



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 09/13/17**

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.

08/15/17 ww/lc; 09/07/17lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300908

CASE NAME: Linda Jewell Peroutka

HEARING:

Hearing re Final Discharge

COUNSEL:

CRYSTAL ORR

(PET)...LINDA ROBERTS ROSS

LINDA JEWELL PEROUTKA

(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Crystal Orr, daughter/sole heir approved on 10/04/16.
2. No receipt required, petitioner is sole heir.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

#### RECOMMENDATION

Inquire status of discharge order.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500693

CASE NAME: KIM ALAN RUTLEDGE

**SEE ALSO 3 4**

HEARING:

Hearing Re: AMENDED FIRST & FINAL REPORT OF ADMINISTRATOR

COUNSEL:

EDDIE JOE RUTLEDGE (PET)...GAUDY LAW, INC  
KIM ALAN RUTLEDGE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Amended** Waiver of Final Account, Distribution and Petition for Allowance of Fees by Eddie Rutledge, father.

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

1. All heirs waive accounting.
2. Petitioner requests statutory compensation of \$2,577.17 in lieu of full statutory compensation of \$12,325.71.
3. Attorney requests statutory fees of \$3,500 in lieu of full statutory fees of \$12,325.71.
4. Need bank statements to support Inventory and Appraisal balance per local rule 20-908. **Supp 09/01/17 statement attached for period 6/22/16 to 7/22/16. Need statement to support I&A balance as of date of death on 05/09/15.**
5. Petitioner and decedent's mother Sherry Rutledge assigned their interest to decedent's sister Cynthia Rutledge. It appears that distribution was made without court order; however, no harm appears to have been made to the estate. [Acct. 06/20LFpg15].
6. No amended proposed order. Submit after hearing.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/19/18**.

(/lc/lh)

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500693

CASE NAME: KIM ALAN RUTLEDGE

**SEE ALSO 2 4**

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE ON EDDIE RUTLEDGE

COUNSEL:

EDDIE JOE RUTLEDGE (PET)...GAUDY LAW, INC  
KIM ALAN RUTLEDGE (DEC)...

GENERAL INFORMATION:

OSC continued from 06/12/17. Matter is trailed to July 24, 2017 for counsel to clear probate notes on accounting. Court orders that Eddie Joe Rutledge return to court on July 24, 2017 if the probate notes on the accounting are not cleared. Court notes that counsel is to also be present at next hearing if probate notes are not cleared.

**Continued from 07/24/17. No appearance. Register of actions reflects hearing for 09/13/17.**

THIS CASE IS SET FOR HEARING ON OSC re Sanctions/Surcharge on Eddie Rutledge

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

1. Matter set at 05/08/17 hearing, wherein, the Court ordered Eddie Joe Rutledge to be personally present at hearing.

RECOMMENDATION:

Court's discretion re OSC. Waiver of accounting filed, matter 4.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500693

CASE NAME: KIM ALAN RUTLEDGE

**SEE ALSO 2 3**

HEARING:

APPROVING FIRST AND FINAL Account and Report of EDDIE JOE  
RUTLEDGE and Petition for allowance of fees filed.

COUNSEL:

EDDIE JOE RUTLEDGE (PET)...GAUDY LAW, INC  
KIM ALAN RUTLEDGE (DEC)...

See notes on matter 4.

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501053

CASE NAME: ROBERTO SALVADOR SANTAMARIA

HEARING:

Petition for SETTLEMENT AND FINAL DISTRIBUTION WITHOUT AN  
ACCOUNT, FOR APPROVAL OF WAIVER OF ACCOUNT ETC

COUNSEL:

GUILLERMO A SANTAMARIA (PET)...THE LAW OFFICE OF THOMAS W SAR  
ROBERTO SLAVADOR SANTAMARIA (DEC)...  
DEPARTMENT OF HEALTH CARE SERVICES (TP )...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Guillermo Santamaria, son.

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

1. All heirs waive accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$7,750. Ok.
4. Petitioner seeks authorization to pay Creditor's Claim by Department of Health Services for \$3,075.76.
5. Need after discovered property clause.
6. Proposed Order: 08/30/17

#### RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/19/18**.

(lc/lh)

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501183

CASE NAME: THE ROBIN H ELDER TRUST

**SEE ALSO 7 8**

HEARING:

Hearing Re: STATUS CONFERENCE & POSSIBLE SETTING FOR MEDIATION

COUNSEL:

GLEN E ELDER JR	(PET)...HARTNELL LAW GROUP
THE ROBIN H ELDER TRUST	(TRU)...
JOSEPHINE A RICH	(RES)...JOSEPHINE A. RICH

Status Conference & Possible Setting for Mediation - No Notes- JTD.

Future Hearings: 4/18/18: Readiness Calendar, 5/14/18-5/17/18: Court Trial

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501183

CASE NAME: THE ROBIN H ELDER TRUST

**SEE ALSO 6 8**

HEARING: Petition for INVALIDATE THE PURPORTED 2ND AMENDMENT TO TRUST 08/31/16

COUNSEL:

GLEN E ELDER JR	(PET)...HARTNELL LAW GROUP
THE ROBIN H ELDER TRUST	(TRU)...
JOSEPHINE A RICH	(RES)...JOSEPHINE A. RICH

GENERAL INFORMATION:

Continued from 2/22/16 for Attorney Josephine Rich to file written objections/demurrer. Continued from 05/02/16, 7/28/16, 08/31/16 and 11/09/16. Court overruled demurrer to petition to invalidate 3<sup>rd</sup> amendment.

**Continued from 02/22/17 and 05/10/17. Trial dates set.**

THIS CASE IS SET FOR HEARING ON

- Petition 1 to invalidate purported second amendment to trust.
- Petition 2 to invalidate purported third amendment to trust.

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

1. Petitioner is Glen Elder, Jr., heir-at-law of decedent and beneficiary of a prior amendment of the subject trust.
2. Petitioner alleges that decedent trustor executed the subject trust in 2011, executed a first trust amendment later in 2011, and purportedly executed a second trust amendment in 2012 and a third trust amendment in 2015.
3. **Petition 1 re Second Trust Amendment:** Petitioner seeks to invalidate the second amendment to the trust on the basis of undue influence and lack of capacity, to suspend and remove trustee, to compel accounting, for damages based upon Financial Elder Abuse, and to claim trust ownership and return of property including a constrictive trust.
4. **Petition 2 re Third Trust Amendment:** Petitioner seeks the same relief on the same basis as to the third trust amendment.
5. No opposition filed as of date of review.

RECOMMENDATION

Set for evidentiary hearing.

(ds/sa/lc)



Future Hearings: 4/18/18: Readiness Calendar, 5/14/18-5/17/18: Court Trial

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/13/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1501183

CASE NAME: THE ROBIN H ELDER TRUST

**SEE ALSO 6 7**

HEARING:

Petition for INVALIDATE THE PURPORTED 3RD AMENDMENT TO TRUST  
08/31/16

COUNSEL:

GLEN E ELDER JR

(PET)...HARTNELL LAW GROUP

THE ROBIN H ELDER TRUST

(TRU)...

JOSEPHINE A RICH

(RES)...JOSEPHINE A. RICH

See notes on matter 7.

Future Hearings: 4/18/18: Readiness Calendar, 5/14/18-5/17/18: Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600145

CASE NAME: JEANNE BRALEY AHLFELDT TRUST DATED 8/25/01

HEARING:  
Hearing Re: RESULT OF MEDIATION

COUNSEL:

JEANNE GAIL SMITH	(PET)...MARK J. ANDREW FLORY
JEANNE BRALEY AHLFELDT TRUST	(TRU)...
ROBERT AHLFELDT	(OBJ)...JAMES B CHURCH

***XREF: CONPS1500316 (Jeanne Ahlfeldt)***

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Result of Mediation

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

1. Matter set on 04/17/17 Petition for Removal of Trustee Robert Ahlfeldt/Trial. Trial dates set and if parties need new mediation date, counsel to call department to change.

RECOMMENDATION

Inquire status.

