



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 10/16/17

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.

09/18 ww/nb0921/1011

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: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400371

CASE NAME: Carl Lee Peavy

HEARING:

FIRST AND FINAL Account and Report of STACEE BLOKZYL and
Petition for allowance of fees filed.

COUNSEL:

STACEE BLOKZYL (PET)...PRO/PER
CARL LEE PEAVY (DEC)...

GENERAL INFORMATION:

Continued from 06/19/17 at request of administrator. Accounting to be filed by 09/18/17. Nothing new filed in this matter.

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

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

1. Final Inventory and Appraisal filed 09/12/16 has the following issues:
 - a. Section 3 is incomplete;
 - b. Declaration of Probate Referee is incomplete. Need appraisal by probate referee;
 - c. Matters that should be on Attachment 2 are included on Attachment 1.
Need complete and corrected inventory.
2. Petitioner has used a local, incomplete Riverside County form. Need proper, amended account that complies with Pr. C. § 1060 et seq.
3. Accounting period 01/21/14 to 07/18/16.
4. Need Summary of Account and supporting schedules. It cannot be determined whether or not this accounting balances.
5. Petition indicates assets on hand consist of real property. However, real property was sold and inventory and appraisal filed 09/12/16 includes cash assets.
6. Petitioner waives compensation.
7. Wells Fargo Checking Account Statement [LF, p.20] reflects withdrawals totaling \$73,742.76 and appears to be closed. Question whether preliminary distributions

have been made and status of net proceeds from sale of real property? Need verified supplement.

8. Need proof of service to Notice of Proposed Action re Sale of Real Property.
9. Need further clarification regarding Pr. C. §13100 petition [LF, p36] as to Wells Fargo Account that is not included on final inventory and account via verified supplement.
10. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
11. Need Notice of Hearing with proof of service.

RECOMMENDATION:

Need amended accounting to be set on first check calendar no sooner than **11/27/17**. This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500671

CASE NAME: JOULAN LU

HEARING:

FINAL Account and Report of WENSHENG XU and Petition for allowance of fees filed.

COUNSEL:

WENSHENG XU (PET)...FEI PANG
JOULAN LU (DEC)...

GENERAL INFORMATION:

Continued from **06/26/17** for review of supplement filed 06/22/17. Counsel indicates an amended final accounting may be filed. Court notes amended final accounting to be filed by 07/28/17.

Continued from 08/28/17 at request of court. Nothing new filed in this matter.

THIS CASE IS SET FOR HEARING ON Final Accounting and Report of Personal Representative, Wenshen Xu ["Petitioner"].

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

1. No compensation is requested.
2. Need Summary of Account.
3. Need supporting schedules.
4. Need findings re: known creditors; there are two (2) creditor's claims from Capital One and American Medical Response filed on 08/11/15 and 11/02/15, respectively. However, there are no allowances or rejection notices in the file regarding these claims. Need verified supplement confirming status of these claims.
5. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
6. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary. (Pr. C. § 1064 (a)(4). Need verified supplement.
7. **Unconformed Notice of Hearing, affixed to supplement filed 06/22/17, does not include parent(s) of minors or creditors, American Medical Response; or Capital One; and does not give 15 days' notice. Need proper service.**
8. Decedent died intestate with 2 minor children (12 & 6) who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is

separate property of decedent. Does Court wish to appoint counsel for minors?
JTD.

RECOMMENDATION:

Need complete, proper accounting to comply with Pr. C. § 1060 et seq., to be set on first check calendar no sooner than **10/16/17** or thereafter. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501121

CASE NAME: LUCY JOHNSON

HEARING:
Accounting Review

COUNSEL:
CAROLINE DALTON-ALVAREZ (PET)...GREGORY PAUL BENTON
LUCY JOHNSON (DEC)...

GENERAL INFORMATION:
Continued from 04/10/17 and 08/14/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Letters of Administration issued to Caroline Dalton-Alvarez, daughter, on 06/09/16, limited authority, \$20,000 bond.
2. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION:

Inquire status of accounting. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. Clerk may notice bond company if applies

(nb/ww)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600041

CASE NAME: DANIEL B GIELLA

HEARING:

Probate status report filed.

COUNSEL:

MELODIE Z SCOTT (PET)...BRYAN C HARTNELL
DANIEL B GIELLA (DEC)...
DEPARTMENT OF HEALTH CARE SERVICES (TP)...PRO/PER
PACIFIC WESTERN BANK (HEMAR, ROUSSO & HEALD)
GOOD DEEDS, INC (JEFFREY A COLEMAN)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration

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

1. Letters of Administration issued to Melodie Scott on 03/04/16.
2. Petitioner alleges the estate is not in a condition to be closed as creditor claims from Departments of Healthcare Services has not been filed and Federal and California tax returns have not been filed.
3. Petitioner requests an additional 12 months to close the estate.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **07/23/18**.

(lh)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600103

CASE NAME: ROBERT SHOWER

HEARING:

FIRST AND FINAL Account and Report of DAVID P LENHARDT and
Petition for allowance of fees filed.

COUNSEL:

DAVID P LENHARDT (PET)...KRISTA DAWKINS
ROBERT SHOWER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Executor, David P. Lenhardt ["Petitioner"].

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

1. All beneficiaries waive accounting.
2. Accounting period 03/22/16 to 06/15/17.
3. Assets on Hand \$225,608.89 in cash.
4. Statutory fees of \$8,442.08 requested. Calculated.
5. Attorney requests extraordinary fees of \$9,180 for services rendered in connection with the sale of real property totaling 45.9 hours' time. Attachment "F" is not affixed as alleged. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
6. Attorney requests reimbursement of costs advanced of \$2,706.84. Itemized [LF, p56].
7. Photocopy fees of \$331.80 was paid. However, copies are considered overhead per Local Rule 20-909. JTD.
8. Need Property Tax Certificate per Revenue and Taxation Code §480.
9. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. §9202(b).
10. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. §9202(c)(1).
11. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. §1064 (a)(4). Need verified supplement.

12. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C. §1064(a)(5).
13. Proposed Order 07/13/17 - top of the page does not contain the name, address and phone number of the person filing the document. See CRC, Rule 2.111; includes a reserve not prayed for; and is not complete in and of itself per Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 5, 8-12 then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/22/18**.

(nb)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700701

CASE NAME: JERRY GENE STANDING

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LISA NELSON	(PET)...GABRIELLE R RANSELL
JACK STANDING	(PET)...GABRIELLE R RANSELL
ANDREA SILLIVENT	(PET)...GABRIELLE R RANSELL
JERRY GENE STANDING	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Lisa Nelson, Andrea Sillivent, and Jack Standing, daughters and grandson.

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

1. Petitioners seeks 100% interest, 1/3 each; in decedent's 100% interest; in real property per intestate succession.
2. ~Proposed Form Order: 07/13/17

RECOMMENDATION

RFA.

(ww)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700702

CASE NAME: JEAN FRANCES KVETON

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AIAE

COUNSEL:

KYLE KVETON (PET)...PRO/PER
JEAN FRANCES KVETON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Kyle Kveton, son

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

1. Petitioner is allegedly sole heir and waives bond. The estate consists of \$204,000 of which \$4,000 is 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. Section 3.g. of the petition is incomplete. Court to clarify if petitioner is a resident of the United States.
3. Section 5 is incomplete as to whether there was or was not issue of a predeceased child. Court may wish to clarify on record or in alternative; need verified supplement.
4. Need proof of publication
5. ~Proposed Form Order/Letters: 07/14/17/07/19/17

RECOMMENDATION

Need to clear notes 4 & 5. Court's discretion re: notes 2 & 3 and bond. If approved, set Accounting/Status Review **12/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

SEE ALSO 9

HEARING:

Petition for SUBSTITUTED JUDGMENT TO ESTABLISH SPECIAL NEEDS TRUST

COUNSEL:

AISHA L.J. DEBOSE	(CP)...
GWENDOLYN F BROWN	(CPE)...PRO/PER
DALILA DAVEEN DEBOSE	(CTE)...JENNIFER M DANIEL
LARRY G DEBOSE	(TP)...

