



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/18/17

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.

08/25 ww/nb0825/0913

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: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500441

CASE NAME: RICARDO RENTERIA CHAVEZ

HEARING:

Accounting Review

COUNSEL:

AURELIO RENTERIA (PET)...KATHLEEN G. ALVARADO
RICARDO RENTERIA CHAVEZ (DEC)...

GENERAL INFORMATION

Continued from 07/05/17. Waiting for tax id from IRS.

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 Aurelio Renteria, father, on 07/13/16; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc/ww)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501022

CASE NAME: HAROLD M WALLIS

HEARING:

Waiver of Account and Report of SHERMAN MARINE WALLIS and
Petition for allowance of fees filed.

COUNSEL:

SHERMAN MARINE WALLIS (PET)...JEFFERY D GOLD
HAROLD M WALLIS (DEC)...
ROSE LOW (TP)...THOMAS W DOMINICK

XREF: PROPS1300468 [Lugarda Wallis-predeceased spouse]

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Amended (09/11/17)** Petition for Final Distribution upon Waiver of Account and for fees by Administrator w/WA, Sherman Wallis ["Petitioner"-son].

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

1. Beneficiaries waive accounting.
2. Accounting period 03/17/15 to 05/31/17
3. **Assets on Hand \$67,572.80 in cash.**
4. Statutory fees of **\$4,857.63** requested. Calculated.
 - a. Legal Counsels, Jeffrey D. Gold; Jason L. Gaudy; and Neil J. DeLeon to equally divide fees among counsels. **Agreement re apportionment and waiver of compensation by Attorney Gaudy filed 09/11/17.**
5. Petitioner requests extraordinary fees of \$1,000. **Decl. filed 09/11/17 generally describes services for 12 hours. Does Court wish to require itemization as required by CRC 7.702, indicating the specific amount requested for each category of service? If so, require verified supplement.**
6. Attorney Gold requests **reduced** extraordinary fees of \$2,000 **Billed at \$350/hour for 7.3 hours' attorney time and \$175/hour for 6.2 hours' paralegal time. Itemized [see Decl. 09/11/17, LF, pgs. 9-12]. JTD.**
 - a. **Paralegal hourly rate exceed community standard of \$150/hour.**

7. Attorney DeLeon requests extraordinary fees of \$950. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
8. **Attorney DeLeon requests reimbursement of costs in the amount of \$76.50.**
9. **Supp. (09/11/17) requests specific cash bequests be distributed “without interest” as directed by Article Fifth of decedent’s will. JTD**
10. Petitioner requests authority to withhold **\$4,000** as a reserve for closing costs.
11. Petition indicates Decedent’s former caregiver, Twaila Dwyer, is a named beneficiary under the Decedent’s Will. Ms. Dwyer failed to return cash in the amount of **\$30,480.28, of which, petitioners efforts resulted in the return of \$9,442.51**, from Decedent’s JP Morgan Chase Bank Account; Decedent’s 2006 Lincoln Town Car valued at \$5,000; **and 1986 Ford Ranger Super valued at \$1,400.00**. Petitioner requests authority NOT to distribute the \$5,000 bequest to Twaila Dwyer as the value of the Decedent’s assets retained by Twaila Dwyer exceed \$5,000. Petitioner filed claims with JP Morgan Chase Bank; filed a Police Report; and retained the services of a Private Investigator. Though her last known address was secured, **Petitioner was unable to recover the decedent’s personal property from Twaila Dwyer.** JTD.
12. Petitioner was unable to ascertain the last whereabouts of Decedent’s 1986 Ford Ranger Super vehicle valued at \$1,400 and believes it was stolen.
13. Rose Low, Administrator of the Estate in the related case, as an individual, withdrew all claims against the Estate in exchange for distribution of the Estate’s 50% presumed interest in the real property located at 1937 Armory Road, Barstow, CA 92311.
14. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear note 7 then Court’s discretion. If approved, set next hearing for receipts and final discharge for **09/17/18**.

(nb)

Future Hearing:

12/20/17: Accounting Review-**VACATE**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600210

CASE NAME: ROSEMARY BROWN

HEARING:

Accounting Review

COUNSEL:

LAUREN R BROWN

(PET)...PRO/PER

ROSEMARY BROWN

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 6th Account for Lisa Chan, sister, approved on 09/21/15.
2. Need 6th Account beginning with 01/01/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600973

CASE NAME: MARY ELLEN CARROLL

HEARING:

WAIVER OF ACCOUNT & REPORT OF ADMINISTRATOR Account and Report
of LAMONT A CARROLL and Petition for allowance of fees filed.

COUNSEL:

LAMONT A CARROLL (PET)...PRO/PER
MARY ELLEN CARROLL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for fees by Administrator, Lamont A. Carroll ["Petitioner"-son].

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

1. All heirs waive accounting.
2. Assets on Hand \$804,114.84 of which \$529,723.01 is cash and remaining in real
and personal property.
3. Petitioner waives statutory compensation.
4. Petitioner requests authority to withhold \$1,500 as a reserve for closing costs.
5. Proposed Order 06/21/17 refers to community property and does not include
address of heirs receiving real property.

RECOMMENDATION

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

09/17/18.

(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: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700413

CASE NAME: MTR OF DELMER EDWIN SILLS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

KATHY LYNN MCCARTNEY (PET)...PRO/PER
DELMER EDWIN SILLS (DEC)...

GENERAL INFORMATION

Continued from 07/24/17.

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

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

1. All heirs waive bond. The estate consists of \$271,000 in personal property. Petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per Pr. C. § 8571. Court also has discretion to require bond per Pr.C. § 8481(b). Does court wish to require minimum bond of \$20,000.00 or alternatively based on assets of \$271,000? JTD
2. **Proof of publication filed.**
3. ~Proposed Form Order/Letters: 04/25/17 & 05/12/17

RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/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: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700611

CASE NAME: MTR OF FREDERICK HAYS

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL AUTHORIZATION TO
ADMINISTER UNDER IAEA

COUNSEL:

JAMES B JENSEN (PET)...JEREMIAH RAXTER
FREDERICK HAYS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by James Jensen, grandson

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

1. All heirs waive bond; however, need bond waiver by Lisa Carlson. The estate consists of \$250,000 of which the value of personal property is currently unknown.
2. Duties and liabilities is missing telephone number of petitioner. Need same.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication
5. No proposed order. Submit order after hearing.

RECOMMENDATION

Need to clear notes 2-4. Court's discretion re bond. If approved, set Accounting/Status Review for **11/19/18**. 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

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700613

CASE NAME: MTR OF DANIEL ANDREW DEARDORFF

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

SANDIE ATKINSON (PET)...LAW OFFICE OF MARY M. BADER
DANIEL ANDREW DEARDORFF (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner is a non-resident and requests that bond be fixed; however, no amount provided. Court may wish to require bond of \$480,000. The estate consists of \$480,000 of which \$30,000 is personal property.
2. Petitioner's signature in petition is not dated. Need dated verification. Alternatively, court may wish to verify on the record. JTD
3. Need Notice to Petition to Administer Estate and proof of service.
4. ~Proposed Form Order: 06/21/17

RECOMMENDATION

Need to clear notes 2 & 3. Court's discretion re bond . If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601083

CASE NAME: JERRY HABERLI

HEARING:

Petition for TERMINATION OF PROCEEDINGS OF ESTATE AND DISCHARGE OF
PERSONAL REPRESENTATIVE

COUNSEL:

JEFF HABERLI (PET)...DAVID
JERRY HABERLI (DEC)...

GENERAL INFORMATION

Continued from 08/21/17 at request of counsel.

THIS CASE SET FOR HEARING ON Petition for Termination of Further Proceedings and Discharge of Personal representative Pr. C. § 12251 by Administrator of the Estate, Jerry Haberli ["Petitioner"-son].

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

1. Letters issued 01/06/17, full authority, no bond.
2. Petitioner seeks to terminate this administration per Pr. C. § 12251 on the basis that the sole asset of the Estate, consisting of a policy with Hartford Life and Annuity Insurance Company, was previously distributed to the decedent's spouse pursuant to a properly executed California Small Estate Affidavit.
3. Petitioner requests termination and discharge of further duties and responsibilities as Administrator of the Estate; and any bond to be exonerated.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06063

CASE NAME: MTR OF ANNE H PRILL

SEE ALSO 9

HEARING:

Hearing Re: STATUS REPORT

COUNSEL:

STEVEN T PRILL	(PET)...PRO/PER
ANNE H PRILL	(DEC)...
PAMELA COLEMAN	(PET)...HARTNELL LAW GROUP
PEGGY ROSE SZYCHOWSKI	(TP)...MARTIN E KELLER

GENERAL INFORMATION

Continued from 03/30/17. Court directs counsel that the report of sale and accounting is to be filed by 4pm June 15, 2017; the accounting is to be set by the clerk's office for June 29, 2017 if the accounting is filed by this deadline. Notice to be given by Bryan Hartnell.

THIS CASE SET FOR HEARING ON Status Report [filed 02/02/17] by Administrator, Pamela L. Coleman ["Petitioner"].

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

1. Letters of administration with will annexed issued to Pamela Coleman on 09/18/07.
2. Petitioner requests an additional year to close the estate in order to sell the real property.
3. ~Proposed Order: 02/02/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **04/05/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS06063

CASE NAME: MTR OF ANNE H PRILL

SEE ALSO 8

HEARING:

Hearing Re: PROOF OF FUNDS FROM SALE INTO BLOCKED ACCOUNT

COUNSEL:

STEVEN T PRILL	(PET)...PRO/PER
ANNE H PRILL	(DEC)...
PAMELA COLEMAN	(PET)...HARTNELL LAW GROUP
PEGGY ROSE SZYCHOWSKI	(TP)...MARTIN E KELLER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Proof of Funds from Sale into Blocked Account

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

1. Matter set at 06/19/17 hearing, wherein, the Court ordered that the proceeds of sale be deposited into a blocked account.
2. Need proof of blocked account.

RECOMMENDATION:

Need to clear note 2.

(nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400622

CASE NAME: Robert Joseph Vinson

HEARING:

Hearing Re: PROOF OF PROCEEDS INTO BLOCKED ACCOUNT

COUNSEL:

JANNINA K. MALEK (PET/TP)...FULLERTON LEMANN SCHAEFER & DO
ROBERT JOSEPH VINSON SR (DEC)...
FREDERICK LAFATE VINSON (PET)...PRO/PER
SURETEC INSURANCE COMPANY (WOLKIN CURRAN LLP)
STATE OF CALIFORNIA FRANCHISE TAX BOARD

GENERAL INFORMATION:

Continued from 08/21/17 at request of counsel. Escrow is being finalized.

