



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/06/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

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

Lc08/07;08/31/17lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501163

CASE NAME: MTR OF ROBERT T CHAMP, JR

HEARING: FIRST AND FINAL Account and Report of ROBERT T CHAMP III and
Petition for allowance of fees filed.

COUNSEL:

ROBERT T CHAMP III

(PET)...J BENJAMIN SELTERS III

ROBERT T CHAMP JR

(DEC)...

XREF: PROPS1500953 (*Robert Champ Jr*)

GENERAL INFORMATION

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

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

1. Petitioner and counsel request attorney fees of \$16,922.68 each. Ok
2. Petitioner requests extraordinary fees of \$2,484 for 82.8 hours at \$30 per hour.
Itemized [Acct. 05/31 LFpg10-11]. JTD
3. Counsel requests extraordinary fees of \$1,152 for 3.6 hours at \$320 per hour.
Itemized [Acct. 05/31 LFpg12]. JTD
4. Petitioner requests reimbursement of costs of \$1,603. Itemized [Acct. 05/31
LFpg6].
5. Elizabeth Maxwell is named as Trustee in petition. Elizabeth declined to act as
executor; however, there does not appear to be a copy of trust, declination to act as
trustee or acceptance of trustee. Petitioner names himself as trustee in report.
Need verified supplement with copy of Trust. **Supp. 08/28/17 copy of trust
provided; however, still need declination to act as trustee and acceptance of
trustee.**
6. ~Proposed Order: 05/31/17. Ok as to form and content. Need to clear note 6.

RECOMMENDATION

Need to clear note 6. If approved, set hearing on the filing of receipts and final discharge
for **09/12/18**.

(lc/lh)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600171

CASE NAME: MTR OF JEROME NEWELL MARTIN

HEARING:

Probate status report filed.

COUNSEL:

RONALD J MARTIN (PET)...CARL G EHMANN
JEROME NEWELL MARTIN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Ronald Martin, brother, on 04/11/16; full authority, no bond.
2. Petitioner seeks an additional year to close the estate in order to sell the vacant lots.
3. Notice of hearing and proof of service filed 06/20/17. However, need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION

Need proper notice. If approved, set Accounting/Status Review for **09/12/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600822

CASE NAME: MTR OF RODERICK YZAGUIRRE

HEARING:

Hearing Re: Trial Conference

COUNSEL:

MEDHAT NASHED	(PET)...KRISTEN B. BROWN
RODERICK YZAGUIRRE	(DEC)...
JILL YZAGUIRRE	(OBJ)...PRO/PER

XREF: CIVDS1511117 (Nashed V Yzaguirre)

TSC – No notes – JTD

Future Hearings: 12/12/17: Readiness Calendar, 1/22/17-1/26/17: Court Trial

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700520

CASE NAME: MTR OF FELIPE NAJERA SANCHEZ

SEE ALSO 4A

HEARING:

Hearing Re: AMENDED PTN FOR LETTERS OF ADMIN W/FULL AUTH IAEA

COUNSEL:

ERIKA ALVARADO TORRES (PET)...THE BOUTIQUE LAW GROUP APLC
FELIPE NAJERA SANCHEZ (DEC)...

GENERAL INFORMATION

Letters of special administration issued to Erika Alvarado Torres with limited IAEA on 07/25/17, \$150,000 bond.

Continued from 08/17/17.

THIS CASE SET FOR HEARING ON **Amended** Petition for Letters of Administration with Full Authority under IAEA by Erika Alvarado Torres, step-daughter

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

1. Bond request in the amount of \$150,000. Ok.
2. Petition is on an outdated form. JTD
3. ~Proposed Form Order: 05/25/17

RECOMMENDATION

RFA, \$150,000 bond. Court's discretion re notes 2 & 3. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700520

CASE NAME: MTR OF FELIPE NAJERA SANCHEZ

SEE ALSO 4

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH LIMITED AUTHORITY TO
ADMINISTER UNDER IAEA

COUNSEL:

ERIKA ALVARADO TORRES (PET)...THE BOUTIQUE LAW GROUP APLC
FELIPE NAJERA SANCHEZ (DEC)...

GENERAL INFORMATION

Erika Alvarado Torres appointed special administrator on **05/30/17**; limited authority
\$150,000 bond.

Continued from 08/17/17 at request of court due to amended petition set for 9/6/17.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with **limited**
authority under IAEA by Erika Alvarado Torres, step-daughter.

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

1. Notice to Petition to Administer Estate and proof of service filed; however, for future hearing; 09/06/17.
2. Petitioner seeks bond of \$150,000. Ok. Temporary bond ordered has not yet posted; therefore, letters have not yet issued. Court to inquire.
3. Date of death stated is 05/15/**20167**. However, amended petition states date of death 05/15/17.
4. It appears amended petition seeks full authority, rather than limited; hearing 09/06/17. **See notes on previous page.**
5. Proof of publication filed; however, reflects future hearing date of amended petition not yet heard.
6. ~Proposed Form Order: 05/25/17.

RECOMMENDATION

Matter appears moot as amended petition was filed. See prior matter.

Inquire status of bond. Court to trail **09/06/17**. If approved, set Accounting/Status Review for **10/25/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (lc/lh)

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

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700582
CASE NAME: MTR OF WILLIAM ALLEN HOLMES
HEARING: Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY
WITH FULL AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

DAVID W MUSICK	(PET)...THOMAS W DOMINICK
WILLIAM J DAUP JR	(PET)...THOMAS W DOMINICK
WILLIAM ALLEN HOLMES	(DEC)...
JOANNE BUXTON	(RES)...COPENBARGER & ASSOCIATES
SHERI AUTREY	(COPENBARGER & ASSOCIATES)

GENERAL INFORMATION

Ex parte application to suspend successor trustee powers and freeze trust assets denied on 07/05/17. Attorney Thomas Dominick agrees that there will be no distributions of the \$114,000 in the attorney/client trust account without court order.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by David Musick & William Daup, Jr, nephews/co-trustees.

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

1. Will waives bond. The estate consists of \$114,470 in personal property. co-petitioner David Musick is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b). Does court wish to require minimum bond of \$20,000 or in alternative, based on assets of \$114,470?
JTD
2. Will appoints current successor trustees as executors. No names given; however, petitioners claim to be successor trustees. JTD if sufficient.
3. The will conditionally incorporates decedent's Trust. Copy of trust filed 06/14/17.
4. Notice to Petition to Administer Estate and proof of service to Kenneth Odom Jr.
Supp 08/31: alleges that petitioner believes Kenneth changed his name and petitioner has conducted internet searches with no results. JTD
5. ~Proposed Form Order: 06/14/17

RECOMMENDATION

Court's discretion re bond and note 4. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc/lh/lc)

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

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

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: CIP DS1700104

CASE NAME: IN RE: ESTATE OF ANGELA LIZETTE ALBA
SEE ALSO 5B 5C
HEARING: Order to show cause re: verification of deposit

COUNSEL:

JEFFREY G PRENTICE (PET)...LAW OFFICE OF PETER R NASMYTH JR
ISSABELLA PRENTICE (PET)...LAW OFFICE OF PETER R NASMYTH JR
ANNELISE PRENTICE (M/P)...LAW OFFICE OF PETER R NASMYTH JR
KATHERINE PRENTICE (M/P)...LAW OFFICE OF PETER R NASMYTH JR

XREF: PROPS1500171

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON OSC re Verification of Deposit

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

1. Matter set on 08/03/17, wherein, Court granted settlement of \$9,333.33 ordered deposited in a trust account with no funds to be withdrawn without court approval.
2. Need proof of deposit

RECOMMENDATION

Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: CIP DS1700104

CASE NAME: IN RE: ESTATE OF ANGELA LIZETTE ALBA

SEE ALSO 5A 5C

HEARING: Order to show cause re: verification of deposit

COUNSEL:

JEFFREY G PRENTICE	(PET)...LAW OFFICE OF PETER R NASMYTH JR
ISSABELLA PRENTICE	(PET)...LAW OFFICE OF PETER R NASMYTH JR
ANNELISE PRENTICE	(M/P)...LAW OFFICE OF PETER R NASMYTH JR
KATHERINE PRENTICE	(M/P)...LAW OFFICE OF PETER R NASMYTH JR

XREF: PROPS1500171

See notes on prior matter 5A.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/06/17 TIME: 8:30 DEPT: S35P

CASE#: CIP DS1700104

CASE NAME: IN RE: ESTATE OF ANGELA LIZETTE ALBA

SEE ALSO 5B 5C

HEARING: Order to show cause re: verification of deposit

COUNSEL:

JEFFREY G PRENTICE	(PET)...LAW OFFICE OF PETER R NASMYTH JR
ISSABELLA PRENTICE	(PET)...LAW OFFICE OF PETER R NASMYTH JR
ANNELISE PRENTICE	(M/P)...LAW OFFICE OF PETER R NASMYTH JR
KATHERINE PRENTICE	(M/P)...LAW OFFICE OF PETER R NASMYTH JR

XREF: PROPS1500171

See notes on prior matter 5A.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 09/06/17 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000281

CASE NAME: SHANIKA LISTER

HEARING:

Hearing Re: STATUS OF DR. LEEB'S REPORT

COUNSEL:

VICKI LISTER	(CP/CPE)... HARTNELL LAW GROUP
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
CHRISTINA ERICKSON-TAUBE	(CP)...SHERRI L KASTILAHN
SHANIKA A LISTER	(CEP/CEE)...EDWARD B FISCHER & ASSO
EDWARD B FISCHER	(PET)...EDWARD B FISCHER & ASSOC
YO TASHI KO Y. TUCKER	(PET)...HARTNELL LAW GROUP
CARMELA C JOHNSON	(CP)...PRO/PER
STAN MANDELL	(PET)...LAMB MORRIS & LOBELLO
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
BANK OF THE WEST	(RANDOLPH M SHARON)

XREF: PROPS1400134 (*Vicki Lister*) **CIVDS1309039** (*Hartnell V Lister*)

GENERAL INFORMATION

Vacated on 08/09/17 and reset.

THIS CASE SET FOR HEARING ON Status Report by Dr. Leeb

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

1. On 06/07/17 Dr. Leeb was ordered to submit a report by 07/28/17.
2. Need report.

RECOMMENDATION

Inquire status of report.

(lc)

Future Hearings: 10/18/17: Pre-Trial Conference, 11/16/17: Readiness Calendar (2X), Hearing Re: Petition for Conservatorship (2X), 12/11/17-12/15/17: Court Trial, 4/19/18: 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 for clarification of the notes only - **no legal or procedural advice will be given**

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

DATE: 09/06/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600153

CASE NAME: MTR OF MARITSA RAMIREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of LETICIA RAMIREZ

COUNSEL:

LETICIA RAMIREZ (CPE)...PRO/PER
MARITSA RAMIREZ (CEE)...MELVIN L FRIEDLAND

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Leticia Ramirez, mother, appointed limited conservator of the person only on 02/01/17.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Care Plan in accord with Pr.C.§2352.5 filed on 07/25/17.

RECOMMENDATION

Need to clear notes 2 & 3.

(ww)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600382

CASE NAME: CARMEN MARQUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SARA SHERMAN

COUNSEL:

SARA SHERMAN (PET)...GAUDY LAW, INC
CARMEN MARQUEZ (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sara Sherman, daughter, appointed conservator of the person and estate on 02/01/17, No bond. However, **need** letters as none are in the file to issue.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 1-7.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/06/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700083

CASE NAME: MTR OF OFELIA M REYES

SEE ALSO 10

HEARING:

Petition for EXCLUSIVE AUTHORITY TO GIVE CONSENT FOR MEDICAL
TREATMENT

COUNSEL:

RONALD CHARLIE REYES (CP)...PRO/PER

OFELIA M REYES (CTP)...

See notes on matter 10.

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

DATE: 09/06/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700083

CASE NAME: MTR OF OFELIA M REYES

SEE ALSO 9

HEARING: Petition for Appointment of Conservator

COUNSEL:

RONALD CHARLIE REYES (CP)...PRO/PER
OFELIA M REYES (CTP)...

GENERAL INFORMATION

Temporary orders granted on 03/21/17. Ronald Reyes appointed person only.
Continued from 05/10/17. Need amended petition re estate powers.
OSC set on 06/14/17 when there was no appearance. Court will terminate temporary conservatorship and dismiss petition if petitioner fails to appear.

Continued from 07/26/17. OSC taken off calendar.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Ronald Reyes, son.

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

1. Petitioner seeks Pr.C. § 2590 powers; however, this is a petition for **person only**.
Need amended petition for estate powers.
2. Petitioner seeks Pr.C.§§ 1873 or 1901 powers; however, it appears attachment indicates 1873 in regards to estate transactions. [Pet.03/07 LFPg12].
3. Certificate of Completion of the Conservatorship Training Class filed 05/08/17.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2358
5. Petitioner seeks medical powers. Capacity Declaration filed 03/07/17;
 - a. Section 3 is incomplete as to whether party is physician.
 - b. Section 4 is incomplete as to conservatee's name.
6. Need return of citation.
7. Need notice of hearing and proof of service.
8. Court Investigator report filed 05/09/17.
9. ~Proposed Form Order: 03/07/17.

RECOMMENDATION

Need to clear notes 5-7. If approved, set hearing for Compliance Review for **04/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

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Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0600285

CASE NAME: TERINA SPRAGUE SPECIAL NEEDS TRUST

HEARING: Order to Show Cause RE: Sanctions for FTA/Failure to file
required docs

COUNSEL:

BANK OF THE WEST (PET)...JOHN A PAYNE JR
TERINA SPRAGUE (PET)...PRO/PER
SHERRIL SPRAGUE (PET)...LAW OFFICES OF CAMERON SANCHEZ
THE TERINA SPRAGUE SPECIAL NEEDS TRUST (TRU)...
CHERYL SPRAUGE (STE)...PRO/PER

GENERAL INFORMATION

OSC set on 12/14/16 when there was no appearance or notes cleared.

OSC Continued from 02/22/17, 04/19/17 and 06/23/17. Counsel Cameron Sanchez's office requested second call, but did not notify clients. Clients did not wish to wait.

THIS CASE SET FOR HEARING ON **OSC re Sanctions for FTA/FTF/1st** and Final Account and Report of SNT by Sherril Sprague.

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

1. Accounting period 03/28/14 – 10/13/16.
2. Assets on hand: \$4,573.54 cash and real property.
3. Trustee waives compensation.
4. Attorney requests fees of \$2,000, reduced from \$3,000 for 10 hours at \$300 per hour. Itemized [Acct.10/20 LFpg14].
5. Petitioner requests court waive sanctions of \$500.
6. Petitioner seeks the SNT be terminated. However, it is unclear why the termination as real property still remains. See next notes.
7. Petitioner requests that remaining funds be used to repair the beneficiary's residence. However, it appears the property should be held in the name of the trust. Need vesting deed as real property was listed in prior accountings. **Deed provided in supplement indicating held in name of trust** See bulk filing [12/31/07 LFpg159]. **Supp04/14: Petitioner requests that the real property be transferred outside of trust due to lack of liquid assets. Petitioner alleges that the real property will not affect the beneficiary's public benefits.**
8. Petitioner states that the trust does not have any real property; however, page 2 line 6 states that the home was purchased with trust fund money. Question why the real

property is not listed in the accounting? Need verified supplement and accounting to reflect the real property. **Supp04/14: amended accounting does not appear to be provided.**

9. No proposed order. Submit after hearing.
10. All government agencies have been noticed.

RECOMMENDATION

Court's discretion re OSC. Amended accounting filed to be heard 10/10/17.