Waiver of Court Fees and Costs filed by DALILA DAVEEN DEBOSE is GRANTED

XREF: CIPDS1700092(*Dalila Daveen Debose*)

Currently under review by Legal Research.
(LR)

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

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

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

SEE ALSO 8

HEARING:

Accounting Review

COUNSEL:

AISHA L.J. DEBOSE	(CP)...
GWENDOLYN F BROWN	(CPE)...PRO/PER
DALILA DAVEEN DEBOSE	(CTE)...JENNIFER M DANIEL
LARRY G DEBOSE	(TP)...

XREF: CIPDS1700092(Dalila Daveen Debose)

GENERAL INFORMATION

Continued from **02/01/17** and **04/05/17**.

Continued from 09/11/17. Matter will be moot once special needs trust is established.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Aisha DeBose & Gwendolyn Brown, sister and mother, appointed conservators, person/estate on 11/25/15, no bond.
2. Final Inventory and Appraisal filed indicating \$0. Court to inquire as to if there are any assets to manage that would require conservatorship over the estate.
3. Need accounting.

RECOMMENDATION

Inquire status of accounting and court's discretion re note 2.

(lc/ww/)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700271

CASE NAME: MURRY NEAL BOULTON

HEARING: Hearing Re: PETITION FOR APPOINTMENT OF CONSERVATOR
COUNSEL:

EUGENIA PARKER-BOULTON (PET)...SCHWARTZBERG& LUTHER, APC

MURRY NEAL BOULTON (CTP)...

GENERAL INFO//RMATION

Continued from 08/24/17. Court signs order on request for continuance of hearing. Judicial assistant makes courtesy call to counsel to notify of the hearing date being reset.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Eugenia Parker-Boulton (mother)

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

1. Proposed conservatee is developmentally disabled. It appears a limited conservatorship is appropriate. Does Court wish to require an amended petition?
2. As 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
3. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
4. Petitioner seeks medical powers. Capacity Declaration filed 07/14/17 is incomplete at item #4a as to date physician saw proposed conservatee. Need completed form.
5. **Court Investigator report filed.**
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Confidential Screening form is incomplete at item #13. Need completed form.
8. Need return of Citation.
9. ~Proposed Form Order: 07/14/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5
(lh/nb)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: PRO PS1600722

CASE NAME: MTR OF JESSIE VELASQUEZ

HEARING:

Hearing Re: FIRST AND FINAL ACCOUNTING

COUNSEL:

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

GENERAL INFORMATION:

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

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

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

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/28/18**.

(nb)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS02281

CASE NAME: MATTER OF JESSIE VELASQUEZ

SEE ALSO 13

HEARING:

Petition for COURT APPOINTED ATTORNEY FOR ALLOWANCE OF
CONSERVATEE'S ATTORNEY'S FEES

COUNSEL:

MARY ANN VELASQUEZ	(SC)...JOHN M RAGER
JESSIE VELASQUEZ	(CEP)...C L FARRELL
RUTH L HENRICKS	(CPE)...HARTNELL LAW GROUP
C L FARRELL	(TP)...LAW OFFICES OF C L FARRELL PC

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Attorney Fees by CL Farrell

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

1. Petitioner CL Farrell was appointed counsel for conservatee Jessie Velasquez on 01/28/03. Conservatorship terminated on 04/14/16 upon death of conservatee.
2. Petition requests fees of \$27,789 for a total of 93.1 hours for attorney services for period 01/28/03 to 12/31/14 at \$295/hour, and for period 01/01/15 to 09/10/17 at \$325/hour. Itemized. [Petition, 09/11/17, LFpgs10-31]
3. Petition is not verified per Pr. C. §1021. **Need same.**
4. Request for attorney's fees exceeds two-year period and was not made within one year of termination of conservatorship. **Need verified supplement showing good cause why fees should not be denied per Local Rule 20-1402(b).**
5. Notice of Hearing filed 09/26/17; however, a copy of petition was not included with service. Proof of Service is incomplete as to address of server in item #2. **Need proper service and complete Proof of Service.**
6. **Response to Petition for Fees filed 10/03/17 by MaryAnn Velasquez. Does Court wish to deem response an Objection? If so, require service. JTD.**
7. No proposed Order Submit after hearing.

RECOMMENDATION

Need to clear notes 3-5, then Court's discretion.

(lh/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS02281

VACATED

CASE NAME: MATTER OF JESSIE VELASQUEZ

HEARING:

Accounting Review

COUNSEL:

MARY ANN VELASQUEZ

(SC)...JOHN M RAGER

JESSIE VELASQUEZ

(CEP)...C L FARRELL

RUTH L HENRICKS

(CPE)...HARTNELL LAW GROUP

C L FARRELL

(TP)...LAW OFFICES OF C L FARRELL PC

Seventh and Final Account filed 09/25/17.

(lh)

Future hearing date:

11/07/17 Seventh and Final Account and Report

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800129

CASE NAME: ERIK OLINGER

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MELODIE Z SCOTT

(SC/PET)...HORSPPOOL & HORSPPOOL

ERIK OLINGER

(CEP/CEE)...HARTNELL LAW GROUP

ELISABETH KEMPE OLINGER

Future hearing dates:

10/23/17 Accounting Review

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800245

CASE NAME: DANIEL LEWIS

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DANIEL LEWIS

(CPE)...COUNTY COUNSEL

(CEP/CEE)...HARTNELL LAW GROUP

Future hearing dates:

10/23/17 Accounting Review

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0900178

CASE NAME: PAUL ESTABROOK

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

PAUL ESTABROOK

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

Future hearing dates:

10/23/17 Accounting Review

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200119

CASE NAME: IRIS WHITE

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

IRIS WHITE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

Future hearing dates:

10/23/17 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300265

CASE NAME: MTR OF LUCINDA NOLEN

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

LUCINDA NOLEN

KERN COUNTY PUBLIC GUARDIAN

(CE)...COUNTY COUNSEL

(CTE/CEP)...

(PET)...KERN COUNTY COUNSEL

Future hearing dates:

10/23/17 Accounting Review

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

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

HEARING:

Petition for ORDER REFERRING CONSERVATEE FOR AN ASSESSMENT BY
THE MENTAL HEALTH INVESTIGATOR OF SB

COUNSEL:

ARTHUR A CAPPILLA (CPE/CP)...J. DAVID HORSPHOL
SHAWN P HUGHES (CEP)...EDWARD B FISCHER
EDWARD B. FISCHER (PET)...EDWARD B FISCHER & ASSOCIATES
BARBARA E BOWERSOCK (TP)...BARBARA E BOWERSOCK

X-REF: FSB 1302655

GENERAL INFORMATION:

Continued from 04/04/17 and 07/24/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Order Referring Conservatee for an Assessment by the Mental Health Investigator of San Bernardino County [Welfare & Inst. Code § 5650.5].

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

1. Petitioner, Arthur A. Capilla, is the conservator of the person and estate of Shawn Hughes. Petitioner was subsequently appointed as the LPS Conservator of the person, but that conservatorship proceeding was terminated. Both the probate conservatorship and the LPS conservatorship proceedings were pending in Riverside County, when, on 02/7/14, the probate conservatorship was transferred to San Bernardino County.
2. Petitioner alleges the LPS conservatorship was to have been transferred at the same time, but, due to a clerical error, it was not transferred to San Bernardino County until 03/10/14, after it was terminated by operation of law. Petition indicates there is currently no pending LPS proceeding for Shawn Hughes.
3. Petition indicates that on 06/22/13, Shawn Hughes was arrested in the related case and on 11/14/13, Shawn was found mentally incompetent. On 03/20/15, Shawn was found mentally competent to stand trial and the criminal proceedings were reinstated.