(lc)

Future Hearings: 1/08/18: Readiness Calendar, Petition for Removal of Robert Ahlfeldt as Successor Co-trustee & Etc. 2/05/18-2/09/18: Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700583

CASE NAME: MTR OF HEIDI ANNE MARIE AUBREY

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS OF ADMINISTRATION  
W/WILL ANNEXED W/AUTH TO ADMIN FULL IAEA

COUNSEL:

EDWARD WONDERCHECK (PET)...JOSEPH D BORJAS  
HEIDI ANNE MARIE AUBREY (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Edward Wondercheck, executor/friend

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

1. Petitioner seeks bond of \$200,000. Net value of the estate consists of \$227,000 of which \$115,000 is personal property. Suggest bond of \$227,000.
2. The petition caption is marked as will annexed but it is clear that Edward is the named executor. Does Court wish for an amended petition for letters testamentary be filed? JTD
3. Due Diligence Declaration re biological daughter Ramona filed 09/01/17. JTD
4. ~Proposed Form Order: 06/14/17

#### RECOMMENDATION

Court's discretion. Bond of \$227,000. Court's discretion re note 2. If approved, set Accounting/Status Review for **11/21/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700601

CASE NAME: OLGA H VASQUEZ AKA OLGA VASQUEZ

HEARING:

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

COUNSEL:

YOLANDA NAVA (PET)...CALDWELL, KENNEDY & PORTER, A.  
OLGA H VASQUEZ (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Yolanda Nava, daughter

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

1. All beneficiaries waive bond. Value of real property is \$195,000; personal property to be determined.
2. ~Proposed Form Order: 06/19/17

#### RECOMMENDATION

RFA subject to Court's discretion re bond. If approved, set Accounting/Status Review for **11/21/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 11A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/13/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1401023

## **VACATED**

CASE NAME: Dominic Juarez Special Needs Trust

HEARING:

Hearing Re: STATUS RE ACCOUNTING OF NATALIE BLICKENSTAFF

COUNSEL:

MASS MUTUAL TRUST COMPANY (PET)...PATRICK MCNALLY

SALVADOR JUAREZ (PET)...FULLERTON LEMANN SCHAEFER

JAMIE JUAREZ (PET/CT)...JENNIFER DANIEL

CRAIG E WILSON (PET)...CRAIG E WILSON

DOMINICK JUAREZ (REBECCA J THYNE)

First Account Current and Report of Successor Trustee filed 08/21/17.

Future hearing dates: 12/18/17 First Account Current by Successor Trustee  
03/28/18 Final Discharge for Jamie Juarez, previous trustee

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 09/13/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON DS1000312

CASE NAME: EDWARD LE TU

HEARING: SECOND Account and Report of HOA LIEU and Petition for allowance of fees filed.

COUNSEL:

HOA LIEU	(CP/CPE )...PRO/PER
SOPHIA TU	(CP )...PRO/PER
EDWARD LE TU	(CTP/CEP/CP)... JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...CALDWELL, KENNEDY & PORTER, A.

GENERAL INFORMATION

**Continued from 07/05/17 Court approved petition for withdrawal of \$5,000 from blocked account for dental, laptop, and vacation for Edward Le Tu only. Court cannot approve accounting due to notice and proof of service.**

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> SNT Account Current by Hoa Lieu, mother.

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

1. Accounting covers period: 02/28/15 – 02/28/17.
2. Assets on hand: \$60,525.91; cash in blocked account.
3. No fees are sought by conservator during this accounting period.
4. Petitioner has placed the interest in the credits column rather than the charges; however, it appears the accounting balances.
5. Proof of Service of Notice filed 08/23/17 is incomplete at item 2 re address of server. Need amended Proof of Service.
6. ~Proposed Order: 06/08/17.

RECOMMENDATION

Need to clear note 5, then Court's discretion. If approved, set hearing on the next accounting review for **05/16/18** (if one year) or **05/15/19** (if two years). Accounting to be filed 30 days in advance.

(lc/lh/ww/lh)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/13/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS0800265

CASE NAME: MARISA NICOLE SILVA

**VACATED**

HEARING:

Accounting Review

COUNSEL:

MICHAEL ANTHONY SILVA	(CPE)...E LAWRENCE BROCK
MARISA NICOLE SILVA	(CEP)...
LEO MARTINEZ	(PET)...GAREIT NEWSTROM
OLGA MARTINEZ	(SC)...GAREIT NEWSTROM
JANINA CABREAR	(SC)...GAREIT NEWSTROM

Waiver of Account forwarded to department for signature on 08/23/17. Clerk's office to set next suggested hearing date of 02/21/18.

(lc)



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

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DATE: 09/13/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600282

CASE NAME: OSMOND KH LEE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of LISA HC LEE

COUNSEL:

LISA HC LEE (CPE)...PRO/PER  
OSMOND KH LEE (CEE)...JACK B OSBORN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Lisa HC Lee, mother, appointed limited conservator of the person only on 02/08/17
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN **PROBATE**

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1300360

CASE NAME: MATT REMFERT

HEARING:

Hearing Re: Updated Status Report

COUNSEL:

MATT REMFERT (DEC)...  
ELIJAH MARSHALL (PET)...E JOAN NELMS  
MARK J ANDREW FLORY (TP )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Updated Status Report

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

1. On **07/05/17** Counsel represented that a supplement was filed on 06/15/17. Court vacated the OSC re: Removal of Administrator as counsel had appeared and set 09/13/17 hearing.
2. Court requested status report be submitted by 09/13/17.

#### RECOMMENDATION

Court's discretion.

(ww)

Future hearing: 12/05/17 Final Discharge

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

**SEE ALSO 3 4**

HEARING:

Hearing Re: Rcpt of signed settlement

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
REGINA NITASHA HOWARD	(PET)...PRO/PER
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP )...PRO/PER

GENERAL INFORMATION

**Continued from 07/05/17. Signed settlement not submitted.**

THIS CASE SET FOR HEARING ON Receipt of Signed Settlement.

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

1. Matter set on 05/31/17 when Regina Howard withdrew her will contest and trial dates. The court retained jurisdiction to enforce terms of settlement.
2. **Settlement filed on 06/27/17.**

RECOMMENDATION

None.

(lc/ww/lc)

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

**SEE ALSO 2 4**

HEARING:

Order to Show Cause RE: Sanctions (Failure to Appear/Failure to File)

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
REGINA NITASHA HOWARD	(PET)...PRO/PER
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP )...PRO/PER

GENERAL INFORMATION

Continued from 10/13/16, 12/12/16, 02/28/17, 03/16/17 and 07/05/17.

**OSC set on 07/05/17 Fee of \$90.00 due by 07/26/17.**

THIS CASE SET FOR HEARING ON **OSC re Sanctions FTA/FTF/Accounting Review/Status.**

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

1. Letters of Administration issued to Catherine Rountree, daughter, on 08/18/15; full authority, \$275,000 bond.
2. Partial Inventory and Appraisal filed; need property certificate (section 5) and final Inventory and Appraisal.
3. Status report was filed on 03/17/17; however, hearing date stated in caption is 03/16/17, which had already passed the day prior. Petitioner was requesting an additional 90-120 days for the close of escrow.
  - a. Fees not taken and matter not set for calendar. **Court ordered fees to be paid by 07/26/17; however, it does not appear fees have been paid.**
  - b. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-3. Clerk to notice bonding company. (lc/nb/lc/lh/ww/lc)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500564

CASE NAME: Annabelle Childress

**SEE ALSO 2 3**

HEARING:

Accounting Review

COUNSEL:

ANNABELLE CHILDRESS	(DEC)...
REGINA NITASHA HOWARD	(PET)...PRO/PER
CATHERINE ROUNTREE	(PET)...LINDA ROBERTS ROSS
CLORINDA CHILDRESS	(TP )...PRO/PER

See notes on matter 3

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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600016

CASE NAME: THE LILLIAN J. McDOUGAL DECLARATION

**SEE ALSO 6**

HEARING: Re: First Account

COUNSEL:

BRIAN M. MCDUGAL (PET)...VERANO & VERANO  
LILLIAN J. MCDUGAL DEC. (TRU)...  
LEE C MCDUGAL (PET/RES)...DIANE E ROBBINS  
PAMELA K. MCDUGAL

GENERAL INFORMATION:

Settlor, Lillian J. McDougal died on 04/02/15.