(lc)

Future hearing dates: 10/10/17 final accounting by Sherril Sprague.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200854

CASE NAME: ALFRED CHARLES LAWRENCE

HEARING:

Hearing re Final Discharge

COUNSEL:

VALERIE LAWRENCE HANNIGAN (PET)...BURLISON LAW GROUP
ALFRED CHARLES LAWRENCE (DEC)...
WALTER T MOORE (PET)...WALTER T. MOORE
NEIL PATRICK HIERS (ANY)...WALTER T MOORE (GAL)

GENERAL INFORMATION

Continued from 07/05/17. Counsel stated the vehicle has been disposed of and receipt has been submitted.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Valerie Hannigan, daughter, approved on 06/29/16.
Proposed order submitted 08/17/17 was returned on 08/31/17 for corrections.
2. No receipt required; petitioner is sole heir.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b) once note 1 is cleared.

RECOMMENDATION

Inquire status of orders.

(lc/lh)

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501040

CASE NAME: ROBERT ST.JOHN

HEARING:

FIRST AND FINAL Account and Report of JEFFREY E PAPCIAK, JOSEPH T BLAUM and Petition for allowance of fees filed.

COUNSEL:

JEFFREY E PAPCIAK	(PET)...SELTERS & SELTERS
JOSEPH T BLAUM	(PET)...J. BENJAMIN SELTERS III
ROBERT ST.JOHN	(DEC)...
LAURA WOODWARD	(TP)...
SCOTT A HANCOCK	
PHYLLIS A BENJAMIN	(BRYAN C. HARTNELL)
US BANK	(SAMUELS, GREEN & STEEL, LLP)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Jeffrey Papciak and Joseph Blaum, cousin and brother of predeceased spouse.

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

1. Petitioners request statutory compensation of \$36,672.87 to be divided equally. Ok
2. Attorney requests statutory fees of \$36,672.87. Ok.
3. Attorney requests extraordinary fees of \$2,555 for 7.3 hours at \$350 per hour for. Itemized [Acct. 05/31/17 LFpg19-20]. JTD
4. Petitioner requests extraordinary fees for attorney Clark Selters of \$9,872.50 for 35.9 hours at \$275 per hour. Itemized [Acct. 05/31/17 LFpg17-19]. JTD
5. Attorney's request reimbursement of costs totaling \$2,277.40. Itemized [Acct. 05/31/17 LFpg9].
6. Petitioner requests a reserve of \$15,000; bond premiums are reportedly \$4,500 per year.
7. ~Proposed Order: 05/31/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/12/18**.

(lc/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: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600060

CASE NAME: MTR OF JEAN SUZANNE SCATES

HEARING:

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

COUNSEL:

SANDY DIEDERICH (PET)...PRO/PER
JEAN SUZANNE SCATES (DEC)...

GENERAL INFORMATION

Continued from 07/05/17. Creditor's Claims have been paid.

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution by Sandy Diederich, daughter.

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

1. Petitioner waives statutory compensation.
2. All heirs waive accounting.
3. Petitioner seeks a reserve of \$1,000.
4. ~Proposed Order: 04/06/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **09/12/18**.

(lc/lh/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: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700066

CASE NAME: MTR OF RONALD C HESS

HEARING:

Hearing Re: STATUS CONFERENCE/ISSUANCE OF ORDER/LETTERS

COUNSEL:

KATHERYN ANNE KIRKMEYER (PET)...ZUMBRUNN LAW CORPORATION
RONALD C HESS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Conference/issuance of letters.

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

1. Letters of Administration issued to Linda Rogers, PPF, on 07/25/17; full authority \$250,000 bond.
2. Settlement was reached.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing: 8/29/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700274

CASE NAME: MTR OF LOIS HELEN STUTES

HEARING:

Petition for CONVEYANCE OR TRANSFER OF PROPERTY CLAIMED TO
BELONG TO OTHER PERSON

COUNSEL:

DALE WADE	(PET)...PRO/PER
LOIS HELEN STUTES	(DEC)...
THE LOIS HELEN STUTES TRUST	(TRU)...
WALTER MOORE	(GAL)...

Currently under review by legal research

(LR)

NOTICE:

1. If property is encumbered, court may wish to require notice to mortgage company.
JTD

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700536

CASE NAME: MICHAEL PAUL MCCARTY

HEARING:

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

COUNSEL:

CYNTHIA S REUTER (PET)...LAW OFFICE OF SU P CHEAH
MICHAEL PAUL MCCARTY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Cynthia Reuter, executor.

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

1. Will waives bond. Net estate value \$133,846 of which \$16,000 is personal property.
2. ~Proposed Form Order: 05/31/17.

RECOMMENDATION

RFA subject to Court's discretion re bond. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700674
CASE NAME: ROBERT OSCAR CLARK
HEARING: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DALE CRAIG CLARK (PET)...MICHAEL C MADDUX
ROBERT OSCAR CLARK (DEC)...

GENERAL INFORMATION

Letters of special administration issued to Dale Clark on 07/17/17.

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

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

1. Petitioner is the purported sole heir and waives bond. Estimate value of estate is \$15,000, cash.
2. Notice of Petition to Administer Estate filed 08/23/17 includes notice to Nicole Carter. Need verified supplement clarifying Nicole Carter's relationship to decedent as she is not listed in section 8 of Petition.
3. Declaration filed on 07/14/17 re exparte notice indicating that Nicole Carter replied with a statement that she was "executor and owns everything". Will must be lodged per Pr.C. § 8200 and court would order persons to produce a will per Pr.C. § 8201. Question if there is a will as Nicole cannot be an executor without testamentary document? Need verified supplement. **Supp. 08/23/17 Nicole Carte has ignored phone calls and letters, and has not provided a copy of Will.**
4. ~Proposed Form Order: 07/10/17

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700676

CASE NAME: MTR OF PAUL JAMES LENHART

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JODIENNA ANN LUKACS (PET)...MICHAEL C MADDUX
PAUL JAMES LENHART (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Jodienna Lukacs, girlfriend

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

1. All heirs waive bond; however, need bond waiver by Beth Arnold. Estate value has not been determined.
2. Duties and liabilities has the attorney's address in place of the petitioner's. Need corrected form.
3. Petitioner is nominated by two of decedent's 3 daughters who have higher priority per Pr.C. § 8461.
4. ~Proposed Form Order: 07/10/17

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino
Page: 9A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/06/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700440

CASE NAME: MTR OF KENNETH B AND CLAIRE A SAMPLE TRUST

HEARING:
Hearing Re: Proof of Bond

COUNSEL:
BRYAN SAMPLE (PET)...CHANDLER LAW FIRM
MELANIE SAMPLE (PET)...CHANDLER LAW FIRM

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Proof of Bond

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

1. Matter set on 08/08/17, wherein, Court appointed Catherine Sample as successor trustee, \$85,000 bond.
2. Need proof of bond.

RECOMMENDATION

Inquire status.
(lh)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900074

CASE NAME: MTR OF MICHAEL EDWARD EVANS

HEARING: THIRD Account and Report of RUSSELL EVANS, ELIZABETH EVANS
and Petition for allowance of fees filed.

COUNSEL:

RUSSELL EVANS	(CPE/TEE)...PRO/PER
ELIZABETH EVANS	(CPE)...PRO/PER
MICHAEL EDWARD EVANS	(CEP)...NOREEN FONTAINE
MICHAEL EDWARD EVANS S.N TRUST	(TRU)...

GENERAL INFORMATION

Continued from 07/12/17. Bond increased by \$16,550 for total bond of \$99,550.

THIS CASE IS SET FOR HEARING ON 3rd Account Current of SNT and Petition for Costs
by Russell and Elizabeth Evans, Trustees/parents.