4. Petitioner states that on 02/07/17, Petitioner was informed that Shawn was going to be readmitted to Patton State Hospital for further treatment for his mental capacity.
5. Petitioner proffers Welfare & Inst. Code § 5650.5 as authority for this Court to re-establish the LPS Conservatorship and requests this matter be referred to the Mental Health Investigator of the County of San Bernardino, or to such other person or entity that has been designated by the Director of the San Bernardino County Department of Behavioral Health, for an assessment by the local mental health system to determine if the conservatee has a treatable mental illness, including whether the conservatee is gravely disabled as result of a mental disorder and is unwilling to accept, or is incapable of accepting, treatment voluntarily; and directing that the assessment be filed with this Court within 30 days from the date of the referral.
6. **Confidential Assessment filed 04/04/17.**
7. **Report of Court-Appointed Attorney, Edward B. Fischel, filed 06/20/17.**
8. Notice given.
9. ~Proposed Order 02/22/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

10/17/17: Twenty-Fourth Current Account & Report

10/17/17 Petition for Court Appointed Attorney Fees

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400282

CASE NAME: RONALD R SESATE

HEARING:

First Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RONALD R SESATE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Order Termination of Conservatorship entered 07/14/17.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

1. Accounting period 10/03/14 to 12/31/15.
2. Assets on Hand \$2,128.01 in cash.
3. Petitioner requests ratification of compensation already taken in the amount of \$3,000. Generally described. JTD.
4. County Counsel requests ratification of fees already taken of \$1,500. Generally described. JTD.
5. Proposed Order 06/08/17 is incomplete.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Second and Final Account in 60 days.
(nb)

Future Hearing:

01/22/18: Accounting Review

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

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500222

CASE NAME: EDWARD HINER

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

EDWARD HINER (PCE)...HARTNELL LAW GROUP
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Letters expire 10/23/17.

THIS CASE IS SET FOR HEARING ON Petition to Establish Irrevocable Burial Trust by Public Guardian ["Petitioner"].

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

- 1 Petitioner alleges the current assets on hand are \$3,119.69, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
- 2 Petitioner requests authority to deposit up to \$5,000 in an Irrevocable Burial Trust.
- 3 ~Proposed Order 08/08/17.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600121

CASE NAME: GENE PRICE

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

GENE PRICE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

Future hearing dates:

10/23/17 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600263

CASE NAME: SHELBY JEAN MORGAN-PETRIZZI

HEARING:

Petition for Allowance of Compensation to Conservator and to his attorney

COUNSEL:

SHELBY JEAN MORGAN-PETRIZZI
PUBLIC GUARDIAN

(CEP)...ROSE C ROSADO
(CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Conservator of the Person and Estate, Public Guardian ["Petitioner"].

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

- 1 Petitioner alleges that services have been rendered for which petitioner and counsel has not been compensated.
- 2 Petitioner and County Counsel request fees of \$495.00, each. Generally described.
- 3 ~Proposed Order 07/28/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearings:

10/23/17: Conservatorship Compliance Review Hearing,

01/08/18: Hearing Re: Status of Sale of Residence

03/26/18: Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS158

CASE NAME: IN THE MATTER OF PETRENA HOOGENBOSCH

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

PATRENA HOOGENBOSCH

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

Future hearing dates:

10/23/17 Accounting Review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/16/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600079

CASE NAME: DAVID T HUANG

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DAVID T HUANG

(CPE)...COUNTY COUNSEL

(CEP)...SANDY L. TURNER

XREF: CONPS1600080 (*Geraldine Huang*)

Future hearing dates:

10/30/17 Accounting Review

10/30/17 Hearing Re: PTN FOR APPT OF SUCCESSOR TRUSTEE

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

DATE: 10/16/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

VACATED

HEARING:

Hearing Re: Court Trial (1st day)

COUNSEL:

THERESA BELTRAN (PET)...LAW OFFICES OF AARON F GARCIA

CAROLINE LUNA KRIEGER (PET)...LAW OFFICES OF AARON F GARCIA

BEN C LUNA REVOCABLE TRUST (TRU)...

STELLA JAURIGUE (OBJ)...MICHAEL C MADDUX

REGINA MARIE LUNA (MICHAEL C MADDUX)

Waiver of Court Fees and Costs filed by STELLA JAURIGUE is GRANTED

Waiver of Court Fees and Costs filed by REGINA MARIE LUNA is GRANTED

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0900844

CASE NAME: DALE E CHANNELL

HEARING:

Accounting Review

COUNSEL:

KENNETH DECKER (PET)...JOHN F WEBER

DALE E CHANNELL (DEC)...

STATE OF CALIFORNIA FRANCHISE (AGN)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

GENERAL INFORMATION

Continued from 07/31/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Kenneth Decker, executor, on 01/26/10; full authority, \$137,000 bond. Additional bond of \$108,000 filed on 04/19/11. Total bond is \$245,000.
2. Final Inventory and Appraisal filed.
3. Previous status report approved on 01/31/17.
4. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting or status report.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401135

CASE NAME: the Dorothy J. Maloney Living Trust

HEARING:
Accounting Review

COUNSEL:

EUGENE K. MALONEY (PET)...WM ERDMIER
THE DOROTHY J. MALONEY LIVING (TRU)...

VACATE – status report filed (s/b accounting)

GENERAL INFORMATION:

Per minute order dated **02/27/17**, Petitioner withdrew the first and final and amended first and final account. Counsel to submit a complete new accounting. Petition on Accounting Review of Eugene K. Maloney Is withdrawn per agreement of counsel.

Continued from 07/14/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Eugene K. Maloney appointed Successor Trustee, no bond, on 02/05/15.
2. **Accounting filed in the form of a status report. Require proper filing fees.**

RECOMMENDATION:

Inquire status.

(nb/ww/nb)

FUTURE HEARING DATES:

12/21/17 Status Report (s/b Accounting)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500256

CASE NAME: MTR OF JORGE HEREDIA

HEARING:

Hearing re Final Discharge

COUNSEL:

ANNE DASCOMB (PET)...MYERS, WIDDERS, GIBSON, JONES & FEINGOLD
JORGE HEREDIA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Revised Order on Judgement entered 10/03/16.
2. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500905

VACATED

CASE NAME: MTR OF EDWARD MARK LIMON SR

HEARING:

Accounting Review

COUNSEL:

CARMEN LIMON

(PET)...MARIA G NICIFOROS

EDWARD MARK LIMON SR

(DEC)...

Future hearing dates:

12/11/17 Probate status report filed.

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600096

CASE NAME: JANE LIEBERG CRASE

HEARING:
Accounting Review

COUNSEL:
SIMON A HOUSMAN (PET)...SCHLECHT, SHEVLIN & SHOENBERGE
JANE LIEBERG CRASE (DEC)...

GENERAL INFORMATION:

Continued from 07/24/17. No appearance by counsel nor the administrator. Court orders Simon Housman and his counsel to be present.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Special Administration issued 02/26/16; general letters of administration issued to Simon Housman, nominee, on 05/27/16, full authority \$250,000 bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION:

Inquire status of accounting or status report.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700266

CASE NAME: MARGARET MARQUEZ

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION
TO ADMINISTER IAEA

COUNSEL:

THERESA DANIEL (PET)...MICHAEL C MADDUX
MARGARET MARQUEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Theresa Daniel, sister

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

1. All heirs waive bond. The estate consists of \$165,000 in real 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: 06/29/17

RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review **12/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1300834

CASE NAME: ETHAN CAMPOS IRREVOCABLE SPECIAL NEEDS TRUST

HEARING:

FOURTH Account and Report of MIDLAND STATES BANK and Petition
for allowance of fees filed.

COUNSEL:

SECURANT BANK & TRUST (PET)...SUSAN A KATZEN
ETHAN CAMPOS IRREVOCABLE SPECIAL NEEDS TRUST (TRU)...
MIDLAND STATES BANK (PET)...MELINDA S. BELL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Fourth Account Current and Petition for Fees by
Trustee, Midland States Bank ["Petitioner"].

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

1. Accounting period 02/01/16 to 01/31/17.
2. Assets on hand \$124,074.27 consisting of \$6,676.42 in cash and \$117,397.85 in non-cash assets.
3. No bond – corporate fiduciary.
4. Petitioner requests ratification of paid trustee fees in the sum of \$5,000.04 per order dated 08/04/16 [LF, p43]. Petitioner requests continued periodic payments on account to trustee from the Trust Estate based upon its current published fee schedule, revised 08/01/14. Generally described [LF, pgs. 26-29]. JTD.
5. Attorney requests fees of \$6,763.50. Billed at the rate of \$225-\$400/hr. for 18.9 hours' attorney time. Itemized [LF pages 30-42]. JTD.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, Court to set the next hearing re Accounting Review for
03/26/18. Any account to be filed 30 days' in advance.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600216

CASE NAME: MTR OF SHARON LOUISE PEARCE SPECIAL NEEDS TRUST

HEARING:

FIRST Account and Report of LOREN ELIZABETH PEARCE and Petition
for allowance of fees filed.