THIS CASE IS SET FOR HEARING ON Proof of Proceeds into Blocked Account

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

1. Matter set at 06/19/17 hearing, wherein, the Court ordered that the proceeds of sale of property to be placed into blocked account.
2. Need Order to Deposit Money into Blocked Account [MC-355].
3. Need Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account [MC-356].

RECOMMENDATION:

Need to clear notes 2-3.

(nb)

Future Hearing:

11/13/17: Accounting Review

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 09/18/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0800210

CASE NAME: KUY CHAU

HEARING:

Accounting Review

COUNSEL:

LISA CHAN

(PCR/CE/CPE)...FULLERTON LEMANN SCHAEFER & DO

KUY CHAU

(PCE/CTE/CEP)...

DANIEL P. PHILLIPS (TP)...

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 Lauren Brown, daughter/executor, on 07/11/16; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. Notice of Withdrawal by Attorney Jeremy Eveland filed on 07/20/16. Does Court wish to require the mandatory Substitution of Attorney form? JTD

RECOMMENDATION

Inquire status of accounting and final Inventory and Appraisal. Court's discretion re note 4.

(ww)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500223

CASE NAME: HUEY JACKSON SR

SEE ALSO 12

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of OLIVIA JACKSON

COUNSEL:

OLIVIA JACKSON (CPE)..
HUEY JACKSON SR (CTE)...BRYAN C. HARTNELL

GENERAL INFORMATION

Continued from **04/25/16, 06/20/16, 11/21/16, 02/06/17 and 04/24/17**. Non-appearance by
Olivia Jackson.

Continued from 06/05/17.

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

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

1. Olivia Jackson, spouse, appointed conservator of person and estate on 09/21/15,
no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 10/15/15.
3. Care Plan filed 01/14/16.
4. Determination of Conservatee's Appropriate Level of Care filed 04/21/16.
5. Final Inventory & Appraisal filed 06/27/16 reflects \$0.00 assets as all property is
purportedly community property.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection
per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of
recordation of letters in each county where the real property is located or where
conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Need to clear notes 6 -7.

(dl/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500223

CASE NAME: HUEY JACKSON SR

SEE ALSO 11

HEARING:

Accounting Review

COUNSEL:

OLIVIA JACKSON

(CPE)...

HUEY JACKSON SR

(CTE)...BRYAN C. HARTNELL

GENERAL INFORMATION

Continued from **11/21/16** and **02/06/17**. Citation issued on Olivia Jackson for failure to appear/failure to file.

Continued from **04/24/17** OSC hearing set re imposing sanctions on Olivia Jackson for her fta/ftf.

On **06/05/17** OSC taken off as counsel indicated that he will be filing the documents.

Continued from 06/05/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Olivia Jackson, spouse, appointed conservator of the person and estate on 09/21/15; accounting now due.
2. Final Inventory & Appraisal filed 06/27/16 reflects \$0.00 assets as all property is purportedly community property. **Question need for estate powers? Court to inquire.**
3. Need 1st accounting.

RECOMMENDATION:

Need 1st accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/ww)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500343

CASE NAME: JOSE LUIS GOMEZ JR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of OLGA L GOMEZ

COUNSEL:

OLGA L GOMEZ (CP)...PRO/PER
JOSE L GOMEZ SR. (CP)...PRO/PER
JOSE LUIS GOMEZ JR. (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 10/24/16, 01/09/17, 04/10/17, 05/08/17 and 06/12/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Olga and Jose Gomez, Sr., parents, appointed limited Co-Conservators of the person on 03/21/16.
- 2 Need Notification of Conservatee's rights per Pr.C.§1830(c).
- 3 Need Care Plan in accord with Pr.C.§2352.5.
- 4 Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).

RECOMMENDATION:

Need to clear notes 2-4. When documents are not filed as ordered, court may set a hearing in accord with Pr.C.§2655.

(nb/ww)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700130

CASE NAME: VICTORIA ROSALEE MAREZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

VANESSA MORENO (PET)...PRO/PER
VICTORIA ROSALEE MAREZ (CEE)...MARK J. FLORY

GENERAL INFORMATION

Continued from **06/12/17**. Attorney Mark J. Flory appointed. Court clears note 3 re conservatorship class. Daniel Marez, II state that he objects; proposed conservatee objects to petition on the record. Any competing petitions for conservatorship are to be filed by 4pm July 3, 2017; if not filed by that deadline they will be deemed waived. Notice by Judicial Assistant

Continued from 07/24/17. Cart report present in court. Court sets deadline for written objections to be filed and served by 4PM on 08/21/17 and further admonishes as follows: Objections to the petition must be in writing and served and filed by 4PM on 08/21/17. If objections are not served and filed by that date and time, then they will be waived permanently. In addition, written objections must be complete: If matter proceeds to trial, the court will consider only evidence relevant to the objections that were filed with the court. Unless otherwise provided by law, the court will not consider any objections not set forth in your written objections, and will not consider any evidence thereon. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Vanessa Moreno ["Petitioner"].

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

- 1 Court to review Confidential Supplemental Information form filed 04/12/17.
- 2 Petitioner requests that bond not be required. It appears the estate consists of Social Security, only. Question if petitioner is the "representative payee" and if so, the need for estate powers?
- 3 **Court Investigator's Report filed.**
- 4 **Need report by court-appointed counsel, Mark J. Flory.**
- 5 Citation returned served.

6 **Objections filed 09/11/17 by proposed conservatee, Victoria R. Marez.**
7 ~Proposed Form Order/Letters 04/12/17

RECOMMENDATION:

Need to clear note 4 then set for contested hearing. If approved, set hearing for Compliance Review for **02/26/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **10/01/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0900023

CASE NAME: CARRIE JOHNSON

SEE ALSO 16

HEARING:

Hearing Re: STATUS OF INFORMAL ACCOUNTING/LIEN

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MELODIE Z. SCOTT

(PCR)...

CARRIE JOHNSON

(CEP/PCE)...HARTNELL LISTER & MOORE

JENNIFER M. DANIEL

(PET)...JENNIFER M DANIEL

GENERAL INFORMATION:

Continued from 05/15/17. Court is in receipt of copy of summary of account Gc400- Jennifer Daniel indicates she also received a copy of this. Jennifer Daniel recites questions she has as to this summary of account into the record; if Jennifer Daniel has further/additional questions- she is to file them by 4pm June 5, 2017. Public Guardian to file and serve the accounting and supplement to the summary of account provided today- this is to be filed by 4pm August 21, 2017. Court notes that the cash assets (currently stated as \$10,438.08) and any other amount of money left over is to be transferred to the public administrator forthwith.

THIS CASE IS SET FOR HEARING ON Status of Informal Accounting/Lien

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

1. Matter set at 04/18/17 hearing, wherein, the Court directed County Counsel for Public Guardian to provide and informal accounting and status of the lien to Attorney Jennifer Daniel.

RECOMMENDATION:

Need informal accounting and status of lien.

(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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0900023

CASE NAME: CARRIE JOHNSON

SEE ALSO 15

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MELODIE Z. SCOTT

(PCR)...

CARRIE JOHNSON

(CEP/PCE)...HARTNELL LISTER & MOORE

JENNIFER M. DANIEL

(PET)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 2/8/16, 2/23/16, 09/12/16 and 05/15/17.

THIS CASE IS SET FOR HEARING ON Accounting Review re *Conservatorship*

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

1. On 2/2/15 Court approved the 1st Account Current for the period ending 3/25/14.
2. Conservatee died 10/30/15.
3. Need a second and final account that includes pre and post death account periods.

RECOMMENDATION:

Need a final accounting.

(sa/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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100232

CASE NAME: MTR OF JACQUELINE GLORIA ABELL

VACATED

HEARING:

Accounting Review

COUNSEL:

TIONI BARZAR

JACQUELINE GLORIA ABELL

PUBLIC GUARDIAN

(CP/CPE)...PRO/PER

(CTP)...JENNIFER M DANIEL

(CP)...COUNTY COUNSEL

FUTURE HEARING DATES:

12/18/17 Second Account and Report of Public Guardian

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300099

CASE NAME: DAVID HOWARD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DAVID HOWARD

(CPE)...COUNTY COUNSEL

(CEP/CEE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 05/19/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Second Account entered 02/27/17; third account or waiver of account now due.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400188

CASE NAME: Liliana Hicks

HEARING:

Petition for APPOINTMENT OF SUCCESSOR CONSERAVATOR OF THE
PERSON AND ESTATE

COUNSEL:

PUBLIC GUARDIAN	(PCR/CPE)...COUNTY COUNSEL
LILIANA HICKS	(PCE/CEP)...JEANNE E KENNEDY
CHRISTOPHER REULBACH	(SC)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition [filed 07/27/17] for Appointment of
Successor Conservator of Person and Estate by Christopher Reubach (friend)

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

1. Public Guardian was appointed conservator of the person and estate on 07/21/14.
There is currently no vacancy for successor conservator. Need to file petition for removal per Pr.C. §2651, or conservator needs to sign resignation per Pr. C. §2660.
2. Petitioner seeks bond of \$1,646.80. Suggested bond \$18,115.00 per bond calculation. JTD
3. Petitioner seeks orders under Pr. C. §2590 to sell at public or private sale, real or personal property of the estate. Proceeds to be used for Conservatee's care and needs. JTD
4. Petitioner seeks medical powers. Capacity Declaration previously filed 06/19/14.
5. Petitioner seeks dementia powers. Need report of appointed Counsel Jeanne Kennedy.
6. **Court Investigator report filed.**
7. Petition is incomplete at item 11 as to list of relatives. Need verified supplement to include Dolores Hart (step-daughter) and any other relatives contacted as indicated in attachment 3f(1) [see petition, 07/27/17, LFpg11].

8. List of required contacts is missing step-daughter, Dolores Hart. Need completed form.
- 9. Certificate of Completion of the Conservatorship Training Class filed.**
10. Need Notice of Hearing and Proof of Service to Dolores Hart (step-daughter), Public Guardian (conservator), and Jeanne Kennedy (appointed counsel).
11. Need return of Citation with Proof of Personal Service.
12. See Confidential Screening form filed 07/27/17 [LFpg4].
13. ~Proposed Form Order: 07/27/17

RECOMMENDATION Need vacancy prior to appointment.