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

1. Account period covers 04/01/15 – 03/31/17.
2. Assets on hand \$90,491.62 consisting of \$71,676.94 in cash and the balance in securities.
3. Petitioners do not request compensation.
4. Petitioners request reimbursement of \$150.00 for costs advanced for postage, copying etc. There does not appear to be a local rule excluding a trustee for reimbursement of these costs. JTD
5. Corrected notice of hearing and proof of service filed; however, proof of service does not indicate server's address. Need corrected proof of service.
6. No proposed order. Submit after hearing.

RECOMMENDATION:

Need proper notice. If approved, set hearing re next Accounting Review for **06/06/18** (if one year) or **06/05/19** (if two years). Accounting to be filed 30 days in advance.
(lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300104

CASE NAME: KENNETH DEWAYNE DOERR

SEE ALSO 12

HEARING:

Hearing Re: Status/Review

COUNSEL:

STEPHANIE GAMBLE (CPE)...PRO/PER
KENNETH DEWAYNE DOERR (CEE)...

XREF: CONPS1300105 (*Donald Doerr Jr, brother*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status/Review.

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

1. Matter set on 07/12/17 when there were concerns of Court Investigator report. After review of all pertinent documents (APS report, Court investigator's report and court appointed counsel's report), the Court finds there are no care issues or abuse issues. Any further concerns, parties to filed petitions/documentation.

RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300105

CASE NAME: DONALD WAYNE DOERR JR

SEE ALSO 11

HEARING:

Hearing Re: Status/Review

COUNSEL:

STEPHANIE GAMBLE (CP)...PRO/PER

DONALD WAYNE DOERR JR (CEE)...

XREF: CONPS1300104 (*Kenneth Doerr, brother*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status/Review.

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

1. Matter set on 07/12/17 when there were concerns of Court Investigator report. After review of all pertinent documents (APS report, Court investigator's report and court appointed counsel's report), the Court finds there are no care issues or abuse issues. Any further concerns, parties to filed petitions/documentation.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300208

CASE NAME: William G Carr

HEARING:
Petition for ATTORNEY'S FEES

COUNSEL:

KAREN VILLALPANDO	(CPE)...J. DAVID HORSPOOL
BILLIE TEEL	(CPE)...J. DAVID HORSPOOL
WILLIAM G CARR	(CEP)...MARK J. FLORY
MARK J. ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Continued from 07/12/17 at request of counsel.

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mark Flory.

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

1. Petitioner, Mark Flory, appointed counsel on 08/08/13.
2. Petitioner requests fees of \$1,890 for 9.6 hours at \$105/350 for paralegal and attorney services. Itemized [Pet. 06/09/17LFpg 6-8].
3. ~Proposed Order: 06/09/17.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearing: 01/21/19: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110
CASE NAME: LUCIO CORONADO

HEARING: FIRST

Account and Report of LUCIO CORONADO III and Petition for allowance of fees filed.

COUNSEL:

CHERI SIPLE (CPE)...PRO/PER
LUCIO CORONADO III (CPE)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO (CEE)...JAMES B CHURCH
WALTER MOORE (GAL)

Waiver of Court Fees and Costs filed by Lucio Coronado III

CASE TO REMAIN IN S36

GENERAL INFORMATION

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

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

1. Accounting period 09/15/15 – 12/31/16.
2. Assets on hand \$211,963.10 of which \$1,212.70 is cash.
3. Petitioner is not seeking compensation at this time.
4. Inventory and Appraisal indicates value of assets for 12/09/16 and accounting period begins 09/15/15.
 - a. Need assets at date of temporary appointment of 08/31/15.
 - b. Need accounting period to begin with temporary appointment 08/31/15.
 - c. Need bank statement covering 08/31/15.
5. Attorney seeks reimbursement of costs totaling \$469.73 of which \$400 is requested. Need separate itemization.
6. Attorney requests fees of \$34,546.75 for 192.25 hours at \$95/350 for paralegal and attorney services. Itemized [Acct. 08/02 LFpg16-46].
7. Current bond is \$20,000 and proceeds of sale to be placed into blocked account (08/08/17).
8. Proposed Order: 08/02/17; however, need to correct Inventory and Appraisal and accounting period.

RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing on the next accounting review for **03/14/18** (if one year) or **03/13/19** (if two years). Accounting to be filed 30 days in advance.

(lc)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600160

CASE NAME: BRIAN J. PARRA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA VIORATO

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Viorato & Victor Parra Ante, parents, appointed limited co-conservators of the person only on 02/01/17.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Care Plan filed 08/14/17.

RECOMMENDATION

Need to clear notes 2-3.

(ww/lh)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600196

CASE NAME: SHANE ROBERT DEAL

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ELIZABETH DEAL

COUNSEL:

ELIZABETH DEAL	(PET)...PRO/PER
EMILY CUNDIFF	(PET)...PRO/PER
SHANE ROBERT DEAL	(CEE)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Elizabeth Deal & Emily Cundiff, mother and sister, appointed limited co-conservators of the person only on 02/01/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 02/09/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed on 02/27/17; however, there is conflicting information as to whether conservatee resides in board and care or his personal residence. Court to clarify.
4. Care Plan in accord with Pr.C.§2352.5 filed on 02/27/17; however, the section regarding the time at the present residence and level of care is blank. Need same.

RECOMMENDATION

Need to clear note 4 and court's discretion re note 3.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284
CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANDREW PRAMSCHUFER

COUNSEL:

ANDREW PRAMSCHUFER (CPE)...ROSA M MARQUEZ
JANICE ANNE PRAMSCHUFER (CEP)...DONNASUE ORTIZ
SUSAN PRAMSCHUFER (CPE)...LAW OFFICE OF ROSA M. MARQUEZ
LIBERTY MUTUAL INSURANCE (TP)...
BARBARA PRAMSCHUFER (MITCHELL I ROTH)

XREF: CONPS1600244 (*Barbara Pramschufer*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Susan and Andrew Pramschufer, sister and brother, appointed Co-Conservators of the person and estate on 02/01/17, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/22/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed on 02/22/17.
4. Need Care Plan in accord with Pr.C.§2352.5.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.

RECOMMENDATION

Need to clear notes 4-5.

(ww/lh)

Future hearing dates:

09/13/17 Petition for order fixing and allowing reimbursement of attorney's fees

04/16/18 Accounting Review

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

DATE: 09/06/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700286

CASE NAME: MTR OF ASHLEY LORIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BLANCA LORIA	(CP)...PRO/PER
JONATHAN LORIA	(CP)...PRO/PER
ASHLEY LORIA	(CTP)...

GENERAL INFORMATION

Craig Parker appointed counsel on 08/09/17. Exparte orders denied.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Blanca and Jonathan Loria, mother and brother

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

1. Petitioners seek medical powers. Capacity Declaration filed 07/27/17.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). JTD
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court appointed counsel per Pr.C. §1470. Need report of Counsel Craig Parker.
4. Need return of citation.
5. Need notice of hearing and proof of service.
6. CI Report filed 08/31/17.
7. ~Proposed Form Order: 07/27/17.

RECOMMENDATION

Need to clear notes 3-5. If approved, set hearing for Compliance Review for **04/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lc/lh)

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

DATE: 09/06/17 TIME: 1:30 DEPT: S36P

CASE#: SC SS02769

CASE NAME: MTR OF JOHN H MIKEASKY

SEE ALSO 20

HEARING: Hearing Re: ORDER COMPELLING CONSERVATOR TO PAY
CHARGES DUE

COUNSEL:

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

GENERAL INFORMATION:

Continued from **11/01/16** at request of counsel. Notice to be given by petitioner.
Continued from **01/17/17** for Mr. Mikeasky to be personally served. The Court orders the bonding company to be notified. Accounting to be filed by 03/21/17. Notice by Judicial Assistant.

