



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/21/17

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.

09/15 ww/lh

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

SEE ALSO 2

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(PET)...BORDEN LAW OFFICE
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY G PRENTICE	(OBJ)...PETER R NASMYTH JR
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR

XREF: CIPDS1700104 (*Estate of Angela Lizette Alba*)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status of Settlement.

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

1. Matter set on 05/18/17 competing matter for petition for administration/probate.

RECOMMENDATION:

Inquire status of settlement.

(lc)

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

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500171

CASE NAME: ANGELA LIZETTE ALBA

SEE ALSO 1

HEARING:

Hearing Re: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ANGELA LIZETTE ALBA	(DEC)...
ANNELISE PRENTICE	(MIN)...PETER R NASMYTH JR
CHRISTINA ERICKSON-TAUBE	(PET)...BORDEN LAW OFFICE
GOOD DEEDS, INC.	(PET)...JEFFREY A COLEMAN
ISABELLA PRENTICE	(MIN)...PETER R NASMYTH JR
JEFFREY G PRENTICE	(OBJ)...PETER R NASMYTH JR
KATHERINE PRENTICE	(MIN)...PETER R NASMYTH JR

XREF: CIPDS1700104 (*Estate of Angela Lizette Alba*)

GENERAL INFORMATION

Continued from **4/9/15** and **6/26/15** Bradley Damron appointed Special Administrator.
Continued from **7/30/15**, **9/17/15** and **10/29/15** for parties to meet and confer. Jeffrey
Prentice appointed GAL for Katherine Prentice.

Continued from 1/20/16, 03/16/16, 05/18/17 and 07/20/17

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by Bradley Damron (fiancé)
- Petition 2 – Petition for Letters of Administration with full authority under IAEA by Jeffery Prentice (former spouse)

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

Petitioner 1 – Bradley Damron, fiancé.

- 1 Will waives bond. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
- 2 Decedent left 3 minors age 13 and under.
- 3 **Objection and will contest filed on 03/25/15 by Jeffrey Prentice, former spouse. Need summons issued and set for hearing Pr.C. § 8250.**

4 **Answer to will contest filed by Good Deeds Inc. on 04/13/16.**

5 ~Proposed Form Order: 02/23/15.

Petitioner 2 – Jeffrey Prentice, former spouse.

1. Petitioner is seeking bond of \$296,000.
2. Decedent left 3 minors age 13 and under.
3. ~Proposed Form Order: 05/18/15.

RECOMMENDATION

Need summons. Matter is contested; petitioner 1 appears to have higher priority. If approved, need determination re bond and set hearing for Accounting/Status Review on **11/29/18**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(lc/sa/lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601092

CASE NAME: THE BRAYDEN HANSON SPECIAL NEEDS TRUST

HEARING:

Hearing Re: CONFIRMATION OF SALE HEARING

COUNSEL:

BRAYDEN HANSON (BEN)...
LAURI HANSON (PET)...KEVIN URBATSCH
THE BRAYDEN HANSON SPECIAL NEE (TRU)...

XREF CIVDS913403 (Hanson v County of San Bernardino)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON confirmation of Sale hearing

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

1. Court approved establishment of SNT on 05/04/17. Herb Thomas appointed trustee with \$2,767,000 bond.
2. Court authorized purchase of residence for beneficiary on shortened time on 07/27/17.
3. Need proof of sale and how deed is held.

RECOMMENDATION

Inquire status of note 3.

(lc)

Future Hearing: 08/02/18 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700632

CASE NAME: MTR OF ALICE G CAMPA

HEARING:

Petition for PROBATE OF WILL AND LETTERS TESTAMENTARY W/FULL
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

ALICE G CAMPA (DEC)...
SONIA BRISCOE (PET)...DONALD M MEDEIROS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Sonia Briscoe, daughter/executor

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

1. Will waives bond. Estate value \$190,000.00. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. ~Proposed Form Order: 06/28/17

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700633

CASE NAME: BRENDA JOYCE JOHNSON

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AIAE

COUNSEL:

BRENDA JOYCE JOHNSON (DEC)...
MICHAEL MOORE (PET)...MICHAEL C MADDUX

GENERAL INFORMATION:

Letters for Special Administrator issued to Michael Moore on 07/27/17, no bond.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Michael Moore, son

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

1. All heirs waive bond. Net estate value \$151,849 with personal property to be determined. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. There is a bond waiver for Joe Moore; however, Joe Moore appears to be deceased. Court to clarify.
3. ~Proposed Form Order:06/29/17

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 09/21/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700642

CASE NAME: MTR OF GILDARDO MORALES CANTE

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL AUTHORIZATION
UNDER IAEA

COUNSEL:

GILDARDO CANTE	(PET)...PRO/PER
GILDARDO MORALES CANTE	(DEC)...
LANI ROMANI CANTE	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Lani Cante and Gildardo Cante, daughter/son

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

1. All heirs waive bond. Petition indicates personal property in the amount of \$15,000.00 and real property is to be determined. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication.
4. ~Proposed Form Order: 06/30/17

RECOMMENDATION

Need to clear notes 2 and 3. Court's discretion re bond. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 09/21/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600132

CASE NAME: MTR OF NAYELY MARGARITA DIAZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSA E HERNANDEZ

COUNSEL:

NAYELY MARGARITA DIAZ (CTP)...JAMES B CHURCH
ROSA E HERNANDEZ (CP)...PRO/PER

GENERAL INFORMATION

OSC set on 06/08/17. Conservator Rosa Hernandez to personally appear on 7/27/17.
Continued from 07/27/17 to complete compliance documents. OSC vacated.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Rosa Hernandez, mother, appointed limited conservator of the person only on 09/29/16.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 filed on 08/31/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed 08/23/17; however section 3 of proof is incomplete as to way of mailing. Court may wish to clarify on record if it was mailed at post office or deposited into mail collection box.
4. Care Plan in accord with Pr.C.§2352.5 filed 08/31/17; however, it is completed in Spanish. JTD.

RECOMMENDATION

Court's discretion re notes 3 & 4.

(lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 09/21/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600201

CASE NAME: ASIA SMITH

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JAMMIE SMITH

COUNSEL:

ASIA SMITH (CEE)...JEANNE E KENNEDY
JAMMIE SMITH (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Jammie Smith, mother, appointed **limited** conservator of the person only on 02/23/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 05/23/17 and corrected notice filed 09/13/17; however the date of the order in section 5 is incorrect. JTD
3. Determination of Conservatee's Appropriate Level of Care form, Care Plan filed 05/23/17.

RECOMMENDATION

Court's discretion re note 2.