Need to clear notes 1, 5-11. If approved, set hearing for Compliance Review for **04/23/18** 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.

Set future hearing for Accounting/Status Review on **11/19/18**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908. (lh/nb)

Future Hearing: 1/08/18: Accounting Review (PG)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

SEE ALSO 20A 20B

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MADELINE M. PRATKO TRUST	(TRU)...
MADELINE MARY PRATKO	(CEE)...SANDY L. TURNER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed conservator of the person and estate on 10/04/16, no bond.
2. No account or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

SEE ALSO 20 20A

HEARING:

OSC re Transfer from Trust to Conservatorship Estate

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MADLINE M. PRATKO TRUST	(TRU)...
MADLINE MARY PRATKO	(CEE)...SANDY L. TURNER

GENERAL INFORMATION:

Continued from 08/21/17 at request of counsel to trail other hearing.

THIS CASE IS SET FOR HEARING ON OSC re Transfer from Trust to Conservatorship Estate

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

1. Matter set at 06/19/17 hearing, wherein, Court noted that as to the property being requested to be transferred into the estate of conservatee, Madeline Pratko, the court describes the following types of property the court will find sufficient: property profile, deed, or other evidence of ownership.
2. Court orders that any objection to the OSC are to be filed and served by 4pm July 24, 2017- court notes that if the objections are not timely filed, they will be deemed waived permanently. Counsel is to give notice of this order.
3. Notice to be given by counsel for Public Guardian.

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: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600044

CASE NAME: MTR OF ROMONEE AGUERRE

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ROMONEE AGUERRE (CEP)...BRYAN HARTNELL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed conservator of the person and estate of Romonee Aguerre on 06/17/16, no bond.
2. Need proof of service of Notice of Filing of Inventory and Appraisal as to Bryan Hartnell, appointed counsel.
3. Need First Account Current or Waiver.

RECOMMENDATION:
Inquire status.
(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700126

CASE NAME: Kathleen Schaeffer

HEARING:

Hearing Re: STATUS OF IHSS REPORT & CAPACITY DECLARATION

COUNSEL:

PUBLIC GUARDIAN (PET)...COUNTY COUNSEL
KATHLEEN SCHAEFFER (CEP/OBJ)...MITCHELL I ROTH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status of IHSS Report & Capacity Declaration

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

1. Matter set at 06/19/17 hearing, wherein, Court directed County Counsel for Public Guardian to file either capacity declaration or status re capacity declaration by 06/05/17. Need same.
2. Need IHSS report.
3. **Report by court-appointed GAL, Sherri L. Kastilahn, filed.**

RECOMMENDATION:

Need to clear notes 1-2 then Court's discretion

(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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1401034

CASE NAME: OLEN RALPH BALES

HEARING:
Accounting Review

COUNSEL:
SB COUNTY PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER
OLEN RALPH BALES (DEC)...
TENNA VAUGHN COOK (PET)...FORESIGHT LEGAL GROUP
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...PRO/PER

Waiver of Court Fees and Costs filed by TENNA VAUGHN COOK is GRANTED

GENERAL INFORMATION

Continued from 09/12/16. Court approves status report.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration issued 5/5/15, \$20,000 bond.
2. Need Order after Hearing as directed by court on 09/12/16.
3. No accounting or updated status report. Need same.

RECOMMENDATION:
Inquire status.

(sa/nb)

FUTURE HEARING DATES:

12/18/17 Petition for Termination of Proceedings & Discharge of Personal Representative

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01634

CASE NAME: MTR RE JOHNNY JOHNSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

JOHNNY JOHNSON

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Orders expire 06/16/18.

Continued from 09/12/16 and 01/23/17 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. On 11/5/15 Court approved a Waiver of account for the period ending 6/30/15.
2. Need an accounting.

RECOMMENDATION:

Inquire status.

(sa/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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02160

CASE NAME: MTR OF VICTOR VIALLIANT

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
VICTOR BAILLAND (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expire 06/02/18

Continued from 02/29/16, 06/13/16 and 01/09/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Waiving Seventh Account granted 02/20/15 for period ending 12/17/14.
2. Eighth Account/Waiver now due for period 12/18/14 – current date.

RECOMMENDATION:

None.
(dl/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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3448

CASE NAME: IN THE MATTER OF HAROLD EMBREY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

HAROLD EMBREY

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 07/21/18

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 17th Account entered 06/26/17 for period 11/21/14 to 12/31/15.
2. Need 18th Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3971

CASE NAME: IN THE MATTER OF JOHN J MENDOZA

HEARING:

Twenty-Third and Final Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JOHN MENDOZA (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Conservatee passed away on 01/05/14.

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

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

1. Accounting period 03/05/13 to 09/11/15 (pre & post-death periods).
2. Assets on Hand \$1,772.00 in cash.
3. Public Guardian requests compensation of \$886.00. Generally described. JTD.
4. County Counsel requests fees of \$886.00. Generally described. JTD.
5. On 12/02/15, petitioner made final distribution in the sum of \$1,772.802 to Jessie Mendoza, mother of the Decedent, under this case number. Question the authority to make final distribution to other than executor or administrator of the estate of the conservatee? Need verified supplement.
6. Account is not signed by Deputy PG, Violet Marquez. Need same via verified supplement.
7. Need Notice of Hearing with proof of service.
8. Proposed Order 05/25/17 discharges upon filing of receipts instead of upon entry of final discharge order.

RECOMMENDATION:

Need to clear notes 5-7 then Court's discretion. If approved, set next hearing for receipts
and final discharge for **09/17/18**.

(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: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS5519

CASE NAME: MTR OF SHARI SMITH

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

SHARI SMITH

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 10/02/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 12th Account entered 11/18/16 for period 07/01/15 to 06/30/16.
2. Need 13th Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS8597

CASE NAME: IN THE MATTER OF LISA M BAKER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

LISA MARIE BAKER

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 02/27/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 25th Account entered 11/18/16 for period 07/01/15 to 06/30/16.
2. Need 26th Account Current or Waiver.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS887

CASE NAME: IN THE MATTER OF EUGENE SALLEE

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

EUGENE SALLEE

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON final discharge

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

1. Order Settling Thirteenth and Final Account entered 09/12/16.
2. All receipts filed.
3. Ex-parte petition/order for final discharge returned for corrections. Also, final discharge order was entered on 09/12/16. As such, section one should reflect same date.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 09/18/17 TIME: 10:00 DEPT: S35P

CASE#: VC VS00189
CASE NAME: MTR OF CASEY MARIE SHAW

HEARING:
Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

CASEY MARIE SHAW (CEP)...PRO/PER
LYNETTE A WADKINS (CPE)...CALDWELL, KENNEDY & PORTER, A.
GARY WADKINS (PET)...JEANNE E KENNEDY
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Ex parte orders entered 05/23/17. Public Guardian appointed Temporary Conservator, person only,

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for appointment of Successor Conservator of Conservatorship of person only, by Gary Wadkins (step-father) to appoint PG

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

1. Lynette Wadkins (mother) was appointed conservator of the person on 04/15/99. Conservator is now deceased.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
JTD
3. Petitioner seeks medical powers. JTD
4. Conservatee is developmentally disabled. Does Court wish to appoint Counsel for report?
5. Need Court Investigator's Report.
6. ~Proposed form Order: 05/17/17

RECOMMENDATION:

If approved, set hearing for Compliance Review for **04/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); and Care Plan per Pr.C.§2352.5. (lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: CIP DS1700115

CASE NAME: IN RE JOHN DOE 58-11

HEARING:
Status Hearing on Petition

COUNSEL:
JOHN DOE 58-11 (PET)...SAN BERNARDINO COUNTY COUNSEL

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 **PROBATE**

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0900366

CASE NAME: SAM DOPPIERI & ROSEMARY DOPPIERI REV. TRUST

HEARING:

Accounting Review

COUNSEL:

TIRSA DOPPIERI	(PET)...HARDEE & BROUSARD
SALVADOR ANTONI & ROSEMARY DOPPIERI (TRU)...	
LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
ROSEMARY DOPPIERI	(OBJ)...LAW OFFICE OF H JOHN KHOUKAZ

GENERAL INFORMATION:

Continued from 06/26/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 4th trust account of Lawrence Dean, PPF granted on 05/01/17.
2. Need 5th trust account beginning with 05/01/16.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200565

CASE NAME: JAYDEN ARIAS SETTLEMENT TRUST

VACATED

HEARING:

Accounting Review

COUNSEL:

WESTAMERICA BANK

JAYDEN ARIAS SETTLEMENT TRUST

(PET/TEE)...RANDOLPH M SHARON

(TRU)...

Sixth Account filed and set for 11/30/17.

(ww/nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200864

CASE NAME: MTR OF EDWARD ANTHONY BYERS

HEARING:
Accounting Review

COUNSEL:

EDWARD R BYERS	(PET)...JOHN F WEBER
EDWARD ANTHONY BYERS	(DEC)...
TONJA DISHMON	(PET/TP)...ESTELLE & KENNEDY

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 successor administration issued to Edward Byer, grandfather, on 10/27/16; no authority, no bond.
2. 2nd accounting was granted on 09/28/16. **Need** order on 2nd accounting.
3. Need accounting or status report.

RECOMMENDATION

Need to clear notes 2 & 3.

(ww)

Future Hearing:

10/30/17: Report of Sale & Petition for Order Confirming Sale

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300350

CASE NAME: RAYMOND LESLIE PARIMORE

HEARING:

FIRST AND FINAL Account and Report of BARBARA N WARREN and
Petition for allowance of fees filed.

COUNSEL:

BARBARA N WARREN (PET)...MICHAEL J ARMENTA
RAYMOND LESLIE PARIMORE (DEC)...

GENERAL INFORMATION:

Continued from 07/10/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and Petition for Fees by Administrator of the Estate, Barbara N. Warren
[“Petitioner” - daughter].

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

1. All heirs waive accounting.
2. Assets on Hand \$18,100 consisting of real and personal property.
3. Statutory fees of \$1,586.00 requested. Calculated. However, as there are no cash assets, question how parties intend to be compensated? Need verified supplement.
4. Petition indicates there is approximately \$1,000 owed in delinquent taxes. Need further clarification via verified supplement.
5. Petition indicates personal property located in Parker, Arizona needs to be demolished and removed in order for the land to be sold. Question whether “the land” is part of decedent’s estate and if so, whether ancillary proceedings have commenced? Need verified supplement.
6. No proposed distribution. Need verified supplement.
7. Petitioner requests authority to withhold the sum of \$450 as a reserve.
8. Proof of Service to Notice filed 05/15/17 does not include entity to which taxes are owed. Need proper service.
9. No proposed order.

