



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 10/12/17**

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

### **Destruction of Filed Documents:**

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

### **Contacting the Probate Examiners:**

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

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

9/19/17-10/5 lh/lc/cs

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: 10/12/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501012

CASE NAME: CLARISE JD FOREMAN

HEARING:

Hearing re Final Discharge

COUNSEL:

ROYAL J FOREMAN

(PET)...PRO/PER

CLARISE JD FOREMAN

(DEC)...

NOREEN T FONTAINE

(TP )...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Petition for Final Distribution approved on 12/08/16, order filed 01/19/17.
2. Need receipts from Patricia, Clarence, Joseph and Xena Foreman.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

#### RECOMMENDATION

Inquire status.

(lh/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIP**

-----  
DATE: 10/12/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600352

CASE NAME: MATTHEW STEVEN ISLAS RODRIGUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIA GUADALUPE ISLAS

COUNSEL:

MARIA GUADALUPE ISLAS

(PET)...PRO/PER

ELIAS ISLAS

(PET)...PRO/PER

MATTHEW STEVEN ISLAS RODRIGUEZ (CEE)...JENNIFER M DANIEL

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Maria Islas and Elias Islas appointed co-conservators of the person on 03/09/17.
2. Notification of Conservatee's rights filed 03/16/17.
3. Determination of Conservatee's Appropriate Level of Care filed 06/07/17.
4. Confidential Care Plan filed 06/07/17.

#### RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

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DATE: 10/12/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1100536

***Vacated***

CASE NAME: MTR OF ARTHUR R MCCLIMAN

HEARING:

Accounting Review

COUNSEL:

WILLIAM O MCCLIMAN

(PET)...ROBBINS & HOLDAWAY

ARTHUR R MCCLIMAN

(DEC)...

Future hearing dates: 01/04/18 Waiver of Final Account

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

HEARING:  
Accounting Review

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN  
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...  
BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN  
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 3<sup>rd</sup> SNT Account by Noreen Fontaine, Successor Trustee, approved on 10/22/15.
2. Need 4<sup>th</sup> Account beginning with 09/01/15.

RECOMMENDATION

Inquire status.  
(/lc)

Future Hearing: 11/14/17: Petition for Authority to Sell & Purchase Real Property

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

**SEE ALSO 3A, 3B, 3C**

HEARING: Petition for REPORT OF SALE AND PETITION FOR ORDER  
CONFIRMING SALE OF REAL PROPERTY

COUNSEL:

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

Address 902 Tribune Sandy Turner. Redlands 92374  
APN 0169-106-0-000

Appraised value \$235,000.00

Sale price \$225,000.00

First overbid \$236,700.00

Deposit \$22,500, ok.

Commission 5% total commission, \$11,250 split equally to Remax and Hills Realty.

Additional bond None.

Reason for sale Devise and administration expenses.

Exposure to market MLS (Multiple listing service), marketing and advertising.

Notice **Need notice of hearing and proof of service, including to buyers and agents.**  
**Need to file original Proof of publication notice per Pr.C. § 10300.**  
~Proposed Form Order: 06/23/17

(lc)

Superior Court of Calif, County of San Bernardino

Page: 3A ADD ON

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

**SEE ALSO 3, 3B, 3C**

HEARING: Hearing Re: REMOVAL OF ADMINISTRATOR

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS  
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.

**Continued from 09/18/17 to hearing pending matters.**

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator (Eric Ramirez) by Esther M. David, daughter 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].
3. Waiver of Notice filed 11/14/16 by Sylvia Vizcarra, and Jose Juan Ramirez on 11/21/16.
4. Order Voiding Grant Deed 02/06/17.
5. Proof of blocked account filed on 08/22/17.

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

6. **Objections filed 11/21/16 by suspended administrator, Eric Ramirez.**
7. **Declaration of Juan Ramirez in support of Objections by Eric Ramirez filed on 01/26/17.**

RECOMMENDATION

Matter is contested.

(lc/nb/ww/lc)



Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

**SEE ALSO 3, 3A, 3C**

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

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS  
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 and 09/18/17.**

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 petitioner 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 **12/20/18**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(lc/nb/ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 3C ADD ON

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

**SEE ALSO 3, 3A, 3B**

HEARING: Accounting Review

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS  
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 and 09/18/17.**

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/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600205

CASE NAME: MTR OF JOSEPH MATTHEW LUKSICH

HEARING: FIRST AN FINAL Account and Report of REA JEAN PUTNAM-VALL and  
Petition for allowance of fees filed.

COUNSEL:

REA JEAN PUTNAM-VALL (PET)...THOMAS W DOMINICK  
JOSEPH MATTHEW LUKSICH (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees by Rae jean Putnam-Veil, niece.

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

1. Assets on hand \$446,230.63, cash.
2. Personal representative and attorney request statutory fees of \$12,721 each. Ok.
3. Attorney requests extraordinary fees of \$9,950 for 15.45 hours at \$125/375 per hour for paralegal and attorney services. [Acct. 06/23 LFpg 29-36].
4. Personal representative seeks a reserve of \$5,000.
5. ~Proposed Order: 06/23/17.

RECOMMENDATION

RFA subject to Court's discretion re extraordinary fees. If approved, set hearing on the filing of receipts and final discharge for **10/18/18**.

(lc)

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601140

CASE NAME: MTR OF MARY BUDISALOVICH

HEARING:

Hearing Re: Proof of Bond/Issuance of Letters

COUNSEL:

CORINNA C SCHNEPF (PET)...PRO/PER  
MARY BUDISALOVICH (DEC)...

#### GENERAL INFORMATION

**Continued from 09/04/17. No appearance, nor any contact with Court, nor has petitioner filed required documents. Corinna Schnepf ordered to appear in person.**

THIS CASE SET FOR HEARING ON Proof of Bond/Issuance of Letters.

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

1. Corinna Schnepf, daughter, appointed administrator on 08/08/17, full authority \$100,000 bond.
2. Need bond in order for letters to issue.

#### RECOMMENDATION

Inquire status.

(lc/lh)

Future Hearing: 10/16/18 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700355

CASE NAME: MARY JO GANT

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

RICHARD E GANT (PET)...MICHAEL C MADDUX  
MARY JO GANT (DEC)...

GENERAL INFORMATION:

**Continued from 07/13/17 and 08/24/17 Counsel states he has not had any contact with his client. Request for continuance made.**

THIS CASE SET FOR HEARING ON **Amended** [04/14/17] Petition for Letters of Administration with full authority under IAEA by Richard Gant, son.

