



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/12/17

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.

nb0822/0906

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

PROBATE

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300730

CASE NAME: Joanna Lexx Kubo

HEARING:

Probate status report filed.

COUNSEL:

JOANNA LEXX KUBO

(DEC)...WALTER T. MOORE

MICHAEL MORTON

(PET)...E LAWRENCE BROCK

X-REF: CIVDS 1404487

GENERAL INFORMATION

Continued **03/07/16, 05/19/16, 08/17/16, 11/01/16 and 01/17/17** (no appearance).

Court orders Michael Morton to be present in court on March 14, 2017. Notice by Judicial Assistant.

Continued from 03/14/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Status Report of Administration filed 01/20/16 by Personal Representative, Michael A. Morton ["Petitioner"].

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

1. Letters of Administration issued to Michael A. Morton on 10/16/13, full authority, no bond.
2. Petitioner alleged at the 08/17/16 hearing that payments required by the settlement agreement, approved 03/15/16, have not been made. Petitioner withdraws his request to terminate the estate, and will be filing a petition to enforce the settlement agreement.
3. Per minute order of 08/17/16, Petitioner to file a supplement to the status report. Same not filed.
4. Petition to Enforce Settlement has not been filed.
5. Proposed order re: status report filed 05/19/16.
6. Petitioner requests time for compliance with the settlement agreement.

RECOMMENDATION:

Court's discretion. If approved, set for accounting review 11/07/17.

(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 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: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600722

CASE NAME: MTR OF JESSIE VELASQUEZ

HEARING:

FIRST & FINAL Account and Report of MARY ANN VELASQUEZ and
Petition for allowance of fees filed.

COUNSEL:

BRYAN C HARNELL	(TP)...BRYAN C HARTNELL
JESSIE VELASQUEZ	(DEC)...
MARY ANN VELASQUEZ	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

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

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

1. Accounting period 04/14/16 to 05/31/17.
2. Assets on Hand \$180,796.30 consisting of cash.
3. Statutory fees of \$7,020.00 requested. Calculated.
4. Attorney requests extraordinary fees of \$2,300 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 7.80 attorney hours.' Itemized ["LF, p. 35]. JTD.
5. Petitioner requests reimbursement of costs advanced of \$3,244.10. Itemized.
6. Petitioner requests authority to withhold the sum of \$2,500 as a reserve.
7. Petition indicates the bills incurred by the individual residing in decedent's residence are the responsibility of that individual and that the estate has no liability to pay said bills.
8. ~Proposed Order 06/20/17.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

SEE ALSO 4

HEARING:

Hearing Re: Post Mediation Status Conference

COUNSEL:

BRENDA SIERDSMA

(PET)...WEINSTOCK MANION

PAUL VANDEN PIERCE

(OBJ)... LAYNE A BARTHOLOMEW

THERESA AILE EN CORTEZ LI VING

(TRU)...

No notes – Status Conference.

(nb)

Future Hearing:

12/19/17 Readiness calendar

01/08/18 Court Trial

01/09/18 Court Trial

01/10/18 Court Trial

01/11/18 Court Trial

01/12/18 Court Trial

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600911

CASE NAME: THERESA AILEEN CORTEZ LIVING TRUST

SEE ALSO 3

HEARING:

Petition for TO INVALIDATE TRUST FOR RELIEF FROM ELDER ABUSE
FROM RELIEF FROM CONVERSION

COUNSEL:

BRENDA SIERDSMA

PAUL VANDEN PIERCE

THERESA AILE EN CORTEZ LI VING

(PET)...WEINSTOCK MANION

(OBJ)... LAYNE A BARTHOLOMEW

(TRU)...

Currently under review by Legal Research.
(LR)

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

Future Hearing:

12/19/17 Readiness calendar

01/08/18 Court Trial

01/09/18 Court Trial

01/10/18 Court Trial

01/11/18 Court Trial

01/12/18 Court Trial

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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

HEARING:

Hearing Re: AMENDED PETITION FILED ON 3/30/17

COUNSEL:

ANITA RENEE MARTINEZ (PET)...PRO/PER

LAWRENCE DE LA ROSA HERNANDEZ (DEC)...

See next matter #5A.

(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: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601231

CASE NAME: MTR OF LAWRENCE DE LA ROSA HERNANDEZ

HEARING:

Hearing Re: OSC re DISMISSAL of AMENDED PETITION FILED ON 3/30/17

COUNSEL:

ANITA RENEE MARTINEZ (PET)...PRO/PER

LAWRENCE DE LA ROSA HERNANDEZ (DEC)...

GENERAL INFORMATION:

Matter set at 08/08/17 hearing due to 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 re: First Amended petition filed on 03/30/17

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700602

CASE NAME: MTR OF STEVE REBAR

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY WITH
WILL ANNEXED WITH FULL AUTH TO ADMIN IAEA

COUNSEL:

CHARLES PAVLIK

(PET)...CRAIG E WILSON

STEVE REBAR

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Charles Pavlik, executor/nephew

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

1. Will waives bond. Estate value consists of \$196,000 with \$1,000 in personal property. If petitioner is a **non-resident**, the court may require bond if the proposed personal representative resides outside of California 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 alternatively based on net assets of \$196,000? JTD
2. Petition indicates executor is a resident of California; however, Section 8 indicates an out of state address. Need verified supplement.
3. Olga Pavlik, executrix named in will, with higher priority, is declining to act as executor. Need Declination.
4. Section 5a(2)(a) indicates decedent was divorced; however, section 7(b) indicates decedent had a predeceased spouse. Need verified supplement.
5. ~Proposed Form Order: 06/19/17

RECOMMENDATION

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

(cs)

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

DATE: 09/12/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700603

CASE NAME: SAUNDRA JOANN CHAMBERS
HEARING:
Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DAVID TARULA (PET)...JOHN R. GOTTES
SAUNDRA JOANN CHAMBERS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by David Tarula ["Petitioner"] as nominated by surviving spouse, Glenn Chambers.

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

1. Petitioner seeks bond of \$255,000. Estate value consists of \$255,000 in real property. Bond of \$255,000 is sufficient.
2. Petition is incomplete at Sections 6 & 7 on Page 3. Heirs who might require notice cannot be determined
3. Surviving spouse, Glenn Chambers, indicates decedent was the sole heir of her mother's estate, and he as a surviving sole heir of decedent's estate, is entitled to inherit a 100% interest in decedent's mother's property located in Los Angeles County. Question whether decedent's mother's estate has been probated in Los Angeles County? Need verified supplement.
4. Glenn Chambers, surviving spouse of and sole heir to the estate of Sandra Chambers, irrevocably assign, transfer and sells to Pilot Fish, Inc., a California Corporation, all of his rights.
5. Declination and Nomination signed by Glenn Chambers, surviving spouse filed 06/20/17, LF, p. 6.
6. ~Proposed Form Order: 06/20/17

RECOMMENDATION

Need to clear notes 2. If approved, set Accounting/Status Review for **11/20/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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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 **CONSERVATORSHIP**

DATE: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400141

CASE NAME: Febe Gonzalez

HEARING:

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

COUNSEL:

FEBE GONZALEZ

(CEP)...

SILVIA GONZALEZ

(CPE)...GARY H BLAYLOCK

Request for Waiver of Court Fees and Costs filed by FEBE GONZALEZ is GRANTED
Fee waiver amount due \$930.00
\$465.00 for petition for atty fees by court appointed counsel on 07/19/16
\$465.00 for accounting on 10/05/16

GENERAL INFORMATION:

Conservatee passed away on 01/09/17.

Continued from **11/22/16** at request of counsel to clear notes. Referred to Court
Investigator for investigation and report.

Continued from 03/07/17 and 06/06/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees.