RECOMMENDATION:

Need to clear notes 3-6 & 8. It does not appear estate is ready to close.

(nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 7 8

HEARING:

Hearing Re: REMOVAL OF ADMINISTRATOR

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS-R
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **09/19/16 and 11/28/16**. Court orders an accounting to be filed 12/21/16. Court orders that all monies be placed into a blocked account. All temporary orders to remain.

Continued from **02/06/17 and 04/10/17**. Counsel represent all parties agree to the listing of property for sale. Counsel is to communicate regarding approval of sale.

Continued from 06/26/17 Proof of blocked account has not been filed. Copy of check and proof it was placed into blocked account must be filed by 06/28/17 or administrator will be removed.

06/28/17 Hearing re Proof of Blocked Account was taken off calendar as Order as to funds was signed.

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator (Eric Ramirez) by daughter (Esther M. David) Pr.C. §§ 850, 859, 8500, 8540.

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

1. Letters Testamentary issued to Eric Ramirez on 6/27/16, no bond. (Order appointing was granted 8/21/15.) Eric Ramirez suspended on 08/01/16 and Letters of Special Administration were issued to Esther David, daughter, \$20,000 bond.
2. Petitioner, Esther David, is seeking removal of executor Eric Ramirez. Petitioner alleges that Eric has wrongfully taken, concealed and disposed of property in the estate. Petitioner additionally cites Pr.C. § 859 that Eric be twice liable for assets taken. Grant deed attached to petition showing real property was transferred by Eric as executor to himself [LFpg8].

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

3. Waiver of Notice filed 11/14/16 by Sylvia Vizcarra, and Jose Juan Ramirez on 11/21/16.
4. Need notice of hearing and proof of service.
5. **Objections filed 11/21/16 by suspended administrator, Eric Ramirez.**
6. **Declaration of Juan Ramirez in support of Objections by Eric Ramirez filed on 01/26/17.**
7. **Order Voiding Grant Deed entered 02/06/17.**
8. **Proof of blocked account filed on 08/22/17.**

RECOMMENDATION

Need to clear note 4. Matter is contested.

(lc/nb/ww)

Future Hearing: 10/12/17: Petition for Report of Sale & Petition for Order Confirming Sale of Real Property

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 6 8

HEARING:

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

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS-R
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **11/28/16**.

Ex parte hearing on **01/11/17** for Authority to Administer under IAEA was heard and taken off calendar. Partial settlement was reached at mediation and parties agreed to sell the real property. Counsel to prepare order.

Continued from 02/06/17 and 04/10/17. The Court addresses probate note #2 on the record.

Continued from 06/26/17.

THIS CASE SET FOR HEARING ON Petition for Probate, **Successor** Letters of Administration W/WA with Full Authority under IAEA **by Esther David, daughter.**

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

1. **Temporary Letters issued 01/09/17 to Esther David, daughter.**
2. Petitioner Esther David requests no bond and all proceeds of sale to be placed into blocked account. There does not appear to be personal property.
3. Need proof of publication.
4. Does Court wish to require the Order on partial settlement that was reached on 01/11/17?
5. ~Proposed Form Order: 07/27/16.

RECOMMENDATION

Need to clear note 3. Prior administrator needs to be removed prior to granting this petition. If approved, set Accounting/Status Review for **11/19/18**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/ww)

Future Hearing: 10/12/17: Petition for Report of Sale & Petition for Order Confirming Sale of Real Property

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

SEE ALSO 6 7

HEARING:

Accounting Review

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS-R
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

GENERAL INFORMATION

Continued from **6/21/16** for Eric Ramirez, son, to appear.

On **8/1/16** Eric Ramirez, suspended and Esther David, daughter appointed Special Administrator with authority to file an 850 petition and marshal assets.

Continued from 08/31/16, 09/19/16, 11/28/16, 02/06/17, 04/10/17 and 06/26/17.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review (re Eric Ramirez)

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

1. Letters Testamentary issued to Eric Ramirez, son, on 6/27/16, no bond. (Order appointing was granted 8/21/15.) However, as Eric Ramirez, is now suspended and no I&A filed. Court may wish to inquire if any assets were marshaled thus requiring an accounting.
2. Partial Inventory and Appraisal filed 02/06/17 by Eric Ramirez. Need a final inventory & appraisal.
3. Need an 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.

(nb/sa/lc/nb/ww)

Future Hearing:

10/12/17: Petition for Report of Sale & Petition for Order Confirming Sale of Real Property

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501062

CASE NAME: MTR OF MICHAEL LYLE RILEY

VACATED

HEARING:

Accounting Review

COUNSEL:

SHAWN WALKER	(PET)...JOHN F WEBER
MICHAEL LYLE RILEY	(DEC)...
SCOTT A HANCOCK	(TP)...
KATHLEEN EVENSON	(PRO/PER)

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 Shawn Walker, equitably adopted son, on 08/03/16; full authority, \$180,000 bond.
 - a. Order for increase of bond filed on 03/06/17. **Need** additional bond of \$27,000.00
2. Final Inventory and Appraisal filed on 03/01/17.
3. Need accounting or status report.

RECOMMENDATION

Need additional bond of \$27,000 and 1st accounting.

(ww)

FUTURE HEARING DATES:

12/06/17 First and final Account and Report of Shawn Walker

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 11 12

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND	(PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND	(DEC)...
TONYA MICHAELS	(PET)...PRO/PER
MICHAEL MICHAELS	(PET/OBJ)...MANSOUR LAW GROUP, APLC

GENERAL INFORMATION

Letters of Special Administration issued to Penisha McFarland, daughter, on 01/31/17, no bond.

Continued from **03/21/17**. Michael Michaels to retain counsel and file a competing petition. Court amends powers of the Special Administrator and removes the right to evict and removes the power to evict or access bank accounts or sell real property. Bond required \$50,000. Court notifies the Public Administrator of possible appointment. No bond or competing petition filed as of the review of this matter.

Continued from 06/13/17 to be heard with competing petition.

THIS CASE IS SET FOR HEARING ON

- Petition 1 Petition for Letters of Administration with full IAEA by ***Penisha McFarland, daughter***
- Petition 2 Petition for Letters of Administration with full IAEA by ***Tonya and Michael Michaels, niece and nephew-in-law***

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

Petitioner 1 Penisha McFarland, daughter

1. Bond waived by Penisha McFarland (sole heir); Court has discretion to require bond per Pr. C. §8481(b). – JTD. General petition shows an estimated estate value of \$303,072, whereas Special petition alleges value unknown. Estate assets include real property. **NOTE: Order entered 01/31/17 does not include bond. However, on 03/21/17 court ordered \$50,000 bond as Special Administrator; bond filed.**
2. **Objections filed 03/13/17 by Michael Michaels.**
3. **Reply to Objection filed 04/03/17 by Penisha McFarland.**

4. **Objections filed 06/06/17 by Tonya Michaels.**
5. ~Proposed form Order: 04/03/17

Petitioner 2 Tonya and Michael Michaels, niece and nephew-in-law

6. Petitioner requests bond of \$50,000. Estate value is currently unknown and will be determined.
7. Section 5a2 is incomplete as to spouse's status. Need verified supplement.
8. Notice to Petition to Administer Estate and proof of service filed 06/08/17; however, section 10 is missing the names of the petitioners. Need corrected notice.
9. **Proof of publication filed.**
10. **Objection by Penisha McFarland, special administrator, filed on 06/29/17; however, need verification by Penisha and proper proof of service of objections.**
11. ~Proposed Form Order: 06/06/17

RECOMMENDATION

Matter is contested. Need to clear notes 7-8. Court's discretion re bond. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/nb/lh/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 10 12

HEARING:

Petition for DETERMINE TITLE TO REAL PROPERTY; OR IN THE
ALTERNATIVE FOR UNJUST ENRICHMENT

COUNSEL:

PENISHA MCFARLAND	(PET)...MICHAEL C MADDUX
PECOLIA MCFARLAND	(DEC)...
TONYA MICHAELS	(PET)...PRO/PER
MICHAEL MICHAELS	(PET/OBJ)...MANSOUR LAW GROUP, APLC

Currently under review by Legal Research.
(LR)

Notice:

Need return of served Summons per Pr. C. § 851 as to Respondent, Pecolia McFarland.
(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: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

SEE ALSO 10 11

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND

(PET)...MICHAEL C MADDUX

PECOLIA MCFARLAND

(DEC)...

TONYA MICHAELS

(PET)...PRO/PER

MICHAEL MICHAELS

(PET/OBJ)...MANSOUR LAW GROUP, APL

See notes on matter 10.

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

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700324

CASE NAME: MTR OF LINDA JOYCE WHITE BARRY

SEE ALSO 14

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

JOHNNY BARRY	(PET)...	JOSEPH JOOHYUN PARK
LINDA JOYCE WHITE BARRY	(DEC)...	
MARCIA L HEAD	(PET)...	JOHN G WURM

GENERAL INFORMATION

Continued from 07/05/17. Counsel represents that Jerry Williams resides in Georgia. Matter to be heard with contested petition.

THIS CASE SET FOR HEARING ON:

- Petition 1-Petition for Letters of Administration with full IAEA by **Johnny Barry, spouse**
- Petition 2- Petition for Letters of Administration with Full IAEA by **Marcia Head, sister**

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

Petitioner 1 Johnny Barry, spouse

1. Petitioner seeks bond of \$200,000. Ok.
 - a. Per supplement filed on 06/30/17 petitioner now seeks that no bond be required. Does court wish for bond waivers to be filed? JTD
2. Petitioner is not listed in section 8; however, it is clear that Petitioner is spouse. Does court wish to require verified supplement? JTD
 - a. Supplement filed on 06/30/17 indicating that the petitioner is the spouse, and requests that petition should be amended to reflect limited IAEA and delete the \$200,000 bond requirement. Does Court wish for petition to be amended per the supplement? JTD
3. Sibling Jerry Williams' address is allegedly unknown. Need due diligence.
 - a. Supplement filed on 06/30/17 states that a due diligence as to Jerry Williams was completed and attached as exhibit A; however exhibit A was not attached. **Need** verified supplement.

- b. Declaration of due diligence as to Jerry Williams filed on 06/30/17. JTD
- 4. **Need** Notice of Petition to Administer Estate served on Jeremey Head, issue of Carwell Head, Jr.
- 5. **Objections by Marcia Head, sister, filed on 06/08/17.**
- 6. ~Proposed Form Order: 03/28/17.