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

1. All heirs waive bond. Value of estate TBD. Need bond waivers for Stephanie and Kendall Gant.
2. As the renunciation and disclaimer [Lf04/14/17 pg4] appears to be ambiguous as to all property of estate and whether they are assigning interest, court to clarify if there are issue of disclaimant(s) that would inherit.
3. Section 7 indicates pre-deceased spouse; however, court to clarify as section 7 shall not be completed if decedent had issue.
4. ~Proposed Form Order: 04/14/17.

RECOMMENDATION

Need to clear note 1, court's discretion re notes 2-3 and bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc/cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700386

CASE NAME: Terresa Cuson

**SEE ALSO 8**

HEARING:

Hearing Re: OSC RE: DISMISSAL

COUNSEL:

CHANCE DERRICK CUSON (PET)...PRO/PER  
TERRESA CUSON (DEC)...

GENERAL INFORMATION

Continued from 07/20/17.

**OSC set when there was no appearance on 09/07/17.**

THIS CASE SET FOR HEARING ON **OSC Re Dismissal** on Petition for Letters of Administration with full authority under IAEA by Chance Cuson, son.

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

1. Petitioner is sole heir and waives bond. Net value of estate is \$50,679 in real property.
2. Need proof of publication.
3. ~Proposed Form Order: 04/24/17.

RECOMMENDATION

Court's discretion re OSC. Need to clear note 2. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww/cs/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700386

CASE NAME: Terresa Cuson

**SEE ALSO 7**

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

CHANCE DERRICK CUSON (PET)...PRO/PER  
TERRESA CUSON (DEC)...

See notes on matter 7.

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700505

CASE NAME: MTR OF DEBORAH SUE BYRNE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JENNIFER SPENCER (PET)...ZIEBOLD LAW GROUP  
DEBORAH SUE BYRNE (DEC)...

Currently under review by legal research

(LR)



Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700506

CASE NAME: RICHARD KENNETH GLANDER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MARIA CASTELLANOS (PET)...PRO/PER  
RICHARD KENNETH GLANDER (DEC)...

#### GENERAL INFORMATION

**Continued from 08/24/17 to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Maria Castellanos, spouse.

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

1. Statutory bond amount is being requested. The estate consists of \$900,000 in real property. Petitioner does not know the amount of possible encumbrances. JTD
2. The petition for probate is on an outdated form. Court's discretion.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Duties and liabilities filed, however, the telephone number for the proposed personal representative is missing and the Court address is incorrect. Need same.
5. Need proof of publication.
6. No proposed order. Submit after hearing.

#### RECOMMENDATION

Need to clear notes 3-5. Court's discretion re bond amount. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700624

CASE NAME: SERGIO F ALVAREZ

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ROCELIA LOPEZ (PET)...THOMAS W DOMINICK  
SERGIO F ALVAREZ (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Spousal Property Petition by Rocelia Lopez, spouse.

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

1. Petitioner, Rocelia Lopez, seeks court determine community property left by decedent passes to petitioner without administration.
2. Petitioner and decedent were married on 10/11/94 and property was acquired in 2005 with alleged community assets. However, the property was held in decedent's name only.
3. Decedent only left a brother Jose Guadalup Alvarez Faricia.
4. ~Proposed Form Order: 06/27/17.

#### RECOMMENDATION

Court's discretion.

(lc)

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700625

CASE NAME: TIMOTHY R SEEGER

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PETER G WEAVER (PET)...MICHAEL W BROWN  
TIMOTHY R SEEGER (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Peter Weaver, brother-in-law

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

1. Petitioner seeks bond of \$290,000. Net estate value \$290,000 in real property. Ok.
2. Petitioner is nominated by daughter.
3. ~Proposed Form Order: 07/13/17

#### RECOMMENDATION

RFA, \$290,000 bond. If approved, set Accounting/Status Review for **12/20/18**. 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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/12/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700696

CASE NAME: MTR OF CARLOS MAURICE HEARON SR

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

CELESTINE CLEMONS (PET)...PRO/PER  
CARLOS MAURICE HEARON SR (DEC)...

#### GENERAL INFORMATION

Letters of special administration issued to Celestine Clemons 08/08/17; no authority, no bond.

**Continued from 09/07/17 to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Celestine Clemons, mother

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

1. All heirs waive bond. Need bond waivers by Carlos Hearon Jr and Carla Hearon. Estimated estate value is marked \$0 for personal and real property. Court to inquire if estate is open for a wrongful death suit.
2. Section 8 fails to list the relationships to the decedent. Need verified supplement.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication
5. Section 8 also fails to list the petitioner; however, it is clear that she is mother.
6. ~Proposed Form Order: 07/13/17

#### RECOMMENDATION

Need to clear notes 1-4. Court's discretion re bond and note 5. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **READINESS**

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DATE: 10/12/17      TIME: 8:29      DEPT: S37P  
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CASE#: PRO PS1600478

CASE NAME: MONICA G WHITE LIVING TRUST

HEARING:

Readiness Calendar

COUNSEL:

PATRICK WHITE

(PET)...DANIEL E KATZ

BRIAN WHITE

(PET)...DANIEL E KATZ

JEFFREY WHITE

(PET)...DANIEL E KATZ

KELLI ZIENOWICZ

(PET)...DANIEL E KATZ

THE MONICA G WHITE LIVING TRUST

(TRU)...PRO/PER

EVAN S WHITE

(OBJ)...ORLAND LAW GROUP

SEAN WYMAN

(ORLAND LAW GROUP)

Readiness—no notes—JTD

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 13C, 13D, 13E**

HEARING: Hearing Re: PETITION TO ENFORCE JUDGMENT

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

GENERAL INFORMATION

Continued from 06/23/16 and 09/01/16. Counsel to respond within 20 days.