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

1. Petition is not verified. Need same.
2. Accounting period 02/24/15 to 02/28/16.
3. Assets on Hand \$220,053.30 consisting of \$18,053.30 in cash and remaining in real property.
4. Current bond of \$20,000. Insufficient. Suggest bond increase by \$5,000 for a total bond of \$25,000 (includes recovery).
5. Petitioner waives compensation for this account period.
6. Attorney requests reduced fees of \$2,754.90. Billed at \$250/hour for 15.3 hours; attorney time. Itemized [LF, pgs. 12-13]. JTD.
7. Need cash and non-cash assets on hand at end of accounting period schedules via verified supplement.

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.**

8. Need copy of bank statement to support beginning and ending balances per Local Rule 20-908.
9. Account does not state conservatee's residences during the account period per Local Rule 20-1406(a). Need verified supplement.
10. Last CI report filed 03/03/16. **CI Special report filed 01/12/17.**
11. Notice given.
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes \$25,000 bond. If approved, set next hearing for Accounting Review **in 60 days** for pre and post death, final accounting. 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: STANFORD E. REICHERT

DATE: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500122

CASE NAME: STEVIE RAY VALENCIA

HEARING:

FIRST Account and Report of GRACIELA VALENCIA and Petition for allowance of fees filed.

COUNSEL:

DESIREE MARIE GONZALEZ (CP)...PRO/PER
GRACIELA VALENCIA (TP)...NETT & NETT, P.C.
STEVIE RAY VALENCIA (CTP)...DONNASUE ORTIZ

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

Fee waiver amount due \$465.00 for filing fees for conservatorship on 05/11/15

Request for Waiver of Court Fees and Costs filed by STEVIE RAY VALENCIA is GRANTED

Fee waiver amount due \$435.00 for filing fees for Ntc of joinder by court appointed attorney on 08/02/16

GENERAL INFORMATION:

At **03/16/16** hearing, Court took jurisdiction over the Graciela Valencia Irrevocable Trust and ordered that the trust's bank account(s) at Chase Bank in Perris, California be frozen and blocked until further order of the court. Court ordered that Graciela Valencia prepare and file an accounting on the Graciela Valencia Irrevocable Trust. Continued from **08/02/16 and 10/18/16** at request of counsel. Court orders Graciela Valencia to be personally present at hearing.

Continued from **02/28/17**. The Court orders Graciela Valencia and Attorney Amy Nett to be present at the next hearing on 5-30-17.

Continued from 05/30/17. Attorney Donnasue Ortiz to submit an order for the taxes to be prepared. Court orders Attorney Amy Nett and Graciela Valenica to personally be present at the next hearing.

THIS CASE IS SET FOR HEARING ON **AMENDED (10/13/16)** First Account and Report by Trustee Graciela Valencia (re: Graciela Valencia Irrevocable Trust).

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.

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

1. Accounting period 01/29/13 to 08/31/16.
2. Assets on hand \$69,906.07.
3. Amended Summary of Account [LF, p. 6] reflects a forced "Amount to Balance," in the amount of \$52.18. Petitioner requests the Court to deem amount de minimus. JTD.
4. Compensation or fees are not requested.
5. During the accounting period, petitioner paid to Vanessa Martinez for care services. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c). **Supp. (05/18/17) affixes weekly time records [LF, pgs. 29-35]. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).**
6. Notice of Joinder by CALPERS filed 08/02/16 indicates conservatee received funds due to the death of his father, Ray C. Valencia.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear note 5. If approved, set next Accounting Review for **10/24/17**.

(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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

SEE ALSO 11

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JAMES KUNST

COUNSEL:

JAMES KUNST

(PET)...VALERIE ROSS

SARA M KUNST

(CEE)...

GENERAL INFORMATION

Continued from **11/08/16** at request of counsel.

Continued from **02/28/17**. Counsel represents the conservatee has recently passed away in December. Matter is continued by the Court. Accounting Review is ordered vacated and reset to 05/23/17.

Continued from 05/23/17 at the request of counsel. Court relieves Roberta Taylor as counsel for conservatee as conservatee is deceased.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. James Kunst, son, appointed conservator of the person and estate on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. **Conservatee passed away on 12/05/16.**
3. Final Inventory and Appraisal was filed 12/13/16.

RECOMMENDATION

Matter appears moot.

(lc/nb/lh/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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

SEE ALSO 10

HEARING:

Accounting Review

COUNSEL:

JAMES KUNST

(PET)...VALERIE ROSS

SARA M KUNST

(CEE)...

GENERAL INFORMATION

Conservatee died on 12/05/16.

Continued from 05/23/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. James Kunst, son, appointed conservator of the person and estate on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. Question whether any assets were marshaled as to require an accounting? If no assets were marshaled, suggest Court require a verified statement that no assets were marshaled, in which case an accounting will not be necessary. Alternatively, require pre-death and post-death accountings per Pr. C. §2620(b).

RECOMMENDATION

Inquire status.

(lh/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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500341

CASE NAME: MTR OF SARA ANDRADE

HEARING:

Accounting Review

COUNSEL:

HILDA ANDRADE

(CPE)...LAW OFFICES OF RYAN S CARRIGAN

SARA ANDRADE

(CEP)...

GENERAL INFORMATION

Continued from **03/23/17**. Counsel indicated he has item to file re accounting. Counsel to file and return to the department with information for next hearing.

Continued from 04/13/17 and 05/23/17 to file accounting.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Hilda Andrade, daughter, appointed conservator of the estate only on 01/15/16, \$539,000.00 bond.
2. Balance Sheet as First Account and Report granted on 05/23/17. Need Order after Hearing.
3. **Order Terminating Conservatorship of the Estate entered 05/23/17; second and final accounting now due beginning 01/01/17.**
4. **Conservatee passed away on 08/24/17.**

RECOMMENDATION

Need to clear notes 2 & 3. Inquire status.

(lc/nb/cs/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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JOHN MARANAN

COUNSEL:

CLIFFORD MOORE	(PET)...CHRISTINA FERRANTE
GLORIA MOORE	(CEE)...SANDY L. TURNER
JOHN MARANAN	(PET)...CHRISTINA FERRANTE
SURETEC INSURANCE COMPANY	()...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. John Maranan and Clifford Moore appointed Conservatee of the person and estate on 02/07/17, \$224,700 total bond.
2. Notification of Conservatee's rights filed 04/25/17.
3. **Care Plan filed.**
4. **Determination of Conservatee's Appropriate Level of Care filed.**
5. Partial Inventory and Appraisal filed 05/02/17. Need final Inventory and Appraisal per Pr. C. §2610 and Notice of Filing and How to Object

RECOMMENDATION

Inquire status.

(lh/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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700012

CASE NAME: LYDA M SHILLINGBURG

HEARING:

Hearing Re: STATUS OF ACCOUNTING OF TEMPORARY CONSERVATOR

COUNSEL:

DONNA WASHBURN (PET)...PRO/PER

LYDA M SHILLINGBURG (CPE)...JENNIFER M DANIEL

VACATE – first and final account filed and set for 09/19/17.

(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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700022

CASE NAME: MTR OF MARLENE M YANEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARLENE M YANEZ (CTP)...

SILVIA L YANEZ (CP)...PRO/PER

GENERAL INFORMATION:

Continued from **03/07/17**. No appearance. Court continues hearing and sets OSC re dismissal. Court notes that if petitioner does not appear at next hearing, or have all probate notes cleared, Court will dismiss petition at next hearing date.

Continued from 06/13/17 for petitioner to clear notes.