(lc/ww)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700212

CASE NAME: JAKE KURTEN

HEARING: Petition for Appointment of Conservator

COUNSEL:

JAKE KURTEN	(CTP)...
LINDA KURTEN	(CP)...ROSSANA MITCHELL
TODD KURTEN	(CP)...ROSSANA MITCHELL

GENERAL INFORMATION

Todd and Linda Kurten appointed temporary co-conservators of the person on 06/14/17.
Continued from 07/20/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Todd and Linda Kurten (parents).

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

1. It appears a limited conservatorship is appropriate. Does Court wish to deem this petition for limited conservatorship?
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
4. Petition does not request medical powers; however, item #9 indicates medical treatment. Need verified supplement as to whether medical powers are sought. If so, need Capacity Declaration.
5. Section 11 of Petition does not list petitioners/parents. Need verified supplement.
6. List of required contacts does not list petitioners/parents. Need completed form.
7. Need Certificates of Completion of the Conservatorship Training Class.
8. Need return of Citation.
9. Need Notice of Hearing and proof of service, including 30 days' notice to Inland Regional Center.
10. Court Investigator report filed 07/19/17.
11. No proposed order for general petition.

RECOMMENDATION

Need to clear notes 4-9. If approved, set hearing for Compliance Review for **04/26/18** 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/lc)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700220

CASE NAME: MTR OF ANTHONY ALEXANDRO ISIDRO OROZCO

HEARING: Petition for Appointment of Conservator

COUNSEL:

ANTHONY ALEXANDRO ISIDRO OROZCO (CEP)...
LUCILA OROZCO REYES (CPE)...PRO/PER
MARCO ANTONIO ISIDRO (CPE)...PRO/PER

GENERAL INFORMATION

Continued from 08/03/17. *Interpreter*. Matters COMO27392 and RIF082055 have been settled. Mr. Isidro is not on probation. Oral motion approved to amended as to person only, estate no longer requested. IRC to be notified and training class to be completed.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Marco Mendoza and Lucila Reyes; parents.

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

1. As proposed conservatee appears to be developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
2. Petitioners seek medical powers. Amended Capacity Declaration filed 06/07/17 is incomplete at section 5 as to whether proposed conservatee will attend hearing. JTD.
3. Section 11 indicates mother and father are the only relatives within the 2nd degree.
4. As proposed conservatee appears to be developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). IRC to be notified. **Need** report.
5. Need Notice of Hearing and Proof of Service with 30 days' notice to Inland Regional Center.
6. Need return of Citation.
7. Need Certificates of Completion of the Conservatorship Training Class.
8. Court Investigator report filed 07/27/17.
9. ~Proposed Form Order: 06/07/17

RECOMMENDATION

Need to clear notes 4-7. If approved, set hearing for Compliance Review for **04/26/18** for the filing of the required documents and hearing re Accounting Review for **11/29/18**. Any accounting to be filed 30 days in advance.

(lh/lc)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS8903

CASE NAME: IN THE MATTER OF MICHAEL ALLEN STEPHENS

HEARING: TWELFTH Account and Report of DANNY R STEPHENS and Petition for allowance of fees filed.

COUNSEL:

DANNY R STEPHENS	(CE)...HARTNELL LAW GROUP
DANNY R STEPHENS	(CPE)...HARTNELL LAW GROUP
DANNY R STEPHENS	(CPE)...HARTNELL LISTER & MOORE
MICHAEL ALLEN STEPHENS	(CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 12th Waiver of Final Account, Petition for Distribution and Fees by Danny Stephens, brother.

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

1. Conservatee passed away on 03/25/17
2. Accounting period 009/01/15 – 03/25/17.
3. Assets on hand \$148,156.88; cash and personal property.
4. Petitioner is sole heir and requests accounting be waived. However, question under what authority the accounting may be waived as the conservatorship does not qualify under Pr.C. § 2628. Need verified supplement.
5. Petitioner seeks assets be distributed to himself per Pr.C. § 13100.
6. Petitioner waives compensation.
7. Attorney requests fees of \$9,135 for 37.8 hours at \$50/425 per hour for paralegal and attorney services. Itemized. [08/11 LFpgs15-17]. JTD
8. Petitioner seeks exoneration of \$40,000 bond. Bond shall generally be exonerated at discharge; however, petitioner is sole heir. JTD
9. ~Proposed Order: 08/11/17.

RECOMMENDATION:

Need to clear note 4. If approved, set hearing on the filing of receipts and final discharge for **09/27/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 09/21/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1700093

VACATED

CASE NAME: MTR OF VIRGINIA L ESPINOSA

HEARING:

Hearing Re: COURT TRIAL ON PETITION FOR PROBATE OF WILL

COUNSEL:

CAROL LEE HYDER

(OBJ)...PRO/PER

CARRIE STRADELLA

(PET)...MITCHELL I ROTH

CARRIE STRADELLA

(PET)...RODRIGO LAW FIRM

VIRGINIA L ESPINOSA

(DEC)...

Future hearing dates: 11/01/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 1

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: CIP DS1700097

CASE NAME: IN RE: LIU ZIJIA

HEARING:

OSC re: PROOF OF FUNDING OF STRUCTURED SETTLEMENT filed by YE
JINFENG

COUNSEL:

LIU ZIJIA
YE JINFENG

(M/P)...ALDER LAW PC
(PET)...ALDER LAW PC

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Proof of Funding of Structure Settlement.

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

1. OSC set on 08/10/17 when Minor's Compromise was approved as modified minus the worker compensation lien and fees for Mitchell Roth.

RECOMMENDATION

Inquire status of funding.

(lc)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

SEE ALSO 3

HEARING: Hearing Re: Status of second & final account by S.Dimeff

COUNSEL:

ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT	(TP)...LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

GENERAL INFORMATION

Matter reset on 2/1/17, court noted that 2nd and Final Account filed by Suzanne Dimeff, matter is contested and set for 08/16/17. Status of account was set for this date.

Continued from 03/30/17, 06/29/17 and 07/06/17. Matter is contested and set for trial.