**Continued from 11/09/16, 12/08/16, 03/16/17 and 07/26/17. Any further objection to be filed by 04/15/17.**

THIS CASE IS SET FOR HEARING ON Petition to Enforce Judgment

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

1. Petitioner, Pamela Ann Williams Chunchick, alleges that she is the executor of the Estate of Rita Williams and the successor trustee of the Rita Williams Living Trust.
2. Petitioner alleges that Rita Williams and Alice Johnson were awarded damages in a money judgment that was entered in 7/2/08 against George Williams.
3. On or about July 30, 2008, George Williams allegedly fraudulently transferred real property located at 16651 Bolero Lane, Huntington Beach, CA (Bolero Property) to his wife, Skaidrite Williams. Skaidrite has allegedly died.
4. George filed an appeal of the Judgment on August 28, 2008. The trial court's ruling was affirmed.
5. Rita died on 4/12/11. The beneficiary of her estate is the Rita Williams Living Trust.
6. George died on 9/8/11. Petitioner filed a creditor's claim against George's estate for the full amount of the judgment on September 7, 2012.
7. Petitioner seeks an order conveying the Bolero Property. She also seeks the imposition of a constructive trust. She also seeks to quiet title to the 16651 Bolero Lane, Huntington Beach, CA and double damages under Pr. C. 859.

8. On 5/20/16, Objector Darina (Sky) Williams filed a demurrer, wherein she argues that the court lacks jurisdiction and the claims are barred by the applicable statute of limitations.
9. On 5/23/16, Dacrey Northrup, Trustee of the Williams Family Trust as filed a demurrer to the petition, alleging that each of the causes of action are barred under the applicable statute of limitations and/or the doctrine of laches. Dacrey also argues that the court has no jurisdiction over the Bolero Property.
10. Objection to Demurrer of Dacrey Northrup filed by Pamela Churchick on 06/10/16.
11. Further objection filed by Dacrey Northrup on 09/16/16.
12. Answer filed by Darina Sky Williams on 07/18/17.
13. Objection filed by Margo Richardson, PPC on 07/21/17.
14. Notice of pendency of action filed by Pamela Ann Williams Churchick on 02/22/17.

**RECOMMENDATION:**

Treat the demurrers as objections and set for evidentiary hearing.  
(occ/lc).

Superior Court of Calif, County of San Bernardino

Page: 13C

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 13B, 13D, 13D**

HEARING:

Hearing Re: PTN FOR ORDER DETERMINING VIABILITY OF CREDITORS.

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

Currently under review by legal research

(LR)



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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 13B, 13C, 13E**

HEARING:

FIRST AND FINAL Account and Report of DACREY NORTHRUP and  
Petition for allowance of fees filed.

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

GENERAL INFORMATION

**Continued from 12/08/16, 03/16/17 and 07/27/17. Discovery ongoing.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees of DacreY Northrup Trustee.

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

1. **Need** notice of hearing and proof of service.
2. Creditor's Claim re Pamela Churchick for \$3,889,700.00 was rejected on 09/07/16. 90 days did not pass at time of filing of the accounting on 10/05/16. The period has now passed.
3. Petitioner, DacreY, alleges that there are ground leases subject to probate matter in Orange County and the subject of a court-approved settlement [Acct.10/05 LFPg4]. . Question why there are probate matters in both counties? **Supp 01/09/17: George lived in San Bernardino and Skaidrite lived in Huntington Beach around 1993/1994.**
4. Petitioner disputes that the Orange County real property is or was a part of the decedent's estate.
5. There is not a proper balanced accounting with schedules. However, there was only a vehicle and boat valued at \$800. Accounting does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. JTD

6. There appears to be other pending matters in this case. Question how the estate can close? **Supp 01/09/17: Petitioner alleges as there are no assets, the estate may close.**
7. **Objections filed by Pamela Ann Williams Churchick on 12/01/16.**

#### RECOMMENDATION

Need proper notice; matter is contested. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 13E

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 13B, 13C, 13D**

HEARING:

Trial Setting Conference

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

TSC—no notes—JTD

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: 10/12/17 TIME: 9:30 DEPT: S36P  
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CASE#: CIV DS1614969

CASE NAME: ARCINIEGA-V-RAMIREZ

HEARING:

Motion Re: To Compel Attendance & Testimony of Virginia Arcinieg

COUNSEL:

VIRGINIA TAPIA ARCINIEGA (PLA)...TETLEY LAW OFFICES  
DEBRA JEANNE RAMIREZ (DEF)...LAW OFFICES OF JOHN SETLICH

No notes – JTD

(LR)

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: 10/12/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1100285

CASE NAME: GILBERT E. MADRID

**SEE ALSO 16**

HEARING:

OSC re: Suspension/Removal of Conservator filed by GILBERT MADRID

COUNSEL:

GILBERT E MADRID

(CEP)...MITCHELL I ROTH

W. A. HLAVATY

(SC )...RICHARD W S PERSHING

MITCHELL I. ROTH

(CPE)...MITCHELL I ROTH

GILBERT MADRID

(PET)...JOHN SETLICH

GENERAL INFORMATION

**OSC continued from 08/31/17 at request of counsel to submit report of W.A. Hlavaty.  
Notice waived.**

THIS CASE SET FOR HEARING ON OSC re Suspension/Removal of Conservator.

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

1. OSC set on 07/27/17. Gilbert Madrid was suspended as the trustee of the trust and as conservator of the estate. W A Hlavaty is appointed successor interim trustee and conservator of the estate. Court ordered no payments be made other than the facility bills from the trust or the conservatorship accounts. W A Hlavaty to personally be present and submit a report on the 08/31/17 hearing.
2. Need report by W A Hlavaty.

RECOMMENDATION

Need report, then Court's discretion.

(lc/lh)

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

-----  
DATE: 10/12/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1100285

CASE NAME: GILBERT E. MADRID

**SEE ALSO 15**

HEARING:

FOURTH Account and Report of GILBERT MADRID and Petition for allowance of fees filed.

COUNSEL:

GILBERT E MADRID	(CEP)...MITCHELL I ROTH
W. A. HLAVATY	(SC )...RICHARD W S PERSHING
MITCHELL I. ROTH	(CPE)...MITCHELL I ROTH
GILBERT MADRID	(PET)...JOHN SETLICH

GENERAL INFORMATION

Continued from **07/06/17 and 07/13/17**. Gilbert Madrid to pay \$72 overdraft fees and get his rent up to date. Rent is payable monthly on the 15<sup>th</sup>. Declaration to be filed as to payments made. Gilbert Madrid suspended as Conservator and trustee on 07/27/17. **Continued from 08/31/17 at request of counsel to submit accounting.**

THIS CASE SET FOR HEARING ON 4<sup>th</sup> Account Current and Petition for Allowance of Fees by Gilbert Madrid, son.