COUNSEL:

LOREN ELIZABETH PEARCE (PET)...SELTERS & SELTERS
SHARON LOUISE PEARCE SPECIAL NEEDS TRUST (TRU)...

X-REF: PROPS 1200860

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by
Trustee, Loren E. Pearce ["Petitioner"].

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

1. Accounting period 04/20/16 to 06/01/17.
2. Assets on Hand \$16,593.01 consisting of cash.
3. Current bond of \$73,000. Petitioner requests exoneration of bond, or in the
alternative, reduction in the amount of \$56,000 for a new bond in the amount of
\$17,000. Appears sufficient. JTD.
4. Petitioner waives compensation.
5. Attorney requests fees of \$3,795.00. Billed at \$275/hour for 13.8 hours' attorney
time. Itemized [LF, p. 6]. JTD.
6. Attorney requests reimbursement of costs advanced of \$962.00. Itemized [LF, p4].
7. Petitioner requests future accounting not to be required per CRC 7.903(d).
8. ~Proposed Order 06/16/17.

RECOMMENDATION:

Court's discretion re fees and future accountings. If approved, set next hearing for
Accounting Review for **08/20/18**.

(nb)

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

DATE: 10/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600875

CASE NAME: REVOCABLE LIVING TRUST OF SOPHIE SPEED

SEE ALSO 10

HEARING:

Petition for RELIEF FROM BREACH OF TRUST , ETC

COUNSEL:

LAURA GARCIA	(PET)...	ROBERT M EBINER
REVOCABLE LIVING TRUST OF SOPHIE SPEED	(TRU)...	
DANIEL GARCIA SR	(PET)...	MAUREEN MURATORE

Currently under review by Legal Research.
(LR)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1600875

CASE NAME: REVOCABLE LIVING TRUST OF SOPHIE SPEED

SEE ALSO 9

HEARING:

FIRST Account and Report of DANIEL GARCIA sr and Petition for allowance of fees filed.

COUNSEL:

LAURA GARCIA	(PET)...	ROBERT M EBINER
REVOCABLE LIVING TRUST OF SOPHIE SPEED	(TRU)...	
DANIEL GARCIA SR	(PET)...	MAUREEN MURATORE

GENERAL INFORMATION:

Sophia Speed, Trustor, passed away on 01/0/93. Upon her death, her only child, Patricia J. Garcia, became the Successor Trustee and sole beneficiary of the Trust. Patricia J. Garcia was the wife of Petitioner, Daniel Garcia Sr. Successor Trustee, Patricia J. Garcia, passed away on 03/30/97, wherein Petitioner and his daughter, Laura Garcia were nominated to serve as Successor Co-Trustees.

Continued from 07/31/17. Court order supplemental to be filed by 09/16/17. It is determined the assets on hand are listed under additional real property, this is the LA County rental properties.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Successor Co-Trustee, Daniel Garcia, Sr. ["Petitioner"].

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

1. Accounting period 03/30/97 to 12/31/16 [19.9 years].
2. Assets on hand \$10,009.29 in cash and a ¼ interest in rental property located in 33266 Condor Road, Newberry Springs, CA & mobile home. Suggest Court require a final inventory and appraisal. JTD.
3. Petitioner would like to reserve on the issues of a trustee fee and a property management fees for the 3 rental units over the past 20 years and asks the court to retain jurisdiction. Petition indicates that although Petitioner has never been paid a formal trustee fee, he has taken funds from the bank accounts in the same manner that he and Patricia (spouse) did when she was alive. Need itemization for amounts taken in kind and owing, for services rendered via verified supplement.

4. Attorney Muratore would like to reserve on the issue of her attorney fees, and requests that the court retain jurisdiction over the same. JTD.
5. Summary of Account [LF, p. 12 does not include trust's ¼ interest in Newberry Springs property. Need amended Summary of Account.
6. Need copies of bank/financial statements per Local Rule 20-908.
7. Petition indicates that after Trustor Speed's death, Patricia paid the couples personal expenses from the account and treated the account as if it were community property assets. Patricia maintained Petitioner's name on the account and co-mingled their marital assets with the trust assets (ie: rent deposits). Patricia considered this account hers and told Petitioner the account belonged to him, as well. After Patricia died, Petitioner continued to use the account just as he had always done so. Matters were further exacerbated when parties invested in the Newberry Springs property, then transferred their interests to their own trusts. **Therefore, the accounting cannot and will not balance.**
8. Petitioner alleges he will later segregate this income; itemize payments; and seek credit in a supplement to this account. Need same.
9. Disbursements – Schedule B [LF, p. 26] requires further clarification as to the following via verified supplement.
 - a. Unnamed descriptions;
 - b. Distributions to Daniel Garcia Sr.; Karen Garcia; Daniel Garcia, Jr.; Laura Garcia; Jaime Orozco; Arnulelo Diaz;
 - c. Mission Capital Investment Group;
 - d. Husky & Brown, attorney fees, trust admin;
 - e. Cash Withdrawals;
 - f. Hydroscape;
 - g. Returned checks and NSF fees;
 - h. Transfer to Mastercard.
10. **Amended Account filed in the form of a supplement. Continue to first check calendar no sooner than 11/27/17.**
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended accounting to be placed on first check calendar no sooner than **09/26/17**. This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700626

CASE NAME: FEINSTEIN FAMILY TRUST,ORIGINALLY EST 04/23/1990

HEARING:

Petition for 1) DECLARE THE LAST AMENDMENT TO THE FEINSTEIN TRUST
VOID FOR LACK OF CAPACITY ETC

COUNSEL:

ALLEN R BENNER (PET)...SCHOMER LAW GROUP, APC
FEINSTEIN FAMILY TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200124

CASE NAME: CARMEN VILLEGAS

HEARING:

OSC re: Sanctions for FTA/Failure to file Final Discharge filed
by CARMEN ANKELE

COUNSEL:

CARMEN ANKELE

(CPE)...PRO/PER

CARMEN VILLEGAS

(CEP)...DONNASUE ORTIZ

Waiver of Court Fees and Costs filed by CARMEN ANKELE is GRANTED

GENERAL INFORMATION:

Matter set at 07/17/17 due to non-appearance. Court orders Carmen Ankle to be present in court.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions for FTA/Failure to file Final Discharge.

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

1. Order on Final Account entered 08/30/16.
2. Final Discharge entered 08/24/17. Matter appears moot.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600224

CASE NAME: EMILY MEGAN ELST

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CARRIE E COLELLA

COUNSEL:

CARRIE E COLELLA

(PET)...PRO/PER

EMILY MEGAN ELST

(CEE)...SHERRI L KASTILAHN

GENERAL INFORMATION

Order Appointing Carrie E. Colella, Limited Conservator of the person, entered 12/12/16..

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Carrie Colella, mother, appointed as conservator of the person only on 12/12/16.
2. Notice of Conservatee's Rights per Pr.C.§1830(c) filed 08/01/17
3. Statement of Care Plan and a Determination of Conservatee's Appropriate Level of Care filed 05/16/17.

RECOMMENDATION:

None.

(nb/ww)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600256

CASE NAME: MTR OF DEVIN CHRISTOPHER HAMMOND

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of KIMBERLY REDDEN

COUNSEL:

KIMBERLY REDDEN (CP)...PRO/PER
DEVIN CHRISTOPHER HAMMOND (CTP)...LENITA A SKORETZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Kimberly Redden, mother, appointed conservator of the person on 03/06/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/29/17.
3. Care Plan filed 04/24/17.
4. Determination of Conservatee's Appropriate Level of Care form GC-355 filed;
however, Section4a is incomplete as to measures necessary to keep conservatee in
residence. Does court wish to clarify on record or in alternative; need verified
supplement. .

RECOMMENDATION

Court's discretion re: note 4.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600284

CASE NAME: MTR OF JANICE ANNE PRAMSCHUFER

VACATED

HEARING:

Petition TO TERMINATE THE CNSVTRSHIP OF THE ESTATE, ISSUANCE
OF LTRS & WVR OF ACCOUNTING

COUNSEL:

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

Waiver of Court Fees and Costs filed by JANICE ANNE PRAMSCHUFER is GRANTED

XREF: CONPS1600244 (*Barbara Pramschufel*)

Future Hearings:

11/02/17 Petition to Terminate Conservatorship etc

04/11/18: Accounting Review

04/16/18: 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

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600285

CASE NAME: MTR OF BETTY YVONNE SIMONS

HEARING:

First and final Account and Report of LESLIE A FRUGIUELE and
Petition for allowance of fees filed.