THIS CASE SET FOR HEARING ON Second Amended **(03/24/16)** First and Final Account by **prior administrator, Suzanne Cowan Dimeff:**

1. Accounting period 01/16/10 to 11/24/15 (5.10 years)
2. Zero assets on hand.
3. Partial No.1 and corrected I&As filed. **Need Final Inventory and Appraisal.**
4. Petitioner does not seek compensation.
5. Petitioner requests extraordinary fees of \$81,993.00 for years of work, and reimbursement of costs totaling \$41,872.46 including cost of legal counsel which her law firm advanced [LF, p. 41-49]. Billed at the lower rate of \$375 /hour for attorney time, \$65/hour for administrative support and reduced paralegal fees of \$75/hour. Itemized [LF, pgs. 29-40]. JTD.
6. Petitioner requests the total amount of compensation in the sum of \$123,865.46 to be a lien against Trust Assets. JTD.
7. Petitioner informs the Court that Successor Personal Representative, Alex Borden, was appointed Special Administrator by Ex Parte Application, without bond on 11/06/14, for the express purpose of substituting into Los Angeles Civil Action, Case Number YC069475, wherein, the petitioner estimates the value of decedent's one-half interest in these community property assets in exclusive control of the

estranged spouse to be \$1,694,500.00. Petitioner indicates that on 06/26/15, with no Notice or explanation to this Court, Administrator Borden dismissed this Civil Action, without prejudice. Estranged spouse, Anders Ljungwe then transferred a \$1M annuity, titled in the name of the Ljunge Family Trust, and declared by Siv Ljungwe as having her one-half interest funded into her separate trust, and into his personal name. Does Court wish to set a Surcharge Hearing? JTD

8. Copy of the Siv Ljungwe Trust filed 06/24/10 and 07/06/15.
9. **Objections to First Accounting filed 6/1/15 by Alex Borden administrator, CTA to prior accounting. Supplement to Objections filed 8/19/15**
10. **Response to Objections filed 09/03/15 and 09/13/16 by Suzanne Dimeff.**
11. **Objections to 2nd Amended First Account filed 9/6/16 by Marilyn Kriebel.**
12. **Notice of lodgment in support of objections filed on 09/07/16.**
13. **Request for judicial notice filed 10/28/16 re San Diego Case and appeal.**
14. **Statement of issues filed 10/28/16.**
15. **Status Conference Report filed by Marilyn Kriebel.**

RECOMMENDATION:

Need to clear note 3. Matter is opposed. If approved, set hearing for receipts and final discharge for **09/27/18**.

(sa/lc)

Future Hearing: 04/05/18 Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

SEE ALSO 2

HEARING:
Readiness Calendar

COUNSEL:

ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT	(TP)...LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

Readiness – No notes – JTD

Future Hearing: 04/05/18 Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400984

VACATED

CASE NAME: MANUEL D PEREZ

HEARING:

Accounting Review

COUNSEL:

BRIANNA ESCONTRIAS	(MIN)...
GLORIA M CHAVARRIA	(PET)...G STEVEN GACKLE
HELENA PEREZ	(OBJ)...THE RYAN LAW FIRM
HELENA PEREZ	(PET)...MCGARRIGLE, KENNEY &
LINDA MAXWELL	(PET)...ELISABETH KEMPE-OLINGER
MANUEL D PEREZ	(DEC)...MITCHELL I ROTH
MITCHELL I ROTH	(PET)...PRO/PER
RAYMOND PEREZ	(MIN)...

Future hearing dates: 12/06/17 First and Final Account and Report of Linda Maxwell

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500514

CASE NAME: ANN M CHAFFEE

HEARING: Probate status report filed.

COUNSEL:

ANN M CHAFFEE	(DEC)...
MELODIE Z SCOTT	(PET)...BRYAN C. HARTNELL
PACIFIC WESTERN BANK	(TP)...HEMAR, ROUSSO & HEALD, LLP

XREF: CONPS1100153 (*Ann Chaffee*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Melodie Scott, on 02/26/16; full authority, \$55,000 bond.
2. Petitioner seeks an additional year to close the estate in order to locate beneficiaries and determine who has pre or post deceased decedent.
3. Need final Inventory and Appraisal.
4. ~Proposed Order: 07/19/17.

RECOMMENDATION

Need notice and Inventory and Appraisal. If approved, set Accounting/Status Review for **07/12/18**. 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

Page: 6

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500815

CASE NAME: ****MASTER FILE PATRICIA GAIL GOOD SHUERMAN****

SEE ALSO 7, 8

HEARING:

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

COUNSEL:

ANNE CONSTANCE DEL VALLE	(PET)...STEPHEN PENNER
HERMANN SCHUERMANN	(PET)...JAMES P CRONN
PATRICIA GAIL GOOD SCHUERMANN	(DEC)...

GENERAL INFORMATION:

Continued from **10/06/15 and 12/15/15**. Case PROPS1500926 is to be consolidated into this case. Both parties to be file written objections and serve by 01/15/16 4pm.

Continued from **02/02/16, 03/22/16, 05/24/16, 11/07/16, 03/16/17 and 06/22/17**.

THIS CASE IS SET FOR HEARING ON

Petition -1: Petition for Letters Testamentary with full authority under IAEA by Hermann Schuermann, surviving spouse.

Petition -2: Petition for Letters Testamentary with full authority under IAEA by Anne Constance Del Valle, granddaughter.

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

Petitioner 1 - Hermann Schuermann, surviving spouse:

1. Will waives bond. Estate consists of real property of \$441,000. JTD
2. The will conditionally incorporates decedent's Trust. **Need** Certification of Trust that meets the requirements in Pr. C. § 18100.5, to include a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD.
3. ~Proposed Form Order/Letters 08/28/15.

Petitioner 2 - Anne Constance Del Valle, granddaughter.

4. Will waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. § 8571. Estate consists of real property of \$415,897. Value stated less than first petition. JTD.
5. ~Proposed Form Order/Letters 10/06/15.

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.

6. **Opposition filed by Herman Schuermann on 01/15/16 alleging Decedent executed the Arizona Will after suffering a stroke; was mentally and physically impaired by medications and cancer at the time she purportedly executed the Arizona Will; and the Arizona Will is inconsistent with the previously expressed testamentary intent of the Decedent and the change procured by Del Valle's undue influence over the Decedent.**
7. **Objection filed by Anne C. Del Valle on 01/19/16.**

RECOMMENDATION:

Need to clear note 2; matter is contested. If approved, set future hearing for Accounting/Status Review on **11/29/18**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.

(nb/lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500815

CASE NAME: ****MASTER FILE PATRICIA GAIL GOOD SHUERMAN****

SEE ALSO 6, 8

HEARING:

Hearing re: Petition for Probate, Letters of Testamentary With
Full Authority Under IAEA..

COUNSEL:

ANNE CONSTANCE DEL VALLE	(PET)...STEPHEN PENNER
HERMANN SCHUERMAN	(PET)...JAMES P CRONN
PATRICIA GAIL GOOD SCHUERMAN	(DEC)...

See notes on matter 6.

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500815

CASE NAME: ****MASTER FILE PATRICIA GAIL GOOD SHUERMAN****

SEE ALSO 6, 7

HEARING:
Trial Setting Conference

COUNSEL:

ANNE CONSTANCE DEL VALLE	(PET)...STEPHEN PENNER
HERMANN SCHUERMAN	(PET)...JAMES P CRONN
PATRICIA GAIL GOOD SCHUERMAN	(DEC)...