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

1. Accounting period 07/03/15 – 01/05/17.
2. Assets on hand \$369,873.76 of which \$73,614.03 is cash and remainder in investment accounts.
3. No request for fees made.
4. Disbursements indicate two overdraft fees totaling \$72.00. Petitioner has since deposited his own funds to prevent a reoccurrence.
5. Charges are not totaled and appear to total as \$424,421.79 which is off from the Credits of \$408,502.76. Need accounting that balances.
6. Need actual proof of residential facility statements and/or written verification of rent for Pacifica per Pr.C. §2620(c)(5).
7. Prayer is incomplete and does not match report for items 2 & 4 re balance and fee request. **Supp 07/03/17 indicates assets of \$408,502.76; however, the assets are incorrect.**
8. Supplemental report of Counsel Roth filed 05/31/17.

9. Declaration filed **07/27/17** indicating \$45,000. \$17,000 and \$72 deposit into conservatee's account.
10. **Objections filed by conservatee through counsel on 05/02/17. Need proof of service for bonding company.**
11. No proposed order. Submit after hearing.

#### RECOMMENDATION

Need to clear notes 5-7. If approved, set hearing on the next accounting review for **04/11/18** (if one year) or **04/10/19** (if two years). Accounting to be filed 30 days in advance.

(lc/lh)

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

-----  
DATE: 10/12/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1500228

CASE NAME: CHARLOTTE K KNIGHT-UTTER

HEARING: Petition for Appointment of Conservator

COUNSEL:

LINDA K GUYETTE	(PET)...MICHAEL C. MADDUX
E JOAN NELMS	(PET)...E. JOAN NELMS
WRETHA KNIGHT	(PET)...FRANK O TETLEY
CHARLOTTE K KNIGHT-UTTER	(CEE)...E JOAN NELMS
CARY KNIGHT	(FRANK O TETLEY)

GENERAL INFORMATION:

Continued from **9/28/15** Court appoints Melvin Friedland as GAL. Clerk's counsel and GAL to look into issue of proposed conservatee's ability to make decisions on power of attorney, as well as issue of funds being withdrawn from her banking account(s).

Continued from **11/10/15** COURT ORDERS CASE TRANSFERRED TO RIVERSIDE COUNTY. Written report received from Melvin Friedland. Court orders Cary Knight to turn over all records/possessions of Charlotte Knight-Utter to E. Joan Nelms or Melvin Friedland who are to make a first appearance at the Riverside Court upon the transfer of this case to Riverside County. Transfer of the case to Riverside County will be effective upon the signing of the order after hearing.

Continued from **12/16/15** and **1/13/16** at request of counsel. Court grants motion for reconsideration of court's ruling on 11/10/15. CASE REMAINS IN SAN BERNARDINO COUNTY PENDING FURTHER ORDER OF THE COURT.

Continued from **03/09/16**. Court was informed that there are 2 blocked accounts at US Bank; one in name of grandson and the other in name of conservatee.

Continued from **05/12/16** and **06/20/16** at request of counsel.

Continued from **8/30/16** as matter is trailed specially. Counsel directed to provide info re treating doctor and where conservatee is located to Appointed-counsel. Counsel to file declaration re conservatee's ability to travel back to CA by car.

On 8/30/16 Court granted authority to accept offer on sale of Iowa real property.

On 8/31 re Status of Conservatee, Court directs that the medical records re Charlotte Knight-Utter may be released to the attorneys and they are to be maintained confidentially (confidentially with the court)-not to be discussed/disseminated to third parties and no copies to be made. Counsel agree that Charlotte Knight-Utter is to be transported from Oregon to California, and the trip is to commence on Tuesday after the labor day weekend.



Court continues this hearing to September 14, 2016. Court orders that Linda Guyette is to make an appointment (coordinating with E Joan Nelms and Melvin Friedland, so that they attend the doctor's appointment for Charlotte Knight-Utter) for Charlotte Knight-Utter to be seen by her regular physician as soon as possible. E Joan Nelms to prepare order (re above order re doctor appointment).

On 9/14/16 re Status of Conservatee, Court orders that no monies be removed from any bank account of Charlotte Knight-Utter.

Continued from **09/22/16 and 10/19/16**. No settlement reached. Trial requested.

Continued from **01/26/17** at request of counsel. Matter set for trial readiness.

Continued from **06/08/17**. **A competing petition was filed and set for 07/03/17. Parties agree that petition will be continued to 10/12/17 to be heard with this petition.**

**Parties state they are going to work on a settlement.**

THIS CASE IS SET FOR HEARING ON

- Petition - 1: Petition for Appointment of Conservator, person and estate, filed by Linda Guyette, daughter
- Petition - 2: Petition for Appointment of Conservator, person and estate, by daughter-in-law, Wretha Knight.

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

**Petition 1 - Linda Guyette, daughter**

1. Proposed Conservatee resides in Riverside County.
2. Petitioner requests bond be fixed at \$150,000. Appears adequate. JTD
3. Petitioner requests medical and dementia powers. Capacity Declaration filed 08/11/16. **Need dementia attachment GC-313.**
4. Citation returned with proof of mailed service given in care of Cary Knight on 8/21/15. However, personal service upon proposed conservatee is required. JTD sufficient.
5. Petitioner requests powers under Pr.C. 2590. Specifically, the power to sell real or personal property with or without notice, other than the personal residence of the conservatee. JTD
6. Report of court-appointed counsel, E. Joan Nelms filed 10/07/15.
7. Report of GAL, Melvin Friedland, filed 10/07/15.
8. Court Investigator report filed 09/22/15.
9. Proof of completion of Conservatorship Education course filed 9/18/15.
10. **Objections filed 10/19/15 by Cary Knight.**
11. **Reply to Opposition filed 11/02/15 by Linda K. Guyette.**
12. ~Proposed form Order/Letters: 8/21/15.

**Petitioner 2 –Wretha Knight daughter-in-law:**

13. Proposed Conservator resides in Riverside County. If approved, suggest transfer to Riverside County and Court to set control date.
14. Petitioner requests bond be fixed in the amount of \$150,000. Appears sufficient.
15. Petitioner seeks Pr. C. § 2358 powers to provide for the care, treatment, education and welfare of the conservatee.

16. Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
17. Section 11 to petition [LF, p. 8] does not include all relatives to the second degree. Need verified supplement.
18. Petitioner seeks medical powers. Need Medical Capacity Declaration with Dementia Attachments.
19. Petitioner requests dementia powers; Need appointment of counsel and report by same.
20. Need Court Investigator's Report.
21. Need return of Citation.
22. Certificate of Completion re Conservatorship Class filed.
23. ~Proposed Form Order/Letters 05/19/17.