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

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Need appointment of counsel and report of same.
3. List of Required Contacts does not include father or sibling. Need corrected form.
4. **Medical Capacity Declaration is not dated. Court to determine if sufficient.**
5. Need Notification to Court of Conservatorship Address form.
6. Need return of Citation.
7. Court Investigator Report filed 02/28/17.
8. Need Inland Regional Center Report.
9. **Certificate of Completion re Conservatorship Class filed.**
10. Need Notice of Hearing with proof of service, to include Inland Regional Center and Due Diligence Declarations as to paternal grandparents.
11. ~Proposed Form Order: 01/23/17

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:

Court to appoint counsel, then need to clear notes. If approved, set hearing for Compliance Review for **04/17/18** 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/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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700071

CASE NAME: JOSE LUIS GONZALEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GRACIELA GONZALEZ (CP)...PRO/PER
JOSE LUIS GONZALEZ (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **04/11/17**. Court clears probate notes 2 (re existing conservatorship), 4 (re Citation), 5 (re Notice) on the record. Witness Graciela Gonzalez (re probate note 2) is sworn and examined. Court specially sets matter for 06/13/17. Hearing continued to clear probate notes. Petitioner states that Jose Gonzalez objects to her being appointed conservator. Attorney Walter Moore appointed for Jose Luis Gonzalez. Court appoints Rose Rosado as Guardian Ad Litem for Jose Luis Gonzalez.

Continued from 06/13/17 at request of petitioner.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Graciela Gonzalez (mother)

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

1. Petitioner seeks medical powers. Need Capacity Declaration.
2. Need report of appointed Counsel Walter Moore.
3. **Certificate of Completion of the Conservatorship Training Class filed.**
4. Report of Rose Rosado (GAL) filed.
5. Court Investigator report filed.
6. ~Proposed Form Order: 03/03/17

RECOMMENDATION

Need to clear notes 1-2. If approved, set hearing for Compliance Review for **04/17/18** 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 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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700292

CASE NAME: ALYSSA CISNEROS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALYSSA CISNEROS (CTP)...
MARIE CISNEROS (CP)...PRO/PER

GENERAL INFORMATION

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract and make and consent to all medical decisions. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 08/03/17.
4. Return of Citation filed 08/23/17.
5. Proposed conservatee is developmentally disabled. Need report of counsel E Joan Nelms.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Need Certificate of Completion of the Conservatorship Training Class.
- 8. Court Investigator report filed.**
9. ~Proposed Form Order: 08/03/17

RECOMMENDATION

Need to clear notes 5-7. If approved, set hearing for Compliance Review for **04/17/18** 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 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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700293

CASE NAME: MTR OF PATRICK MICHAEL O'BRIEN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
ANGELA TAFOYA (CP)...PRO/PER
EDWARD TOFOYA (CP)...PRO/PER
PATRICK MICHAEL O'BRIEN (CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Angela and Edward Tafoya (parents)

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

1. Proposed conservatee is developmentally disabled.
 - a. It appears a limited conservatorship is appropriate. Does Court wish to deem this a petition for limited conservatorship?
 - b. An IRC report is optional per Pr.C. 1827.5(b). Does court wish to require?
JTD
 - c. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
2. Request to Excuse Notice with Due Diligence Declaration as to Michael O'Brien (father), Rick O'Brien (pgf), Sue Grim (pgm), and siblings: Mike, Katelyn, and Lylee O'Brien. JTD.
3. Petitioner seeks medical powers. Capacity Declaration filed 08/03/17 not dated at signature on page 1. Need completed form.
4. Petition indicates conservatorship was previously established on 09/24/12 in Arizona, case number GC-2012-0073. Need Arizona Order approving out-of-state move. [See petition 08/03/17, LFpg5].
5. Need return of Citation.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need Notice of Hearing and proof of service.
- 8. Court Investigator report filed.**
9. ~Proposed Form Order: 08/03/17

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

RECOMMENDATION

Need to clear notes 3-7. If approved, set hearing for Compliance Review for **08/03/17** 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 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: 09/12/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS03151

CASE NAME: MTR OF JEANNE HARRIS

HEARING:

FIFTH AND FINAL Account and Report of DIANE D HARKISON and
Petition for allowance of fees filed.

COUNSEL:

DIANE D HARKISON (CPE)...M DANIEL SAYLOR
JEANNE HARRIS (CEP)...EDWARD B FISCHER

Request for Waiver of Court Fees and Costs filed by JEANNE HARRIS is GRANTED
Fee waiver amount due \$450.00 for Ci fees on n 03/19/15

Request for Waiver of Court Fees and Costs filed by DIANE D HARKISON is GRANTED
Fee waiver amount due 2270.00
\$450.00 for Ci fees on 01/26/12
\$395.00 for accounting on 06/14/12
\$450.00 for Ci fees on 03/18/13
\$450.00 for Ci fees on 01/26/15
\$525.00 for petition to accept etc on 09/21/16

GENERAL INFORMATION:

Conservatee died on 09/27/16.

Continued from **02/28/17** at request of counsel. Notice by Judicial Assistant.

Continued from 05/30/17 to clear notes.

THIS CASE IS SET FOR HEARING ON **Amended** (03/29/17) Fifth and Final Account
and Petition for Fees by Conservator of the Person and Estate, Diane D. Harkison
(PPF).

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

1. Accounting period 08/01/16 to 12/31/16 (pre & post-death periods).
2. Assets on hand \$273.48 consisting of cash.
3. Petitioner indicates it is anticipated that the amount on hand will be less than \$350 and requests the balance of funds on hand to be paid to the Conservator as Conservator's fees (up to \$350). 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 for clarification of the notes only - **no legal or procedural advice will be given.**

4. Attorney makes no fee request for this accounting period, as there are no funds available to pay them.
5. Conservator requests discharge which does not occur until entry of final discharge order.
6. Proposed Order 03/29/17 discharges conservator upon filing of receipts and ex parte petition for final discharge instead of upon entry of final discharge order.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **05/29/18.**

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA/PG

DATE: 09/12/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1400108

CASE NAME: Davison Family Trust dated 7/9/90

HEARING:

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

COUNSEL:

DAVISON FAMILY TRUST DATED 7/9
SAN BERNARDINO PUBLIC ADMINIST

(TRU)...
(PET)...CRAG M PARKER

X-REF: CONDS 1000049

GENERAL INFORMATION:

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

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

1. Accounting period 11/23/10 to 04/15/17.
2. Assets on Hand \$237,964.04 consisting of \$224,964.04 in cash and remaining
in unimproved real property.
3. Statutory fees of \$8,870.50 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. 27]. JTD.
5. Disbursements – Schedule D [LF, p. 16] indicates a preliminary distribution in
the amount of \$30,000 was made without prior court authority, There does not
appear to be harm to the estate or creditors. JTD.
6. Petitioner requests authority to withhold the amount of \$6,000 as a reserve.
7. ~Proposed Order 06/14/17.

RECOMMENDATION:

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

(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 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**

DATE: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000326

CASE NAME: NAFIZA NOOR SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

ABUL KALAM AZAD

(PET)...HORSPPOOL & HORSPPOOL

ABUL KALAM AZAD

(TEE)...J. DAVID HORSPPOOL

NAFIZA NOOR SPECIAL NEEDS TRUS

(TRU)...

XREF: CONPS1500200

GENERAL INFORMATION:

Continued from 07/11/17 at request of counsel. Notice given by Attorney J. David Horspool.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Fourth Account entered 09/20/16; fifth account now due.
2. No accounting or status report of administration. 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0700798

CASE NAME: WALTER FLOWERS JR.

SEE ALSO 3

HEARING:

Hearing Re: Second amended accounting

COUNSEL:

FRANCES FLOWERS	(PET)...JO ANN MCDOLE
WALTER FLOWERS JR	(DEC)...
WANDA ROGERS	(OBJ)...PRO/PER

GENERAL INFORMATION:

Continued from 07/18/17. The court imposes sanctions on Attorney Jo Ann McDole in the amount of \$ \$750.00 payable to the court on or before 08/18/17. Court orders a completed amended accounting be filed by 08/18/17. Court agrees to continue the hearings set for 08/08/17 to 9/12/17 so all matters can be heard together.