COUNSEL:

LESLIE A FRUGIUELE (CPE)...JEFFREY L COTTRELL
BETTY YVONNE SIMONS (CEP)...E JOAN NELMS

Waiver of Court Fees and Costs filed by BETTY YVONNE SIMONS is GRANTED
TOTAL FEES WAIVED TO DATE: \$930.00

X-REF: PROPS 1700755

GENERAL INFORMATION:

Conservatee passed away on 03/29/17.

THIS CASE IS SET FOR HEARING ON AMNDED (09/14/17)First and Final Account and
Petition for Fees by Conservator of the Person and Estate, Leslie Frugieule, ["Petitioner"].

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

1. Accounting period 01/12/17 to 05/18/17.
2. Assets on Hand \$287,673.22 consisting of \$20,973.46 in cash and remaining in real and personal property.
3. Petitioner requests current bond of \$20,000 be terminated. However, bond is not exonerated until entry of final discharge order.
4. Petitioner waives compensation.
5. Attorney requests fees of \$2,400.00. Billed at \$300/hour for 8 hours' attorney time. Itemized [see amended acct., LF, p 9-11]. JTD.
6. Petition does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614c.
7. Need vehicle license number via verified supplement.
8. Need legal description of the real property via verified supplement.
9. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
10. Need Property Tax Certificate per Revenue and Taxation Code § 480.

11. Petition does not include proposed distribution. Need distribution clause via verified supplement.
12. Proposed Order 09/14/17 terminates bond and closes conservatorship.

RECOMMENDATION:

Need to clear notes 6-11 then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/22/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600365
CASE NAME: MTR OF TEODORICO LAWENKO

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ZOLITA LAWENKO

COUNSEL:

ZOLITA LAWENKO (CPE)...PRO/PER
TEODORICO LAWENKO (CEE)...

GENERAL INFORMATION

Continued from 04/10/17, 06/26/17 and 08/21/17. Attorney Walter Moore to assist with filing required documents.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

1. Zolita Lawenko appointed conservator of the person and estate on 02/10/17, no bond.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.
4. Need Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.
8. **Notice of Change of Address filed on 05/02/17 indicates Conservator/spouse, Zolita Lawenko, has moved to Jurupa Valley in Riverside County.**

RECOMMENDATION:

Need to clear notes 2-7. When documents are not filed as ordered, court may set a hearing in accord with Pr.C.§2655.

(nb/ww/)

FUTURE HEARING:

04/02/18: Accounting Review

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

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700264

CASE NAME: MTR OF MARGERY DE HELSBY

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JANE WALTERS (CP)...PRO/PER
MARGERY DE HELSBY (CTP)...SHERRI L KASTILAHN

GENERAL INFORMATION

Continued from 08/21/17. Sherri L. Kastilahn appointed.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Jane Walters (sister)

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

1. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, control right to contract, give/withhold consent to medical treatment, control social/sexual contacts, make decisions re: education. JTD.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. **Capacity Declaration filed 08/10/17 is not dated. Need complete capacity declaration.**
4. Proposed conservatee is developmentally disabled. **Need report by court-appointed counsel Sherri L. Kastilahn.**
5. Proposed conservatee is developmentally disabled. **Court to review IRC letter.**
6. Need Court Investigator report.
7. **Citation returned served.**
8. **Certificate of Completion of the Conservatorship Training Class filed.**
9. Petition indicates Jane Walters is the only relative within the 2nd degree [Petition, 07/12/17,LFpg8]. Court to inquire.
10. ~Proposed Form Order: 07/14/17

RECOMMENDATION

Need to clear notes 3-7. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600225

CASE NAME: MTR OF AYHAM KAREEM JLELATI

SEE ALSO 20 21

HEARING:

Petition for APPOINTMENT OF PROBATE CONSERVATOR OF THE PERSON

COUNSEL:

ABDUL JLELATI	(CP)...PRO/PER
AYHAM KAREEM JLELATI	(CTP)...JENNIFER M DANIEL
BASSIMAH A AYOUBI	(CP)...PRO/PER

Continued from 10/20/16. Jennifer Daniel appointed counsel.

Continued from 01/05/17. Oral report given by Jennifer Daniel. Matter continued for proposed conservatee to be served.

Ex parte hearing held 01/05/17. Matter will be continued to be hearing along with the petition for appointment of conservator on 01/10/17.

Continued from 01/10/17. Oral report given by Jennifer McDaniel. Matter continued to serve proposed conservatee.

Ex parte hearing held 01/10/17. Oral report given by Jennifer McDaniel.

Ex parte hearing held 03/23/17. Court appoints Attorney Mitchell Roth as the Guardian Ad Litem for Ayham Kareem Jlelati. Court orders Ayham Jlelati not to be removed from his current placement in Kansas without prior court approval.

Continued from 03/28/17. Matter continued to be heard with competing petition [by Abdul Jlelati, father].

Continued from 04/24/17. Pending meeting with IRC.

Continued from 05/18/17 at request of Counsel. Court orders Abudel Jlelati to remove his son's name (Ayham Kareem Jlelati) from the bank account. Court further orders bank information or statements are not to be released to the mother (Bassimah Ayoubi) or daughter (Nour Aljceilati).

Continued from 09/14/17 to be heard by Judge Welch.

Continued from 09/20/17. Matter set for TSC. Public Guardian appointed temporary conservator of the person.

THIS CASE SET FOR HEARING ON

- **Petition - 1** by Bassimah Ayoubi (mother) for Appointment of *Limited* Conservator, person only
- **Petition -2** by Abdul Jlelati (father) for Appointment of Conservator, person only

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

Petitioner-1 by Bassimah Ayoubi (mother)

1. Petitioner seeks medical powers. Need Capacity Declaration.
2. Proposed conservatee is developmentally disabled. Report of Counsel Daniel filed 12/23/16 & 09/12/17.
3. Proposed conservatee is developmentally disabled. IRC report filed 10/19/16.
4. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
5. Petitioner seeks civil rights not be limited without court order. However, attachment 1j is not filed. Need same.
6. Declaration filed by petitioner on 12/23/16 with attached IPP program. [Dec.12/23 LFpg6-22].
7. Need return of Citation.
8. Need notice of hearing and proof of service for general hearing.
9. Certificate of Completion of the Conservatorship Training Class filed 11/03/16.
10. Court Investigator report filed 03/21/17.
11. **Declaration by Bassimah Ayoubi filed 07/25/17 alleges Abdul Jlelati (father) has not complied with court order to remove Ayam Kareem Jlelati from bank account.**
12. ~Proposed Form Order: 08/01/16.

Petitioner -2 by Abdul Jlelati (father) filed 03/17/17

13. Proposed conservatee is developmentally disabled. Does court wish to deem this petition as a petition for limited conservatorship? JTD
14. Proposed conservatee resides at a special needs facility in Wichita, Kansas.
15. Petition does not request medical powers, yet indicates proposed conservatee lacks capacity for medical treatment in section 9 [LF, pg7]. Need verified supplement clarifying whether medical powers are sought. If so, need Capacity Declaration.
16. Need Certificate of Completion of the Conservatorship Training Class.
17. Need return of Citation.
18. Notice of Hearing and proof of service filed 03/27/17 & 05/08/17. However, did not serve copy of petition with notice; proof of service is incomplete at section 2 as to server's address; need to include 30 days' notice to Inland Regional Center.
19. **GAL Report filed 05/15/17.**
20. Court Investigator report filed 03/21/17.
21. ~Proposed Form Order: 03/17/17

RECOMMENDATION:

Need to clear notes 8-9; 16-19. If approved, set hearing for Compliance Review for **05/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lc/lh/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600225

CASE NAME: MTR OF AYHAM KAREEM JLELATI

SEE ALSO 19 21

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ABDUL JLELATI

(CP)...PRO/PER

AYHAM KAREEM JLELATI

(CTP)...JENNIFER M DANIEL

BASSIMAH A AYOUBI

(CP)...PRO/PER

See prior matter #19.

(nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 10/16/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600225

CASE NAME: MTR OF AYHAM KAREEM JLELATI
SEE ALSO 19 20
HEARING:
Trial Setting Conference

COUNSEL:
ABDUL JLELATI (CP)...PRO/PER
AYHAM KAREEM JLELATI (CTP)...JENNIFER M DANIEL
BASSIMAH A AYOUBI (CP)...PRO/PER

No notes – TSC.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300758

CASE NAME: MTR OF LOUISE MERCEDES BORQUEZ

HEARING:

FIRST AND FINAL Account and Report of DARLENE L PARRIS and
Petition for allowance of fees filed.

COUNSEL:

DARLENE L PARRIS (PET)...PRO/PER
LOUISE MERCEDES BORQUEZ (DEC)...

Waiver of Court Fees and Costs filed by DARLENE L PARRIS is GRANTED
TOTAL AMOUNT FEES WAIVED TO DATE: \$1110.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON AMENDED (09/27/17) Petition for Final
Distribution upon Waiver by Personal Representative, Darlene L. Parris ["Petitioner"-
daughter].

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

1. All heirs waive accounting.
2. Assets on Hand \$65,110 consisting of \$110 in cash and remaining in real property.
3. Petitioner does not request compensation.
4. Need Summary of Account.
5. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
6. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
7. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
8. Please file verified supplement which includes address(es) of beneficiary(ies) receiving real property.
9. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)). Need verified supplement.

10. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
11. Need findings re: sole and separate property
12. Need findings re: known creditors
13. Need findings re: all taxes have been paid, or reserve made for taxes
14. Need bank statement to support date of death balances per Local Rule 20-908.
15. Need proposed distribution as to real property.
16. ~Proposed Order 07/18/17 is not complete in and of itself. Local Rule 20-614.

RECOMMENDATION:

Appears moot. Per minute order dated 07/18/16, the Court approved the first and final accounting and indicated that the filing fees previously waived in the amount of \$1,110.00 were to be paid prior to the hearing on receipts and final discharge. When this accounting was filed, the hearing on final discharge was vacated.

Need proof of paid fees previously waived; need Order after Hearing; and set next hearing for Final Discharge in 60 days.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400128

CASE NAME: Walter McKibben

HEARING:

FIRST AND FINAL Account and Report of JANICE WINEKE and Petition
for allowance of fees filed.

COUNSEL:

MICHAEL T CHAMBERS	(PET)...JAMES D PETERSON
WALTER MCKIBBEN	(DEC)...
JANICE WINEKE	(PET)...JAMES D PETERSON

GENERAL INFORMATION:

Continued from 07/24/17 at request of counsel. Notice to be given by Mr. Peterson.

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

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

1. Accounting period 05/11/16 to 04/30/17.
2. Assets on Hand \$66,449.93 consisting of cash.
3. Statutory fees of \$1,370.42 requested. Calculated.
4. Petitioner requests authority to withhold \$1,000 as a reserve.
5. ~Proposed Order 05/01/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for final discharge for **10/22/18**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500047

CASE NAME: Peter Fredric Williams

HEARING:

Probate status report filed.

COUNSEL:

SUSAN WILLIAMS (PET)...DINA I FARHAT, ESQ
PETER FREDRIC WILLIAMS (DEC)...

GENERAL INFORMATION:

Continued from 05/15/17 at request of counsel.

Continued from 07/24/17.

THIS CASE IS SET FOR HEARING ON Status Report by Personal Representative, Susan Williams.

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

1. Petitioner alleges the estate is not in a condition to be closed as the First and Final Account needs to be completed.
2. Petitioner requests an additional 3 months to close the estate.
3. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201.
Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next Accounting Review for **08/14/17.**

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600157
CASE NAME: MTR OF ROBERTA M RICHEY

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

RACHELLE WILLIAMS (PET)...PRO/PER
ROBERTA M RICHEY (DEC)...

GENERAL INFORMATION

Letters of special administration issued **02/25/16** to Rachelle Williams, daughter.
Continued from **04/11/16**. Court was advised the home had been sold.
Continued from **07/18/16**. No appearance. OSC set. Rachelle Williams ordered to be personally present.
Continued from **09/26/16** OSC taken off calendar.
Continued from **11/28/16, 02/27/17** no appearance. OSC set.
Continued from **05/15/17** OSC taken off calendar.
Continued from 07/24/17.

THIS CASE IS SET FOR HEARING ON Letters of Administration W/Full IAEA by Rachelle Williams, daughter

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

1. Petitioner alleges she is daughter and sole heir who waives bond, however, petition indicates there is a registered domestic partner who would also be an heir. **Need** verified supplement. 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. Item 5.2.b. states decedent's spouse is deceased. Item 7.a. states decedent had no predeceased spouse. **Need** verified supplement. Item 5b not completed.
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate and proof of service.
5. ~Proposed form Order filed 02/22/16.

RECOMMENDATION:

Need to clear notes 1-4. Court's discretion re bond. If approved, set Accounting/Status Review for **12/24/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rules.
(dl/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600547

CASE NAME: LINDA S EDMONDSON

HEARING:
Accounting Review

COUNSEL:

BRENDA S GARCIA (PET)...J. TERRENCE MOYNIHAN
LINDA S EDMONDSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Brenda Garcia, daughter, on 09/08/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700179

CASE NAME: DONALD R STRATTON

HEARING:

Motion Re: RECONSIDERATION * Filed by Petitioner AURORA STRATTON

COUNSEL:

AURORA STRATTON (PET)...PRO/PER
DONALD R STRATTON (DEC)...

Currently under review by Legal Research.
(LR)

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700634

CASE NAME: MTR OF ELEANOR RAE NEWCOMER

HEARING:

Spousal Property Petition hearing.

COUNSEL:

TERRA HAGEL (PET)...BLAKE D THOMPSON
ELEANOR RAE NEWCOMER (DEC)...

XREF: PROPS1700089 (*Richard A Newcomer*)

GENERAL INFORMATION:

Decedent passed away on 04/29/07.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Personal Representative in related case, Terra Hagel ["Petitioner"].

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

1. Petitioner requests determination of property passing to the surviving spouse as community property. Specifically, real property located at Chino, CA, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were the parties married? How was the property interest acquired – with community funds, etc? Need verified supplement.
2. Petitioner alleges the title vesting on said improved real property is held as "Tenants in Common" and claims Decedent's interest in the property passes to Richard A Newcomer, who died on 12/21/16, in the related case. Does Court wish to require copy of vesting document? JTD.
3. Petitioner states the subject property has been sold in the related case and during escrow, the vesting title was determined to be problematic and requests this Court determine ownership so that the sale can move forward.
4. Notice filed 08/03/17 does not include decedent's daughter, Connie Erickson. Need proper service.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need verified supplement and proper service then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS06898

VACATED

CASE NAME: EST OF ROYCE IRVIN PERKINS

SEE ALSO 9

HEARING:

Accounting Review

COUNSEL:

MELISSA HANSON

(PET)...HARTNELL LAW GROUP

ROYCE IRVIN PERKINS

(DEC)...

Status report filed. See matter 9.

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS06898

CASE NAME: EST OF ROYCE IRVIN PERKINS

SEE ALSO 8

HEARING:

Probate status report filed.

COUNSEL:

MELISSA HANSON (PET)...HARTNELL LAW GROUP
ROYCE IRVIN PERKINS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report of Administration

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

1. Letters of Administration issued to Melissa A. Hanson on 03/17/06.
2. Petitioner alleges the estate is not in a condition to be closed. Counsel is working on recovering estate's only assets consisting of past due receivables from the accountancy corporation with a face value of \$305,110 and \$115,732.64.
3. Petitioner requests an additional 12 months to close the estate.
4. ~Proposed Order: 07/24/17

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **07/23/17**.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000075

CASE NAME: KENNETH WAYNE NEWTON

HEARING:

THIRD Account and Report of DAVID NEWTON and Petition for allowance of fees filed.