#### RECOMMENDATION

Need to clear notes 3 & 17-21. Matter is contested.

If approved, set hearing for Compliance Review for **05/17/18** for the filing of the required documents and hearing re Accounting Review for **12/20/18**. Any accounting to be filed 30 days in advance.

(gls/nb/sa/lc/dl/nb/sa/lc/lh/lc/nb/lh/lc)

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

-----  
DATE: 10/12/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600144  
CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS  
HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ARTHUR CHARLES EWING

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE  
LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 05/11/17. No property or stocks be sold without court approval.  
Continued from **07/13/17 and 08/31/17. Attorney Ferrante represents recordation of letters were sent to Los Angeles and Maricopa counties and is awaiting the receipt in order to file proof of recordation with the Court. Notice to be given by Attorney Ferrante.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Arthur Ewing, son, appointed conservator of the person and estate on 10/06/16, \$20,000 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 04/25/17.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 05/12/17.
4. Care plan filed 08/11/17.
5. Proof of recordation of letters filed 10/03/17.
6. Final Inventory and Appraisal filed 06/09/17.

RECOMMENDATION

None.  
(lc/lh/lc)

Future Hearing: 12/14/17 *Accounting Review – conservatorship*  
12/14/17 *Accounting Review – trust*

Superior Court of Calif, County of San Bernardino

Page: 19 ADD ON

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

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DATE: 10/12/17 TIME: 1:30 DEPT: S36P  
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CASE#: CIV DS1600795

CASE NAME: TAPIA VS RAMIREZ

HEARING:  
Hearing Re: TRIAL

COUNSEL:  
ELAINE TAPIA (PLA)...SALLY ANNE COX  
RICHARD RAMIREZ (DEF)...PRO/PER

Trial – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 20 ADD ON

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

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DATE: 10/12/17 TIME: 1:30 DEPT: S36P  
-----

CASE#: CIV DS1610559

CASE NAME: RICHARD RAMIREZ -V- ELAINE TAPIA, ET AL

HEARING:  
Hearing Re: TRIAL

COUNSEL:

ALEX RAMIREZ	(	)...
ELAINE TAPIA	(DEF)	...
ESTHER ARCHULETA	(	)...
JESSE RAMIREZ	(	)...
PATRICIA RAMIREZ	(	)...
RICHARD RAMIREZ	(PLA)	...PRO/PER
RUBY MACIAS	(	)...
RUDY RAMIREZ	(	)...
VALERIE RAMIREZ	(	)...

Trial – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 21 ADD ON

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

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DATE: 10/12/17 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

HEARING:  
Hearing Re: TRIAL

COUNSEL:

ELAINE TAPIA	(PET)...	SALLY ANNE COX
PETRA AMADOR RAMIREZ	(DEC)...	
RICHARD RAMIREZ	(OBJ)...	PRO/PER

Trial – No notes – JTD

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

-----  
DATE: 10/12/17 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

HEARING: Probate status report filed.

COUNSEL:

ELAINE TAPIA (PET)... SALLY ANNE COX  
PETRA AMADOR RAMIREZ (DEC)...  
RICHARD RAMIREZ (OBJ)...PRO/PER

**XREF: CIVDS1610559** (*Richard Ramirez v Elaine Tapia etal*), **CIVDS1600795** (*Tapia Vs Ramirez*)

GENERAL INFORMATION:

Continued from **11/21/16**. Matter set to trail CIVDS1610559 and CIVDS1600795.

Continued from **02/27/17**. Richard Ramirez advises court a motion for summary judgment was filed on related case CIVDS1610559 and is set for 05/16/17. This matter will be continued to be heard on that date. Notice waived.

**Continued from 05/16/17 and 09/28/17. Matter set for trial**

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of administration issued to Elaine Tapia, daughter, on 05/22/15, full authority \$140,000 bond.
2. Petitioner alleges the estate is not in a condition to be closed as there are numerous civil complaints being litigated that are preventing this administration from closing.
3. Petitioner does not specify the additional time in which to close the estate. Suggest 12 months.
4. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need notice. If approved, set next Accounting Review for **09/27/18**. Note requirements of local rule 20-908.

(nb/cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**READINESS**

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DATE: 10/12/17      TIME: 8:29      DEPT: S37P  
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CASE#: PRO PS1600478

CASE NAME: MONICA G WHITE LIVING TRUST

**MOVED TO S36P CALENDAR SEE PAGE 13A**

HEARING:

Readiness Calendar

COUNSEL:

PATRICK WHITE

(PET)...DANIEL E KATZ

BRIAN WHITE

(PET)...DANIEL E KATZ

JEFFREY WHITE

(PET)...DANIEL E KATZ

KELLI ZIENOWICZ

(PET)...DANIEL E KATZ

THE MONICA G WHITE LIVING TRUST

(TRU)...PRO/PER

EVAN S WHITE

(OBJ)...ORLAND LAW GROUP

SEAN WYMAN

(ORLAND LAW GROUP)

Readiness—no notes—JTD



Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/12/17      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO DS1000419

CASE NAME: KENYA ELIZABETH DAY SPECIAL NEEDS TRUST (MSTR)

HEARING:

Accounting Review

COUNSEL:

LAWRENCE A DEAN II	(PET/TEE)...SHERRI L KASTILAHN
KENYA ELIZABETH DAY SPECIAL NEEDS TRUST	(TRU)...
LAWRENCE A DEAN II	(PET)...SHERRI L KASTILAHN
GLINDA L. DAY	(PET)...JUDITH L HUBERT
KENYA ELIZABETH DAY	(MIN)...
LENITA A SKORETZ	(PET)...LENITA A SKORETZ

GENERAL INFORMATION

**Continued from 07/27/17 to file accounting. Notice to be given by Attorney Kastilahn.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 6<sup>th</sup> Trust Account for Larry Dean PPF approved on 01/05/17.
2. Need 7<sup>th</sup> Account beginning with 05/01/16.

RECOMMENDATION

Inquire status of accounting.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS0801057

CASE NAME: MICHAEL J MCGOOKIN

HEARING:  
Accounting Review

COUNSEL:  
BONNIE L FISKE (PET)...CHARTER CALIBORNE HUGHES  
MICHAEL J MCGOOKIN (DEC)...