Petitioner 2 Marcia Head, sister

- 7. Petitioner requests bond of \$225,000. Ok.
- 8. Notice to Petition to Administer Estate and proof of service filed on 07/21/17; however, notice was not served on Jeremey Head. **Need** corrected notice.
- 9. **Need** proof of publication
- 10. ~Proposed Form Order: 06/08/17

RECOMMENDATION

Matter is contested. Need to clear notes 3, 4, 8 & 9. Court's discretion re bond. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww).

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/18/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700324

CASE NAME: MTR OF LINDA JOYCE WHITE BARRY

SEE ALSO 13

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JOHNNY BARRY

(PET)...JOSEPH JOOHYUN PARK

LINDA JOYCE WHITE BARRY

(DEC)...

MARCIA L HEAD

(PET)...JOHN G WURM

See notes on matter 13.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

DATE: 09/18/17 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000215

CASE NAME: LAURA DARDEN WILLIAMS (MASTER FILE)

HEARING:

Hearing Re: Review/Possible Transfer to Riverside County

COUNSEL:

CLEM E WILLIAMS JR.

(CP/CPE)...PRO/PER

LAURA DARDEN WILLIAMS

(CTP/CTE/CEP)...EDWARD B FISCHEL

LINDA D. GAUNTT

(CPE/CP/OBJ)...MARIVEL M ZIALCITA

Waiver of Court Fees and Costs filed by CLEM E WILLIAMS JR. is GRANTED

Waiver of Court Fees and Costs filed by LINDA D. GAUNTT is GRANTED

Waiver of Court Fees and Costs filed by LAURA DARDEN WILLIAMS is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Review/Possible Transfer to Riverside County.

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

1. Matter set on 12/06/16 re Petition for Medical Placement of Conservatee. Court re-appoints attorney Edward Fischel. Matter referred to Court Investigator for Report.
2. Clem E Williams Jr represents conservatee is currently placed in Riverside Heights.
3. CI report filed on 12/12/16.
4. **Need report by court-appointed counsel, Edward Fischel.**
5. **Counsel to prepare order regarding facility as directed on 03/20/17.**

RECOMMENDATION

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

(lh/lc/nb)

Future Hearing:

4/29/19: Accounting Review

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

DATE: 09/18/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600364

CASE NAME: MTR OF NESTOR JOSUE VEGA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

CRISTINA PALACIO-MOLINA (CP)...PRO/PER
ARTURO VEGA AVILA (CE)...PRO/PER
NESTOR JOSUE VEGA (CEE)...E JOAN NELMS

XREF: FAMRS1302381 FWV1401723 16CR-059491

GENERAL INFORMATION

Ex parte orders granted 01/04/17: Petitioners appointed temporary co-conservators of the person only (order filed 01/04/17; letters issued 01/04/17).

Continued from 01/30/17, 02/27/17 and 04/17/17 for proper notice. Court waives the return of the citation as the proposed conservatee Nestor Josue Vega is present in court. Attorney E Joan Nelms to file a written report.

Continued from 06/26/17. Written report received from E. Joan Nelms. Court referred matter to Court Investigator as proposed conservatee is out of custody and residing with his parents. Notice as to the proposed conservatee was cleared as he was present in Court.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by Cristina Palacio-Molina and Arturo Vega Avila (parents).

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

1. Cristina Palacio-Molina and Arturo Vega Avila (parents) seek conservatorship of the person and estate of Nestor Josue Vega. Cristina Palacio-Molina and Arturo Vega Avila appointed temporary conservators of person only 01/04/17.
2. Need verified supplement identifying names and addresses of Conservatee's children and siblings. Appears there are three children: Nestor Vega Jr. (7), Leilani Vega (6), and Angelina Vega (5); mother is Violet Godinez. Appears there are two siblings: Neil Palacios (brother), and Ikzury Paneto (sister).
3. Need mailed notice to Neil Palacios (brother), Ikzury Paneto (sister), and Daniel Johnson (probation officer).
4. Need capacity declaration to support requests for powers under PC 1873/1901, PC 2351-2358, and 2355.

5. Report of Counsel E Joan Nelms filed 06/26/17.
6. **CI report filed 08/25/17.**
7. Certificate of completion of conservatorship course by Christina filed 01/30/17.
8. Petitioners request no bond, as Conservatee has no estate, only a bank account with a negative balance. Question the need for estate powers. - JTD
9. ~Proposed Form Order/Letters 02/27/16.

RECOMMENDATION:

Need to clear notes 2-4. If approved, set hearing for Compliance Review for **04/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; recordation of letters if applicable per Pr.C.§2313.

If estate powers granted requires: Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610, and set an Accounting Review for **11/19/18**.

(lh/nb/lh)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700185

CASE NAME: MTR OF KYLAND DEON MARTINEZ

HEARING:
Petition for Appointment of Conservator

COUNSEL:

TERESA MARIE MARTINEZ (CP)...PRO/PER
KYLAND DEON MARTINEZ (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION:

Ex Parte orders granted 05/24/17.

Continued from 07/03/17. Attorney Donnasue Ortiz appointed for Kyland Deon Martinez.

THIS CASE IS SET FOR HEARING ON Petition for Conservatorship, person only, by mother, Teresa M. Martinez ["Petitioner"].

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

1. No bond – person only.
2. Court to review Attachment 10 to Confidential Conservator Screening form [LF, p4].
3. Proposed conservatee may be developmentally disabled. **Need report of Counsel Donnasue Ortiz.**
4. Petition indicates proposed conservatee is not developmentally disabled [LF, p7 to petition]. However, supplemental information form indicates services are provided by regional center [LF, p.4]. As this petition is for general, and not limited, conservatorship, an IRC report is, therefore, optional per Pr.C. 1827.5(b). **IRC requests 30 day continuance. JTD.**
5. Medical powers sought. Need complete/corrected capacity declaration. Medical Capacity Declaration filed 05/17/17 has the following issues:
 - a. Caption indicates proposed conservatee has capacity to give informed consent to medical treatment;
 - b. Dementia Attachment – GC335A indicates proposed conservatee has dementia but Section 3a does not indicate physician has at least 2 years diagnosing dementia;
 - c. Need Dementia Attachment GC-313

6. Need return of Citation.
7. Need Notice of Hearing with proof of service or due diligence declarations.
8. **CI report filed 06/29/17.**
9. Proof of Completion re Conservatorship Class filed 07/05/17.
10. ~Proposed Form Order/Letters 05/17/17.

RECOMMENDATION: Continue 30 days.

Need to clear notes 3-7. If approved, set hearing for Compliance Review for **04/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); 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: TARA REILLY **PROBATE**

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO DS1000649

CASE NAME: PEGGY JEAN SMITH BADER

HEARING:

THIRD Account and Report of JAMES M BADER and Petition for allowance of fees filed.

COUNSEL:

JAMES M BADER (PET)...JAMES BADER
PEGGY JEAN SMITH BADER (DEC)...

GENERAL INFORMATION

Continued from 04/27/17 and 06/26/17.

THIS CASE SET FOR HEARING ON 3rd SNT Account of Mark Bader by James Bader, brother.

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

1. Accounting period 08/20/14 – 10/19/16.
2. Assets on hand \$99,097.42; cash. \$22,145.25 spent down from previous accounting.
3. Petitioner waives fees.
4. Accounting indicates there are no receipts, interest or gains.
5. Report is not verified. Need verification per Pr.C. § 1021.
6. No summary of account provided. Unable to determine if accounting balances.
 - a. Need Summary of account with supporting schedules.
7. Need notice of hearing with proof of service, including notice to the three state agencies per Pr.C. §§ 3604(a)(2), 3602(f), and 3611(c); Department of Health Services, Director of State Hospitals and Director of Developmental Services as it does not appear they were noticed at the creation of the SNT; only the probate for Peggy.
8. Petitioner requests accounting be heard every 2 years.
9. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 5-7. If approved, set Accounting/Status Review for **01/10/19**. 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: TARA REILLY

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300277

CASE NAME: DANIEL HAROLD WEINLAND

HEARING:
Hearing Re: AMENDED ACCOUNTING

COUNSEL:

DIANE B HAMBURGER (PET)...PRO/PER
DANIEL HAROLD WEINLAND (DEC)...

GENERAL INFORMATION

Continued from **02/11/16, 04/04/16, 06/06/16, 08/15/16, 11/14/16 and 01/09/17**. The Court authorizes the clerk's office to reissue current letters with today's date.

Continued from 06/26/17 on court's motion to clear notes and provide statement that includes equity at the time of foreclosure.

THIS CASE SET FOR HEARING ON **AMENDED** (03/30/17) Accounting of Blocked Account by Administrator, Diane B. Hamburger ["Petitioner"].

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

1. Accounting period 07/08/16 to 03/15/17.
2. Assets on Hand \$21,528.08 in cash.
3. Petitioner does not request compensation at this time.
4. Petition is not signed. Need same.
5. Petition is not verified per Pr.C. § 1021.
6. Petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1).
7. Final Inventory and Appraisal filed.
 - a. Date of death is missing.
 - b. Sections 4 & 5 are incomplete.
 - c. Attachment 2 lists foreclosure property. Court to inquire if property was foreclosed on date of death or after.

Need corrected inventory and appraisal. Amended account alleges a corrected Inventory and Appraisal shall be filed prior or concurrent with the filing of the First and Final Account and Petition for Distribution [LF, p.3].

8. Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account filed.

9. Notice of Hearing filed 03/30/17 does not include date; time; dept.; or room. Need proper notice.
10. Proposed Order 03/30/17 does not include assets on hand or account period.

RECOMMENDATION

Need to clear notes. If approved, set next hearing for Accounting Review for **05/17/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.
(lc/dl/dl/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500387

CASE NAME: THE SPECIAL NEEDS TRUST OF CHANTE BOYD

HEARING:
Accounting Review

COUNSEL:
SPECIAL NEEDS TRUST OF CHANTE BOYD (TRU)...
INLAND COUNTIES REGIONAL CNTR (PET/TEE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 3rd trust Account for IRC approved on 09/21/15.
2. Need 4th trust Account beginning with 06/01/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500879

CASE NAME: William Gordon Rosenberg

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report
of THOMAS J. RICKER and Petition for allowance of fees filed.

COUNSEL:

THOMAS J. RICKER (PET)...PRO/PER
WILLIAM GORDON ROSENBERG (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Executor, Thomas J. Ricker ["Petitioner"-brother-in-law].