Continued from 04/04/17. Parties report charges have not been paid as previously ordered. Ms. Nelms reports conservatee has passed away and therefore charges cannot be paid at this time. The Court orders a supplemental brief be filed within 30 days. Ms. Nelms states that counsel will accept service on issues related to this petition. Objections to be filed and served by Thursday, 4/6/17.

Continued from 06/13/17. Johnny Mikeasky ordered to be present for trial. Court will rule upon evidentiary objections and sent rulings to parties.

Continued from 08/17/17.

THIS CASE IS SET FOR HEARING ON Petition for Order Compelling Conservator to Pay Charges Lawfully Due for Nursing Care by Vista Pacifica Enterprise, Inc., dba Vista Pacifica Center ["Vista Pacifica"].

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

- 1 Petitioner, Vista Pacifica Enterprises, Inc., dba Vista Pacifica Center brings the following petition for an order compelling Conservator, Johnny Mikeasky, to pay charges lawfully due and payable for 24 hour nursing care services provided to Conservatee, John Mikeasky, by Vista Pacifica Center.
- 2 Conservatee was discharged on 04/12/16 with a balance owing of \$77,448.00, which have not been paid.

- 3 Petition includes calculations for a pre-judgment interest in accordance with this statute reflecting the balance owing of \$77,448.00 at a rate of 10% would equal a balance for prejudgment interest of \$714.32 for a total due of \$78,162.12 as of 08/01/16.
- 4 Petitioner requests an order directing the Conservator, Johnny Mikeasky, to pay Petitioner the sum of \$77,448.000 for nursing care provided to Conservatee; pre-judgment interest in the amount of \$714.32; attorney fees of \$800 based upon the open book account; and the sum of \$435 for filing of this action.
- 5 **Conservatee passed away on 03/26/17.**
- 6 **P's & A's filed 05/04/17 & 05/31/17. Referred to Legal Research.**
- 7 **Objections filed 04/06/17 by Conservator of the person and estate, Johnny Mikeasky.**
- 8 **Supplemental filed 05/14/17 by Controller for petitioner Vista Pacifica Center, Lorraine Stevens, alleges with the inclusion of additional interest, the amount of the debt due and owing as of 06/13/17 is \$78,732.92.**
- 9 **Evidentiary Objections of Vista Pacifica to Respondent's Objections to Petition et seq. filed 06/01/17.**
- 10 **Reply by Vista Pacifica Center to Objections by Respondent to Petition and Declaration et seq. filed 06/01/17.**
- 11 Proposed Order 01/11/17 reflects a different amount owing.

RECOMMENDATION:

Set for contested hearing. If continued, Court to **set matter on a Tuesday** as originally set if possible.

(nb)

Future Hearing: 09/18/17 Eight and final account

Superior Court of Calif, County of San Bernardino

Page: 20 late add on

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

DATE: 09/06/17 TIME: 1:30 DEPT: S36P

CASE#: SC SS02769

CASE NAME: MTR OF JOHN H MIKEASKY

SEE ALSO 19

HEARING:
Mediation Settlement Conference

COUNSEL:

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

M.S.C. – No notes – JTD

Future Hearing:
09/18/17 Eight and final account

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400078

CASE NAME: Petrica Simon Lucian Vaduva

HEARING:

Petition for APPROVAL OF PAYMENT OF ATTORNEY'S FEES TO GUARDIAN
AD LITEM

COUNSEL:

NICOLE MARIE VADUVA

(PET)...ROBERT A KRASNEY

PETRICIA SIMON LUCIAN VADUVA

(DEC)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees and Preliminary
Distribution by Mitchell Roth.

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

1. Petitioner, Mitchell Roth, appointed GAL for minor heirs.
2. Petitioner seeks attorney's fees of \$4,710 for 15.7 hours at \$300 per hour.
3. Petitioner seeks additional authorization to partially distribute as follows:
 - a. \$10,000 to Nicole Vaduva spouse.
 - b. \$20,000 to Magdalena Cazan minors' mother, to be distributed to the 4 minor children.
4. Petitioner states that a petition for fees has not been filed prior due to court recently ordered him to file petition for fees under the Spousal Property Petition at the 04/19/17 hearing.
5. ~Proposed Order: 06/13/17.

RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500817

CASE NAME: GRACE U BOCANEGRA

HEARING:
Hearing re Final Discharge

COUNSEL:

DAVID LAZOR (PET)...PRO/PER
GRACE U BOCANEGRA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of David Lazor approved on 08/31/16; order filed 10/04/16.
2. No receipt required, petitioner is sole beneficiary.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of discharge order.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600606
CASE NAME: THERESA M. HERRERA
HEARING: Report Sale and Petition for Order Confirming Sale of Real
Property.

COUNSEL:

JENNIFER MEDRANO (PET)...HORSPPOOL & HORSPPOOL
THERESA M. HERRERA (DEC)...
INHERITANCE FUNDING COMPANY (TP)...STEVEN D SCHROEDER

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

Address	14681 Dana St., Adelanto 92301 APN 3132-251-62-0000
Appraised value	\$150,000.00.
Sale price	\$135,000.00
First overbid	\$142,250.00
Deposit	\$13,500. Ok.
Commission	6% total commission, \$8,100.00 to Sierra Realty.
Additional bond	Proceeds to be placed into blocked account.
Reason for sale	Debts and expenses.
Exposure to market	MLS (Multiple listing service), marketing and advertising.
Notice	Ok. ~Proposed Form Order: 06/16/17.
(lc)	
Future Hearing: 2/20/18: Accounting Review	

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600927

CASE NAME: FELIPE DE JESUS LEAL

SEE ALSO 5

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

FELICITAS HERNANDEZ	(PET)...JOSHUA W CENTENO
FELIPE DE JESUS LEAL	(DEC)...
MINOR CHILDREN	(MIN)...
MARIA LEAL	(OBJ)...
JOAN E NELMS	(GAL)...

Status – No notes – JTD

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600927

CASE NAME: FELIPE DE JESUS LEAL

SEE ALSO 4

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

FELICITAS HERNANDEZ	(PET)...JOSHUA W CENTENO
FELIPE DE JESUS LEAL	(DEC)...
MINOR CHILDREN	(MIN)...
MARIA LEAL	(OBJ)...
JOAN E NELMS	(GAL)...

GENERAL INFORMATION

Continued from 01/18/17. Maria Leal, surviving spouse, to file written objections or competing petition if she chooses to object. Court suggests Maria Leal to seek counsel. Joan Nelms appointed GAL for minors.

Continued from 04/05/17. Default was filed in family law matter, but a default judgment was not filed. Maria Leal needs to file a competing petition. A settlement is being negotiated, but not yet in writing. **Bond required \$119,000.**

Continued from 06/05/17 trailing settlement hearing. Administrator to be part of any settlement agreement.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Felicitas Hernandez, former spouse.

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

1. Petitioner does not state amount of bond. Court requires bond of \$119,000.
2. Decedent left 3 issues; Rossie 18, Jennifer 12 and Patricia 9.
3. Report of GAL Joan Nelms filed 04/05/17. **Supplement report of GAL filed on 06/07/17.**
4. **Objections by Maria Leal, claimed surviving spouse of decedent, filed 03/14/17. Appears objector has priority appointment.**
5. Proposed Form Order: None.

RECOMMENDATION

Matter is contested. Court's discretion, \$119,000 bond.. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/ww)

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700209
CASE NAME: ARTHUR LUNA

SEE ALSO 7 8 17 18 19

HEARING: Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

ALBERT A JIMENEZ (PET)...LAMB & KAWAKAMI
ARTHUR LUNA (DEC)...
DORA L VILLASENOR (PET)...LAW OFFICE OF JOHN R RAMOS

CIFDS1700033 XREF: CONPS1700084 (*Arthur Martin Luna*)

GENERAL INFORMATION:

Letters of special administration issued to Albert Jimenez on 03/06/17, \$133,000.00 bond. Access to bank account only for funeral expenses from Rose Hills to Riverside, and to pay mortgage. Court advised Dora Villasenor to file written objections and competing petition no later than 04/04/17. **Walter Moore appointed GAL for Arthur Luna in conservatorship case.**

Continued from 07/12/17. Contested hearing will be set. Related action CONPS1700084 to be heard with this matter.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - for Letters of Administration with **limited** authority under IAEA by Albert Jimenez, nephew.
- Petition 2 - for Letters of Administration with **limited** authority under IAEA by Dora Villasenor, niece.