GENERAL INFORMATION

**Continued from 03/23/16, 09/22/16, 12/29/16, 03/30/17 and 06/15/17.**

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters Testamentary issued to Bonnie Fiske, executor, on 1/15/09, no bond.
2. Previous status report approved on 03/18/15.
3. Partial 1 & 2 final inventory & appraisals filed. **Need** final Inventory and Appraisal and account statements confirming date of death balance per Local Rule 20-908.
4. Need accounting or next status report.

RECOMMENDATION:

Need to clear notes 3&4.

(sa/lc/lh)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1100709

CASE NAME: MANUEL OCHOA

HEARING:

Probate status report filed.

COUNSEL:

MELINDA HERBER

MANUEL OCHOA

(PET)...M. BRIAN CULLEN

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of administration issued to Melinda Herber, stepdaughter, on 06/04/12.
2. Petitioner alleges the estate is not in a condition to be closed as there are no funds available to pay attorney's statutory compensation. Estate must remain open until death of Sally Ochoa, surviving spouse, as there is no reasonable wait to divide title to subject real property without resulting in further litigation.
3. Petitioner requests Court allow biennial reports instead of annual reports.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **07/19/18** (if one year), or **07/28/19** (if two years).

(lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 6 7 8**

**MOVED TO S36P CALENDAR SEE PAGES 13B, 13C, 13D, 13E**

HEARING: Hearing Re: PETITION TO ENFORCE JUDGMENT

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

GENERAL INFORMATION

Continued from 06/23/16 and 09/01/16. Counsel to respond within 20 days.

**Continued from 11/09/16, 12/08/16, 03/16/17 and 07/26/17. Any further objection to be filed by 04/15/17.**

THIS CASE IS SET FOR HEARING ON Petition to Enforce Judgment

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

1. Petitioner, Pamela Ann Williams Churchick, alleges that she is the executor of the Estate of Rita Williams and the successor trustee of the Rita Williams Living Trust.
2. Petitioner alleges that Rita Williams and Alice Johnson were awarded damages in a money judgment that was entered in 7/2/08 against George Williams.
3. On or about July 30, 2008, George Williams allegedly fraudulently transferred real property located at 16651 Bolero Lane, Huntington Beach, CA (Bolero Property) to his wife, Skaidrite Williams. Skaidrite has allegedly died.
4. George filed an appeal of the Judgment on August 28, 2008. The trial court's ruling was affirmed.
5. Rita died on 4/12/11. The beneficiary of her estate is the Rita Williams Living Trust.
6. George died on 9/8/11. Petitioner filed a creditor's claim against George's estate for the full amount of the judgment on September 7, 2012.

7. Petitioner seeks an order conveying the Bolero Property. She also seeks the imposition of a constructive trust. She also seeks to quiet title to the 16651 Bolero Lane, Huntington Beach, CA and double damages under Pr. C. 859.
8. **On 5/20/16, Objector Darina (Sky) Williams filed a demurrer, wherein she argues that the court lacks jurisdiction and the claims are barred by the applicable statute of limitations.**
9. **On 5/23/16, Dacrey Northrup, Trustee of the Williams Family Trust as filed a demurrer to the petition, alleging that each of the causes of action are barred under the applicable statute of limitations and/or the doctrine of latches. Dacrey also argues that the court has no jurisdiction over the Bolero Property.**
10. **Objection to Demurrer of Dacrey Northrup filed by Pamela Churchick on 06/10/16.**
11. **Further objection filed by Dacrey Northrup on 09/16/16.**
12. **Answer filed by Darina Sky Williams on 07/18/17.**
13. **Objection filed by Margo Richardson, PPC on 07/21/17.**
14. **Notice of pendency of action filed by Pamela Ann Williams Churchick on 02/22/17.**

RECOMMENDATION:

Treat the demurrers as objections and set for evidentiary hearing.  
(occ/lc).

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 5 7 8**

**MOVED TO S36P CALENDAR SEE PAGES 13B, 13C, 13D, 13E**

HEARING:

Hearing Re: PTN FOR ORDER DETERMINING VIABILITY OF CREDITORS..

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

Currently under review by legal research

(LR)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 5 6 8**

**MOVED TO S36P CALENDAR SEE PAGES 13B, 13C, 13D, 13E**

HEARING:

FIRST AND FINAL Account and Report of DACREY NORTHRUP and  
Petition for allowance of fees filed.

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

GENERAL INFORMATION

**Continued from 12/08/16, 03/16/17 and 07/27/17. Discovery ongoing.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees of Dacrey Northrup Trustee.

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

1. **Need** notice of hearing and proof of service.
2. Creditor's Claim re Pamela Churchick for \$3,889,700.00 was rejected on 09/07/16. 90 days did not pass at time of filing of the accounting on 10/05/16. The period has now passed.
3. Petitioner, Dacrey, alleges that there are ground leases subject to probate matter in Orange County and the subject of a court-approved settlement [Acct.10/05 LFpg4]. . Question why there are probate matters in both counties? **Supp 01/09/17: George lived in San Bernardino and Skaidrite lived in Huntington Beach around 1993/1994.**
4. Petitioner disputes that the Orange County real property is or was a part of the decedent's estate.

5. There is not a proper balanced accounting with schedules. However, there was only a vehicle and boat valued at \$800. Accounting does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. JTD
6. There appears to be other pending matters in this case. Question how the estate can close? **Supp 01/09/17: Petitioner alleges as there are no assets, the estate may close.**
7. **Objections filed by Pamela Ann Williams Churchick on 12/01/16.**

#### RECOMMENDATION

Need proper notice; matter is contested. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

**SEE ALSO 5 6 7**

**MOVED TO S36P CALENDAR SEE PAGES 13B, 13C, 13D, 13E**

HEARING:  
Trial Setting Conference

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

TSC—no notes—JTD

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400769

CASE NAME: Ralph Wilson

**SEE ALSO 10**

HEARING:

PETITION FOR SETTLEMENT OF THE 2ND AND FINAL Account and Report  
of DAISY WILSON, EDWARD WARREN and Petition for allowance of fees

COUNSEL:

DAISY WILSON	(PET)...THE BROUSARD LAW FIRM
RALPH WILSON	(DEC)...
SILVIA P CURNE	(PET)...PRO/PER
KEMP & ASSOCIATES INC	(PET)...LAURA WOODWARD
THE RALPH T. WILSON FAMILY TRUST (TRU)...	
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...	PRO/PER

Waiver of Court Fees and Costs filed by DAISY WILSON is GRANTED  
TOTAL FEES WAIVED TO DATE: \$90.00

GENERAL INFORMATION

**Continued from 07/27/17 for supplement and order.**

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> and Final **Trust Account** by Daisy Wilson &  
Edward Warren, **co-trustees**.