**Continued from 07/12/17. Attorney Hugh Verano Jr withdraws objections to accounting. On Petition for relief- Counsel represents matter has settled at mediation. Terms of settlement are/is recited into the record. Parties will execute general release. Prevailing party is entitled to attorney fees. Attorney Hugh Verano Jr to prepare settlement agreement (in writing). Court continued matter as Pamela McDougal is not present.**

THIS CASE IS SET FOR HEARING ON First Trust Account Current and Petition for Fees by Trustee, Lee McDougal.

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

1. Accounting period 12/07/11 to 12/07/16.
2. Assets on Hand \$486,023.02 consisting of \$93,824.01 in cash, real property with carry value of \$270,000 and receivables owed by beneficiaries totaling \$122,199.01.
3. Trustee requests ratification of fees already paid in the amount of \$9,075. Petitioner states it is approximately \$4,000 per year which appears to be 1% annually. JTD if itemization needed.
4. Petitioner requests ratification of attorney fees already paid in the amount of \$9,353.98. Itemized [Acct. 06/07/17 LFpg 7-13].
5. Disbursements – Schedule 4 [LF, pgs. 23-33] requires further clarification:
  - a. Several payments to Andika McDougal, **Supp 06/07/17** assistance with issue of deceased son. JTD
  - b. Transfer of \$100,000 to Wells Fargo Bank Acct. **Supp 06/07/17, \$100,000 was returned to Trust.**

6. Objection to the First account filed by Brian McDougal on 03/24/17. **Objeciton withdrawn on 07/12/17.**
7. **Response filed by Lee McDougal 04/26/17.**
8. ~Proposed Order 12/09/16.

RECOMMENDATION:

No future dates needed as court does not appear to have continuing jurisdiction.

(nb/lc/ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600016

CASE NAME: THE LILLIAN J. McDOUGAL Declaration

**SEE ALSO 5**

HEARING:

Petition for relief under PrC 17200(b); to surcharge trustee for breach of fiduciary etc

COUNSEL:

BRIAN M. MCDUGAL	(PET)...VERANO & VERANO
LILLIAN J. MCDUGAL DEC.	(TRU)...
LEE C MCDUGAL	(PET/RES)...DIANE E ROBBINS
PAMELA K. MCDUGAL	

Currently under review by legal research.

(LR)

Continued matter, notice not re-reviewed.



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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600816

CASE NAME: STACY RICHARDS

**SEE ALSO 8**

HEARING:

Petition for to Determine Heirship and Entitlement to Estate

COUNSEL:

SUNNY G. INOUE (PET)...THOMAS W SOM ERS  
STACY RICHARDS (DEC)...  
SUNNY G. INOUE (PET)...THOMAS W SOM ERS  
MICHAEL S GRAHAM (PET)...HARTNELL LAW GROUP  
AMERICAN CONTRACTORS INDEMNITY (TP )...  
BRYAN C HARTNELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Heirship by Michael Graham, brother Pr.C. § 11700.

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

1. Petitioner, Michael Graham alleged brother, seek court determine the he and Mark Richards are the only heirs and should inherit 50% each.
2. Petitioner provides copy of his birth certificate indicating decedent's name as his mother [Pet.06/06LFpg25]. It appears Michael was born to decedent and decedent's former spouse James Graham 10+ years prior to siblings Mark and Gary.
3. Petition does not address the alleged siblings Sunny Inouye, personal representative, or Melinda Richards. Question how they are not siblings entitled to distribution? Need verified supplement.
4. **Objection by Sunny G. Inouye with proof of service filed 08/25/17.**
5. Proposed order 06/06/17; however, not preapproved as note 3 needs to be cleared.

RECOMMENDATION

Need to clear note 3. Matter is contested. See next matter.

(lc/lh)

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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600816

CASE NAME: STACY RICHARDS

**SEE ALSO 7**

HEARING:

FIRST AND FINAL Account and Report of SUNNY G. INOUYE and  
Petition for allowance of fees filed.

COUNSEL:

SUNNY G. INOUYE (PET)...THOMAS W SOM ERS  
STACY RICHARDS (DEC)...  
SUNNY G. INOUYE (PET)...THOMAS W SOM ERS  
MICHAEL S GRAHAM (PET)...HARTNELL LAW GROUP  
AMERICAN CONTRACTORS INDEMNITY (TP )...  
BRYAN C HARTNELL

GENERAL INFORMATION

**Continued from 06/21/17 to trail petition.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees by Sunny Inouye, sister.

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

1. Petitioner and attorney request statutory fees of \$33,308.21 each. Ok.
2. Petitioner seeks a reserve of \$1,000.
3. Petition to Determine Heirship by Michael S Graham (brother) filed on 06/06/17.
4. ~Proposed Order: 03/24/17.

RECOMMENDATION

Need to rule on heirship petition prior to granting this matter. If approved, set  
Accounting/Status Review for **09/19/18**. Any accounting to be filed 30 days in advance  
local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601245

CASE NAME: IN THE MATTER OF TERRY GALLOWAY

HEARING:

Petition for PAYMENT OF ATTORNEY FEES TO MELVIN L FRIEDLAND

COUNSEL:

LORI GALLOWAY (PET)...LAW OFFICE OF DAVID M GROSSMAN  
TERRY GALLOWAY (PET/INC)...MELVIN L FRIEDLAND

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition For Attorney Fees by Melvin Friedland.

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

1. Petitioner, Melvin Friedland, was appointed counsel for conservatee on 01/03/17.
2. Petitioner requests fees of \$1,650 for 5.5 hours at \$300per hour. Itemized [Pet. 07/12LFpg7].
3. ~Proposed Order: 07/12/17

#### RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700296

CASE NAME: MTR OF LOUIS MENDOZA CARBAJAL

HEARING:

Motion Re: PRELIMINARY INJUNCTION Filed by Petitioner MARTHA  
LILAH PADILLA

COUNSEL:

MARTHA LILAH PADILLA (PET)...PRO/PER  
LOUIS MENDOZA CARBAJAL (DEC)...

No notes – JTD

(LR)

Future Hearing: 9/04/18: Accounting Review

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIP DS1700145

CASE NAME: IN RE: NORMAN PLASSE

HEARING:  
Status Hearing on Petition

COUNSEL:  
NORMAN PLASSE (PET)...PRO/PER

No notes – Status

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700704

CASE NAME: MTR OF DEBORAH ANN HICKEY

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JOHN MICHAEL VUKICH

(PET)...HORSPOOL & H ORSPOOL

DEBORAH ANN HICKEY

(DEC)...

#### GENERAL INFORMATION

Letters of special administration issued to John Vukich on 07/25/17; no bond.

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

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

1. Bond in the amount of \$466,000 is being requested. Ok.
2. Section 2b is blank as to proposed administrator's name; however it is clear that John Vukich is the petitioner. JTD
3. **Competing Petition for Probate of Will by Jacob Hickey filed 08/29/17. Court to trail to 11/29/17.**
4. ~Proposed Form Order: 07/17/17

#### RECOMMENDATION

**Court to trail to 11/29/17.**

Court's discretion re note 2, \$466,000 bond. If approved, set Accounting/Status Review for **11/21/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700166

CASE NAME: BRAD LANE

HEARING:

Hearing Re: PETITION FOR EMANCIPATION

COUNSEL:

ADAM GONZALEZ

(MIN)... WILLIAM M NASSAR & ASSOCIATES

BRAD LANE

(DEC)...

CAROL ROSS

(PET)...WILLIAM M NASSAR & ASSOCIATES

J. DAVID HORSPOOL

(GAL)...