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

Petitioner 1 - Albert Jimenez, nephew.

1. Requested bond \$133,000 based on personal property and \$29,000 net real property. Appears ok as Petitioner is only seeking limited authority.
2. **Objections filed by Dora Villasenor on 04/27/17.**
3. ~Proposed form order: 05/02/17.

Petitioner 2 - Dora Villasenor, niece.

4. Petitioner seeks bond of \$6,000. Net value of estate is \$150,000 in real property only. Ok; however, court may wish to require min bond of \$20,000. Court to clarify as petitioner 1 mentions personal property.
5. Duties form does not indicate petitioner's phone number. Need same.

6. Need proof of publication.
7. Need Notice to Petition to Administer Estate and Proof of Service [DE-121].
8. Petitioner is a nominee of 4 relatives; filed 05/04/17.
9. ~Proposed form order: 04/26/17.

RECOMMENDATION:

Need to clear notes 5-7. Matter is contested. If approved, set future hearing for Accounting/Status Review on **11/14/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700209

CASE NAME: ARTHUR LUNA

SEE ALSO 6 8 17 18 19

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH LIMITED AIAE

COUNSEL:

ALBERT A JIMENEZ (PET)...LAMB & KAWAKAMI
ARTHUR LUNA (DEC)...
DORA L VILLASENOR (PET)...LAW OFFICE OF JOHN R RAMOS

XREF: CONPS1700084 (Arthur Martin Luna)

See notes on matter 6.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700209

CASE NAME: ARTHUR LUNA

SEE ALSO 6 7 17 18 19

HEARING:

Trial Setting Conference

COUNSEL:

ALBERT A JIMENEZ (PET)...LAMB & KAWAKAMI
ARTHUR LUNA (DEC)...
DORA L VILLASENOR (PET)...LAW OFFICE OF JOHN R RAMOS

XREF: CONPS1700084 (Arthur Luna)

TSC – No notes – JTD

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700598
CASE NAME: SANDRA MARIE PINEDO

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

MARC ENRICO PINEDO (PET)...NICHOLAS A BUSCEMI
SANDRA MARIE PINEDO (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner Marc Pinedo is sole heir and waives bond. Estate consists of \$405,000 of which \$500 is personal property. Personal property amount looks as though it should be \$5,000 from the total calculation. Court to clarify.
2. The petition is incomplete as follows:
 - a. Section 2c as to the request for full or limited authority is incomplete; however it is clear from the caption that **full** authority is being requested.
 - b. Section 5 is incomplete as to whether there was or was not a registered domestic partner. Court may wish to clarify on record, or in alternative, need verified supplement. .
 - c. Section 8 does not list the relationship of the petitioner but it is clear that he is the **son** of the decedent.
3. The Court address is incorrect on the petition, order and letters. Does court wish that corrected forms be submitted? JTD
4. Need Notice to Petition to Administer Estate and proof of service.
5. Proof of publication filed on 07/17/17; however the department number is not 537 and the court address are incorrect. Need corrected publication.
6. ~Proposed Form Order: 06/16/17

RECOMMENDATION

Need to clear notes 4 & 5. Court's discretion re bond and notes 2 & 3. If approved, set Accounting/Status Review for **11/14/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIPS**

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

SEE ALSO 11 12 13 14

HEARING:

Hearing Re: DEPOSITION OF JACOB AND TINA NIXA

COUNSEL:

TINAMARIA A NIXA	(CP)...JEREMIAH RAXTER
NATALIE BLICKENSTAFF	(CE/PCR/CPE)...JENNIFER M DANIEL
JOHN MOIO	(CPE)...MARC B HANKIN
NAJLA FORD	(CEP/PCE/PP/CEE)...SANDY TURNER
CHARLES NAJJAR	(PET)...MARC B HANKIN
SANDY TURNER	(PET)...SANDY L. TURNER
JORDAN NIXA	(PRO/PER)
ISABELLA PLACENTIA	(PRO/PER)
JACOB NIXA	(PRO/PER)

No notes – JTD

Future hearing dates: 11/06/17 Final Accounting of Natalie Blickenstaff

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

SEE ALSO 10 12 13 14

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT (ISABELLE PLACENTIA)

COUNSEL:

TINAMARIA A NIXA	(CP)...JEREMIAH RAXTER
NATALIE BLICKENSTAFF	(CE/PCR/CPE)...JENNIFER M DANIEL
JOHN MOIO	(CPE)...MARC B HANKIN
NAJLA FORD	(CEP/PCE/PP/CEE)...SANDY TURNER
CHARLES NAJJAR	(PET)...MARC B HANKIN
SANDY TURNER	(PET)...SANDY L. TURNER
JORDAN NIXA	(PRO/PER)
ISABELLA PLACENTIA	(PRO/PER)
JACOB NIXA	(PRO/PER)

GENERAL INFORMATION:

Continued from 07/18/17. Settlement reached. Agreement accepted on record re Pr.C. § 850 and Elder abuse claims as to Isabella Placentia. Counsel Roth to prepare settlement.

THIS CASE IS SET FOR HEARING ON Receipt of Settlement (Isabelle Placentia)

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

1. Matter set at 04/25/17 hearing, wherein, Counsel reported matter was settled as to Isabella Placentia.
2. Settlement filed 07/27/17.

RECOMMENDATION:

None.

(nb/lc)

Future hearing dates: 11/06/17 Final Accounting of Natalie Blickenstaff

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

SEE ALSO 10 11 13 14

HEARING:

Hearing Re: ELDER ADULT ABUSE

COUNSEL:

TINAMARIA A NIXA	(CP)...JEREMIAH RAXTER
NATALIE BLICKENSTAFF	(CE/PCR/CPE)...JENNIFER M DANIEL
JOHN MOIO	(CPE)...MARC B HANKIN
NAJLA FORD	(CEP/PCE/PP/CEE)...SANDY TURNER
CHARLES NAJJAR	(PET)...MARC B HANKIN
SANDY TURNER	(PET)...SANDY L. TURNER
JORDAN NIXA	(PRO/PER)
ISABELLA PLACENTIA	(PRO/PER)
JACOB NIXA	(PRO/PER)

No notes – JTD

Continued matters since 2016 – notice not re-reviewed.

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

SEE ALSO 10 11 12 14

HEARING:

Petition for PAYMENT OF ATTORNEY FEES TO COURT APPOINTED
COUNSEL FOR NAJLA FORD

COUNSEL:

TINAMARIA A NIXA	(CP)...JEREMIAH RAXTER
NATALIE BLICKENSTAFF	(CE/PCR/CPE)...JENNIFER M DANIEL
JOHN MOIO	(CPE)...MARC B HANKIN
NAJLA FORD	(CEP/PCE/PP/CEE)...SANDY TURNER
CHARLES NAJJAR	(PET)...MARC B HANKIN
SANDY TURNER	(PET)...SANDY L. TURNER
JORDAN NIXA	(PRO/PER)
ISABELLA PLACENTIA	(PRO/PER)
JACOB NIXA	(PRO/PER)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Counsel, Sandy Turner.

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

- 1 Petitioner, Sandy Turner, was appointed on 05/03/16.
- 2 Attorney requests fees of \$32,315.00 for 92.50 at \$350 per hour Itemized [Pet. 06/26/17 LFpg9-17].
- 3 Need Notice of Hearing with proof of service including to conservatee.
- 4 **Objections filed by John Moio as POA for Charles Najjar on 07/31/17.**
- 5 ~Proposed Order 06/26/17.