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

1. Accounting period 04/01/16 – 04/20/17.
2. Assets on hand \$317,207.65.
3. Trustees seek compensation of \$2,777.10 for Edward and \$4,083.94 for Daisy which is approximately 1% of the gross trust. Amounts agreed upon trustees.
4. Attorney seeks fees of \$2,304.14, reduced from \$3,910, for 13 hours at \$300 per hour, \$609 in expenses is included. Itemized [Trust Acct. 05/04/17 LFpg28-29 & supp 07/13 ].
5. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **10/18/18** as the trust appears to be court supervised.

(lc)

Future Hearing: 12/20/17: Motion Re: To Compel Attorney of Record

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400769

CASE NAME: Ralph Wilson

**SEE ALSO 9**

HEARING: FIRST AND FINAL Account and Report of DAISY WILSON, EDWARD WARREN and Petition for allowance of fees filed.

COUNSEL:

DAISY WILSON	(PET)...THE BROUSARD LAW FIRM
RALPH WILSON	(DEC)...
SILVIA P CURNE	(PET)...PRO/PER
EDWARD WARREN	(PET)...THE BROUSARD LAW FIRM
KEMP & ASSOCIATES INC	(PET)...LAURA WOODWARD
THE RALPH T. WILSON FAMILY TRUST (TRU)...	
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...	PRO/PER

Waiver of Court Fees and Costs filed by DAISY WILSON is GRANTED  
TOTAL FEES WAIVED TO DATE: \$90.00

GENERAL INFORMATION

**Continued from 07/27/17 for supplement and order.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Daisy Wilson & Edward Warren, **co-administrators**.

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

1. Petitioners and counsel seek statutory fees of \$9,484 each (administrator split Daisy 75% \$7,113 and Edward 25% \$2,371).
2. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **10/18/18**.

(lc)

Future Hearing: 12/20/17: Motion Re: To Compel Attorney of Record

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/12/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1500519

**VACATED**

CASE NAME: JOHN RAY ALTOMARE

HEARING:

Hearing re Final Discharge

COUNSEL:

GINA N ALTOMARE

(PET)...MARC PAUL JACOBS

JOHN RAY ALTOMARE

(DEC)...

Final discharge filed on 09/20/17.

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600080

CASE NAME: MTR OF BARBARA ANN BLACKMUR

HEARING:  
Accounting Review

COUNSEL:  
STEVEN L BLACKMUR (PET)...PRO/PER  
BARBARA ANN BLACKMUR (DEC)...

#### GENERAL INFORMATION

**Continued from 07/27/17. No appearance. Steven Blackmur ordered to appear if accounting not filed. Notice given by Judicial Assistant.**

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 Steven Blackmur, son, on 06/03/16; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.

#### RECOMMENDATION

Need to clear notes 2-3.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600849

CASE NAME: WASSILCHALK TRUST DATED APRIL 30,1992

**SEE ALSO 14 and 14A**

HEARING:

Petition for TO SUSPEND AND REMOVE CO-TRUSTEES AND APPOINTMENT  
OF SUCCESSOR TRUSTEE FOR OTHER RELIEF FOR BREACH

COUNSEL:

THE FAMILY REVOCABLE TRUST (TRU)...  
ROBERT J. SPITZ (PET)...ROBERT J SPITZ  
SUSAN WASSILCHALK (PET)...ROBERT J SPITZ  
KAREN WASSILCHALK (PET/TEE)...VICTORIA P STAPLETON

Waiver of Court Fees and Costs filed by SUSAN WASSILCHALK is GRANTED

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearings: 11/29/17: Motion Re: To be Relieved as Counsel, 10/12/18: Petition for (First Amended) Petition for Orders Regarding Trust Etc.

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600849

CASE NAME: WASSILCHALK TRUST DATED APRIL 30,1992

**SEE ALSO 13 and 14A**

HEARING:

FIRST Account and Report of KAREN WASSILCHALK and Petition for allowance of fees filed.

COUNSEL:

THE FAMILY REVOCABLE TRUST (TRU)...  
ROBERT J. SPITZ (PET)...ROBERT J SPITZ  
SUSAN WASSILCHALK (PET)...ROBERT J SPITZ  
KAREN WASSILCHALK (PET/TEE)...VICTORIA P STAPLETON

Waiver of Court Fees and Costs filed by **Susan Wassilchalk** is GRANTED  
TOTAL FEES WAIVED TO DATE: \$467.00

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current of Trustee Karen Wassilchalk.

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

1. Accounting period 11/13/08 – 05/31/17.
2. Assets on hand:
  - a. Trust A \$0.
  - b. Trust B \$217,331.16.
3. There were distributions of 21 Shares of stock to Susan, Eric, Denzel and Karen Wassilchalk, valued at \$1,081.71 each.

RECOMMENDATION

Court's discretion. ***If court retains jurisdiction of trust***, set next Accounting review for **08/23/18**.

(lc)

Future Hearings: 11/29/17: Motion Re: To be Relieved as Counsel, 10/12/18: Petition for (First Amended) Petition for Orders Regarding Trust Etc.

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600849

CASE NAME: WASSILCHALK TRUST DATED APRIL 30,1992

**SEE ALSO 13 and 14**

HEARING:

Petition for (FIRST AMENDED) PETITIN FOR ORDERS REGARDING TRUST  
ESTATE ETC

COUNSEL:

SUSAN WASSILCHALK	(PET)...PRO/PER
THE FAMILY REVOCABLE TRUST	(TRU)...
KAREN WASSILCHALK	(PET/TEE)...VICTORIA P STAPLETON

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.



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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601049

CASE NAME: MTR OF VICKIE IRENE ATIYEH  
HEARING: Petition for PROBATE OF WILL & FOR LTRS TESTAMENTARY W/  
FULL IAEA

COUNSEL:

AWANA IRENE RING (PET)...PRO/PER  
VICKIE IRENE ATIYEH (DEC)...

GENERAL INFORMATION

Continued from 01/05/17 and 03/16/17.