COUNSEL:

KATHRYN NEWTON	(CPE)... EDWARD B FISCHEL & ASSOC
DEBORAH COOKSEY	(CPE)...PRO/PER
GLORIA ROMAN	(CEP)...GEORGE F DICKERMAN
PUBLIC GUARDIAN	(CEP)...RALPH K HEKMAN
JULY CURD	(CPE)... EDWARD B FISCHEL & ASSOC
EDWARD B FISCHEL	(PET)...
DONALD NEWTON	(CPE)... EDWARD B FISCHEL & ASSOC
LYNDA ROYSTER	(CPE)... HORSPOOL & PARKER
BONZA-RHEE MURRAY	(CPE)...PRO/PER
CLAUDETTE SMITH	(CPE)...PRO/PER
WOODROW NEWTON	(PET)...MILES & HATCHER
PEGGY WALLACE-NEWTON	(PET)...MILES & HATCHER
KENNETH WAYNE NEWTON	(CEP/CTE/CEE)...
MAZIO D ROYSTER	(CPE)...HORSPOOL & H ORSPOOL
E JOAN NELMS	(PET)...MARK J. FLORY
DAVID NEWTON	(CPE/CE)...EDWARD B FISCHEL & ASSOC
ETHEL L NEWTON	(PET/CE)...PRO/PER
KENDRA NEWTON-FRANCISCO	(CP)...
AMERICAN CONTRACTORS INDEMNITY (CRAIG P BRONSTEIN)	
BOND SERVICES OF CALIFORNIA (PRO/PER)	

Waiver of Court Fees and Costs filed by BONZA-RHEE MURRAY is GRANTED

Waiver of Court Fees and Costs filed by DAVID NEWTON is GRANTED

TOTAL FEES WAIVED TO DATE: \$3437.00

XREF: CONPS1300213 (*Bertha Mae Chatman*)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by Conservator of the Person and Estate, David Newton ["Petitioner"].

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

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

1. Accounting covers 10/01/14 to 09/30/16.
2. Assets on hand: \$157,504.30 (of which \$2,114.30 is cash, \$115,000 in carry value of real property and the balance in carry value of personal property)
3. Current bond posted in the amount of \$80,000. Appears sufficient.
4. Petitioner does not request fees.
5. During the accounting period, petitioner paid for caregiver services. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c) by Kendra Newton, July Curd Newton, and Mary Fisher.
6. Disbursements – Schedule C includes bookkeeper fees of \$800.00. JTD.
7. Need Notice of Hearing and proof of service.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 5 & 7 then Court's discretion. If approved, set next hearing for Accounting Review on **11/26/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000221

VACATED

CASE NAME: DWIGHT G BANKS

HEARING:

Accounting Review

COUNSEL:

JACQUELINE M BANKS

(CP)...JENNIFER M DANIEL

DWIGHT G BANKS

(CTP)...NOREEN T FONTAINE

DWIGHT G BANKS

(INC)...NOREEN T FONTAINE

XREF: CONPS1300213 (Bertha Mae Chatman)

Ex-parte Petition to dispense with Accounting and Order Approving filed 09/12/17.

Future hearing dates: 08/29/19 Accounting Review

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800148

CASE NAME: DEBORAH LYNNE PICKETT

HEARING:

FINAL (13TH) Account and Report of FRANK D. PICKETT III, DALE NOEL and Petition for allowance of fees filed.

COUNSEL:

FRANK D. PICKETT III	(PCR/CPE)...LINDA M BATTRAM
DALE NOEL	(PCR/CPE)...LINDA M BATTRAM
DEBORAH LYNNE PICKETT	(PCE/CEP)...SHERRI L KASTILAHN

GENERAL INFORMATION

Conservatee passed away on 01/20/17.

Continued from 07/24/17 at request of counsel. Notice given by Ms. Battram.

THIS CASE SET FOR HEARING ON Thirteenth and Final Account and Request for Termination of Conservatorship and Exoneration of Bond by Co-Conservators, Dale Noel and Frank D. Pickett III ["Petitioners"].

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

1. Inventory and Appraisal filed 06/19/17 includes personal property on attachment one that should be on attachment 2 and appraised by Probate Referee. Need corrected inventory.
2. Accounting period: 07/01/16 to 03/30/17 (pre & post death).
3. Assets on hand: \$6,792.00 consisting of personal property. However, Inventory and Appraisal filed on 06/19/17 indicates there are cash assets in the sum of \$1,483.04.
4. Summary of Account [LF, p. 10] does not reflect cash assets. Need amended summary and affected schedules.
5. Account does not include Cash and Non-Cash Assets on Hand at End of Account Period Schedules. Need verified supplement.
6. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
7. Co-Conservator/petitioner, Frank D. Pickett, does not seek reimbursement due to lack of funds.
8. Attorney does not request fees due to lack of funds.

9. Petitioners request current bond of \$100,000 to be exonerated. However, bond is not exonerated until entry of final discharge order.
10. Co-Conservators/Petitioners request to be relieved of their duties under the Conservatorship and termination of the Conservatorship. Conservatorship of the Person terminated by operation of law upon Conservatee's demise and the Court retains jurisdiction of the estate.
11. Petitioner, Frank D. Pickett, III, requests distribution of personal property (the family heirloom furniture) to himself via Pr. C. § 13100 (affixed to inventory filed on 06/15/17- LF, p. 8). JTD.
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1, 4-6. If approved, set next hearing for final discharge for **10/22/18**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300069

CASE NAME: ERIK GRADY

HEARING:
Accounting Review

COUNSEL:

ERIK GRADY (CEP)...BERNITA S BORGES
ARTHUR A CAPPILLA (CPE)...BARBARA E BOWERSOCK
ERIK J. GRADY (CEP)...
AMERICAN CONTRACTORS INDEMNITY (TP)...PRO/PER
US DEPT OF VETERANS AFFAIRS (ALAN K ACHEN)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 9th Account for Arthur Cappilla, VA fiduciary, approved on 11/09/15.
2. Need 10th Account beginning with 08/01/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400131

CASE NAME: MTR OF DANA MARLENE STEIN

HEARING:

Accounting Review

COUNSEL:

ERICH EDWARD STEIN

(CPE)...ERIC N CHUNG

DANA MARLENE STEIN

(CEP/PET)... DONNASUE ORTIZ

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. 1st accounting for Erich Stein, son, approved on 02/04/16.
2. Need 2nd accounting beginning with 07/21/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400327

CASE NAME: GREGORY SMITH

SEE ALSO 16

HEARING:

Hearing Re: SUSPENDING CONSERVATOR/APPMT OF PUBLIC GUARDIAN

COUNSEL:

HEATHER ROBINSON	(CPE)...RICHARD A. LEPORE
GREGORY SMITH	(CTE/CTP)...MATTHEW E. SHEASBY
CASEY HAGOOD	(CP)...PRO/PER

Waiver of Court Fees and Costs filed by HEATHER ROBINSON is GRANTED

GENERAL INFORMATION

OSC set on **02/22/17**. Accounting ordered to be filed by 03/15/17. Nothing new filed. **Continued from 05/03/17**. The Court orders CASEY HAGOOD and HEATHER ROBINSON to fully cooperate with the public guardian in acquiring information in this matter. Notice given by Mr. Domen.

Continued from 07/17/17. Casey Hagood is suspended as conservator. Court appointed Public Guardian as conservator of estate. Matthew Sheasby to prepare Order Suspending Conservator. Casey Hagood and Heather Robinson are cited to appear at next hearing.

THIS CASE SET FOR HEARING ON **OSC re Suspension of conservatee/Appointment of Public Guardian/Accounting review.**

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

1. Half-brother, **Casey Hagood**, was appointed conservator of the **Estate only**, \$45,000 bond; and friend, Heather Robinson, was appointed conservator of the **Person only** on 3/4/16.
2. Need 1st accounting by Casey Hagood.
3. Citation returned unserved.
4. Need Order suspending conservator.

RECOMMENDATION

Court's discretion re OSC. Inquire status.

(lc/nb/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400327

CASE NAME: GREGORY SMITH

SEE ALSO 15

HEARING:

Accounting Review

COUNSEL:

HEATHER ROBINSON

(CPE)...RICHARD A. LEPORE

GREGORY SMITH

(CTE/CTP)...MATTHEW E. SHEASBY

CASEY HAGOOD

(CP)...PRO/PER

Waiver of Court Fees and Costs filed by HEATHER ROBINSON is GRANTED

See notes on prior matter #15.

(lh)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600037

CASE NAME: MTR OF CHRIS CLAYTON JACKSON JR.

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHRISTINA JACKSON

COUNSEL:

CHRISTINA JACKSON (PET)...PRO/PER
CHRIS CLAYTON JACKSON JR (PCE)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Referred to Court Investigator for investigation and report on 04/12/16.