RECOMMENDATION:

Need notice. Matter is contested.

(/lc)

Future hearing dates: 11/06/17 Final Accounting of Natalie Blickenstaff

Superior Court of Calif, County of San Bernardino

Page: 13A add-on

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

DATE: 09/06/17 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000257
CASE NAME: CLARK ORIN ALLEN
HEARING: FIRST AND FINAL Account and Report of MICHAEL J. ULISSE and
Petition for allowance of fees filed.

COUNSEL:

CLARK ORIN ALLEN	(DEC)...
PATRICK B WRIGHT	(PET)...PRO/PER
TOM SALGADO	(PET)...PRO/PER
DOUGLAS ALLEN	(PET)...SPRINGER & POLLOCK
MICHAEL J. ULISSE	(PET)...ALAN D. DAVIS
TOM SALGADO	(TP)...PRO/PER
CAROL GALLARDO	(LAYNE A BARTHOLOMEW)
SUSAN RAE PARISI	(PRO/PER)
MAPLE LEAF CAPITAL COMPANY	(ANGELA Y SHIN)

XREF: CIVDS1202420 (*Allen v Gallardo*) **CIVDS1302691** (*Maple Leaf Capital Co. v Salgado etal*) **CIVDS1400538** (*Estate of Clark Allen v Maple Leaf*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Successor Administrator Michael Ulisse.

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

1. Assets on hand only consist of \$1,239.31.
2. Petitioner seeks statutory compensation of \$12,354.04.
3. Counsel Davis seeks statutory fees of \$12,354.04.
4. Although the estate appears to be insolvent, prior administrators and counsel have been noticed and no objections have been filed at time of review.
5. Petitioner seeks extraordinary fees of \$1,792.50 for 23.9 hours at \$75 per hour. Itemized [Acct.06/19 LFpg20].
6. Counsel Davis seeks extraordinary fees of \$12,360 for 41.2 hours at \$300 per hour. Itemized [Acct.06/19 LFpg21].
7. Petitioner seeks reimbursement to Bond company in the amount of \$4,533.
8. Case CIVDS1202420 re misappropriation of decedent's funds totaling approximately \$1M was entered as a judgment of non-suit.
9. Need bank statement to support ending balance per local rule 20-908.
10. ~Proposed Order: 06/19/17.

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

RECOMMENDATION

Need to clear note 9. If approved, set hearing on the filing of receipts and final discharge for **09/12/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600090

VACATED

CASE NAME: NAJLA FORD

SEE ALSO 10 11 12 13

HEARING:

Accounting Review

COUNSEL:

TINAMARIA A NIXA	(CP)...JEREMIAH RAXTER
NATALIE BLICKENSTAFF	(CE/PCR/CPE)...JENNIFER M DANIEL
JOHN MOIO	(CPE)...MARC B HANKIN
NAJLA FORD	(CEP/PCE/PP/CEE)...SANDY TURNER
CHARLES NAJJAR	(PET)...MARC B HANKIN
SANDY TURNER	(PET)...SANDY L. TURNER
JORDAN NIXA	(PRO/PER)
ISABELLA PLACENTIA	(PRO/PER)
JACOB NIXA	(PRO/PER)

Future hearing dates: 11/06/17 Final Accounting of Natalie Blickenstaff

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100089

CASE NAME: JOSE PEREZ JR

HEARING:

Hearing Re: RECONSIDERATION OF PETITIONER'S FEE REQUEST

COUNSEL:

KATIE HERNANDEZ (CPE)...HARTNELL LAW GROUP

JOSE PEREZ JR (CEP/DEC)...

JEANNE E KENNEDY (PET)...

No notes – JTD

Future Hearing: 10/24/18: Accounting Review

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400077

CASE NAME: EDWARD FRANK SANTILLI

HEARING:
Accounting Review

COUNSEL:

LILIANA SANTILLA	(PET)...HORSPOOL & HORSPOOL
NATALIE ANN BLICKENSTAFF	(CPE)...
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ROSEMARY HERNANDEZ-ENNIS	(SC)...HORSPOOL & HORSPOOL
EDWARD FRANK SANTILLI	(PET/DEC/CEE)...MITCHELL I ROTH
ANITA SANTILLI	(CPE)...HORSPOOL & H ORSPOOL
J DAVID HORSPOOL	(HORSPOOL & HORSPOOL)

GENERAL INFORMATION

Continued from 06/28/17.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Anita Santilli appointed successor conservator of the person and estate on 04/20/16, \$60,000 bond.
2. Inventory and Appraisal filed by previous Conservator Christina Erickson Taube on 09/23/14.
3. Need accounting.

RECOMMENDATION

Inquire status of accounting. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

((lc/lh/lc/lh/lc/lh/ww))

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700084

CASE NAME: MTR OF ARTHUR MARTIN LUNA

SEE ALSO 6 7 8 18 19

HEARING:

Order to Show Cause RE: Dismissal (As to Petition of Dora Villaseñor)

COUNSEL:

GILBERT SALINAS	(CPE)...PRO/PER
ARTHUR MARTIN LUNA	(CEP)...MITCHELL I ROTH
DORA L VILLASEÑOR	(CPE)...LAW OFFICE OF JOHN R RAMOS
ALBERT A JIMENEZ	(CPE)...TOMOHIRO J KAGAMI

XREF: PROPS1700209 (Arthur Luna) **CIFDS1700032** (Luna V Luna)
CIFDS1700033 (Luna V Villaseñor)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Dismissal as to Dora Villaseñor.

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

1. OSC set on 07/12/17 when notes remained not cleared. See matter 18.

RECOMMENDATION

Court's discretion re OSC.

(lc)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700084

CASE NAME: MTR OF ARTHUR MARTIN LUNA

SEE ALSO 6 7 8 17 19

HEARING:

Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON & ESTATE

COUNSEL:

GILBERT SALINAS	(CPE)...PRO/PER
ARTHUR MARTIN LUNA	(CEP)...MITCHELL I ROTH
DORA L VILLASENOR	(CPE)...LAW OFFICE OF JOHN R RAMOS
ALBERT A JIMENEZ	(CPE)...TOMOHIRO J KAGAMI

XREF: PROPS1700209, CIFDS1700032(Luna V Luna) , CIFDS1700033(Luna V Villasenor)

GENERAL INFORMATION

Ex parte hearing held on 03/23/17. Walter Moore appointed guardian ad litem and Attorney Mitchell Roth appointed for Arthur Martin Luna. Court orders Dora Villasenor to give a copy of any financial documents/records, social security cards, or any other documents of Arthur Martin Lunas within 24 hours. Attorney Walter Moore is authorized to obtain any records from IRC and any medical records he is able to obtain. Court orders no withdrawals to be made from the Chase bank account held by Arthur Martin Luna.

Albert A Jimenez appointed temporary conservator on 04/06/17. Conservatee to stay with Andrew Valesteros until 04/13/17, and is to stay with Frank L. Luna from 4/13/17 to 4/20/17. No barring of visitors during conservatee's stay. Both Andrew Valesteros and Frank L Luna to cooperate with doctor appointments. Order authorizing completion of Capacity Declaration is submitted in open court and signed this date.

Continued from 04/20/17. Walter Moore appointed GAL for Arthur Luna in related probate. Continued from 05/12/17 and 05/15/17 to trail *CIFDS1700032, CIFDS1700033*.

Continued from 07/12/17. Court may Dismiss Dora Villasenor's petition if notes are not cleared. Counsel Roth represents that proposed conservatee is not a client of IRC. However, temporary Conservator has filed for services to bring Arthur on board as a client.

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Appointment of Limited Conservator person and estate by Albert A Jimenez for himself and Gilbert Salinas, cousins.

- Petition 2 - Petition for Appointment of Limited Conservator person and estate by Dora Villasenor, cousin.