TSC – No notes - JTD

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501156

CASE NAME: PAMELA JEAN KEENE

HEARING:

Hearing Re: Status Conference

COUNSEL:

BARBARA BATES	(PET)...MATTHEW D FISCHER
NANCY DRUMMON	(PET)...MATTHEW D FISCHER
PAMELA JEAN KEENE	(DEC)...
WAYNE ZEI	(OBJ)...KEITH S WALKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Conference.

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

1. Matter set at 02/23/17 readiness hearing regarding Petition to Determine Succession to Real Property.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600004

CASE NAME: MTR OF CHARLES SPEAKER SISK

HEARING:

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

COUNSEL:

CHARLES SPEAKER SISK (DEC)...
MELANIE SWEET (PET)...THOMAS W DOMINICK

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Melanie Sweet, daughter.

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

1. Petitioner is sole beneficiary, waives accounting and statutory compensation.
2. Attorney requests statutory fees of \$7,434.38. Ok.
3. Attorney requests extraordinary fees of \$1,096.75 for 4.05 hours at \$110/350 per hour for paralegal and attorney services. Itemized [Acct. 07/19 LFpg14-15].
4. Petitioner requests a reserve of \$1,500.
5. ~Proposed Order: 07/19/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **09/27/18**.

(lc)

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600350
CASE NAME: MTR OF ROBERT BOWSHIER
HEARING: FIRST & FINAL Account and Report of PAUL BOWSHIER and Petition
for allowance of fees filed.

COUNSEL:

MARIA BOWSHIER (TP)...PRO/PER
PAUL BOWSHIER (PET)...PICKELSIMER LAW OFFICES
ROBERT BOWSHIER (DEC)...

Request for Waiver of Court Fees and Costs filed by **MARIA BOWSHIER** is GRANTED

Fee waiver amount due \$90.00 for motion fees on 01/12/17 for Maria Bowshier

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Paul Bowshier, son.

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

1. Petitioner and attorney request statutory fees of \$4,500 each. However, calculation and addition appear to be incorrect. Statutory fees seem to be \$5,350. Need calculation based with loss of sale properly totaled Pr.C. § 10800.
2. Accounting period stated is 09/16/16 – 05/31/17; however, period begins at date of death as also reflected in date of death value of Inventory and Appraisal. Need verified supplement.
3. Accounting does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. Need a properly balanced summary of account and accounting schedules.
4. Exhibit 3 indicates reimbursement invoice of \$3,789.01; however, it is unclear if petitioner is seeking reimbursement. Need verified supplement.
5. Attorney seeks reimbursement of costs totaling \$870 for filing fees of \$425 each; however, appears to total \$850. Court to clarify.
6. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 1-4. If approved, set hearing on the filing of receipts and final discharge for **09/27/18**.

(lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700464

VACATED

CASE NAME: MTR OF DENNIS JONES

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

DENNIS JONES

(DEC)...

SHLLEY E PEEBLES

(PET)...GEORGINA LEPE

Bond filed 09/06/17 and letters issued.

Future Hearing:

10/18/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700465

VACATED

CASE NAME: CARMEN TOSCANO

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

CARMEN TOSCANO

(DEC)...

GUADALUPE L TOSCANO

(PET)...GEORGINA LEPE

Bond filed 09/14/17 and letters issued.

Future Hearing:

10/18/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 09/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700566

CASE NAME: MARCEY LYNN HARRIS-SJOLANDER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

MARCEY LYNN HARRIS-SJOLANDER (DEC)...
SANDRA LEE HOLSTEAD (PET)...ROMBOUD

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Sandra Holstead, mother

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

1. Petitioner is the sole heir and waive bond. Net estate value \$80,000.00 with \$50,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. ~Proposed Form Order: 06/08/17

RECOMMENDATION

RFA. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(cs/ww)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200150
CASE NAME: MTR OF DOLORES DELGADILLO
HEARING: Hearing re Final Discharge

COUNSEL:

D. HERSHEL WILSON	(PET)...
DAVID HERMAN	(CPE)...
DOLORES DELGADILLO	(CEP)...HARTNELL LAW GROUP
PEARL WARDLOW	(CPE)...KELLY L PEXTON
PEARL WARDLOW	(OBJ)...KELLY L. PEXTON, ESQ
U.S. SPECIALTY INSURANCE COMP	(LANAK & HANNA

GENERAL INFORMATION

Continued from 10/06/16 and 12/15/16. Court orally amended 2nd account that the vehicle can be distributed to Pearl Wardlow as she is sole heir.

Continued from 02/09/17. Second account approved as amended. Counsel to submit order after hearing.

OSC set on 04/20/17 when there was no appearance. Attorney Kelly Pexton to personally be present.

OSC continued from 05/25/17. Court imposed sanctions of \$500; as Attorney Kelly Pexton failed to appear/comply. Attorney Pexton and Pearl Wardlow to appear.

Continued from 07/27/17. OSC vacated.

THIS CASE SET FOR HEARING ON /Final Discharge.

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

1. Second and Final Account of Pearl Wardlow was granted on 10/06/15; Court orally amended 2nd account that the vehicle can be distributed to Pearl Wardlow as she is sole heir. **Order rejected on 08/14/17. Need corrected order for second account with distribution.**
2. No receipts needed as Pearl Wardlow is sole heir.
3. **Need** Ex Parte Petition for Final Discharge and Order once the above order is approved.

RECOMMENDATION

Need to clear notes 1 & 3.

(lc/ww)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300006

CASE NAME: SIERRA MARTIN

HEARING:

FIRST Account and Report of MARY MARGARET MARTIN and Petition
for allowance of fees filed.

COUNSEL:

MARY MARGARET MARTIN (CP)... JOSEPH P FOLEY
SIERRA MARTIN (CTP)...

XREF: CIVVS1105356 (*Sierra Martin*)

GENERAL INFORMATION

Continued from 03/30/17 and 05/25/17 for counsel to file supplement re concerns read into
record regarding accounting.

Continued from 07/27/17. Rose Rosado appointed GAL for conservatee.

THIS CASE SET FOR HEARING ON 1st Account Current of Trust and Petition for
discharge of bond by Mary Margaret Martin, paternal grandmother.

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

1. Mary Margaret Martin, paternal grandmother, was appointed limited Conservator of **person only** on 04/03/13. Mary is also Trustee of Special Needs Trust created on 04/15/14 due to an automobile accident.
2. Accounting period 04/15/14 – 03/26/16.
3. Assets on hand \$1,332.97.
4. Petitioner requests exoneration of \$20,000 bond. JTD
5. Disbursements indicate car loan of \$488 and \$2,000 for home equity loan payments [Acct.01/18 LFpg6-7]. Question who owns the vehicle and real property as there are none listed in the property on hand? **Supp 03/27/17: Petitioner states that she owns the vehicle. The SNT is not the lienholder. Court to inquire how these payments fit under "special needs" and why SNT is not the lienholder. Supp 07/25: Payments allegedly reimbursements for household expenses and repairs. Court to clarify situation with vehicle.**
6. Need proof of service of supplement.
7. Need report of GAL.
8. No proposed order.