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

1. All beneficiaries waive accounting.
2. Assets on Hand \$133,475 consisting of \$3,475 in cash and remaining in real property.
3. Inventory and Appraisal received 02/07/17 is not conformed and caption is incomplete. Need conformed copy of final inventory.
4. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
5. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
6. Need findings re: sole and separate property via verified supplement.
7. Petitioner waives statutory compensation.
8. Petitioner indicates he erroneously transferred the decedent's residential properties located in Running Springs to decedent's daughter, Karen Rae Burkart, after giving notice and receiving no objections. However, decedent's will left a partial life estate of the property located at 30832 Allview Drive, Running Springs, CA, 92382, to decedent's sisters-in-laws until their death or upon termination otherwise specified in the will, wherein, the real property would then revert in fee simple to decedent's daughter.

The will further directed that the real property located at 31885 Wagon Wheel Drive,

Running Springs, CA, 92382, was to be sold and the proceeds divided as specified in will [see dispositive section of will affixed to account filed 05/15/17, LF, pgs. 45-46]. A fully executed stipulation re: Distribution of Estate Property and Satisfaction of Bequests as to Wagon Wheel property is affixed [LF, p. 24].

9. Petitioner requests authority to withhold \$3,475.00 as a reserve for closing costs.
10. Proposed Order 05/15/17 includes incorrect hearing date at page one, line 20; does not include real property located at 30832 All View Drive in Running Springs as an Asset on Hand at End of Accounting Period; does not include findings re sole and separate property or finding re known creditors; and does not include 3 lines of content before judge's signature line.

RECOMMENDATION

Need to clear notes 3-6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **09/17/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501059

CASE NAME: MTR OF BILLIE V JARVIS

HEARING:
Accounting Review

COUNSEL:

PETER VAN BUSKIRK	(PET)...PRO/PER
BILLIE V JARVIS	(DEC)...
CHRISTIE DAVIDSON	(SPA/TEE)...PRO/PER
KELLY ANN JARVIS BUTLER	(JOHN W SHORT)

XREF: CIVDS1611522 (Van Buskirk V Christie Davidson)

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 **Special** Administration issued to Christie Davidson on 01/22/16; no authority, \$120,000 bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600107

CASE NAME: MTR OF KATHRYN LUCILLE KAME

HEARING:
Accounting Review

COUNSEL:
CALIFORNIA JAY MCKAY (PET)...HARTNELL LAW GROUP
KATHRYN LUCILLE KAME (DEC)...

GENERAL INFORMATION:
Continued from 06/26/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to California McKay, daughter/executor on 05/12/16, full authority, \$20,000 bond.
2. Need Final Inventory and Appraisal.
3. Need Accounting or status report.

RECOMMENDATION:
Inquire status of accounting and Final Inventory and Appraisal. .

(nb/ww)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

HEARING:

REPORT OF Account and Report of KIMBERLY P TREBING and Petition
for allowance of fees filed.

COUNSEL:

KIMBERLY P TREBING	(PET)...JOHN STYSKAL
VERNON JEROME PETERSON	(DEC)...
RANDALL PETERSON	(PET)...VOORHEES LAW GROUP
LARRY PETERSON	(TP)...DAMIEN J SNOW
INHERITANCE FUNDING COMPANY (PRO/PER)	
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO, LLP)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO, LLP)

GENERAL INFORMATION:

Continued from 06/26/17 on Court's motion.

THIS CASE IS SET FOR HEARING ON **AMENDED** [06/20/17] First Account of Special Administrator and Petition for Costs by Kimberly P. Trebing ["Petitioner"].

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

1. Petitioner proffers Pr. C. § 8547(b) in support of her request for compensation as Special Administrator and joins in this petition, as general personal representative, for allowance of special administrator's compensation.
2. Accounting period **09/10/16 to 12/29/16 but summary of account [LF, p. 11] reflects period of 07/12/16 to 12/31/16. Need verified supplement.**
3. **Assets on Hand \$814,917.03 consisting of cash. However, inventory is incomplete (see note 4).**
4. **Inventory and appraisal affixed to supp. filed 06/20/17 [LF, p. 64] caption is incomplete; not conformed; section 2 and total are blank; section 5 is blank; is not dated or signed by attorney and petitioner; statement about the bond section is incomplete; not appraised by Probate Referee; and does not affix supporting bank/financial statements to support date of death and closing**

balances per Local Rule 20-908. Further, Attachment 2 includes real properties that do not include legal descriptions or APN #'s. Need complete, final inventory and appraisal that should be filed separately.

5. **Receipts - Schedule B [LF, p14] does not specify what property rent income pertains to. Need verified supplement.,**
6. **Disbursements - Schedule C [LF, p15] does not specify what property interest expense pertains to. Question whether monthly mortgage payment is an impound account that include taxes and insurance? Need verified supplement.**
7. Petitioner and Attorney to request fees at close of estate.
8. Petitioner requests reimbursement of costs advanced of \$13,928.83. Itemized [LF, p. 11-13]. However, costs include items such as printing, faxes, copies and postage costs which are normally not allowed. **The Court tentatively approved reimbursement of costs in the amount of \$12,728.53 on 06/26/17. JTD.**
9. **Property on Hand at End of Account [LF, p.16] does not include real or personal property. Need verified supplement.**
10. **Assignment by Shawn P. Peterson filed.**
11. Need Notice of Hearing with proof of service to include all entities requesting special notice.
12. No proposed order. Submit Order after Hearing.
13. **Objections filed 05/17/17 by Randall Peterson.**
14. **Supplement to Objection filed 09/11/17 by Objector, Randall Peterson.**

RECOMMENDATION:

Need to clear notes then set for contested hearing. This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb)

Future Hearings:

9/27/17: Trial Setting Conference, Petition for Removal of Administrator & Revocation Letter of Administration; Surcharge & Removal etc.

2/21/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700267

CASE NAME: MTR OF WALT GLEN PITTER

HEARING:

Hearing Re: Amended LTTTRS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

DEBRA LYN PITTER	(PET)...HORSPOOL & HORSPOOL
WALT GLEN PITTER	(DEC)...
CHRISTOPHER A SHUMATE	(TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **[Amended 06/30/17]** Petition for Letters of Administration with Full Authority under IAEA by Debra Pitter, spouse

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

1. Petitioner requests that all sale proceeds be placed in a blocked account in lieu of bond. Net value of the estate consists of \$219,000 in real property. JTD
2. Section 2b of petition fails to list the proposed personal representative's name; however it is clear that Debra is the petitioner. JTD
3. ~Proposed Form Order: 06/30/17

RECOMMENDATION

RFA subject to Court's discretion re note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **11/19/18**. 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

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700629

CASE NAME: MTR OF OLGA P. ARRESE

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED AUTHORITY UNDER
IAEA

COUNSEL:

JOSEPH VALENZUELA (PET)...MAURICE ABADIA
OLGA P. ARRESE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Limited Authority under IAEA by Joseph Valenzuela, son.

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

1. Petitioner requests bond of \$13,000. Appears ok as it is for limited authority.
2. ~Proposed Form Order: 06/28/17

RECOMMENDATION

RFA. \$13,000 bond. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700637

CASE NAME: MARY A CUMMINGS

HEARING:

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

COUNSEL:

THERESA LEA CUMMINGS (PET)...DEBRA S POPINEAU
MARY A CUMMINGS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Theresa Cummings, daughter/executor/co-trustee

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

1. Will waives bond. The estate consists of \$219,575.36 of which \$9,600 is personal property.
2. The will conditionally incorporates decedent's Trust. Copy of trust is attached.
3. ~Proposed Form Order: 06/29/17

RECOMMENDATION

RFA. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700638

CASE NAME: MTR OF HOWARD LEE WHITEHEAD

HEARING:

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

COUNSEL:

MARGARITA GAYO (PET)...LENITA A SKORETZ
HOWARD LEE WHITEHEAD (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 Margarita Gayo, unknown relation

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

1. Petitioner requests bond of \$20,000 and that sales of real property are placed in blocked account. Net value of the estate consists of \$514,000 in real property. Court may wish to require bond of \$514,000. JTD
2. Section 5 is incomplete as to the existence of a domestic partner; issue; or predeceased child. Need verified supplement.
3. Petitioner indicated that named executors have not acted and that the estate needs to be probated. Need declinations to act by Pearlil Matheney and Boni Burns.
4. Petitioner is not listed in section 8 of the petition. Need verified supplement.
5. Section 8 fails to list the alleged spouse, all relationships, ages and addresses of persons mentioned in the will. Need verified supplement as to proposed spouse; Corean Burns; Boni Burns; and Terrell Johns.
6. Notice to Petition to Administer Estate and proof of service filed on 07/03/17; however, need notice to Corean Burns;, Boni Burns; and Terrell Johns.
7. ~Proposed Form Order: 06/30/17

RECOMMENDATION

Need to clear notes 2-6. Court's discretion re bond and note 2. If approved, set Accounting/Status Review for **11/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 09/18/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS03958

CASE NAME: MTR OF THE BAILY ANN MCNEIL SPECIAL NEEDS TRST

HEARING:

Hearing Re: GUARDIAN AD LITEM'S REPORT

COUNSEL:

BAILY ANN MCNEIL	(MIN)...JUDITH RUNYON
DIANE D HARKISON	(PET)...M DANIEL SAYLOR
BAILY ANN MCNEIL SPECIAL NEEDS TRUST	(TRU)...
MELODIE Z. SCOTT	(APP/TEE)...HORSPOOL & PARKER
KIRK HOFFMAN	(PET)...M DANIEL SAYLOR
PUBLIC GUARDIAN	(COUNTY COUNSEL)
BOND SERVICE OF CALIF/DARNELL	(PRO/PER)
AMERICAN CONTRACTORS INDEMNITY	

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Guardian ad Litem's Report.

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

1. Matter set at 06/26/17 hearing, wherein, the Court appointed Mitchell Roth as GAL.
2. Need report by GAL, Mitchell Roth.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

7/02/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300029

CASE NAME: MTR OF MATTHEW SHEA UPTON

HEARING:

Hearing Re: COURT INVESTIGATOR MEMO FILED 5/11/17

COUNSEL:

JACK L UPTON (CP)...PRO/PER

JULIA L UPTON (CP)...PRO/PER

MATTHEW SHEA UPTON (CTP)...JAMES B CHURCH

INLAND COUNTIES REGIONAL CENTER (TP)...STEVEN K BECKETT

FAIRVIEW DEVELOPMENTAL CENTER (PRO/PER)

GENERAL INFORMATION:

Continued from 07/24/17. Discussion held regarding conservatee's behavior and medication. Court orders IRC file a report on the issue of conservatee's behavior and their position on medications recommended by treating psychiatrist. Counsel is to file notice to IRD and the facility providing them with contact information conservator. Conservator to meet with IRC and treating psychiatrist regarding recommended medications.