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

Petitioner 1 Albert A Jimenez for himself and Gilbert Salinas, cousins.

1. No bond requested per Pr. C. § 2323. Sole asset is estate inheritance in pending x-ref matter. Bond to be addressed once assets are marshalled.
2. Petitioner seeks orders relating to powers under Pr. C. §2351.5 to fix residence, access confidential records, consent or withhold consent to marriage, right to contract, authority to consent or withhold consent to medical treatment, control social/sexual contacts, and make education decisions. JTD
3. Petitioner seeks medical powers. Capacity Declaration and attachment filed 04/25/17.
4. Proposed conservatee is developmentally disabled. **Need** reports from Walter Moore (GAL) and appointed Counsel Mitchell Roth.
5. Proposed conservatee is purportedly developmentally disabled. **IRC letter filed 08/24/17.**
6. Court Investigator report filed 04/18/17, supplemental filed 06/22/17.
7. Citation returned served.
8. Certificates of Completion of the Conservatorship Training Class filed 04/06/17 by Albert Jimenez and Gilbert Salinas.
9. Declaration filed by Gilbert Salinas on 04/10/17. Declaration refers to proposed conservatee as Marty.
10. Notice of related case filed CIFDS1700033.
11. ~Proposed Form Order: 04/19/17.

Petitioner 2 – Dora Villasenor, Cousin.

12. No bond requested per Pr. C. § 2323 as there are only public benefits. Sole asset is estate inheritance in pending x-ref matter. Bond to be addressed once assets are marshalled.
13. Petitioner is a nominee of 4 relatives filed 05/10/17.
14. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
15. Petitioner seeks powers under Pr.C. § 1830(b) re repair and maintenance on property.
16. Petitioner seeks civil rights not be limited without court order. JTD
17. Proposed conservatee is developmentally disabled. **IRC letter filed 08/24/17.**
18. Proposed conservatee is developmentally disabled. **Need** reports from Walter Moore (GAL) and appointed Counsel Mitchell Roth.
19. Petitioner seeks medical powers. **Need** Capacity Declaration.
20. **Proof of Service of Notice filed 08/24/17 did not include copy of petition with notice. Need proper service.**
21. Citation returned served.
22. Certificate of Completion of the Conservatorship Training Class filed 07/12/17.
23. Court Investigator Supplemental report filed 06/22/17.
24. ~Proposed Form Order: 05/10/17

RECOMMENDATION

Need to clear notes 4, 18-20. If approved, set hearing for Compliance Review for **04/11/18** 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, and hearing re Accounting Review for **11/14/18**. Any accounting to be filed 30 days in advance.

(lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700084

CASE NAME: MTR OF ARTHUR MARTIN LUNA

SEE ALSO 6 7 8 17 18

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GILBERT SALINAS	(CPE)...PRO/PER
ARTHUR MARTIN LUNA	(CEP)...MITCHELL I ROTH
DORA L VILLASENOR	(CPE)...LAW OFFICE OF JOHN R RAMOS
ALBERT A JIMENEZ	(CPE)...TOMOHIRO J KAGAMI

XREF: PROPS1700209 (Arthur Luna) **CIFDS1700032** (Luna V Luna)
CIFDS1700033 (Luna V Villasenor)

See notes on matter 18.

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700287

CASE NAME: LINDA YVONNE IBARRA

HEARING: Petition for Appointment of Conservator

COUNSEL:

PABLO IBARRA (CP)...PRO/PER
LINDA YVONNE IBARRA (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition [filed 07/28/17] for Appointment of Limited Conservator person only by Pablo Ibarra, father.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. List of required contacts and Section 11 of petition only lists mother and brother. Court to inquire if there are any further 2nd degree relatives that may need notice.
4. Petitioner seeks medical powers. Need Capacity Declaration.
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. **Proof of Service of Citation filed 08/28/17; however, need attached Citation and proper personal service.**
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
10. Need Court Investigator report.
11. **Note: Competing petition for limited conservatorship by Ada Ibarra filed 08/08/17. Court may wish to trail this matter to 09/18/17 to be heard with competing petition.**
12. ~Proposed Form Order: 07/28/17.

RECOMMENDATION

Court to trail to 09/18/17.

Need to clear notes 4-10. If approved, set hearing for Compliance Review for **04/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh/)

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

DATE: 09/06/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700288
CASE NAME: THOMAS QUID
HEARING: Petition for Appointment of Conservator

COUNSEL:

JEANETTE OCHOA (PET)...PRO/PER
THOMAS QUID (CEE)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Jeannette Ochoa, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed on 07/28/17. However, is incomplete as to physician's name in Section 1 and form is not dated at signature. Need completed form.
4. Proposed conservatee is developmentally disabled. Need report of Counsel J. Kennedy.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Confidential Supplemental Information is not signed or dated. Need same.
7. Need return of citation.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
10. Need due diligence declarations re father and maternal grandmother, Thomas and Kim Quaid.
11. **CI report filed 08/30/17.**
12. ~Proposed Form Order: 07/28/17.

RECOMMENDATION

Need to clear notes 3-10. If approved, set hearing for Compliance Review for **04/11/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. § 1830(c); Level of Care and Care Plan per Pr.C. § 2352.5.
(lc/lh)

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

DATE: 09/06/17 TIME: 9:35 DEPT: S37P

CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

HEARING:

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

COUNSEL:

CHRISTIE DAVIDSON (CPE)...KARIN E HORSPPOOL
TODD L KOERBER (CEP)...JAMES B CHURCH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 7th Trust Account Current and 8th Conservatorship Account Current, Report and Petition for Allowance of Fees of Christie Davidson, Trustee/PPF.

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

1. Accounting covers period: 03/01/16 – 02/28/17.
2. Assets on hand: SNT \$368,611.40; \$259,498.46 of which is cash.
Conservatorship \$ 174.81 in cash.
3. Petitioner requests fees of \$12,713.75 as Trustee; and \$2,921.75 as Conservator for 188.4 hours at \$45/95 per hour. Itemized [Acct. 07/31/17 LFpg30-123]. JTD
4. Attorney requests fees of \$7,317 for 20.7 hours at \$350/395 per hour. Itemized [Acct. 07/31/17 LFpg124-129]. JTD
5. Current bonds appear sufficient; \$20,000 conservatorship and \$475,000 re Trust.
6. Need bank statements to cover ending accounting date of 02/28/17.
7. ~Proposed Order: 07/31/17

RECOMMENDATION

Need to clear note 6. Court's discretion re fees. If accountings approved, set next accounting review for **05/30/18** (if one year) or **05/29/19** (if two years). Accounting to be filed 30 days in advance of hearing.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/06/17 TIME: 1:30 DEPT: S37P

CASE#: SC SS02769

VACATED

CASE NAME: MTR OF JOHN H MIKEASKY

SEE ALSO 24

HEARING:

Petition for ORDER COMPELLING CONSERVATOR TO PAY CHARGES
LAWFULLY DUE FOR NURSING CARE

COUNSEL:

JOHN H MIKEASKY

(CEP)...

JOHNNY MIKEASKY

(CP/CPE)...JAMES B CHURCH

VISTA PACIFICA ENTERPRISES, IN

(PET)...TYLER & WILSON

XREF: SCV120419

Superior Court of Calif, County of San Bernardino
Page: 24 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/06/17 TIME: 1:30 DEPT: S37P

CASE#: SC SS02769

VACATED

CASE NAME: MTR OF JOHN H MIKEASKY

SEE ALSO 23

HEARING:

Court Trial set for SUPPLEMENTAL PETITION FOR CONSERVATORSHIP of VISTA PACIFICA ENTERPRISES, INC.

COUNSEL:

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

XREF: SCV120419

Future Hearing: 9/18/17: 8th & Final Account & Report of Johnny Mikeasky & Petition for Allowance of Fees Filed.