RECOMMENDATION

Need to clear notes 6-7, clarify note 5. If approved, set Accounting/Status Review for **11/22/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500124
CASE NAME: LUCILLE SABBATH GRIFFIN
HEARING: PETITION FOR APPROVAL OF THE FOURTH Account and Report of
YOLANDA QUAM and Petition for allowance of fees filed.

COUNSEL:

LUCILLE SABBATH GRIFFIN (CEP)...
YOLANDA QUAM (CPE)...CHO, SHEASBY, CHUNG &
YOLANDA QUAM (PET)...CKB VIENNA, LLP

XREF: PROPS1400376 (Lucille Sabbath Griffin Revocable Trust)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 4th Account Current for Conservator and Petition for Allowance of Fees by Yolanda Quam, daughter.

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

1. Need order for 3rd accounting with assets on hand and correct fees.
2. Accounting period 02/01/16 – 02/28/17.
3. Assets on hand \$55,034.55 of which \$5,034.55 is cash.
4. Attorney Sheasby seeks fees of \$13,860 for 46.3 hours at \$300 per hour, payable by Trust. Itemized [Dec.08/15 LFpg5 et.seq].
5. Conservator seeks fees of \$3,180 for 79.5 hours at \$40 per hour, payable by trust. [Dec.08/15 LFpg7].
6. Conservator's Trust does not appear to be court supervised; however, a bond is filed for Trustee 05/30/14. Court to clarify.
7. Need Conservatee's list of addresses per local rule 20-1406 (a).
8. Need financial statements covering 02/28/17 per local rule 20-1404(c) and Pr. C. § 2620(c).
9. Need notice of hearing and proof of service.
10. Proposed order 08/15/17; however, ending accounting period is incorrect [03/01/17].

RECOMMENDATION

Need to clear notes 1, 7-9. If approved, set hearing on the next accounting review for **06/27/18** (if one year) or **06/28/19** (if two years). Accounting to be filed 30 days in advance.

(lc)

Future hearing dates: 09/27/17 Motion to be relieved as Counsel by ***M. Stephen Cho***

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

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600242

CASE NAME: MTR OF AURORA ZEPEDA

HEARING:

Petition for APPROVAL AND PAYMENT OF ATTORNEY'S FEES AND COSTS
TO COURT APPOINTED ATTORNEY

COUNSEL:

ANTONIO M ZEPEDA (CPE)...DONNASUE ORTIZ
AURORA ZEPEDA (CEP)...MITCHELL I ROTH
SHEILA MUSA (OBJ)...KROLOFF, BELCHER, SMART,PERRY

XREF FAMSS1506546 (Antonio Zepeda n Aurora Zepeda)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition For Attorney Fees by Mitchell Roth.

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

1. Petitioner, Mitchell Roth, was appointed counsel for conservatee on 08/24/16. Conservatorship matter was withdrawn on 06/01/17.
2. Petitioner requests fees of \$18,337.50 for 48.9 hours at \$375 per hour along with costs of \$18.98 for a total of \$18,356.48. Itemized [Pet. 08/15/17LFpg9-21].
3. Petitioner requests that in the event attorney's fees are not paid, that a lien on the real property located in Chino Hills be allowed.
4. ~Proposed Order: 08/15/17.

RECOMMENDATION

Court's discretion.

(lc)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600250

CASE NAME: SYBIL JOYCE MUMMERT

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MICHAEL C. SNOW

COUNSEL:

MICHAEL C. SNOW (PET)...HARTNELL LAW GROUP
SYBIL JOYCE MUMMERT (CEE)...BROWN WHITE & NEWHOUSE, LLP

GENERAL INFORMATION:

Continued from 07/20/17.

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Michael Snow, son, appointed conservator of the estate only on 12/15/16, \$322,000 bond.
2. Determination of Conservatee's Level of Care and Care plan filed 08/21/17.
3. Notification of Conservatee's rights filed 12/21/16. Need to complete mailed service on Counsel Jack Osborn per Pr.C. §1214.
4. Partial Inventory and Appraisal filed indicating \$0 assets. Need final.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
6. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

Need to clear notes 3-6.

(ww/lc)

Future Hearing: 02/22/18 *Accounting Review.*

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

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700214

CASE NAME: DANIELLE JEAN LENOBLE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DANIELLE JEAN LENOBLE (CEE)...MITCHELL I ROTH
SHERYL LENOBLE (PET)...GARY HARRISON

GENERAL INFORMATION

Ex parte orders denied on 06/15/17. Attorney Mitchell Roth appointed counsel.

**Continued from 07/20/17. Citation is waived as proposed conservatee is present.
Court appoints Donnasue Ortiz to draft the SNT. Attorney Roth to submit Order**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator of the person and estate by Sheryl LeNoble (mother)

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

1. Petitioner requested trust funds \$192,409.18 be deposited in a blocked account. See next note.
2. Petition indicates estate assets consist primarily of personal property held in a Trust Account with Access Advantage, and survivor's benefits of \$1,900 per month from her deceased father's estate.
 - a. Need SNT by Donnasue Ortiz per 7/20/17 minute order.
3. Proposed conservatee seeks the power to retain money in the amount of \$192,000 held in conservatee's trust account, and to seek court's permission to withdraw funds. JTD
4. Petitioner seeks powers under Pr. C. §2590 (p) to pay, collect, compromise claims upon the conservatorship to provide for conservatee's necessities, and to apply for, collect and manage her survivor benefits of \$1,900 per month. JTD
5. Proposed conservatee is developmentally disabled. Report of Mitchell Roth filed 07/18/17.
6. Petitioner requests Orders related to powers under Pr. C. §1830(b) be granted. JTD
7. Petitioner seeks medical powers. Need Capacity Declaration.
8. Proposed conservatee is developmentally disabled. Need IRC report.
9. Need Certificate of Completion of the Conservatorship Training Class.

10. Need return of Citation.

11. Proof of Service of Notice of Hearing filed 07/24/17; however, proof is incomplete at item 4a as to date of mailing. Need amended Proof of Service.

12. Court Investigator report filed 07/12/17.

13. See Confidential Screening Form filed 06/08/17 [LF, pg4].

14. ~Proposed Form Order: 06/08/17

RECOMMENDATION

Need to clear notes 2, 7-11. If approved, set hearing for Compliance Review for **04/26/18** for the filing of the required documents and hearing re Accounting Review for **11/29/18**.

Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh)

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 09/21/17 TIME: 9:30 DEPT: S36P

CASE#: PRO PS0900738
CASE NAME: MARIA ISABEL RUCOBO
HEARING: FIRST AND FINAL Account and Report of SEBASTIAN CARLOS and
Petition for allowance of fees filed.

COUNSEL:

AMERICAN CONTRACTORS INDEMNITY (PET)...LANAK & HANNA	
INHERITANCE FUNDING COMPANY, I	(PRO/PER
JAMES B CHURCH	(PET)...JAMES B CHURCH &
JESSE REYNA	(PET)...CANDICE A GARCIA-
MARIA ISABEL RUCOBO	(DEC)...
PRINCESSA CARLOS	(MIN)...
REY CARLOS	(MIN)...BRYAN C. HARTNELL
RONALD OLUND, IN HIS CAPACITY	(E JOAN NELMS
SEBASTIAN CARLOS	(PET)...DUANE P BOOTH

XREF: CIVDS1203223 (*American v Olund*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by **Sebastian Carlos, father of children.**

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

1. Letters of special administration issued to **Jesse Reyna**, son 10/07/09, then to **Ronald Olund** 12/08/09. Letters of special administration issued to **Sebastian Carlos** on 04/26/10, letters of general administration issued **Sebastian Carlos**, minor children's father 08/12/10, \$100,000 bond.
2. Ron Olund owes the estate \$11,048 from left over surcharge judgment.
3. Administrator and attorney Booth seek statutory fees of \$26,704.75 each. Ok.
4. Attorney Duane Booth seeks extraordinary fees of \$156,503.75 for over 600 hours of work. Details filed 11/15/16 in prior motion for fees.
5. Administrator seeks reimbursement of costs of \$2,500. Itemized [Acct. 07/06/17LFpg84-86].
6. Administrator seeks authorization to pay Hartnell Law \$11,272.50 for then minors' representation.
7. Administrator seeks authorization to pay expert witness Jay Monroe with Strategic Valuation Inc. \$5,637.50 for testifying at trial. [Acct. 07/06/17LFpg63].

8. Administrator seeks authorization to pay expert witness Charles Rice with Rice Group \$1,375 for testifying at trial. [Acct. 07/06/17LFpg64].
9. Beginning balance of the accounting does not match Inventory and Appraisals total; see next note.
10. Supplemental Inventory and Appraisal filed 10/14/16:
 - a. Incomplete as to property tax certificate.
 - b. Durfee Ave. property appears to be reduced by \$20,000;
 - c. Therefore, the beginning balance is unclear. Need corrected final Inventory and Appraisal.
11. Need notice of hearing and proof of service including to prior special administrators; and Inheritance Funding and Franchise Tax Board who requested special notice.
12. There are assignments in favor of Inheritance Funding for Jesse Reyna and Elizabeth Sarmiento for \$21,200 and \$11,900 respectively.
13. Administrator seeks a reserve of \$5,000.
14. Administrator seeks to pay Specialty counsel Lee Brown \$124,172.62 per 07/13/17 order.
15. Proposed Order: 08/23/17. Not preapproved until notes cleared.

RECOMMENDATION

Need to clear notes 8-11, then Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **09/27/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400789

CASE NAME: Frances Sylvia Williams

HEARING:
Hearing re Final Discharge

COUNSEL:
ANGELIA WOODS (PET)...MILES & HATCHER
FRANCES SYLVIA WILLIAMS (DEC)...

GENERAL INFORMATION

Continued from 05/18/17 and 07/13/17.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Angelia Woods approved on 05/25/16.
2. Need receipts for Bernard Bidart and Eli Yoder.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipts and order.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 4, 5

HEARING:

Petition for /TO COMPEL REMOVAL OF TRUSTEE; FOR APPOINTMENT OF
SUCCESSOR TRUSTEE ETC

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
KEITH MITCHELL	(PET)...ROBBINS & HOLDAWAY
MITCHELL FAMILY TRUST	(TRU)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 3, 5

HEARING:

Petition for to Recover Trust Assets, to Impose Constructive Trust, to Impress Equitable Lien etc

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
KEITH MITCHELL	(PET)...ROBBINS & HOLDAWAY
MITCHELL FAMILY TRUST	(TRU)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 3, 4

HEARING: FIRST Account and Report of KEITH MITCHELL and Petition for allowance of fees filed.

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
KEITH MITCHELL	(PET)...ROBBINS & HOLDAWAY
MITCHELL FAMILY TRUST	(TRU)...

GENERAL INFORMATION

Continued from 09/29/16. Written objections to be filed to accounting. Court recommends PPF be considered while the parties are disputing issues. Parties report there is a probate filed in Riverside.

Continued from 12/08/16, 02/23/17 and 05/11/17. Objections by Cherie Keith Withdrawn.

THIS CASE SET FOR HEARING ON 1st Account Current and Report of Trustee, Keith Mitchell.

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

1. Accounting period 11/01/14 – 12/31/15.
2. Assets on hand \$729,945.58: cash of \$26,944.58 and remainder in real property.
3. Accounting does not balance by \$1.30. Court may wish to deem as de minimis.
4. Partial distributions of \$595,000 each made to Keith Mitchell and Cherie Keith and \$25,000 to Carol Storrs.
5. **Objections filed by beneficiary Cherie Keith on 12/07/16. Notice of withdrawal of objections filed on 07/05/17.**
6. **Response to Objection by Keith Mitchell filed 02/15/17.**
7. Proposed Order: 07/08/16; however, need assets on hand and accounting period stated.

RECOMMENDATION

Court's discretion. *If court retains jurisdiction of trust, set Accounting/Status Review for 11/16/17.* Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/oc/lc/lh/lc)

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500989

CASE NAME: MIKE FOSTER

HEARING:

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

COUNSEL:

JUSTIN MCCOLLUM (PET)...MATTHEW L TONKOVICH
MIKE FOSTER (DEC)...

GENERAL INFORMATION

Continued from 03/02/17 and 05/18/17. No appearances. Court finds verification clause improper as to verbiage "account to the laws of California" is not included. Waiver and consent to be filed.

Continued from 07/13/17.

THIS CASE SET FOR HEARING ON Final Account, Distribution by Justin McCollum.

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

1. Initial petition indicates that Justin is grand-nephew, but final account alleges he is grandchild. Court to clarify on the record.
2. Petitioner and attorney waive statutory fees.
3. Decedent's sibling Geraldine assigns her interest to her nephews Matthew and Justin McCollum. **Supp. 9/11/17 Waivers of Matthew, Justin and Geraldine filed 09/11/17.**
4. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/27/18.**

(lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500998

CASE NAME: CLYDE ANDERSON

HEARING:

Probate status report filed.

COUNSEL:

CLYDE ANDERSON (DEC)...
STEPHEN ANDERSON (PET)...MATTHEW ALDEN

GENERAL INFORMATION

Continued from 04/17/17. Accounting to be filed.

