FORTMAN S YAN

(CEP)...WALTER T. MOORE

FORTMAN S YAN

(CPE)...BRYAN C HARTNELL

ROBBIN YAN-SINGZON

(CPE)...BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Robbin Yan-Singzon, appointed conservator of the person and estate on 07/27/16, \$20,000 bond.
2. Need First Account beginning on 07/27/16.

RECOMMENDATION

Inquire status of accounting.

(cs)

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

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DATE: 09/05/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700259

CASE NAME: CARMEN DACANAY

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
CARMEN DACANAY (CTE)...  
DONNA AARFLOT (PET)... MATTHEW SHEASBY

#### GENERAL INFORMATION

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

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

1. Petitioner seeks bond of \$38,280. Appears sufficient.
2. Petitioner seeks medical powers. Need Capacity Declaration.
3. Petitioner seeks dementia powers. Need appointment of counsel for report.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need Notice of Hearing and Proof of Service.
6. Proof of Personal Service filed 07/14/17 as to proposed conservatee, Carmen Dacanay. Need return of Citation.
7. **Court Investigator report filed.**
8. ~Proposed Form Order: 07/10/17

#### RECOMMENDATION

Need to clear notes 2-6 If approved, set hearing for Compliance Review for **04/10/18** for the filing of the required documents and hearing re Accounting Review for **11/03/18**. Any accounting to be filed 30 days in advance.  
(lh/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 09/05/17      TIME: 9:30      DEPT: S37P  
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CASE#: SLC SS02880

CASE NAME: MTR RE CLINTON ROWDEN

HEARING:

Accounting Review

COUNSEL:

CLINTON R ROWDEN

(CEP)...HARTNELL LAW GROUP

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Letters expire 05/19/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Ninth Account entered 08/17/16 for period ending 06/30/15.
2. Need Tenth Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)