THIS CASE IS SET FOR HEARING ON Second Amended Accounting

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

1. Matter set at 05/09/17 hearing, wherein, the Court ordered Attorney Jo Ann McDole to file an accounting by 06/15/17. Court stated sanctions will be imposed as to Attorney Jo Ann McDole if the accounting is not on file by this date.
2. Even if the accounting has been filed - this date is NOT to be vacated.
3. No amended accounting. Need same.

RECOMMENDATION:

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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0700798

CASE NAME: WALTER FLOWERS JR.

SEE ALSO 2

HEARING:

OSC re: SURCHARGE (FLORANCE FLOWERS) filed by FRANCES FLOWERS

COUNSEL:

FRANCES FLOWERS

(PET)...JO ANN MCDOLE

WALTER FLOWERS JR

(DEC)...

WANDA ROGERS

(OBJ)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Surcharge (Florence Flowers)

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

1. Matter set at 06/5/17 hearing, wherein, Mr. Parker informed the Court that accounting filed by Ms. McDole is incomplete as there are funds still coming in.
2. Court orders sanctions of \$350 imposed on Attorney JoAnn McDole for refusing court orders. Sanctions must be paid within 30 days.
3. The Court vacates previous orders of distribution.
4. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

HEARING:

Hearing Re: First and Final Account (Dorothy Harmon)

COUNSEL:

ABRAHAM C. RAMIREZ	(DEC)...
DOROTHY R HARMON	(PET)...PRO/PER
PUNLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **02/02/17 and 03/23/17**. Court order the administrator, Dorothy Harmon to pay back the administrator fees that she paid herself without prior court order. Court notifies the Public Administrator of possible appointment. If a proper accounting is not filed prior to the next hearing the court shall appoint the Public Administrator as the successor administrator.

Continued from **05/11/17**. A request for continuance was received. The court suspends the powers of the administrator. The Public Administrator is appointed as the Special Administrator. Notice by Judicial Assistant.

Continued from 07/11/17. Craig Parker represents all assets were distributed to prior administrator. Matter is continued by the Court to allow petitioner to file proper accounting.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by prior administrator, Dorothy Harmon ["Petitioner"].

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

1. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. Need a proper summary of account, report and accounting schedules.
2. There is no verification per Pr.C. § 1021.
3. Proposed order is not proper.

RECOMMENDATION

Need to file a proper accounting and report.

(lc/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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500250

CASE NAME: Steven Charles Vaughan

HEARING:

WAIVER OF Account and Report of RANDY VAUGHAN and Petition for allowance of fees filed.

COUNSEL:

RANDY VAUGHAN (PET)...PRO/PER
STEVEN C VAUGHAN (DEC)...

GENERAL INFORMATION:

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

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

1. Sole heir waives accounting.
2. Petitioner waives statutory compensation.
3. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614.
4. Need bank/financial statements to support date of death balances per Local Rule 20-908.
5. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 3-5 then Court's discretion. If approved, set next hearing for final discharge on **09/18/18**.

(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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500906

CASE NAME: MTR OF JACQUELINE DAVIS

SEE ALSO 15

HEARING:

Accounting Review

COUNSEL:

CHRISTOPHER DAVIS (PET)...THE GROSSMANLAW FIRM, A.P.C

JACQUELINE DAVIS (DEC)...

XREF: PROPS1500977

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 Christopher Davis, brother, on 12/10/15; full authority, \$150,000 bond.
2. Partial Inventory and Appraisal filed 11/09/16 is not signed by Administrator, Christopher Davis. Need same.
3. Need final inventory and appraisal with supporting bank/financial statements per Local Rule 20-908.
4. Need accounting or status report to include the standing of the related civil matter as directed by court on 07/31/17.

RECOMMENDATION

Inquire status. When an inventory and appraisal is not filed as ordered, the court may set hearing in accord with Pr.C. §§8804 and/or 8505.

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600386

CASE NAME: MTR OF JACK J HALL

SEE ALSO 6B

HEARING:

Hearing Re: Proof of Bond

COUNSEL:

JACK J HALL

(DEC)...

JAYNEEN THORNTON

(PET)...DIANA J CARLONI

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 at 08/15/7 hearing, wherein, Court ordered a bond of \$4.58 million to be posted.
2. Need proof of bond.

RECOMMENDATION:

Need to clear note 2.

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600386

CASE NAME: MTR OF JACK J HALL

SEE ALSO 6A

HEARING:

Accounting Review

COUNSEL:

JACK J HALL

(DEC)...

JAYNEEN THORNTON

(PET)...DIANA J CARLONI

GENERAL INFORMATION

Continued from 08/15/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters testamentary issued 06/04/16 to Jayneen Thornton with full authority and no bond.
2. Final Partial #2 Inventory and Appraisal filed 09/27/16 is not dated at signature of probate referee, and is missing printed name on page 2. Also, caption indicates Partial #2; however, Partial #1 was not previously filed. Need completed form.
3. No accounting or status report of administration. Need same.

RECOMMENDATION

Inquire status.

(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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

SEE ALSO 8, 9, 10

HEARING:

Hearing Re: STATUS RE SETTLEMENT

COUNSEL:

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

No notes – 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

SEE ALSO 7, 9, 10

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITIONS IF ALL TERMS MET

COUNSEL:

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON OSC re Dismissal of Petitions.

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

1. Matter set at 05/03/17 hearing, wherein, the Court noted that if all the terms of the agreement are met and completed, the petitions filed May 10, 2016 and April 18, 2017 will be dismissed with prejudice.

RECOMMENDATION:

Court's discretion

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

SEE ALSO 7, 8, 10

HEARING:

Hearing Re: PETITION FOR INSTRUCTIONS

COUNSEL:

EDWARD WADE	(PET)...CORY C BRENDEL
HARVEY WADE	(PET)...FULLERTON LEMANN SCHAEFER & DO
RICHARD WADE	(RES)...CORY C BRENDEL
RUTH	(TRU)...

GENERAL INFORMATION

Continued from **06/29/16**. Counsel stated a supplement was filed on 06/23/16.

Objections to be filed by next hearing date.

Continued from **09/08/16 and 11/09/16**. Parties wish to attend mediation.

Set on **05/03/17 and continued from 07/18/17**.

THIS CASE IS SET FOR HEARING ON Petition for Instructions

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

1. Copy of trust filed 06/23/16.
2. Petitioner alleges the Ruth Wade Trust was created on 11/14/91, with a First Amendment on 12/28/07 and Second Amendment 2/4/15. Ruth Wade died 3/5/15.
3. Petitioner alleges that he is the successor trustee of the Trust, but that the designation is in doubt as the successor trustee's authority is being challenged.
4. Petitioner alleges the Trust held title to two parcels of real property containing several addresses, but that the designation of the addresses is confused in the Trust Amendments.
5. Petitioner requests the Court find that the beneficiaries, Richard and Edward Wade are in "default" and "contest" under the terms of the Trust for their interference with the Trust Administration.
6. Petitioner requests the Court compel Richard and Edward to account for the rents collected on the Trust property.
7. **Opposition filed 05/19/17 by Kim Cooper.**

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.

8. **Reply filed on 09/06/16 by Richard and Edward Wade.**
9. No proposed order.

RECOMMENDATION:
Set for contested hearing.

(sa/lc/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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

SEE ALSO 7, 8, 9

HEARING:

Petition for TRANSFER OF PRITIES HELD BY ANOTHER FOR DAMAGES FOR
BREACH OF TRUST ETC

COUNSEL:

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to Harvey Wade - Trustee and son of Settlor; Evelyn R. George – beneficiary and daughter of Settlor; and Richard A. Wade – beneficiary and son of Settlor.