No notes—JTD

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: RPR RS02950

CASE NAME: FLORENCE M WHITEHAIR

**SEE ALSO 13 14 14A**

HEARING:

Petition for TO REMOVE MARGARET MARY WHITEHAIR AS ADMINISTRATOR  
OF THE ESTATE OF FLORENCE MARY WHITEHAIR ETC

COUNSEL:

MAGGIE WHITEHAIR (PET)...  
FLORENCE MARY WHITEHAIR (DEC)...  
FLORENCE M WHITEHAIR TRUST (TRU)...  
JOHN PATRICK WHITEHAIR (PET)...ANYIAM LAW FIRM  
JOHN PATRICK WHITEHAIR (PET)...EDWARD B FISCHER & ASSOC  
BURDETTE M GARVIN (TP )...  
SUSAN WHITEHAIR (PRO/PER)

#### GENERAL INFORMATION

Matter set from 08/22/16 ExParte hearing. Trustee powers suspended. Maggie Whitehair ordered to file an accounting. John Whitehair authorized to clear the code violations on the exterior of the property and to communicate with county.

Continued from 11/03/16. Walter Moore appointed GAL for Thomas Whitehair. John Whitehair appointed temporary successor Trustee on 11/22/16; \$75,000 bond.

**Continued from 01/25/17, 04/12/17 and 07/05/17. Successor Trustee is authorized to list and sell the property effective 8/6/17. Maggie Whitehair has until 8/6/17 to obtain a mortgage loan if she intends to purchase real property.**

THIS CASE SET FOR HEARING ON Petition to Remove Margaret Mary Whitehair as administrator, appointment of successor and breach of trust by John Whitehair.

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

1. Letters of Administration issued to Maggie Whitehair, daughter on 04/18/07; full authority \$510,000 bond. **It appears that Maggie was discharged as administrator on 09/21/10.**
2. Petitioner, John Whitehair, seeks removal of administrator Maggie Whitehair. However, it appears that petitioner is seeking removal of Maggie as Trustee.
3. Petitioner requests a trust accounting. See next matter.
4. **Objection filed by Maggie Whitehair, aka Margaret Mary Whitehair on 10/25/16.**



5. **Declaration filed by Maggie Whitehair which appears to support objections on 10/25/16.**
6. **Declaration filed by John Whitehair in reply to declaration on 11/03/16; declaration appears to be objections.**
7. **Further Objections filed by Maggie Whitehair 11/22/16.**
8. ~Proposed Order: 11/28/16 does not appear to be signed re 11/22/16 hearing. However, objections to order filed same day by Maggie Whitehair.
9. There does not appear to be proper notice of hearing regarding this matter. Court may wish to deem service sufficient as parties have objected. JTD

#### RECOMMENDATION

Matter is contested.

(lc)

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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: RPR RS02950

CASE NAME: FLORENCE M WHITEHAIR

**SEE ALSO 12 14 14A**

HEARING:

FIRST Account and Report of MAGGIE WHITEHAIR and Petition for allowance of fees filed.

COUNSEL:

MAGGIE WHITEHAIR (PET)...  
FLORENCE MARY WHITEHAIR (DEC)...  
FLORENCE M WHITEHAIR TRUST (TRU)...  
JOHN PATRICK WHITEHAIR (PET)...ANYIAM LAW FIRM  
JOHN PATRICK WHITEHAIR (PET)...EDWARD B FISCHER & ASSOC  
BURDETTE M GARVIN (TP )...  
SUSAN WHITEHAIR (PRO/PER)

GENERAL INFORMATION

**Continued from 11/09/16, 01/25/17, 04/12/17 and 07/05/17.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Reimbursement of Costs of Former Trustee Maggie Whitehead.

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

1. Accounting period 01/01/10 – 06/30/16.
2. Assets on hand \$566,581.58 of which \$81.58 is cash.
3. **Supp 04/04/17:** indicates assets on hand as of 12/31/09 \$223,193.22 of which \$91,698.11 appears to be cash for a prior accounting from 08/30/09 – 12/31/09. **It is unclear as to why this accounting is attached.**
4. Disbursements indicate Share Draft withdrawals with no detail through 6/17/13. Question what the Share Drafts were in regards to? **Supp 04/04/17:** Petitioner states attorney fees payments were made; however, it is unclear if they were considered share drafts in the accounting. Court to clarify.
5. No disbursements appear after 07/12/13. Court to inquire.
6. Petitioner attaches waivers of accounting from heirs in 2008; however, it appears the waivers pertained to the Administration of the probate estate, not the trust.
7. Petitioner, Trustee Maggie Whitehead, requests her powers be restored as Trustee.
8. Title indicates reimbursement of costs; however, there is no request in prayer.
9. ~Proposed Order: 10/11/16.

## RECOMMENDATION

Court's discretion. If approved, petitioner's powers restored and court retains jurisdiction, set next Accounting review for **10/24/18**.

(lc)

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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 09/13/17 TIME: 8:30 DEPT: S36P  
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CASE#: RPR RS02950

CASE NAME: FLORENCE M WHITEHAIR

**SEE ALSO 12 13 14A**

HEARING:

Trial Setting Conference

COUNSEL:

MAGGIE WHITEHAIR (PET)...  
FLORENCE MARY WHITEHAIR (DEC)...  
FLORENCE M WHITEHAIR TRUST (TRU)...  
JOHN PATRICK WHITEHAIR (PET)...ANYIAM LAW FIRM  
JOHN PATRICK WHITEHAIR (PET)...EDWARD B FISCHER & ASSOC  
BURDETTE M GARVIN (TP )...  
SUSAN WHITEHAIR (PRO/PER)

TSC – No notes – JTD

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17      TIME: 8:30      DEPT: S36P  
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CASE#: RPR RS02950

CASE NAME: FLORENCE M WHITEHAIR

**SEE ALSO 12 13 14**

HEARING:

Hearing Re: Motion to Instruct and Authorize Etc

COUNSEL:

MAGGIE WHITEHAIR                      (PET)..  
FLORENCE MARY WHITEHAIR          (DEC)..  
FLORENCE M WHITEHAIR TRUST (TRU)..  
JOHN PATRICK WHITEHAIR              (PET)...ANYIAM LAW FIRM  
JOHN PATRICK WHITEHAIR              (PET)...EDWARD B FISCHER & ASSOC  
BURDETTE M GARVIN                    (TP )..  
SUSAN WHITEHAIR                      (PRO/PER)

Currently under review by legal research

(LR)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17    TIME: 8:35    DEPT: S36P  
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CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST

HEARING:

Petition for (VERIFIED) PETITION BY CHERYL FULKERSON FOR THE  
REMOVAL OF DOLORES BERTOLINO ETC

COUNSEL:

CHERYL FULKERSON                    (PET)...GRESHAM SAVA GE NOLAN AND TIL  
THE 1997 BERTOLINO FAMILY TRUST    (TRU)...  
DOLORES BERTOLINO                    (OBJ)...ROY A BARRY

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

**CONSERVATORSHIPS**

-----  
DATE: 09/13/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000094

CASE NAME: MTR OF JULIE ANN BRYANT

HEARING:

Accounting Review

COUNSEL:

GERALD BRYANT

(CPE)...PRO/PER

BARBARA BRYANT

(CPE)...PRO/PER

JULIE ANN BRYANT

(CEP)...WALTER T. MOORE

GENERAL INFORMATION

**Continued from 07/05/17. Additional time needed to file accounting.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Previous accounting dispensed for Barbara and Gerald Bryant, parents, approved on 08/26/15.
2. Need next Account beginning with 05/01/14.

RECOMMENDATION

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

(lc/ww)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0700202

CASE NAME: MTR OF SHARELL A PARAMO

HEARING:

Hearing Re: Proof of Additional Bond

COUNSEL:

LINDA J PARAMO (CPE)...MICHAEL J OFFENHEISER  
SHARELL A PARAMO (CEP)...MARK J. ANDR EW FLORY  
INLAND COUNTIES REGIONAL CENTER (AGN)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Additional Bond for Linda Paramo.

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

1. On 08/14/17, court ordered additional bond for a total bond of \$100,000.
2. Need additional bond of \$20,000.

#### RECOMMENDATION

Inquire status of bond.

(lc)

Future Hearing: 1/29/18: Accounting Review



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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300058

CASE NAME: \*\*\*MF MTR OF ANTHONY GALINDO\*\*\*.