THIS CASE IS SET FOR HEARING ON CI Memo filed 05/11/17

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

1. Matter set upon receipt and review of CI memo, wherein, the Court appointed James B. Church.
2. Need report by court-appointed counsel, James B. Church.
3. Need IRC report.

RECOMMENDATION:

Need reports, then Court's discretion.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400205

CASE NAME: TERRY LYNN HERBERT

VACATED

HEARING:

Accounting Review

COUNSEL:

JACQUELINE LEE DADGARKIANI
TERRY LYNN HERBERT

(CPE)...SHARISSE E MOLYNEUX
(CEP)...

XRED: CIVDS1415915 (Herbert-V- Ford Motor Company Et Al)

GENERAL INFORMATION:

Continued from 06/26/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to California McKay, daughter/executor on 05/12/16, full authority, \$20,000 bond.
2. Need Final Inventory and Appraisal.
3. Need Accounting or status report.

RECOMMENDATION:

Inquire status of accounting and Final Inventory and Appraisal. .

(nb/ww)

FUTURE HEARING DATES:

10/03/17 Second and final Account and Report of Jacqueline
Lee Dadgarkiani and Petition for allowance of fees

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500339

CASE NAME: REUBEN HARRINGTON III

HEARING:

FIRST AND CURRENT Account and Report of REUBEN HERMAN HARRINGTON
and Petition for allowance of fees filed.

COUNSEL:

REUBEN HERMAN HARRINGTON (PET)...MICHAEL C. MADDUX
REUBEN HARRINGTON III (CEE)...

Waiver of Court Fees and Costs filed by REUBEN HARRINGTON III is GRANTED
FEES WAIVED TO DATE: \$465.00

Waiver of Court Fees and Costs filed by REUBEN HARRINGTON III is GRANTED

GENERAL INFORMATION:

Conservatee passed away on 02/12/17.

Continued from **04/03/17** for review of supplements recently filed.

Continued from 06/26/17. The Court deems post-death accounting sufficient. The Court approves attorney fees as requested. The Court requests a verified supplement be filed as to the gross amount of the settlement and as to the distribution clause. Copy of 13100 may be attached to the verified supplement.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Conservator of the Person and Estate, Reuben H. Harrington (father).

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

1. Accounting period 07/28/16 to 03/27/17 (pre and post=death accounting period).
2. Assets on Hand \$39,948.97 consisting of cash.
3. Current bond of \$45,000. .
4. Petitioner requests compensation of \$500 for **14** hours conservator services. Generally described [LF, p. 3-4]. **Supplement filed 06/21/17 indicates travel includes 5 trips totaling 308 miles which is considered over-head per Local Rule 20-1406. JTD.**
5. Attorney requests fees of \$4,650.00. Billed at \$300/hour for 15.5 hours' attorney time. **Generally described [see supp. filed 06/21/17, LF, p3]. JTD.**
6. Supplement filed 03/28/17 includes a Disbursement on Schedule C [LF, p. 10] in the amount of \$33,333 to Attorney Maddux for court-approved contingency fee for

representation of conservatee in a personal injury case and for securing a personal injury settlement award.

7. No distribution clause. **Supp. filed 06/21/17 requests remaining funds be distributed to conservator without the need for formal probate. Supplement filed 07/10/17 affixes letter reflecting gross amount of settlement [LF, p5]. JTD.**
8. Proposed Order 02/21/17 reflects incorrect amount for inventory and appraisal; and will have to include applicable findings and proposed distribution required on a final account.
9. **Pr. C. § 13100 petition filed 07/12/17 reflects a different balance.**
10. Proposed Order 06/21/17 does not indicate this is also the final account in caption; hearing date is incorrect; reflects different end of account period; does not include distribution will be made via a Pr. C. §13100 petition; and includes blank Additional Orders.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **09/17/18.**

(nb)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600348

CASE NAME: RAMON LOREDO III

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

BONNIE LOREDO (PET)...PRO/PER
RAMON LOREDO III (CTP)...LISA FISHER

GENERAL INFORMATION

Continued from **01/30/17**. Referred to Court Investigator for investigation and report. Walter Moore appointed.

Continued from 05/15/17. Mr. Moore reports he will be filing a petition to terminate conservatorship.

Continued from 07/24/17 at request of Court to clear probate notes. Petition to terminate not filed yet.

THIS CASE IS SET FOR HEARING ON Conservatorship Management Conference re Transfer from Los Angeles County.

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

1. Bonnie Loredo aka Bonnie Rodriguez (mother) was appointed Conservator of person only and Letters were issued 02/10/10 in Los Angeles County Court.
2. This matter was transferred from Los Angeles County Superior on 06/30/16 as the Conservator resides and intends to continue to reside in San Bernardino County.
3. Court Investigator Report filed.
4. Need Post Move Change of Address
5. Need amended Letters to reflect San Bernardino County.
6. Conservatee is developmentally disabled. Court may wish to request IRC report.
JTD
7. Last PVP Report filed 02/10/10 by attorney Christina M. Stone. Court may wish to appoint counsel and require a report. **Need report by court-appointed counsel, Walter Moore.**
8. **Petition to terminate not filed as of review.**

RECOMMENDATION:

Need to clear notes 4-7, then Court's discretion.

(lh/nb/lh)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700287

CASE NAME: LINDA YVONNE IBARRA

SEE ALSO 17A

HEARING:

Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON

- **Petition #1 [filed 07/28/17]** for Appointment of Limited Conservator person only by Pablo Ibarra, father
- **Petition #2 [filed 08/08/17]** for Appointment of Limited Conservator, person only, by Ada Ibarra (mother)

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

Petition #1 by Pablo Ibarra (father)

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. List of required contacts and Section 11 of petition only lists mother and brother. Court to inquire if there are any further 2nd degree relatives that may need notice.
4. Petitioner seeks medical powers. Need Capacity Declaration.
5. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **IRC report filed.**
7. Need return of citation.
8. **Certificate of Completion of the Conservatorship Training Class filed.**
9. Need notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
10. CI report filed 08/21/17

11. ~Proposed Form Order: 07/28/17.

Petition #2 by Ada Ibarra (mother)

12. Petitioner did not request powers. However, indicates conservatee is developmentally disabled and requests special orders to place conservatee in a secured facility. Question if petitioner seeks medical powers?
13. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
14. Proposed conservatee is developmentally disabled. Need IRC report.
15. Petition is incomplete at item #11 list of relatives. Need completed form to include father and brother.
16. List of Required Contact information is missing father and brother. Need completed form.
17. Need Court Investigator report.
18. Need Notice of Hearing and proof of service.
19. Need return of Citation.
- 20. Certificate of Completion of the Conservatorship Training Class filed.**
21. Capacity Declaration filed 08/08/17.
22. ~Proposed Form Order: 08/08/17

RECOMMENDATION

Need to clear notes 4-7 & 10; and 12-19. If approved, set hearing for Compliance Review for **04/23/18** 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
Page: 17A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700287

CASE NAME: LINDA YVONNE IBARRA

SEE ALSO 17

HEARING:

Petition for APPOINTMENT OF CONSERVATOR

COUNSEL:

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

See prior matter #17.
(nb)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS00546

CASE NAME: HELEN C BOYLES

HEARING:
Accounting Review

COUNSEL:
CAROLANN R STONEY (PET)...ALLAR, SHELTON & O'CONNOR
CELIA D MCDONALD (PET)...ALLAR, SHELTON & O'CONNOR
HELEN C BOYLES (PCE)...

XREF: RPRRS02845 (Helen Boyles)

GENERAL INFORMATION:

On 6/20/06, Court was informed conservatee died on 11/9/05

Continued many times since 9/12/06 with no appearances on: 5/8/12, 6/12/12, 7/24/12, 8/28/12, 12/4/12, 4/30/13, 12/10/13 and 3/18/15.

On **4/29/15** Court set this OSC hearing as there was no appearance or I&A or accounting/status report filed. Attorney Keith Walker is ordered to personally appear. Continued from **08/06/15**. No appearance. Citation reissued to Keith Walker. Continued from **10/08/15 and 01/12/16**. Counsel cannot locate his clients. Counsel to file a motion to be relieved or file an accounting. Attorney Keith Walker ordered to appear. Continued from **03/22/16**. No appearances. Attorney Keith Walker ordered to appear. Continued from **05/10/16, 06/30/16 and 09/26/16**. No appearances. Petitioners and counsel are cited to appear at next hearing. Citation issued to: Carolann Stoney; Celia McDonald; and Keith Walker.

Continued from **12/19/16**. Counsel ordered to file either a waiver of accounting, or an accounting, and will continue the matter to allow for that filing. Former conservators Carolann R Stoney and Celia D Mc Donald are suspended. Court orders counsel to file a fee waiver on behalf of suspended conservators with waiver of accounting/accounting. Continued from **04/03/17** on Courts motion for accounting/status report to be filed. Petitioner urged to speak with counsel to assist with accounting/status report.

Accounting/status report to be filed 30 days prior to next hearing.

Continued from 06/26/17. Patrick Wright appointed as referee.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Carolann Stoney & Celia McDonald, daughters, appointed as co conservators of the person and estate on 07/26/05, no bond. **Conservatee died 11/9/05.**
2. The related probate matter RPRRS02845 shows that Letters of Special Administration were granted on 2/14/05 (and appear from the file they are still in effect). The petition for General Letters of Administration and the Petition to Determine Title to Real Property located at 8181 Salina Street, Rancho Cucamonga, CA, per Pr.C. 850 were taken off calendar on 6/12/12 for failure to appear and prosecute.
3. Final inventory filed 05/22/17 has the following deficiencies:
 - a. Checking account should be reflected on Attachment 1;
 - b. Real and personal property should be reflected on Attachment 2 and appraised by probate referee.
Need corrected inventory and appraisal.
4. Need 1st accounting including pre and post death balances.