Continued from **07/12/16**. No appearance.

Continued from **09/20/16** by stipulation. Counsel's report will report that notice of conservatee's right was sent.

Continued from 12/05/16, 02/03/17 and 04/17/17. Counsel states that he has not located his client. There is a possibility the Conservator and conservatee are in Washington State. The last known address Attorney Flory has is 1356 Watson Ave Costa Mesa, CA 92626. Referred to CI.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Christina Jackson, sister, appointed Conservator of the person on 04/15/15 in Riverside County.
 - a. Proposed San Bernardino Letters received on 12/05/16. However, the box for "conservator" in section 1 is not checked and the Court address is incorrect? Require proper letters.
2. Statement of Care Plan in accord with Pr.C. §2352.5 was not required by Riverside. Does Court wish to require? JTD
3. Determination of Conservatee's Appropriate Level of Care filed 12/22/15.
4. Court Investigator Special Report filed 04/19/17.
5. **Need** report of court-appointed counsel, Mark Flory.
6. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

7. Notice of change of address by CI's office filed 04/19/17 indicates that conservatee now resides in Orange, CA.
8. **Need CI report as directed by Court on 04/17/17.**
9. ~Proposed letters 12/05/16.

RECOMMENDATION:

Need to clear notes 1, 5, 6 & 8 then Court's discretion.

(lc/nb/ww/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600059

CASE NAME: MARIA GRACIELA BARAJAS

HEARING:

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

COUNSEL:

MARIA GUADALUPE BARAJAS (CP)...PRO/PER
MARIA GRACIELA BARAJAS (CTP)...MARK J. ANDREW FLORY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Guadalupe Barajas, mother, appointed limited conservator of the person only on 03/06/17.
2. Need Notification of Conservatee's rights per Pr.C.§1830(c).
3. Need Determination of Conservatee's Appropriate Level of Care form GC-355.
4. Need Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600198

CASE NAME: MTR OF CARLA JAILENE GARCIA

HEARING:

Conservatorship Compliance Review Hearing on PETIITON FOR
CONSERVATORSHIP of AURELIO GARCIA GONZALEZ

COUNSEL:

AURELIO GARCIA GONZALEZ (CP)...PRO/PER
MARLENE GARCIA (CP)...PRO/PER
CARLA JAILENE GARCIA (CTP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Aurelio Garcia Gonzalez & Marlene Garcia, parents, appointed limited conservator of the person only on 03/06/17.
2. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord with Pr.C.§2352.5 filed 04/18/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed 04/18/17; however, **need** notice to all siblings listed on the List of Required Contact form.

RECOMMENDATION

Need to clear note 3.

(ww)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700077

CASE NAME: MTR OF DAVID CASTILLO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ELIAS CASTILLO (CP)...PRO/PER
DAVID CASTILLO (CTP)...CRAIG M PARKER

Waiver of Court Fees and Costs filed by DAVID CASTILLO is GRANTED

GENERAL INFORMATION:

Continued from 04/17/17. Attorney Craig M. Parker appointed. The Court orders IRC to provide a report to the court. The Court orders the Public Guardian conduct an independent review taking into consideration the Court investigator's report. Notice by Judicial Assistant.

Continued from 07/17/17. Parties may file an amended petition adding mother Dorthia Orozco as co-conservator or in the alternative mother may file a competing petition. Court orders IRC to file a report. Public Guardian to notify IRC. Clerk's office to notify IRC. Court makes visitation orders.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by father, Elias Castillo.

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

- 1 No bond – person only.
- 2 Capacity Declaration filed 07/17/17.
- 3 Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
- 4 Proposed conservatee is developmentally disabled. **Need report** of Counsel Craig Parker.

- 5 **Need IRC Report.**
- 6 Court Investigator Report filed.
- 7 Return of Citation with proof of service filed 07/25/17.
- 8 Certificate of Completion re Conservatorship Class filed.
- 9 ~Proposed Form Order/Letters 03/08/17

RECOMMENDATION:

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb/lh)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700219

CASE NAME: MTR OF RAMON IGNACIO MARQUEZ

HEARING:
Petition for Appointment of Conservator

COUNSEL:
RAMON MARQUEZ-RODRIGUEZ (CP/CTP)...CANDICE GARCIA-RODRIGO
HILARIA MARQUEZ (CP)...PRO/PER

GENERAL INFORMATION

Continued from 07/24/17. Attorney Candice A Garcia-Rodrigo appointed for Ramon Ignacio Marquez. Proposed conservators to complete training class.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Ramon and Hilaria Maquez-Rodriguez (father and grandmother)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 06/12/17.
2. Petitioner requests orders limiting civil rights and granting powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, consent/withhold consent to marriage, decisions regarding education.
3. Proposed conservatee is developmentally disabled. Report of Counsel Candice A. Garcia-Rodrigo filed 08/14/17.
4. Proposed conservatee is developmentally disabled. IRC report filed 07/20/17.
5. Proof of Completion of the Conservatorship Training Class filed 09/18/17.
6. Citation returned served.
7. Court Investigator report filed.
8. Petition is incomplete at item 9 re medical treatment. **Need** verified supplement.
9. ~Proposed Form Order: 06/12/17

RECOMMENDATION

Need to clear notes. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb/lh)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700298

CASE NAME: MTR OF SKYE LIM
HEARING:
Petition for Appointment of Conservator

COUNSEL:

JULIE LIM (CP)...GISSELLE M AMINI
SKYE LIM (CTP)...

GENERAL INFORMATION

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re: education. JTD
2. Petitioner seeks civil rights be limited. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 09/19/17.
4. Proposed conservatee is developmentally disabled. Need report of Counsel Mitchell Roth.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. Need return of Citation.
7. **Certificate of Completion of the Conservatorship Training Class filed.**
8. Declaration of Julie Lim regarding maternal grandfather and paternal grandfather. Does Court wish to excuse notice? JTD
9. CI Report filed 09/12/17.
10. ~Proposed Form Order: 08/02/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700299

CASE NAME: MTR OF JORGE HERRERA, JR

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JORGE LUIS HERRERA	(CP)...GISSELLE M AMINI
EUSEBIA RAMOS	(CP)...GISSELLE M AMINI
SELENA HERRERA	(CP)...GISSELLE M AMINI
JORGE HERRERA JR	(CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Jorge Herrera (father), Eusebia Ramos (mother), Selena Herrera (sister)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 08/02/17.
2. Proposed conservatee is developmentally disabled; it appears a limited conservatorship is appropriate. As this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). **IRC report filed.**
3. Need report of appointed Counsel Candice Rodrigo.
4. Need return of Citation.
5. **Need Certificate of Completion of the Conservatorship Training Class by Selena Herrera.**
6. Need Court Investigator report.
7. ~Proposed Form Order: 08/02/17

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5
(lh/nb)

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

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700329

CASE NAME: MTR OF ERIK JOSEPH HERNANDEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

FELIX MENDEZ HERNANDEZ (CP)...PEXTON LAW, APC
LESLEE HERNANDEZ (CP)...PEXTON LAW, APC
ERIK JOSEPH HERNANDEZ (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Ex parte orders entered 09/06/17. Court appointed attorney Jennifer Daniel as counsel for Erik Joseph Hernandez.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Felix and LesLee Hernandez, parents

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

1. Petitioner requests powers under Pr. C. §2351.5 but did not provide attachment 1h specifying powers, and did not complete item 1j of petition re orders limiting civil rights. Need verified supplement.
2. Proposed conservatee is developmentally disabled. Need report of Counsel Jennifer Daniel.
3. Proposed conservatee is developmentally disabled. Need IRC report.
4. Need return of Citation.
5. Need Certificate of Completion of the Conservatorship Training Class.
6. Need Notice of Hearing and Proof of Service.
7. **Court Investigator report filed.**
8. Capacity Declaration filed 08/30/17.
9. ~Proposed Form Order: 08/30/17

RECOMMENDATION

Need to clear notes 1-6. If approved, set hearing for Compliance Review for **05/21/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 10/16/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700107

CASE NAME: MARSHALL VS BARNES

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

JOANN MARSHALL (PP)...PRO/PER

BRENDA BARNES (RP)...

Need proof of personal service on Respondent, Brenda Barnes.

(nb)