HEARING:  
Petition for ATTORNEY FEES

COUNSEL:

ANTHONY GALINDO	(CEP/OBJ)...WALTER T. MOORE
ISMARY DIAZ-GALINDO	(CPE)...HORSPOOL & HORSPOOL
TAMORA GALINDO	(CPE)...MARK J. ANDREW FLORY

**XREF: CIVDS1405052** (*Galindo v Adan etal*)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition For Attorney Fees by Sherri Kastilahn.

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

1. Petitioner, Sherri Kastilahn, was appointed GAL for conservatee on 07/09/15.
2. Petitioner requests fees of \$13,130 for 40.4 hours at \$325 per hour. Itemized [Pet. 08/14LFpg4-8].
3. ~Proposed Order: 08/14/17.

RECOMMENDATION

Court's discretion.

(lc/lh)

Future Hearings: 11/30/17: Accounting Review, 5/23/18: Hearing Re: Final Discharge

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HONORABLE: CYNTHIA LUDVIGSEN

-----  
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CASE#: CON PS1400165

CASE NAME: Norma T. Castillo

HEARING:  
Accounting Review

COUNSEL:  
ROBERTO CASTILLO (CPE)...DENNIS M SANDOVAL  
NORMA T. CASTILLO (CEP)...MELVIN L FRIEDLAND

Petition to Dispense Accounting sent to department for signature on 09/06/17. Clerk's office to set next suggested Accounting review date for 09/18/19.

(lc)

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HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

HEARING:

Hearing Re: Proof of Blocked Account

COUNSEL:

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

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Blocked Account

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

1. Report of Sale approved on 08/08/17 and all proceeds from the sale to go from escrow to blocked account.
2. Need proof of blocked account.

#### RECOMMENDATION

Inquire status of blocked account.

(ww/lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

-----  
DATE: 09/13/17      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

## **VACATED**

HEARING:

Petition for ORDER FIXING AND ALLOWING REIMBURSEMENT OF  
ATTORNEY'S FEES

COUNSEL:

ANDREW PRAMSCHUFER	(CPE)...ROSA M MARQUEZ
SUSAN PRAMSCHUFER	(CPE)...PRO/PER
JANICE ANNE PRAMSCHUFER	(CEP)...DONNASUE ORTIZ
LIBERTY MUTUAL INSURANCE	(TP )...
BARBARA PRAMSCHUFER	(MITCHELL I ROTH)

***XREF: CONPS1600244 (Barbara Pramschufer)***

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for reimbursement of Attorney Fees by Susan and Andrew Pramschufer, co-conservators.

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

1. Petitioners, Susan and Andrew Pramschufer, were appointed co-conservators on 02/01/17, person and estate.
2. Petitioners request reimbursement of attorneys' and costs fees of \$7,903.12. Misc. statements provided; however, need actual summary of fees/costs.
3. No proposed order. Submit after hearing.

### RECOMMENDATION

Need to clear note 2.

(lc)

Future Hearing: 4/16/18: Accounting Review

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600374

CASE NAME: Diego Canedo

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of EMILIO CANEDO

COUNSEL:

EMILIO CANEDO	(CP )...GISSELLE M AMINI
MIRIAM GARCIA	(CP )...GISSELLE M AMINI
DIEGO CANEDO	(CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Emilio Canedo and Miriam Garcia, parents, appointed co-conservators of the person on 02/08/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 03/17/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 04/10/17.

RECOMMENDATION

None.

(ww)

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

-----  
DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700160  
CASE NAME: JAIME AVALOS JR  
HEARING: Petition for Appointment of Conservator

COUNSEL:

ELIZABETH GARCIA (CP )...SCHWARTZBERG& LUTHER, APC  
JAIME AVALOS JR (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Elizabeth Garcia as Temporary Conservator on 05/10/17. Jeanne Kennedy appointed counsel and Court signed an Order for the doctor to complete Capacity Declaration.  
**Continued from 06/27/17. Oral motion granted as to limited conservatorship.**

THIS CASE SET FOR HEARING ON Petition for Appointment of **Limited** Conservator person only by Elizabeth Garcia (mother).

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

1. Petition indicates proposed conservatee is developmentally disabled. Court deemed petition as limited conservatorship.
2. Proposed conservatee is developmentally disabled optional report per Pr.C. 1827.5(b) ordered. IRC report filed 06/19/17.
3. Petitioner seeks medical powers. Capacity Declaration filed 06/13/17.
4. Report of Counsel Jeanne Kennedy filed 06/14/17.
5. Certificate of Completion of the Conservatorship Training Class filed 06/27/17.
6. Request to excuse notice with due diligence re Father Jaime Avalos Sr. filed 06/27/17. Excused.
7. Citation returned served
8. Court Investigator report filed 06/06/17.
9. Notice of Hearing and proof of service filed; however, there is no notice to Kimberly Garcia. Need corrected and complete notice.
10. ~Proposed Form Order: 08/11/17

RECOMMENDATION

Need to clear note 9. If approved, set hearing for Compliance Review for **04/18/18** 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/lc)

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700195  
CASE NAME: JOSE LUIS GOMEZ  
HEARING: Petition for Appointment of Conservator

COUNSEL:

RICARDA GOMEZ (PET)...PRO/PER  
JOSE LUIS GOMEZ (CTP)...ROSE C ROSADO

GENERAL INFORMATION

**Continued from 07/05/17. Petitioner was involved in a car accident. Rose Rosado appointed counsel.**

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

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 07/03/17; however, section 4 is incomplete as to whether proposed conservatee is a patient.
4. Proposed conservatee is developmentally disabled. Need IRC report.
5. List of required contacts (Local form SB-12224) filed; however, is missing all relatives listed in petition. Need corrected form.
6. Need return of citation.
7. Need notice of hearing and proof of service including 30 days' notice to IRC.
8. Need due diligence declarations for paternal grandparents and maternal grandmother.
9. Report of Counsel Rose C Rosado filed 08/30/17.
10. CI Report filed 08/24/17.
11. Certificate of Completion of the Conservatorship Training Class filed 07/03/17.
12. ~Proposed Form Order: 05/23/17.

RECOMMENDATION

Need to clear notes 3-8. If approved, set hearing for Compliance Review for **02/07/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

(lc/lh/lc/lh)

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

-----  
DATE: 09/13/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700304  
CASE NAME: ROBIN LEE BARKSDALE  
HEARING: Petition for Appointment of Conservator

COUNSEL:

CAROLYN JOYCE BARKSDALE	(CP )...CHRISTOPHER A POULOS
ROBIN LEE BARKSDALE	(CTP)...
JEFFREY MITCHELL BARKSDALE	(CP )...
JOSEPH RANDALL BARKSDALE	(CP )...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Carolyn Barksdale, mother for Jeffrey and Joseph Barksdale; siblings.

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

1. Petitioner and spouse nominate proposed conservatee's siblings, Jeffrey and Joseph, who consent to act.
2. Petitioner does not seek medical powers; however, section 9 indicates proposed conservatee lacks capacity. Capacity Declaration filed 08/14/17.
3. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
4. Petitioner seeks civil rights not be limited without court order. JTD
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. CI Report filed 09/06/17.
8. Proof of Completion of the Conservatorship Training Class filed 08/23/17.
9. Return of Citation filed 08/28/17.
10. .~Proposed Form Order: 08/15/17.

RECOMMENDATION

Need to clear notes 5-6. If approved, set hearing for Compliance Review for **04/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh)



Superior Court of Calif, County of San Bernardino

Page: 26 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: CYNTHIA LUDVIGSEN

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DATE: 09/13/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1500365

CASE NAME: MTR OF DAISY PAOLA HERRERA

HEARING:

Hearing Re: Status/Filing of prior accountings

COUNSEL:

DAISY PAOLA HERRERA

(PCE)...

LETICIA AVILA

(PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status/Filing of Prior Accountings

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

1. Matter set on 08/22/17. Attorney Noreen Fontaine to supply last 3 months of accounting to parties. Attorney Noreen Fontaine said there was an SNT case in Los Angeles County that was transferred to this county. No other case than Conservatorship found for Daisy Herrera.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 09/13/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO DS1100109

CASE NAME: MARIAN SYMENS

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES P SYMENS

(PET)...BROWN WHITE & OSBORN

MARIAN SYMENS

(DEC)...