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters Testamentary issued to Stephen Anderson, son, on 12/15/415; full authority no bond.
2. Petitioner requests an additional 4 months to close the estate in order to file 2015 tax return. The documents were allegedly sent to wrong address causing the delay.
3. ~Proposed Order: 02/10/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **11/30/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future hearing dates: 01/02/18 Probate Status Report Filed.

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600199

CASE NAME: MTR OF BENNETTA BETBADAL

HEARING:

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

COUNSEL:

ARLEN VERDEHYOU (PET)...JAMES B CHURCH
BENNETTA BETBADAL (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Arlen Verdehyou, spouse

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

1. Petitioner requests bond not be required due to property will not be sold and no cash will ever come into the estate. Net estate value is \$56,521.99.
2. Need proof of publication.
3. ~Proposed Form Order: 07/03/17

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601190

CASE NAME: MTR OF BARBARA L CROSLEY

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

BARBARA L CROSLEY (DEC)...
DARLEEN BITTER (PET)...PRO/PER

GENERAL INFORMATION

Continued from 07/13/17 New notice regarding probate of will. Court accepts declaration of due diligence as to Debbie Bilderain. Bond required \$151,800.00

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with **limited** authority under IAEA by Darleen Bitter, daughter.

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

1. Per minute order of 07/13/17, bond in the amount of \$151,800.00 is required. Net estate value is \$138,000 of which \$80,300 is personal property.
2. Notice to Petition to Administer Estate and proof of service filed 07/06/17; however, section 4 as to admission of will is marked and there is no will. **Need** corrected notice.
3. Proof of publication filed 07/06/17; however, the verbiage about will admission should not be in the publication. **Need** corrected publication.
4. ~Proposed Form Order: 04/26/17.

RECOMMENDATION

Need to clear note 2 & 3, then Court's discretion. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 11, 12

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM (DEC)...
JAMES F BAKER (PET)...BANKS GARCIA & JANIS
KURT BECKSTROM (PET)...ROBERT J SPITZ

GENERAL INFORMATION:

Continued from **03/20/17 and 05/24/17**. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

Continued from 07/26/17 Court recommends hiring a property manager. Counsel stipulate to property manager Samson Debebe, to be manager of the properties subject to James Baker residing in the home. Discovery to be conducted.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with full authority under IAEA by named executor, **James F. Baker, friend**.
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker**.

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

Petitioner 1 – James Baker, friend.

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Need proof of publication.
- 3 Need Proof of Subscribing Witness.
- 4 Proof of Publication filed 01/23/17 does not include full IAEA language per Pr. C. § 8100. Need proper publication.
- 5 **Objections by Kurt Beckstrom filed 03/03/17.**
- 6 ~Proposed Form Order 01/10/17.

Petitioner 2 – Kurt Beckstrom, brother/caretaker.

1. Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
2. ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Need to clear notes 2-4; matter is contested. If approved, set future hearing for Accounting/Status Review on **11/29/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc/lh/lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 10, 12

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM	(DEC)...
JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
KURT BECKSTROM	(PET)...ROBERT J SPITZ

See notes on matter 10.

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 10, 11

HEARING:
Trial Setting Conference

COUNSEL:
ERNEST ALLEN BECKSTROM (DEC)...
JAMES F BAKER (PET)...BANKS GARCIA & JANIS
KURT BECKSTROM (PET)...ROBERT J SPITZ

TSC – No notes - JTD

Superior Court of Calif, County of San Bernardino

Page: 12A ADD ON

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 10, 11, 12

HEARING:

Hearing Re: PETITION FOR LETTERS OF SPECIAL ADMIN W/LIMITED

COUNSEL:

ERNEST ALLEN BECKSTROM (DEC)...
JAMES F BAKER (PET)...BANKS GARCIA & JANIS
KURT BECKSTROM (PET)...ROBERT J SPITZ

No notes—matter is contested. JTD

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

DATE: 09/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700657

CASE NAME: HOPE TREVINO

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY

COUNSEL:

HOPE TREVINO (DEC)...
ROXANNE TREVINO (PET)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Roxanne Trevino, daughter/executrix

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

1. Will waives bond. Estate value consists of \$316,127.00 with \$50,127.00 in personal property.
2. The will conditionally incorporates decedent's Trust. Certification of trust and copy of trust filed on 09/11/17.
3. ~Proposed Form Order: 07/06/17

RECOMMENDATION

RFA . Court's discretion re bond. If approved, set Accounting/Status Review for **11/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 09/21/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700658

CASE NAME: EVA H DYE FAMILY TRUST

HEARING:

Petition for ORDER DECLARING ASSETS OF DECEDENT TO BE TRUST
ASSETS

COUNSEL:

ALFRED H JEPSON

(PET)...BRIAN W. SMETHURST

EVA H DYE FAMILY TRUST DATED J

(TRU)...PRO/PER

Currently under review by legal research

(LR)

NOTICE:

Petitioner, Alfred Jepson, is sole beneficiary. Court to inquire whether there is an encumbrance on the real property and whether notice is required.

Superior Court of Calif, County of San Bernardino

Page: 14A ADD ON

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700090

CASE NAME: PANIAGUA VS. FIGUEROA

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

JULIO PANIAGUA (PP)...PRO/PER
YVONNE FIGUEROA (RP)...

Notice to Yvonne Figueroa, respondent, filed on 09/08/17.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000109

CASE NAME: REBECCA H VAUGHN

SEE ALSO 16

HEARING:

Hearing re Final Discharge

COUNSEL:

CHRISTINA OSEGUERA

(CPE)...CANDICE A GARCIA RODRIGO

GEORGE H VAUGHN

(CPE)...VARNER & BRANDT, LLP

MITCHELL I ROTH

(PET)...

REBECCA H VAUGHN

(CEP)...MITCHELL I ROTH

REBECCA H VAUGHN

(CEP)...PRO/PER

GENERAL INFORMATION

Continued from 08/15/17.

THIS CASE SET FOR HEARING ON Final Discharge re George Vaughn.

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

1. Accounting dispensed as to George Vaughn, deceased Conservator, on 08/09/16.
2. No receipts needed as order states there were no assets.
3. Need Ex Parte Petition for Final Discharge and Order signed by counsel.

RECOMMENDATION

Inquire status of discharge.