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601004

CASE NAME: MTR OF ERNEST ROLAND HENDRIX

HEARING:

FIRST AND FINAL Account and Report of D HERSHEL WILSON and
Petition for allowance of fees filed.

COUNSEL:

D HERSHEL WILSON (PET)...MCCLELLAN WILSON AND
ERNEST ROLAND HENDRIX (DEC)...

GENERAL INFORMATION:

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

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

1. Assets on Hand \$399,213.14 in cash.
2. Statutory fees of \$11,329.89 requested. Calculated.
3. Petitioner requests authority to withhold the sum of \$50.00 as a reserve.
4. Need verified letter as to balance in IOLTA account per Local Rule 20-908.
5. Need copies of bank/financial statements to support date of death balances per Local Rule 20-908.
6. ~Proposed Order 07/21/17

RECOMMENDATION:

Need to clear notes 4 & 5 then Court's discretion. If approved, set next hearing for
receipts and final discharge for **09/18/18**.

(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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700240

CASE NAME: MTR OF JANET WEAR

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

JANET WEAR

(DEC)...

RICHARD HARTMAN

(PET)...RANDAL P HANNAH

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. Letters of Administration issued to Richard Hartman, son, on 08/07/17; full authority, \$50,000 bond.
2. Matter set on 08/07/17, to provide proof of bond and issuance of letters.
3. Need proof of bond.
4. Need subsequent letters.

RECOMMENDATION:

Need bond and letters.

(cs)

Future Hearing:

10/15/18 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700376

CASE NAME: ROSIE LEE SHOAF

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

JIMMY L SHOAF

(PET)...PRO/PER

ROSIE LEE SHOAF

(DEC)...

XREF: PROPS1600550

GENERAL INFORMATION

Continued from 07/20/17. No appearance. Court will refer the matter to the Public Administrator for the following reasons. A prior case, PROPS1600550 lists several heirs at law and creditor claims were filed and request for special notice. That case was dismissed by the petitioner. Since then this case was filed and the only heir listed is the petitioner. Court requests the Public Administrator to investigate both of these cases.

THIS CASE SET FOR HEARING ON Petition for Probate of will Letters of Administration WWA with Full Authority under IAEA by Jimmy Shoaf, son

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

1. Petitioner is sole beneficiary of will and waives bond. Estate consists of real property with a net value of \$287,310 (see next note). JTD
2. Related case has an assignment of interest signed by petitioner to Joe Diaz. Question how petitioner can be sole beneficiary of will after assignment? Need verified supplement.
3. Will is holographic. Proof of holographic instrument filed 07/13/17; copy of will is not attached.
4. Petitioner and heirs named in prior case PROPS1600550 not listed in section 8. Need verified supplement.
5. Need Notice to Petition to Administer Estate and proof of service to Joe Diaz and other heirs not listed in section 8.
6. ~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 for clarification of the notes only - no legal or procedural advice will be given.

RECOMMENDATION

Need to clear notes , Court's discretion re bond. If approved, set Accounting/Status Review for **09/27/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/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 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: 09/12/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700476

CASE NAME: MTR OF JUAN JOSE CUEVAS 2015 TRUST

HEARING:

Petition for TRANSFER TRUST PROCEEDINGS TO LOS ANGELES COUNTY.

COUNSEL:

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

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: JAMES MICHAEL WELCH **TRUTS AND MOTIONS**

DATE: 09/12/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1500906

CASE NAME: MTR OF JACQUELINE DAVIS

SEE ALSO 6

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner
CHRISTOPHER DAVIS

COUNSEL:

CHRISTOPHER DAVIS

(PET)...THE GROSSMANLAW FIRM, A.P.C

JACQUELINE DAVIS

(DEC)...

XREF: PROPS1500977

VACATE – Substitution of Attorney filed 08/07/17.

(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 **CONSERVATORSHIP**

DATE: 09/12/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300175

CASE NAME: Margaret Mary Dyer

HEARING:

SECOND AND FINAL Account and Report of SHIRLEY R. EARL and
Petition for allowance of fees filed.

COUNSEL:

KARL F SCHMIDT (CPE)...PRO/PER

MARGARET MARY DYER (CEP)...

MICHAEL A DYER (CPE)...PRO/PER

SHIRLEY R. EARL (OBJ)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION:

Conservatee passed away on 11/10/16.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for
Fees by Temporary Conservator, Shirley R. Earl ["Petitioner"].

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

1. Accounting period 11/01/14 to 12/31/16.
2. Assets on Hand \$275,409.58 consisting of \$271,409.58 in cash and \$4,000 in personal property.
3. Conservator seeks compensation of \$27,615.00 for the period 05/17/13 to 12/26/16. Billed at \$35/hour for 789 hours. Itemized [LF, pgs. 27- 33]. JTD.
4. Attorney requests fees and costs of \$85,778.51 for period 10/02/13 to 07/26/17. Billed at \$200-\$350/hour for 330.55 hours' attorney time and \$95-\$110/hour for 171.65 hours' paralegal time. Itemized [LF, pgs. 34- 79]. JTD.
5. Non-Cash Assets to Summary of Account [LF, p.15] does not reflect amount at end of first account of \$140,000. Need corrected summary and affected schedule(s) via verified supplement.
6. Disbursements – Schedule C [LF, p. 25] includes miscellaneous expense reimbursement to Petitioner in the amount of \$2,300 which is not itemized. Need same via verified supplement.

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.**

7. Disbursements – Schedule C [LF, p. 25] includes reimbursement to Petitioner for travel expenses that are not itemized, in the amount of \$276.80, that are normally not allowed when fees are being requested. JTD.
8. Petitioner requests exoneration of bond and discharge upon filing of receipts. However, bond will not be exonerated until entry of final discharge order.
9. Real property was sold during this administration. Need closing escrow statement via verified supplement.
10. Need copy of facility statements per Pr. C. § 2620(c)(5).
11. Need proof of service to Notice of Proposed Action re sale of property.
12. Petitioner requests distribution to be made to Petitioner, Shirley R. Earl as Successor Trustee of the Daniel and Margaret Dyer 2004 Trust. Need a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust?
13. Proof of Service to Notice filed on 07/31/17, section 3 is incomplete. Need proper service.
14. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

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

(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: 09/12/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500305

CASE NAME: MTR OF BUDDY LEE SAILOR

SEE ALSO 18

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THERESA L PRINCE

COUNSEL:

BUDDY LEE SAILOR (CEP)...WALTER T. MOORE
THERESA L PRINCE (CPE)...DAVID M GROSSMAN

XREF: FAMSS1509076

GENERAL INFORMATION:

Continued from **7/20/16 and 10/12/16**. Additional bond to be posted of \$475,000 for a total bond of \$500,000.

Continued from **02/22/17 and 05/17/17**. Oral report given by Attorney Patrick Rogers (re family law case).

Continued from 06/20/17. The final I & A cannot be submitted as the family law case is still pending.

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

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

1. Theresa Prince, Daughter appointed conservator, person/estate on 12/16/15, \$25,000 bond; now \$537,000 bond.
2. Proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c) filed 11/01/16.
3. Determination of Conservatee's Appropriate level of Care form GC-355 Care Plan in accord with Pr.C.§2352.5 filed 11/1/16.
4. Partial Inventory and Appraisals filed 5/18/16 and **7/22/16**. Supplemental filed with unknown amounts on 01/12/17, but accounts listed. **Need proper final Inventory & Appraisal per Pr.C.§2610.**
5. Notice of Filing I & A and Instructions for Objection filed.
6. Need accounting.
7. Proof of recordation of Letters filed 7/20/16.