#### GENERAL INFORMATION

**Continued from 05/17/17 and 07/19/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of James Symens approved on 05/11/16.
2. Receipts filed; however, the receipts do not match distribution. **Need supplement** re possible post deceased heirs' intestate heirs. Court to clarify who Brenda Osborn, Vincent Osborne and Marcos Rivera are as they do not appear to be listed in distribution order.
3. Need Ex Parte Petition for Final Discharge and Order resubmitted.

#### RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500198

CASE NAME: MTR OF FELIX GALLEGOS

HEARING:

Hearing re Final Discharge

COUNSEL:

JAMES GUTIERREZ (PET)...PRO/PER  
FELIX GALLEGOS (DEC)...

#### GENERAL INFORMATION

**Continued from 01/18/17, 04/05/17, 06/07/17 and 07/19/17. No appearances. James Gutierrez to appear if receipts/discharge not filed.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of James Gutierrez approved on 01/13/16. Proposed order does not match minute order. **Need order.**
2. Need receipts for Antonio and Shirley Gutierrez.
3. Need Ex Parte Petition for Final Discharge and Order ***once note 1 is cleared.***

#### RECOMMENDATION

Inquire status of receipts and orders. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with C.C.P. §§ 128 & 1209.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501090

CASE NAME: RICHARD MURRAY JONES

HEARING:  
Accounting Review

COUNSEL:  
RAYMOND KELLY JONES (PET)...PRO/PER  
RICHARD MURRAY JONES (DEC)...

#### GENERAL INFORMATION

Continued from **03/29/17**. No appearance. Raymond Jones ordered to appear.  
**Continued from 06/07/17. Accounting ordered to be filed by 08/13/17.**

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 Raymond Jones, brother, on 01/20/16; full authority, \$241,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

#### RECOMMENDATION

Need to clear notes 2 & 3. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

(lc/ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600187

CASE NAME: MTR OF TIODOLA WILSON MADRID

HEARING:Re: STATUS REPORT

COUNSEL:

ALICIANA LADD (PET)...PRO/PER  
TIODOLA WILSON MADRID (DEC)...  
CIPRIANO M LOERA (PET)...HORSPPOOL & HORSPPOOL  
THOMAS W DOMINICK (TP )...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION

On **05/02/17** Court suspended Aliciana as executor and ordered her to file a waiver of accounting. Upon approval of accounting the Court will accept the resignation. Letter of special administration issued to Cipriano Loera.

**Continued from 07/20/17 on Court's own motion. . Successor letters Testamentary issued to Cipriano Loera, son on 08/10/17, \$376,000 bond.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Testamentary issued to **Aliciana Ladd, granddaughter**, on 04/18/16 full authority, no bond. Successor letters Testamentary issued to **Cipriano Loera, son** on 08/10/17, \$376,000 bond.
2. Aliciana Ladd does not state how long the estate needs to continue administration but does request that the Court accept her resignation as executor. Now moot.
3. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. **Objection to status report by Cipriano Loera, son, filed on 06/20/17.**
5. No proposed order; submit after hearing.

RECOMMENDATIO

Need to clear note 3 and require a final account for **Aliciana Ladd**. Matter is contested.

(ww/lc)

Future Hearing: 9/19/18: Accounting Review **re Cipriano Loera**.

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600597

CASE NAME: DAVID A BROWN SPECIAL NEEDS TRUST

HEARING:

Petition for DECLARATION OF ROBERTA TAYLOR RE ATTORNEY'S FEES

COUNSEL:

BARBARA HARRISON	(PET)...JEANNE E KENNEDY
DAVID A BROWN SPECIAL NEEDS TRUST	(TRU)...
JEANNE E KENNEDY (PET)...CALDWELL, KENNEDY & PORTER	
DAVID A. BROWN	(BEN)...DONNASUE ORTIZ
LARRY E HOOVER	(STE)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition For Attorney Fees by Roberta Taylor.

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

1. Petitioner, Roberta Taylor, was appointed GAL for conservatee on 11/23/16.
2. Petitioner requests fees of \$9,573.75 for 5.5 hours at \$120/300 per hour for paralegal and attorney services. Itemized [Pet. 06/21/17LFpg6-11].
3. ~Proposed Order: 06/21/17.

#### RECOMMENDATION

Court's discretion.

(lc)

Future Hearings: 10/04/17: Hearing Re: Status Review, Hearing Re: Accounting Review  
(Barbara Harrison) x2,

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600928

CASE NAME: MTR OF MADELYN MAHFOOD

**SEE ALSO 7**

HEARING:

Hearing Re: Amended Petition to Determine Succession to Real P

COUNSEL:

JAMES E MAHFOOD	(PET)...JAMES E MAHFOOD
MADELYN MAHFOOD	(DEC)...
BARBARA COWARD	(PET)...JAMES E MAHFOOD

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **Amended [06/26/17]** Petition to Determine Succession to Real Property by James Mahfood and Barbara Coward; siblings.

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

1. Petitioners seek 100% interest in decedent's 100% interest; ½ each, in real property intestate succession.
2. Section 11 of the petition indicates personal property yet no personal property is listed nor does caption indicate as such. Court to clarify on record if there is any personal property or in alternative, need verified supplement.
3. ~Proposed Form Order: 06/26/17

RECOMMENDATION

RFA subject to court's discretion re note 2.

(ww/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600928

CASE NAME: MTR OF MADELYN MAHFOOD

**SEE ALSO 6**

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JAMES E MAHFOOD	(PET)...JAMES E MAHFOOD
MADELYN MAHFOOD	(DEC)...
BARBARA COWARD	(PET)...JAMES E MAHFOOD

See notes on matter 6.



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

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DATE: 09/13/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600967

CASE NAME: THE BECKER FAMILY REVOCABLE LIVING TRUST

HEARING:

Petition for REMOVAL OF TRUSTEE AND APPOINTMENT OF SUCCESSOR  
TRUSTEE, TO COMPEL ACCOUNTING

COUNSEL:

ELAINE S SHOOSHAN (PET)...THOMAS W DOMINICK  
JANET B OWENS (PET)...THOMAS W DOMINICK  
THE BECKER FAMILY REVOCABLE TRUST (TRU)...  
DARLENE SHERRYL BECKER (OBJ)...HARTNELL LAW GROUP

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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

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DATE: 09/13/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

HEARING:

FIRST Account and Report of CHRISTINA BROWN and Petition for allowance of fees filed.

COUNSEL:

RUTH ANITA BELL	(PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON	(PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST	(TRU)...
CHRISTINA BROWN	(PET)...MARIELLEN ROSS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees by Christina Barnes, Trustee.

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

1. Accounting period 09/23/15 – 04/13/17.
2. Assets on hand \$4,888.82 in cash.
3. Real property in Pico Rivera is not included in accounting.
4. Christina Barnes' name appears to be Christina Brown on the record. Additionally, first line of report states Kristine Merrill is successor Trustee. Need verified supplement clarifying parties.
5. Page 2 of report is highly illegible. Court may wish to require new page.
6. Need list of beneficiaries per California Rule of Court 7.902.
7. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 4-6. *If court retains jurisdiction* of trust, set next Accounting review for **06/13/18**.

(lc)

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

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DATE: 09/13/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700054  
CASE NAME: MTR OF THE ANTONINA DARAFEEV LIVING TRUST  
HEARING: FIRST INTERIM Account and Report of W.A. HLA VATY and Petition  
for allowance of fees filed.

COUNSEL:

PAUL DARAFEEV	(PET)...PRO/PER
GEORGE DARAFEEV	(PET)...PRO/PER
THE ANTONINA DARAFEEV LIVING TRUST	(TRU)...
W.A. HLA VATY	(PET)...THOMPSON & COLEGATE
MICHAEL DARAFEEV	(OBJ)...RAYMOND G ROBINSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current of Interim Successor Trustee  
W.A. Hlavaty and Petition for Fees.