(lc)

Future hearing dates: 10/17/17 First and Final account and report of Christina Oseguera

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000109

VACATED

CASE NAME: REBECCA H VAUGHN

SEE ALSO 15

HEARING:

Accounting Review

COUNSEL:

CHRISTINA OSEGUERA	(CPE)...CANDICE A GARCIA RODRIGO
GEORGE H VAUGHN	(CPE)...VARNER & BRANDT, LLP
MITCHELL I ROTH	(PET)...
REBECCA H VAUGHN	(CEP)...MITCHELL I ROTH
REBECCA H VAUGHN	(CEP)...PRO/PER

Future hearing dates: 10/17/17 First and Final account and report of Christina Oseguera

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0700057

CASE NAME: **MF** RUSSELL MACK PHILLIPS

HEARING:
Accounting Review

COUNSEL:

JP MORGAN CHASE BANK N.A	(OBJ)...KEESAL, YOUNG & LOGAN
KEITH PHILLIPS	(CPE)...JAMES B CHURCH & ASSOCIATES
KEITH PHILLIPS	(CPE)...PRO/PER
LAWRENCE A DEAN II	(CPE)...SHERRI L KASTILAHN
ROBERT HEENEY	(PET)...LINDA ROBERTS-ROSS
RUSSELL MACK PHILLIPS	(CEP)...JOAN NELMS
VISITING ANGELS OF RIVERSIDE	(PET)...ALLISON M DE TAL

GENERAL INFORMATION

Continued from 07/13/17. Notice to be given by Sherri Kastilahn

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5th Account for Lawrence Dean, PPF, approved on 10/22/15.
2. Need 6th Account beginning with 04/01/15.

RECOMMENDATION

Inquire status of accounting.

(lc/cs)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900053

CASE NAME: MTR OF JORGE CAMPOS PEREZ

HEARING:
Accounting Review

COUNSEL:

JACK B. OSBORN	(PET)...JACK B OSBORN
JORGE CAMPOS PEREZ	(CEP)...WALTER T. MOORE
LETICIA PEREZ	(OBJ)...WILLIAMS BECK & FORBES
MARIA ESTELA PEDROZA	(CPE)...BRYAN C HARTNELL
WALTER T MOORE	(PET)...WALTER T. MOORE

GENERAL INFORMATION

Continued from 05/18/17 and 07/13/17

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 2nd Account of Maria Pedroza, sister, approved on 11/05/15.
2. Need 3rd Account beginning with 03/05/15.

RECOMMENDATION

Inquire status of accounting.

(lc/cs)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600288

CASE NAME: MTR OF SIERRA INDIA DYER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JAIME NICOLE ETHERIDGE

COUNSEL:

JAIME NICOLE ETHERIDGE (CP)...PRO/PER
SIERRA INDIA DYER (CTP)...ROBERTA L TAYLOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Jaime Etheridge, Mother, appointed **limited** conservator of the person only on 02/16/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 09/08/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 07/31/17.

RECOMMENDATION

None.

(lc/ww)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600368

CASE NAME: MTR OF MATTHEW THOMAS KAMIYAMA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JENNIFER O'CONNOR

COUNSEL:

JENNIFER O'CONNOR	(CP)...PRO/PER
MATTHEW THOMAS KAMIYAMA	(CTP)...SHERRI L KASTILAHN
STEVEN KAMIYAMA	(CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Jennifer O'Connor & Steven Kamiyama, parents appointed conservator of person only on 02/16/17.
2. Notification of Conservatee's rights filed 12/13/16. However, **need** mailed service on all parties listed in required contacts list Pr.C.§1821(b).
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 03/07/17.

RECOMMENDATION

Need to clear note 2.

(lc)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700199

CASE NAME: MTR OF VANESSA LARA SANTACRUZ

HEARING:
Petition for Appointment of Conservator

COUNSEL:
REBECCA SANTACRUZ LUGO (CP)...REGINA Z PERALTA
VANESSA LARA SANTACRUZ (CTP)...

GENERAL INFORMATION

Continued from 07/06/17. Notice to be given by Ms. Peralta.

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

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

1. Petitioner seeks powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, consent/ withhold consent to medical treatment, consent/withhold consent to marriage, control social/sexual contacts, make decisions regarding education. JTD
2. Petitioner requests orders limiting civil and legal rights of proposed conservatee. JTD
3. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. Need IRC report Petitioner seeks medical powers. **Capacity Declaration filed 09/11/17 is incomplete at items #4a/4b as to date last seen/ where proposed conservatee is a patient, and #7b physician's initials. Need completed form.**
5. Proof of Service of Notice of Hearing filed 05/18/17; however, **need at least 30 days' notice to Inland Regional Center.**
6. **Return of Citation filed 09/11/17; however, form is incomplete at item #1b name of proposed Conservator. Need re-issued Citation and proof of same.**
7. CI report filed 07/05/17.
8. Proof of completion of Conservator Education Course filed 07/06/17.
9. ~Proposed Form Order: 05/18/17

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **04/26/18** 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)

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700208

CASE NAME: MTR OF ROSSEBELL SANCHEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ROSA SANCHEZ (CP)...PRO/PER
ROSSEBELL SANCHEZ (CTP)..SANDY TURNER

GENERAL INFORMATION

Continued from 07/13/17. Attorney Jennifer Daniel appointed for Rossebell Sanchez. Court orders IRC to prepare report for Court. Notice given by Judicial Assistant.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Rosa Sanchez, mother

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

1. Petitioner seeks civil rights not be limited without court order. JTD
2. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access all confidential records, control right to contract, and make and consent to medical decisions. JTD
3. Capacity Declaration filed 06/08/17.
4. Proposed conservatee is developmentally disabled. Report of Counsel filed 08/30/17.
5. Proposed conservatee is developmentally disabled. IRC report filed 09/07/17.
6. Certificate of Completion of the Conservatorship Training Class filed 06/30/17.
7. Court Investigator report filed 07/10/17.
8. **Need return of Citation.**
9. Proposed Form Order: 06/05/17

RECOMMENDATION

Need to clear note 8. If approved, set hearing for Compliance Review for **04/26/18** 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/lc/lh)

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

DATE: 09/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700297

CASE NAME: TYRA UNIQUE HOLMES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IRA J BROWN (PET)...PRO/PER
TYRA UNIQUE HOLMES (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Ira Brown (paternal grandfather)

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

1. Petition is incomplete. Need verified supplement addressing the following:
 - a. Item 5f does not indicate whether proposed conservatee is developmentally disabled.
 - b. Item 8 does not indicate if proposed conservatee will attend hearing.
 - c. Item #9 as to medical treatment of proposed conservatee.
2. Other orders requests Court ordered detention of mentally disordered person for evaluation and treatment. [Petition, 08/08/17, LFpg10] Does Court wish to deem matter an LPS conservatorship?
3. Need Court Investigator report. **Report of No Report filed 09/06/17.**
4. List of required contacts is missing Tyrone Holmes (father) and petitioner. Need completed form.
5. Need return of citation.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need notice of hearing and proof of service.
8. ~Proposed Form Order: 08/08/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **04/26/18** 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)