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

RECOMMENDATION:
Need to clear notes 4 & 6.
(sa/lc/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 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: 09/12/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500305

CASE NAME: MTR OF BUDDY LEE SAILOR

SEE ALSO 17

HEARING:

FIRST Account and Report of THERESA L PRINCE and Petition for allowance of fees filed.

COUNSEL:

BUDDY LEE SAILOR

(CEP)...WALTER T. MOORE

THERESA L PRINCE

(CPE)...DAVID M GROSSMAN

XREF: FAMSS1509076 (disso)

GENERAL INFORMATION:

Continued from 06/20/17 for notes to be cleared. The Court notes that this case will not be transferred to Orange County until the related family law matter is resolved completely.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Theresa L. Prince (daughter).

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

1. Accounting period 12/16/15 TO 12/15/16. However, account period should begin on 11/10/15.
2. Petitioner has not used mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use mandatory form(s) on future accountings.
3. Assets on Hand \$590,853.45 consisting of \$226,735.76 in cash and remaining in real and personal property.
4. Current bond of \$562,000. Insufficient. Suggest bond of \$650,000 (includes recovery). JTD.
5. Partial Inventories 1 & 2 indicates estate is includes community property interests that are unknown until the outcome of the related Family Law Case. Need complete, final inventory and appraisal. **Supp. 08/14/17 indicates a final inventory and appraisal cannot be filed until settlement from the Family Court in the related matter.**
6. Petitioner does not request compensation.

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.

7. Attorney requests fees of \$11,146.00 for 22.3 hours' attorney time billed at \$350/hour and 25.7 hours' paralegal time billed at \$130/hour. **Itemized [see supp. 08/14/17, LF, pgs. 7-8]. JTD.**
8. Attorney requests reimbursement of costs advanced of \$465.00.
9. Value is not given; purportedly unknown or not valued by Probate Referee for a business known as Integrity Design Group or Orange County Container Group LLC Profit Sharing. Question the status of these assets? **Supplement 08/14/17 indicates these assets are currently being valued as part of the community assets by the Family Court and will be inventoried upon valuation and division of the community property.**
10. **Need bank/investment statements verifying date of death and ending balances per Local Rule 20-908 for US Bank Acct. XXX4068 and Boeing Investment Plan. Also, Assets on Hand at End of Account Period US Bank Acct. XXX4068.**
11. **Schedule E- Assets on Hand at End of Account Period [acctg. 04/20/17-LF, p25] does not include Chase Checking Acct. XXX2508 or Savings Acct. XXX6083 affixed to supp. filed 08/14/17 [LF, p73]. Need amended Schedule E and affected schedules via verified supplement.**
12. Need proof of service to Notice of Proposed Action re sale of real property.
13. During the accounting period, petitioner paid Julia Chavez and Francesca Kelium for caregiving expenses of \$3,532.55. **Supp. (08/14/17) affixes weekly time cards. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).**
14. Conservatee resides in Fountain Valley, CA which is located in Orange County. Suggest transfer. If so, Court to set control date. JTD.
15. ~Proposed Order does not comply with Local Rule 20-614.

RECOMMENDATION:

Need to clear notes, \$650,000 bond. If approved, set next hearing for Accounting Review on **02/13/18**.

(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: 09/12/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS01164

CASE NAME: IN THE MATTER OF ALFRED A CORDOVA

HEARING:

Hearing Re: Proof of New Mexico Conservatorship

COUNSEL:

ALFRED A CORDOVA

(PLA)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

Continued from **03/13/17** for Counsel to speak with petitioner regarding residence outside of California.

Continued from 05/08/17 and 07/18/17.

THIS CASE IS SET FOR HEARING ON Proof of New Mexico Conservatorship

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

1. Petition to fix residence outside of the State of California granted on 11/07/16.
2. Order Fixing Residence Outside the State of California entered 11/07/16.
3. **Signed, certified mail receipt (green card) returned.**

RECOMMENDATION:

None.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: CIF DS1700009

CASE NAME: LAGUTANSKI V LAGUATAN

HEARING:

Hearing Re: EDLER ABUSE RESTRAINING ORDER

COUNSEL:

BILL LAGUTANSKI (PP)...PRO/PER

JEFFREY LAGUATAN (RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Notice:

Need Notice of Hearing with proof of personal service on Respondent, Jeffrey Laguatan and Notice of Hearing with proof of mailed notice to daughter, Helen L. Laguatan.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 1A

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

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900337

CASE NAME: ISAAC PRUDHOLME S.N. TRUST

SEE ALSO 2

HEARING:

Hearing Re: PAYMENT OF BURIAL PLOT

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV ()...
ISAAC PRUDHOLME SPECIAL NEEDS (TRU)...
KATIE HERNANDEZ (PET)...HARTNELL LAW GROUP
LOS ANGELES COUNTY PUBLIC GUAR ()...
MELODIE SCOTT (TEE)...SHERRI L KASTILAHN
RICKY PRUDHOLME (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RICKY PRUDHOLME is GRANTED

XREF: SCVSS19171

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Payment of Burial Plot.

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

1. Matter set at 07/03/17 hearing, wherein, Tamsen Bennett was ordered to provide the Trust with proof of payment made for the burial plot for Issac Prudholme. Once proof of payment is provided, the Trust will reimburse Ms. Bennett her 1/2 of the costs related to the plot or her 1/2 of the costs related to the plot or portion of the plot for Issac Prudholme. Need same.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900337

CASE NAME: ISAAC PRUDHOLME S.N. TRUST
SEE ALSO 1A

HEARING:
Petition for MOTIONS TO COURT

COUNSEL:
DEPARTMENT OF HEALTH CARE SERV ()...
ISAAC PRUDHOLME SPECIAL NEEDS (TRU)...
KATIE HERNANDEZ (PET)...HARTNELL LAW GROUP
LOS ANGELES COUNTY PUBLIC GUAR ()...
MELODIE SCOTT (TEE)...SHERRI L KASTILAHN
RICKY PRUDHOLME (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RICKY PRUDHOLME is GRANTED

XREF: SCVSS19171

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petitions to Court by decedent's father, Ricky Prudholme ["Petitioner"].

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

1. Petition appears to be Objections to requests past, present and future fees and alleges fraud, embezzlement and money laundering by Katie Hernandez as payment to the mortuary.
2. Need proof of service.

RECOMMENDATION:
Set for contested 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 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: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400118

CASE NAME: Frank Roe

VACATED

HEARING:

FIRST Account and Report of WILLIAM ROE, CONNIE SCHUBERT and
Petition for allowance of fees filed.

COUNSEL:

CONNIE SCHUBERT	(PET)...PRO/PER
FRANK ROE	(DEC)...
WELLS FARGO BANK, N.A.	(TP)...PRO/PER
WILLIAM ROE	(PET)...PRO/PER

FUTURE HEARING DATES:

11/16/17 First and Final upon Waiver of Account

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501189

CASE NAME: INGEBURG ELISABETH GOETZ

SEE ALSO 5

HEARING:

Hearing Re: STATUS OF ACCOUNT OF MELODIE SCOTT

COUNSEL:

FRIEDJOF SCHWARZ	(OBJ)...HOLGER SIEGWART
HOLGER SIEGWART	(PET)...SIEGWART GERMAN AMERICAN
INGEBURG ELISABETH GOETZ	(DEC)...
MELODIE Z SCOTT	(PET)...RYAN J GALLANT

XREF: PROPS1300322, CONPS1400211

GENERAL INFORMATION:

Continued from 03/28/17 and 06/27/17. Ms. Rousso reports a portion of the judgment has been paid and a motion for attorney fees may be filed. Melodie Scott is ordered to be present at next hearing.

THIS CASE IS SET FOR HEARING ON Status of Account of Melodie Scott.