OSC set on **06/01/17** when Awana Ring was not present. Marybeth Fry advised she may file a competing petition.

**Continued from 07/27/17 to clear probate notes. Bond required \$50,000. OSC off calendar due to appearance made in court.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Awana Ring, mother.

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

1. Petitioner states all beneficiaries waive bond. However, need bond waivers by all beneficiaries named in will per Pr.C. §8481(a)(2). Court requires bond of \$50,000.
2. The following persons are named in the will, but not in petition: Joe Cihak, Mary Beth, Fry, Judy Nowlen, Lorene Loader, Rhonda Homes, Bonnie Peterson and Chuck Hershey. **Supp 07/21/17 petitioner alleges internet searches were conducted and no parties were located. JTD if due diligence is sufficient.**
3. Need Notice to Petition to Administer Estate and proof of service to Advance Inheritance, LLC.
4. Need proof of publication.
5. ~Proposed Form Order: 10/19/16.

RECOMMENDATION

Need to clear notes 2-5, \$50,000 bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

**SEE ALSO 17**

HEARING:

Hearing Re: OSC RE: DISMISSAL

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER  
LEEERTHA ALISA ROGERS (DEC)...

GENERAL INFORMATION:

Continued from **03/09/17, 05/25/17 and 07/27/17.**

**OSC set on 07/27/17 when there was no appearance.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Letters of Administration with full authority under IAEA by Evans Rogers, Jr, brother.

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

1. Quentin Rogers, son/sole heir, waives bond. Estimated net value of estate is \$103,799 in real property.
2. Need Proof of Publication.
3. ~Proposed form Order: 12/27/16

RECOMMENDATION:

Court's discretion re OSC. Need to clear note 2, Court's discretion re bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

**SEE ALSO 16**

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER  
LEEVERTHA ALISA ROGERS (DEC)...

See notes on previous matter #16.

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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700447

CASE NAME: LENA SMITH

**SEE ALSO 19**

HEARING:

Petition for LETTERS OF ADMINISTRATION

COUNSEL:

JAMES SMITH JR	(PET)...PRO/PER
DYANNA L SMITH	(PET)...PRO/PER
LENA SMITH	(DEC)...

GENERAL INFORMATION

**Continued from 07/27/17. No bond required.**

THIS CASE SET FOR HEARING ON **Amended [07/27/17]** Petition for Letters of Administration with full authority under IAEA by James Jr and Dyanna Smith, children.

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

1. All heirs waive bond. Ok.
2. Need Notice of Petition to Administer Estate and proof of service to Lakora Benford.
3. ~Proposed Form Order: 05/10/17.

RECOMMENDATION

RFA subject to note 2, no bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700447

CASE NAME: LENA SMITH

**SEE ALSO 18**

HEARING:

Petition for (AMENDED) Letters of administration with full authority

COUNSEL:

JAMES SMITH JR	(PET)...PRO/PER
DYANNA L SMITH	(PET)...PRO/PER
LENA SMITH	(DEC)...

See notes on previous matter # 18.

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700709

CASE NAME: ADAM JESSE BOSCH

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

MARIE GARCIA (PET)...MELINDA S. BELL  
ADAM JESSE BOSCH (DEC)...

#### GENERAL INFORMATION

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

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

1. Petitioner is the sole heirs and waives bond. Estate value is \$802,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(c)).
2. Section 3a of petition as to decedent's date of death is unclear. Need verified supplement.
3. ~ No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA subject to note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700718

CASE NAME: FERNANDE SONIA GERARD

HEARING: Petition for Probate of Lost will for Letters of Administration WWA with full authority under IAEA

COUNSEL:

PETER E GERARD	(PET)...CHRISTOPHER B JOHNSON
MATTHEW GERARD	(PET)...CHRISTOPHER B JOHNSON
FERNANDE SONIA GERARD	(DEC)...

GENERAL INFORMATION

On 07/26/17 Peter Gerard and Matthew Gerard appointed Special Administrators to marshal assets in Vanguard IRA and any other Vanguard accounts and to pay insurance on real property

THIS CASE SET FOR HEARING ON Petition for Probate of Lost will for Letters of Administration WWA with full authority under IAEA by Pete Gerard and Matthew Gerard, sons

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

1. Petitioners request no bond; however, Will does not waive bond as to petitioners. Estate value consists of \$465,000 with \$30,000 in personal property. Does court wish to require bond on the estimated value of \$465,000? JTD
2. Rochelle Boyer, alternate executrix signed Declination, [Petition, LF. p. 1].
3. Need Declination by Fred Feck, alternate executor named in will.
4. Petitioner has attached a photocopy of the will to petition. When a will is lost and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it. Pr. C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. JTD.
5. ~Proposed Form Order: 07/19/17

RECOMMENDATION

Need to clear notes 3 and 4. Court's discretion re bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(CS)

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

-----  
DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700719

CASE NAME: JULIENNE M JENSEN

HEARING:

Petition for LETTERS OF ADMINISTRATION W. FULL IAEA

COUNSEL:

MICHAEL J HOGGARD (PET)...LAYNE A BARTHOLOMEW  
JULIENNE M JENSEN (DEC)...

#### GENERAL INFORMATION

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

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

1. All heirs waive bond. Net estate value \$1,990,000 with \$790,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(c))
2. Section 6 of petition indicates decedent was survived by issue of deceased parents; however, section 8 only lists nieces and nephews. Need verified supplement.
3. ~Proposed Form Order: 07/20/17

#### RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)



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

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DATE: 10/12/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700728

CASE NAME: MTR OF DOROTHY MAE ROBINSON-HOWARD

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

JOHNNIE R GREEN (PET)...PRO/PER  
DOROTHY MAE ROBINSON-HOWARD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Johnnie Green, daughter

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

1. All heirs waive bond. Estate value consists of \$229,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(c)).
2. Section 8 is missing the relationship of Cathy Thomas, Darnell Ross, and Karen Risper to the decedent. Also petitioner is not listed in section 8. Need verified supplement.
3. Section 2b of petition indicates petitioner be appointed executor of estate; however, petitioner requests letters of administration. Court to clarify.
4. Need Notice to Petition to Administer Estate and proof of service.
5. Need proof of publication.
6. ~Proposed Form Order: 07/21/17

RECOMMENDATION

Need to clear notes 2-5. Court's discretion re bond. If approved, set Accounting/Status Review for **12/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)