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

1. W.A. Hlavaty was appointed interim successor trustee on 01/24/17 when Michael Darafeev was removed.
2. Accounting period 01/24/17 – 05/25/17.
3. Assets on hand \$5,635,383.59 of which \$168,983.59 is cash and remainder in partnership and real property.
4. Trustee seeks fees of \$16,858 for 124 hours at \$85/150 per hour. Itemized [Acct. 06/28/17LFpg43-59].
5. Attorney seeks fees of \$59,104.03. Billing provided; however, need all hours and rates summarized for final total.
6. Proposed Order: 06/28/17; however, date of June 1, 2018 appears to be a Friday which probate does not have Friday hearings.

RECOMMENDATION

Need to clear note 5. If approved, set Accounting/Status Review for **05/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future Hearing: 9/25/17: Petition for 1. Remove Trustee 2. Appoint Successor Trustee  
3. Compel Surrender of Trust

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/13/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700404

CASE NAME: FULLER FAMILY TRUST

**SEE ALSO 21**

HEARING:

Hearing Re: RECEIPT OF REPORT BY GAL

COUNSEL:

W A HLAVATY (PET)...RICHARD W S PERSHING  
THE MATTER OF FULLER FAMILY TRUST (TRU)...PRO/PER

**XREF: CONPS1700289** (June Fuller)

GENERAL INFORMATION:

Continued from 07/31/17 to be heard with related conservatorship case.

**Continued from 08/09/17. Objections to GAL filed. Mr. Hlavaty appointed successor Trustee on 06/05/17.**

THIS CASE IS SET FOR HEARING ON Receipt of Report by Guardian ad Litem [GAL].

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

1. Matter set at 06/05/17 when Rose Rosado was appointed GAL.
2. Report of GAL Rose Rosado filed 07/26/17.
3. **Reply to GAL and declarations in support filed 08/08/17.**

RECOMMENDATION:

Court's discretion.

(nb/lh/lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 09/13/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS0800038

CASE NAME: CHARLES D. GLADISH

HEARING:

Hearing re Final Discharge

COUNSEL:

SKY LUNDY

(CPE)...MICHAEL POLLOCK

CHERIE PETERSON

(CPE)...PRO/PER

DANA CALHOUN

(CPE)...PRO/PER

DONN HOUSTON GLADISH

(CPE/SC)... JACK B OSBORN

CHARLES D GLADISH

(CEP)...MITCHELL I ROTH

***XREF: CONPS0800095 (Laverne Gladish)***

GENERAL INFORMATION

**Continued from 12/10/13, 1/28/14, 3/18/14, 6/23/14, 8/25/14, 10/09/14, 01/08/15, 2/24/15 and 5/4/15.** Court notes a petition for surcharge to be filed.

On 6/23/14 hearing re ORAP -- Examination of Judgment Debtor: Off-Calendar. Reason: Don Gladish is deceased.

Continued from **7/6/15 and 8/19/15** for bond company to be present. Court previously signs order to place funds of conservatorship estate in attorney trust account.

Continued from **09/21/15**. Bond company to personally appear on 10/29/15.

Continued from **10/29/15**. Court refers this case to Public Administrator. Public Administrator to determine if estates of conservatee, Charles D. Gladish, and conservator, Don Houston Gladish, need to be opened by the public administrator to distribute the estate on conservatorship of Charles D Gladish.

Continued from **01/05/16** at request of counsel. Bond company will be excused from next hearing if it has been determined that there are enough funds to address notes.

Continued from 02/22/16, 04/25/16, 07/12/16, 09/20/16 and 11/30/16. Conservatee and Conservator have both passed away [per minute order] and there are no funds left to pay bills as ordered in acc. Court requests that counsel check where Conservator resided before his death to see if any funds remain. Mr. Theios reports petition to surcharge will be filed.

Continued from 02/22/17. Conservator has not passed away.

**Continued from 05/03/17 and 07/05/17 to determine what funds are left in conservatorship estate.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Don Gladish, son, approved on 12/04/12.
2. Need receipts for attorney's fees.
3. Need Ex Parte Petition for Final Discharge and Order.

**RECOMMENDATION**

Need to clear notes 2 – 3. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with C.C.P. §§ 128 & 1209.

(lc/sa/tax/lc/sg/sa/sg/lc/nb/dl/nb/lc)

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0900167

CASE NAME: MARK JORDAN ELKINS

HEARING:

Hearing Re: PTN FOR ATTY FEES AND FEES OF MS. ELKINS

COUNSEL:

KERINE E ELKINS	(CPE)...NOREEN T FONTAINE
MARK JORDAN ELKINS	(CEP/CTECEE)...MARK J. ANDREW FLORY
CALIFORNIA DEPT OF STATE HOSPITALS	(PET)...PRO/PER
MARK JORDAN ELKINS SPECIAL NEEDS TRUST	(TRU)...
DENNIS SHOGREN	(CEP)...JAMES B CHURCH
MARK J ANDREW FLORY	(PET)...BROWN WHITE & OSBORN LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees and Fees for Kerine Elkins.

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

1. Matter set on 07/19/17 hearing. **Kerine Elkins removed** as Conservator of estate and as Trustee of SNT. **Dennis Shogren appointed successor** Conservator of estate and successor Trustee; \$275,000 bond for Conservator and for Trustee.
2. Bond filed 07/26/17; however, the body of the document appears to only state Trustee rather than Conservator. **Need separate bond to reflect conservatorship.**
3. There does not appear to be a conservatorship of person.
4. Petition for attorney fees and fees of Kerine Elkins, Former Trustee, to be filed.

RECOMMENDATION

Inquire status of petition for fees and bond.

(lc)

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400045

CASE NAME: Vivian Bertrand

**SEE ALSO 15**

**VACATED**

HEARING: Hearing Re: SANC FOR FAILING TO FILE TIMELY ACCOUNTING

COUNSEL:

VIVIAN BERTRAND	(CEP)...JEANNE E KENNEDY
MELODIE Z SCOTT	(CPE)...BRYAN C HARTNELL
ANNMARIE M SCOTT	(PET)...RYAN J GALLANT
SURETEC INSURANCE COMPANY	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 05/02/17. Compliance review re Melodie deemed moot.

**OSC set on 06/14/17. Court confirmed Judge McCarville's order that Melonie Scott's fees are not to be paid to Melodie Scott but instead go to Pacific Western Bank Petition for surcharge may be filed. Amended 2nd or 3rd and final accounting to be filed. Attorney fees, Melodie Scott's posted bond amount and whether AnneMarie Scott's bond has been brought current to be addressed.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for FTF timely accounting/**Second and Current Account and Petition for Fees by Conservator of the Person and Estate and Successor Trustee, Melodie Scott.

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

1. Accounting period 03/12/15 to 03/11/16.
2. Assets on Hand \$34,628.09 consisting of cash.
3. Current bond set at \$735,000. Suggest bond be reduced to \$47,000. JTD.
4. Petitioner's attorney will file a supplement requesting fees. Petitioner acquired authority to make periodic payments of compensation to herself in an amount of \$80% equal to her monthly billing. The amount of \$4,250 has been paid during this period and will be subtracted from the amount requested in the supplement.
5. Petitioner's attorney will file a supplement requesting attorney's fees.
6. Need Notice of Hearing with proof of service.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion re OSC. Need notice and final accounting; next account period is now overdue. Account to be filed 30 days in advance of hearing. Note requirements of Local Rules. Clerk to notice bonding company.



(nb/lc)

Future hearing dates: 12/20/17: Accounting review re ***James Oberman, successor Conservator***

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

-----  
DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400045

CASE NAME: Vivian Bertrand

**SEE ALSO 14**

**VACATED**

HEARING:

SECOND AND CURRENT Account and Report of MELODIE Z SCOTT and  
Petition for allowance of fees filed.

COUNSEL:

VIVIAN BERTRAND	(CEP)...JEANNE E KENNEDY
MELODIE Z SCOTT	(CPE)...BRYAN C HARTNELL
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
ANNMARIE M SCOTT	(PET)...RYAN J GALLANT
JAMES L OBERMAN	(PET)...DONNASUE ORTIZ
SURETEC INSURANCE COMPANY	(PET)...PRO/PER

See notes on matter 14.