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

1. Matter set on 02/15/17, wherein, Court granted counsel's request to order Melodie Scott to be personally present in court this date if she has not filed an accounting as Special Administrator in PROPS1501189.
2. Accounting filed – see next matter #5.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

10/17/17 Probate status report (by Holger Siegwart)

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: TARA REILLY

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501189

CASE NAME: INGEBURG ELISABETH GOETZ

SEE ALSO 4

HEARING:

FIRST AND FINAL Account and Report of MELODIE Z SCOTT and
Petition for allowance of fees filed.

COUNSEL:

FRIEDJOF SCHWARZ	(OBJ)...HOLGER SIEGWART
HOLGER SIEGWART	(PET)...SIEGWART GERMAN AMERICAN
INGEBURG ELISABETH GOETZ	(DEC)...
MELODIE Z SCOTT	(PET)...RYAN J GALLANT

XREF: PROPS1300322, CONPS1400211

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Special Administrator, Melodie Z. Scott ["Petitioner"].

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

1. Accounting period 11/05/15 to 04/04/17.
2. Assets on Hand \$961.71 consisting of cash.
3. Petitioner and her counsel reserve on the issue of statutory commissions and fees and fees for extraordinary services, until conclusion of the administration of the estate whereat the division of such commissions and fees will be presented.
4. During the accounting period, petitioner paid to Annmarie Scott for case management fees; Raumey Wilson and Vivian Kaviganfor account management services. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
5. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
6. Petition indicates distribution of the estate is to be made to the Administrator of the estate, Holger Siegwart.
7. Petitioner request bond exoneration and discharge upon filing of receipts. However, discharge does not occur until entry of final discharge order.
8. ~Proposed Order 06/27/17.

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

RECOMMENDATION:

Need to clear notes 4-5 then set hearing for receipts and final discharge for **09/18/18**.
(nb)

Future Hearing:

10/03/17 Petition for (EX-PARTE) Preliminary Distribution

10/17/17 Probate status report

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700437

CASE NAME: MTR OF ANDY GASCA

HEARING:

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

COUNSEL:

ANDY GASCA (DEC)...
EDWARD F CORNEJO (PET)...LAW OFFICE OF DAVID T EGLI

GENERAL INFORMATION

Continued from 07/25/17 for notice to Christopher Guillen. Counsel advised the Court will require a \$330,000 bond be posted.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Edward Cornejo,

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

1. All heirs waive bond. The estate consists of \$502,000 of which \$302,000 is personal property.
2. The petition for probate is on an outdated form. Court's discretion.
3. Section 3f2 was addressed as to the petitioner being a person entitled to letters instead of section 3f1 as he is named as the executor. Court's discretion..
4. Proof of publication filed.
5. ~Proposed form order: 05/05/17

RECOMMENDATION

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

(ww/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 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: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700618

CASE NAME: STANLEY MARK DRISDOM

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JEFFERY RAY DRISDOM (PET)...PRO/PER
STANLEY MARK DRISDOM (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jeffery Ray Drisdome, brother

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

1. Net estate value consists of \$14,000 with \$5,000 in personal property. Petitioner requests bond not be required because decedent was his brother and he was his caretaker until his death. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by each heir. Alternatively, suggest minimum bond of \$20,000. JTD.
2. Section 8 to petition [LF, p. 5] does not specify relationships of Donna Drisdome Sparks and Frankie Ellington. Need verified supplement.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication.
5. ~Proposed Form Order: 06/23/17

RECOMMENDATION

Need to clear notes 1 - 4. Court's discretion re bond. If approved, set Accounting/Status Review for **11/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700619

CASE NAME: MTR OF GUADALUPE ALAMILLA

HEARING:

Petition to determine succession to Real Property

COUNSEL:

GUADALUPE ALAMILLA MONJARAS (DEC)...

HELDERBERT A ALAMILLA (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property (Estates \$150,000 or less) by son, Helderbert A. Alamilla [{"Petitioner"}].

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

1. Petition alleges decedent was not a resident of California, but owned real property in California at the time of death. Specifically, property located at Victorville, CA.
2. Petitioner request a determination that decedent's real and personal property located in San Bernardino County pass to petitioner without administration. Petitioner is decedent's son and purported sole heir.
3. ~Proposed Form Order 06/23/17.

RECOMMENDATION:

Court's discretion.

(nb)

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: 09/12/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600747

CASE NAME: GARY L & MARY E INSKEEP 1999 FAMILY TRUST

HEARING:

Hearing Re: INSTRUCTION TO AUTH TRUSTEE TO SELL TRUST PROP

COUNSEL:

CHRISTIE DAVIDSON	(PET)...SU P CHEAH
DANIEL JORDAN INSKEEP TRUST	(TRU)...
GARY LEE & MARY ELIZABETH INSK	(TRU)...
MELISSA CHAINA INSKEEP SUPPLEM	(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 - Civil
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700087

CASE NAME: MARTINEZ VS. MARTINEZ

HEARING:
Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:
BLANCA EVA MARTINEZ (PP)...PRO/PER
STEVEN DANIEL MARTINEZ (RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Notice:

Need Notice of Hearing with proof of personal service on Respondent, Steven Daniel Martinez and Notice of Hearing and proof of mailed service on son, Michael A. Martinez.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

HEARING:

Hearing Re: PRETRIAL ON OSC RE: CONTEMPT

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

JUDITH KATHLEEN PARK

(RP)...LENITA A SKORETZ

PATRICIA MAE LAWRENCE PARK

(PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

No notes – Pretrial.

(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: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700218

CASE NAME: MTR OF KATHRYN ANN BANDHOLTZ

HEARING:
Petition for ORDER FIXING COMPENSATION/AUTH ATTY FEES

COUNSEL:

JENNIFER A GRABOWSKI	(CP)...PRO/PER
JERRY W GRABOWSKI	(CP)...PRO/PER
KATHRYN ANN BANDHOLTZ	(CPE)...DONNASUE ORTIZ
ROBERT BANDHOLTZ	(OBJ)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by Craig Parker

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

1. Petitioner Craig Parker was appointed Guardian Ad Litem for Conservatee Kathryn Ann Bandholtz on 05/10/17.
2. Petition requests fees of \$3,430.00 for 9.8 hours at \$350/hour for attorney services. Itemized [petition 07/25/17, LFpg6].
3. Notice of Hearing filed 07/27/17; however, need notice to appointed Counsel Donnasue Ortiz.
4. ~Proposed Order: 07/25/17

RECOMMENDATION

Need notice, then Court's discretion.
(lh)

Future Hearing:
12/05/18 Accounting Review.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800089

CASE NAME: MARCIA F HAMMOND

HEARING:

Accounting Review

COUNSEL:

BARRY HAMMOND

(CP)...PRO/PER

BARRY HAMMOND

(CPE)...PRO/PER

MARCIA F HAMMOND

(CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Second Account for Barry Hammond approved on 03/21/17 for period ending 04/30/15. Need Order Settling Second Account.
2. Need accounting or waiver.

RECOMMENDATION

Inquire status

(cs)

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

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700047

CASE NAME: MTR OF GLADYS LAMRIA DIASMARA HUTAGAOL

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DIAN HUTAGAOL	(CP)...PRO/PER
GLADYS LAMRIA DIASM HUTAGAOL	(CTP)...JAMES B CHURCH
GRACE HUTAGAOL	(CP)...PRO/PER
HENDRICK HUTAGAOL	(CP)...PRO/PER

GENERAL INFORMATION

Continued from 03/14/17 at request of IRC for 30 day extension to file report.

Attorney James Church appointed Counsel for Gladys Hutagaol.

Continued from **05/16/17** for Capacity Declaration to be filed. Counsel appears on his client's behalf and requests conservatee's appearance be waived. Counsel's report filed in Court.