RECOMMENDATION:

Need to clear notes 3 and 4. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra/abs/abs/nmt/cbr/kra/hfl/vet/gls/vet/gls/cbr/vet/cbr/vet/cbr/gls/kra/cbr//nb/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02219

CASE NAME: MATTER OF MARIAN DRAYMAN

HEARING:
Accounting Review

COUNSEL:

LINDA JOHNSON	(CPE/CP)...C.L. FARRELL
MARIAN DRAYMAN	(CEP/CTP)...ROBERT C CHANDLER
CARYN VELASCO	(OBJ)...PRO/PER
BARBARA DRAYMAN	(PRO/PER)

GENERAL INFORMATION

Continued from **03/27/17**. No appearances. Linda Johnson and/or counsel is ordered to be present if accounting not filed.

Continued from 06/26/17. Another asset found/accounting to be filed.

THIS CASE IS SET FOR HEARING ON Accounting Review (Trust)

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 04/08/15.
2. Need trust accounting or waiver of accounting beginning with 03/01/15.

RECOMMENDATION:

Inquire status of accounting or waiver of accounting.

(nb/ww)

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02769

CASE NAME: MTR OF JOHN H MIKEASKY

HEARING:

EIGHTH AND FINAL Account and Report of JOHNNY MIKEASKY and
Petition for allowance of fees filed.

COUNSEL:

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

XREF: SCVSS120419

GENERAL INFORMATION

Conservatee passed away on 03/26/17.

THIS CASE SET FOR HEARING ON Eighth and Final Account and Petition for Allowance
of Fees by Conservator of the Person and Estate, Johnny Mikeaskey ["Petitioner"-son].

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

1. Accounting period 02/22/16 to 05/23/17 (pre & post-death periods).
2. Assets on hand \$115,774.05 in cash.
3. Current bond of \$205,000.
4. Petitioner requests compensation of \$2,992.50. Billed at \$15/hour for 199.5 hours
of service. Generally described [LF, pgs. 9-10]. Does court wish to require
itemization? JTD
5. Attorney requests fees of \$27,859.50. Billed at \$375/hour for 54.65 hours' attorney
time and \$100-\$150/hour for 60.83 hours' paralegal time. Itemized [Acct.08/14/17,
LF pgs. 49-66]. JTD.
 - a. Order signed re 7th account did not reflect reduction in attorney fees. Petitioner
states that if the court order dated 05/11/17 was intended to grant attorney fees
in the amount of \$9,597.00, then the Law Office of James B. Church will provide
the conservatorship estate with a credit of \$375.00 and requests the
Conservator pay \$28,234.50 instead of \$27,859.50. JTD.
6. Attorney requests reimbursement of costs totaling \$900.00.
7. Disbursements – Schedule C [LF, p46] reflects a Chase Payment for Funeral
Arrangements in the amount of \$3,946.67 and various other uses of a credit card.

- Question whose credit card is being used, the total amount of liability, and whether reimbursement is being sought? Need verified supplement.
8. Petitioner requests that the funds of the Conservatorship be transferred to the children of the Conservatee. Pr. C. §13100 petition is incorporated in accounting [LF, p. 16-17] but does not include verification or signature of sibling, Steven Mikeasky. As Steven's whereabouts is purportedly unknown, question how his share of the estate is proposed to be distributed? Need verified supplement.
 9. Notice filed 08/21/17 does not include sibling, Steven Mikeasky. Need proper service or due diligence declaration.
 10. This estate does not appear to be ready to close as there is pending litigation as to unpaid facility fees, wherein, trial was set.
 11. ~Proposed Order 08/14/17

RECOMMENDATION

Need to clear notes 7-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **09/17/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CIF MS1600004

CASE NAME: JANICE PARK -V- JUDITH PARK

SEE ALSO 22

HEARING:

Court Trial set for ELDER/DEPENDANT ADULT ABUSE of PARK

COUNSEL:

JANICE LYNN PARK

(PET)...PRO/PER

JUDITH KATHLEEN PARK

(RP)...LENITA A SKORETZ

PATRICIA MAE LAWRENCE PARK

(PP)...PRO/PER

XREF: CONPS1600269 (*Patricia Mae Lawrence Park*)

No Notes – Court Trial.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600269

CASE NAME: PATRICIA MAE LAWRENCE PARK

SEE ALSO 21

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JANICE L PARK

PATRICIA MAE LAWRENCE PARK

(CP)...PRO/PER

(CTP)...CHANDLER LAW FIRM

XREF: CIFMS1600004

GENERAL INFORMATION

Ex Parte orders denied on **09/12/16**. Referred to Court Investigator for investigation and report. Attorney Jennifer M. Daniel appointed for proposed conservatee. Notice by Judicial Assistant.

Continued from 10/03/16. Parties report Patricia Park has moved into Judith Park's home. Parties note that in a related action, CIFNS1600004, Judith Park is restrained from removing Patricia Park for her placement and from being financially connected to Patricia Park. Ms. Daniel is ordered to go to Patricia Park's bank to ensure that there is no comingling of funds and that Judith Park has no access to Patricia Park's funds. The Court appoints Walter Moore as guardian ad litem for Patricia Park. Notice by Judicial Assistant.

Continued form 11/15/16. Court finds CIFMS1600004 should be heard in probate court. Court orders Judith Park to provide all bank records from 01/01/16 to 10/21/16 to Mr. Moore by 11/30/16. Court is concerned about Patricia Park's living and financial arrangements, and medical capacity declaration filed by Patricia Park. Janice Park intends to file a contempt action in related matter for Judith Kathleen's violation of court order. Court appoints Robert Sawicky as 730 expert in this matter. Mr. Moore to prepare order appointing Dr. Sawicky.

Continued from 02/28/17. Janice L. Park is ordered temporary conservator of Patricia Mae Lawrence Park, no bond. Order signed this date. Dr. Sawicky is working on 730 report waiting for subpoena documents.

Continued from 05/09/17. The Court advises the parties that the sealed Adult Protective Services documents she received yesterday have not been opened or reviewed at this time. PATRICIA PARK informs the Court that she has retained counsel, CHRIS NELSON, who could not be present today. The Court will not appoint an attorney not on our court-appointed list. The Court will allow

private counsel to be retained, but conservatee will bear the cost of privately retained counsel. JANICE PARK as temporary conservator will need to speak with Mr. Nelson about retaining his services. JENNIFER DANIEL is relieved as counsel of record for PATRICIA PARK. Ms. Carey-Wilson informs the Court that Adult Protective Services has provided a report to the Court regarding the appropriateness of PATRICIA PARK'S current residence in the sealed envelopes provided to the Court. The Court gives PATRICIA PARK two options of how to proceed. All existing orders shall remain in full force and effect.

Continued from **05/30/17**. The matter trailing other hearings in CIFMS1600004. The Court orders the redacted documents provided by Adult Protective Services be provided to Counsel in this matter along with the protective order. The Court orders that any monies received since the time the temporary conservatorship has been in place given to Janice Park for appropriate distribution. All temporary orders to remain in full force and effect. **Continued from 08/07/17 to be heard with Court trial in related case.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by non-resident, daughter.

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

- 1 Proposed Conservatee admitted 08/27/16 to a Rehab Center in Palm Springs (Riverside County).
- 2 Petitioner requests no bond be required but does not include Attachment 1c explaining why. However, review of the estimated value of property reflects income consisting of only Social Security and does not include estimated value of conservatee's real property. Need verified supplement with reasons to support why bond should not be required and estimated value of real property in order to determine a bond amount.
- 3 Petitioner seeks Pr. C. § 2590 powers. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
- 4 Need proper completion of Section 3b to petition, sections (1)(2)(4) and (7) via verified supplement.
- 5 Petitioner requests dementia powers; Need report of court-appointed counsel, Jennifer Daniel.
- 6 Petition, Section 1g, seeking medical powers is incomplete. Need completed Capacity Declaration (see note 6).
- 7 Capacity Declaration filed 11/10/16 is incomplete at item 5 and declarant's initials on page 3. Need same.
- 8 Need return of Citation.
- 9 Need Notice of Hearing with proof of service.
- 10 Need Certificate of Completion re Conservatorship Class.
- 11 Court to review Confidential Conservator Screening Form, #8. Need Attachment 8 to Confidential Conservator Screening Form.
- 12 Need 730 Report of Dr. Robert Sawicky.
- 13 Oral report presented by GAL, Walter Moore, on 10/17/16.
- 14 CI Report filed 11/09/16. **CI Special Report filed 04/27/17.**

- 15 **Objections filed 10/03/16 on behalf of proposed conservatee by Court-appointed counsel, Attorney Daniel.**
- 16 ~Proposed Form Order/Letters 09/02/16.

RECOMMENDATION: Matter is contested.

Need to clear notes 2, 4-12, bond to be determined. If approved, set hearing for Compliance Review for **04/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr. C. §2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **11/19/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(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: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700289

CASE NAME: MTR OF JUNE M FULLER

SEE ALSO 24

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.

Continued from 09/13/17 at request of counsel. Counsel stipulate to sub in Ms. Natalie Blickenstaff as conservator of person. Notice waived.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by ~~W.A. Hlavaty, PPF~~ **Natalie Blickenstaff, 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. **Need Duties of Conservator by Natalie Blickenstaff.**
3. **Need Confidential Conservator Screening Form by Natalie Blickenstaff.**
4. **Need Notification to Court of Address on Conservatorship form.**
5. Petitioner seeks medical powers. Need Capacity Declaration.
6. Petitioner seeks dementia powers. Need appointment of counsel for report.
7. Need dementia attachment.
8. Section 5 is incomplete as to whether proposed conservatee is developmentally disabled. Need verified supplement.
9. Need list of required contacts (Local form SB-12224).
10. **Need Certificate of Completion of the Conservatorship Training Class**
11. **Need notice of hearing and proof of service to GAL, Rose Rosado; brother, Albert C. Greisz; nominees in trust, Richard Kine and Gerry Olson.**
12. **Citation returned served.**
13. **Court Investigator report filed.**
14. No proposed order submitted.

RECOMMENDATION

Need to clear notes 2-11. If approved, set hearing for Compliance Review for **04/25/18** 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/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/18/17 TIME: 9:30 DEPT: S37P

CASE#: PRO PS1700404

CASE NAME: FULLER FAMILY TRUST

SEE ALSO 23

HEARING:

Hearing Re: RECEIPT OF REPORT BY GAL

COUNSEL:

W A HLA VATY

(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.

Continued from 09/13/17 at request of counsel. Stipulated agreement to be filed.

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. **Second report by GAL filed.**
3. Reply to GAL and declarations in support filed 08/08/17. **First supplement to Reply of W.A. Hlavaty filed.**
4. **Need stipulated agreement.**

RECOMMENDATION:

Court's discretion.

(nb/lh/lc/nb)