Future hearing dates: 12/20/17: Accounting review re **James Oberman, successor Conservator**

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500269

CASE NAME: JORDAN ALAN WASHINGTON

**SEE ALSO 17**

HEARING:

Petition for Substituted Judgment to Create a Special Needs Trust

COUNSEL:

RONALD WASHINGTON	(CPE)...MICHAEL J LUTHER
VERNETTE WASHINGTON	(CPE)...MICHAEL J LUTHER
JORDAN ALAN WASHINGTON	(CEP)...SHERRI L KASTILAHN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500269

CASE NAME: JORDAN ALAN WASHINGTON

**SEE ALSO 16**

HEARING:

Accounting Review

COUNSEL:

RONALD WASHINGTON	(CPE)...MICHAEL J LUTHER
VERNETTE WASHINGTON	(CPE)...MICHAEL J LUTHER
JORDAN ALAN WASHINGTON	(CEP)...SHERRI L KASTILAHN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Ronald and Vernetta Washington, parents, appointed co-conservators of the person and estate on 07/06/16, No bond.
2. Final Inventory and Appraisal with a value of \$0 filed on 05/30/17.
3. Need first accounting or Pr.C. § 2628 waiver if estate qualifies.

RECOMMENDATION

Inquire status of accounting or status report.

(ww/lc)

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700202

CASE NAME: RENIEL FRANCO S. REYES

**SEE ALSO 19 20**

HEARING:

Hearing Re: PTN FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

RENAN F REYES	(PET)...PRO/PER
FELICITAS S REYES	(PET)...PRO/PER
REA FATIMA S REYES	(PET)...PRO/PER
RENIEL FRANCO S. REYES	(CEE)...SANDY L. TURNER

**XREF: CONPS1700217** (*Rina Fe S Reyes*)

**CONPS1700218** (*Ral Francis S. Reyes*)

GENERAL INFORMATION

**Continued from 07/19/17, 07/26/17 reset. Rina, Reniel and Ral Reyes Deemed served by their appearance. Notice to Josefa Sanchez and updated list of contacts to be filed. Sandy Turner appointed counsel.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Renan, Felicitas and Rea Reyes, parents and sister.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights and social/sexual contact not be limited without court order.
3. Proposed conservatee is developmentally disabled. Report of Counsel Sandra Turner filed 07/31/17.
4. Petitioner seeks medical powers. Capacity Declaration filed 08/22/17.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Petition is missing Aurora F. Reyes (pgm). Need verified supplement.
7. Notice of Hearing and Proof of Service filed 06/28/17 and 08/22/17; however, need to include 30 days' notice to Inland Regional Center per Pr.C. § 1822(e). Also, need to serve copy of petition with notice of hearing.
8. Certificates of Completion of the Conservatorship Training Class filed; Rea's is filed in related case CONPS1700217.

9. Court waived notice of citation.
10. CI report filed 07/13/17.
11. ~Proposed Form Order: 05/31/17.

#### RECOMMENDATION

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

(lc/lh/lc/lh)

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700217

CASE NAME: Rina Fe S Reyes

**SEE ALSO 18 20**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

RENAN F REYES	(PET)...PRO/PER
FELICITAS S REYES	(CPE)...PRO/PER
REA FATIMA S REYES	(CPE)...PRO/PER
RINA FE S REYES	(CEP)...SANDY L. TURNER

**XREF: CONPS1700202** (*Reniel Franco S. Reyes*) **CONPS1700218** (*Ral Francis S. Reyes*)

GENERAL INFORMATION

**Continued from 07/19/16. Rina, Reniel and Ral Reyes Deemed served by their appearance. Notice to Josefa Sanchez and updated list of contacts to be filed. Sandy Turner appointed counsel.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Renan, Felicitas and Rea Reyes, parents and sister.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights and social/sexual contact not be limited without court order.
3. Proposed conservatee is developmentally disabled. Report of Counsel Sandra Turner filed 07/31/17.
4. Petitioners seek medical powers. Capacity Declaration filed 06/12/17.
5. Petition is missing Aurora Reyes, pgm. Need verified supplement.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Notice of Hearing and Proof of Service filed 06/28/17 and 08/22/17; however, need to include 30 days' notice to Inland Regional Center per Pr.C. § 1822(e). Also, need to serve copy of petition with notice of hearing.

8. Certificates of Completion of the Conservatorship Training Class filed; Felicitas' is filed in related case (matter **20**).
9. Court waived requirement of citation.
10. Court Investigator report filed 07/13/17
11. ~Proposed Form Order: 06/12/17.

#### RECOMMENDATION

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

(lc/lh/lc/lh)



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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700218

CASE NAME: Ral Francis S Reyes

**SEE ALSO 18 19**

HEARING: Petition for Appointment of Conservator

COUNSEL:

RENAN F REYES (PET)...PRO/PER  
FELICITAS S REYES (CPE)...PRO/PER  
REA FATIMA S REYES (CPE)...PRO/PER  
RAL FRANCIS S REYES (CEP)...SANDY L. TURNER

**XREF: CONPS1700217** (*Rina Fe S Reyes*) **CONPS1700202** (*Reniel Franco S. Reyes*)

GENERAL INFORMATION

**Continued from 07/19/16. Rina, Reniel and Ral Reyes Deemed served by their appearance. Notice to Josefa Sanchez and updated list of contacts to be filed. Sandy Turner appointed counsel.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Renan, Felicitas and Rea Reyes, parents and sister.

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

1. Petitioners seek powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioners seek civil rights and social/sexual contact not be limited without court order.
3. Proposed conservatee is developmentally disabled. Report of Counsel Turner filed 07/31/17.
4. Petitioners seek medical powers. Capacity Declaration filed 08/22/17.
5. Petition is missing Aurora Reyes (pgm). Need verified supplement.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Notice of Hearing and Proof of Service filed 06/28/17 and 08/22/17; however, need to include 30 days' notice to Inland Regional Center per Pr.C. § 1822(e). Also, need to serve copy of petition with notice of hearing.
8. Certificates of Completion of the Conservatorship Training Class filed; Rea's is filed in related case.
9. Court Investigator report filed 07/13/17.
10. Court waived requirement of citation.
11. ~Proposed Form Order: 06/12/17.

## RECOMMENDATION

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

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

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DATE: 09/13/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700289

CASE NAME: MTR OF JUNE M FULLER

**SEE ALSO 11**

HEARING: Petition for Appointment of Conservator

COUNSEL:

W A HLA VATY (CP)...REYNOLDS, JENSEN, SWAN & PERSH  
JUNE M FULLER (CTP)...

**XREF: PROPS1700404** (*Fuller Family Trust*)

GENERAL INFORMATION

Temporary orders denied on 08/09/17. Lynne Purkey agrees that petitioner should be Conservator of person **and** estate. GAL Rose Rosado objects to appointment.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by W.A. Hlavaty, PPF.

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

1. Declaration filed in support of conservatorship by Lynne Purkey, daughter, on 08/04/17.
2. Petitioner seeks medical powers. Need Capacity Declaration.
3. Petitioner seeks dementia powers. Need appointment of counsel for report.
4. Need dementia attachment.
5. Section 5 is incomplete as to whether proposed conservatee is developmentally disabled. Need verified supplement.
6. Need list of required contacts (Local form SB-12224).
7. Need return of citation.
8. Need Certificate of Completion of the Conservatorship Training Class.
9. Need notice of hearing and proof of service.
10. Need Court Investigator report.
11. No proposed order submitted.

RECOMMENDATION

Need to clear notes 2-10. If approved, set hearing for Compliance Review for **04/18/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 09/13/17      TIME: 9:30      DEPT: S37P  
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CASE#: PRO PS0700067

CASE NAME: MICHAEL JONAS EVANS

HEARING:

Court Trial set for PETITION FOR PROBATE of TAMMIE J EVANS

COUNSEL:

CARLENA J HARRIS

COLUMBIA PICTURES INDUSTRIES,

MICHAEL JONAS EVANS

TAMMIE J EVANS

(PET)...PRO/PER

(TP )...HOFFMAN, SABBAN &

(DEC)...

(PET)...DENNIS J HEALEY

Court Trial—no notes—JTD