Continued from 07/25/17 on court's motion for notice to paternal and maternal grandparents.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Hendrik Hutagaol (father), Dian Hutagaol (mother), and Grace Hutagaol (sister)

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

1. Petitioner seeks powers to fix residence, access confidential records, consent to marriage, enter contracts, select social/sexual contacts, make educational decisions under PR. C. §2351.5. JTD.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. **Capacity Declaration filed 05/24/17.**
4. Proposed conservatee is developmentally disabled. **Report of Counsel James Church filed 05/16/17.**
5. Proposed conservatee is developmentally disabled. **IRC report filed 05/15/17.**

6. Need Notice of Hearing and Proof of Service as to Ludiana Mangunsong (pgm) and Sri Subekti (mgm).
7. Proof of Service of Notice of Hearing filed 03/02/17 as to Parlindungan Hutagaol (pgf) and Ebenezer Poerbo (mgf) is incomplete as to item 2 address of server, and item #4 date and place of mailing. Need amended Proof of Service.
8. Certificates of Completion of the Conservatorship Training Class from Hendrik, Dian, and Grace Hutagaol filed.
9. CI Report filed 03/06/17.
10. Proposed form Order: 03/01/17

RECOMMENDATION

Need to clear notes 6-7. If approved, set hearing for Compliance Review **04/17/18** 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)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700118

CASE NAME: OMAR GAITAN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

OLGA PLASCENCIA (CP) ...
OMAR GAITAN (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **05/16/17** at request of IRC to file report. Attorney Walter T. Moore appointed for Omar Gaitan.

Continued from 07/25/17. Counsel's report filed in court. The Court waives return of citation by Omar's appearance today. Sister, Fatima, does not need to be added to list of required contacts.

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks order related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, to make and consent to medical decisions. JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed 05/08/17.**
5. Proposed conservatee is developmentally disabled. Letter from IRC filed 05/09/17 requesting 30-day continuance. **IRC report filed.**
6. Proposed conservatee is developmentally disabled. **Report of Counsel Walter T. Moore, filed 07/25/17.**
7. List of required contact Information is missing Alfredo Gaitan (father). Need completed form. **Affidavit re Alfredo filed 09/05/17. JTD.**
8. Need Notice of Hearing and Proof of Service.
9. Certificate of Completion of the Conservatorship Training Class filed.

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

10. CI Report filed 04/25/17.

11. ~Proposed Form Order: 04/04/17

RECOMMENDATION

Need to clear note 8. If approved, set hearing for Compliance Review for **04/17/18** 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/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: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

SEE ALSO 15

HEARING:

Petition for APPOINTMENT OF CONSERVATOR (PERSON/ESTATE)
COMPETING PETITION

COUNSEL:

DENNIS BARWICK

(PET)... MATTHEW SHEASBY

DEREK J BARWICK

(CEE)...CANDICE A GARCIA-RODRIGO

PAMELA L BARWICK

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Ex parte orders granted on 05/11/17. Court appoints Pamela Barwick as temporary conservator.

Continued from **06/20/17**. Father is requesting to be co-conservator. Father advised to file a petition or speak with Counsel and have an amended petition filed. Court does not require an IRC report and will allow Counsel to decide which type of conservatorship requested. Referred to Court Investigator for report.

Continued from 08/08/17. Father's competing petition has been filed. Referred to Court Investigator for investigation and report. The Court requests IRC provide a supplemental report regarding father's request for conservatorship. The Court deems competing petitions to be objections to the other petition. The Court recommends parents use OurFamilyWizard to exchange information regarding proposed conservatee. Matter continued to trail competing petition. Notice waived.

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Appointment of Conservator person and estate by Pamela Barwick (mother)

Petition #2: Petition for Appointment of Conservator person and estate by Dennis Barwick (father)

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.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:
Petition #1 by Pamela Barwick (mother):

1. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers.
2. Proposed conservatee is developmentally disabled. It appears a petition for Limited Conservatorship may be appropriate.
3. **Report of appointed counsel Candice Garcia-Rodrigo, filed 07/24/17.**
4. **Court Investigator report filed.**
5. IRC report filed 06/15/17
6. Petitioner seeks medical powers. Capacity Declaration filed 05/05/17.
7. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
8. Return of Citation filed 05/25/17.
9. ~Proposed Form Order: 05/05/17
10. **Court deems competing petition by father as Objection.**

Petition #2 by Dennis Barwick (father):

1. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers? Court to inquire.
2. Petitioner requests medical powers. Need Capacity Declaration.
3. Proposed conservatee is developmentally disabled. Need report by court-appointed counsel, Candice Garcia-Rodrigo.
4. Need CI Report.
5. Need Certificate of Completion re Conservatorship Class.
6. Proof of Personal Service filed. However, need return of served Citation.
7. Need Notice of Hearing with proof of service.
8. IRC Report filed 08/31/17.
9. ~Proposed Form Order/Letters 08/07/17.
10. **Court deems competing petition by mother as Objection.**

RECOMMENDATION:

Need to clear notes 2-7 for petition #2 then set for contested hearing. If approved, set hearing for Compliance Review for **04/17/18** for the filing of the required documents and hearing re Accounting Review for **11/20/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb/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: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

SEE ALSO 14

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DENNIS BARWICK

(PET)... MATTHEW SHEASBY

DEREK J BARWICK

(CEE)...CANDICE A GARCIA-RODRIGO

PAMELA L BARWICK

(PET)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by DEREK J BARWICK is GRANTED

See prior matter #14.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700170

CASE NAME: ALEXA BIANCA RODRIGUEZ MARTINEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALEXA BIANCA RODRIGUEZ MARTINE (CTP)...SANDRA TURNER
OLGA SOLIS (CP)...PRO/PER

GENERAL INFORMATION

Continued from 06/20/17 at request of counsel. Counsel to assist petitioner in applying for IRC benefits.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Olga Solis (maternal aunt)

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

1. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 05/08/17.
5. Proposed conservatee is developmentally disabled. **Report of court-appointed counsel, Sandy Turner, filed.**
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. **Court Investigator report filed.**
8. Notice filed 06/13/17 does not give 15 days' notice. Need proper service.
9. Citation returned served. However, 15 days' notice not given. Need proper service.
10. Certificate of Completion of the Conservatorship Training Class filed.
11. ~Proposed Form Order: 05/08/17

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

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **04/17/18** 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 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: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS00080

CASE NAME: IN THE CONSERVATORSHIP OF DANIELLE MARIE DOBIAS

HEARING:

Accounting Review

COUNSEL:

DANIELLE MARIE DOBIAS (CEP)...

MARC A DOBIAS (CPE)...ALTHOUSE & MCDONOUGH

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 Account and Report entered 09/06/16.
2. Third Account Current now due.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/12/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS01747

CASE NAME: MATTER OF JESSE MUNOZ

HEARING:

Hearing Re: MR. LIEBERMAN'S FEES

COUNSEL:

DANIEL RIVAS	(PET)...JOHN D MICKUS
HARRY LIEBERMAN	(CPE)...HARTNELL LAW GROUP
JESSE MUNOZ	(CEP)...SHERRI L KASTILAHN
JOHN D MICKUS	(CE)...JOHN D MICKUS
VERLENE CAMERON	(CE)...JOHN D MICKUS
VERLENE CAMERON	(CPE)...JOHN D MICKUS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Mr. Lieberman's Fees.

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

1. Matter set at 07/25/17 hearing, wherein, the Court did not approve Mr. Leiberman's bill as submitted. Mr. Leiberman to submit a declaration reducing his fees from \$50 to between \$25 and \$50 depending on the work performed. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

10/02/17 Hearing re: Receipt of bond

04/26/18 Accounting Review.