



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

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

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.

09/21/17lh/nb1003/1012

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 10/17/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS0800010

CASE NAME: MARY MARGARET ROWE

HEARING:

Accounting Review

COUNSEL:

ETHANAC ROADINVESTORS, A LIMIT

JOHN M BYLSMA

JOHN M BYLSMA

MARY MARGARET ROWE

(TP )...DENNIS K HASTY

(PET)...ALLARD, SHELTON &

(PET)...KEITH S WALKER

(DEC)...

**CCP170.6 filed as to CYNTHIA LUDVIGSEN**

GENERAL INFORMATION:

**Continued from 09/05/17. No appearance. Court orders personal representative and their counsel to be present in Court on 10/17/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Second Status Report entered 036/04/16; accounting now due.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400663

**VACATED**

CASE NAME: ERWIN B. KOWALSKI

HEARING:

FIRST ACCOUNT CURRENT Account and Report of MICHAEL J. KOWALSKI  
and Petition for allowance of fees filed.

COUNSEL:

ERWIN B. KOWALSKI (DEC)...  
MICHAEL J. KOWALSKI (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MICHAEL J. KOWALSKI is GRANTED

Fee waiver amount due \$645.00  
\$465.00 for probate petition filing fees on 08/12/14  
\$90.00 for status report on 10/28/16  
\$90.00 for ex parte hearing on 07/24/17

Future hearing date:

12/04/17 First Account Current and Report of Michael J. Kowalski

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501030

CASE NAME: GEORGE A. PANASOVICH AKA ETC

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$5,000.00 ON STACEY PANASOVICH

COUNSEL:

GEORGE A PANASOVICH (DEC)...  
STACEY PANASOVICH (PET)...MCCLELLAN & WILSON

GENERAL INFORMATION:

Continued from **02/28/17 and 04/11/17** at request of counsel.

Matter set on **05/09/17**. Court orders Stacey Panasovich to be personally present in court on June 13, 2017. Notice to be given by Counsel to Stacey Panasovich

Continued from **06/13/17**. No appearance. Court imposes on Stacey Panasovich a surcharge in the amount of \$500 payable to the estate for her failure to appear as court ordered. Court sets OSC re surcharge in amount of \$5,000 for August 8, 2017 at 8:30am in Department S35.

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

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions** on Accounting Review

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

1. Letters of Administration issued 12/28/16, full authority, no bond.
2. **Waiver of Account filed 09/07/17.**

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

12/18/17 Waiver of account & report

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600302

CASE NAME: FLORENCIO G CHAVEZ

HEARING:

Probate status report filed.

COUNSEL:

FLORENCIO G CHAVEZ (DEC)...  
FLORENCIO G CHAVEZ JR (PET)...BRYAN C. HARTNELL

***X-REF PROPS1600400 (Estate of Magdalena Chavez)***

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 07/19/17).

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

1. Petitioner alleges this action was filed so that petitioner would have standing to file a spousal property petition. The Spousal Property petition has been granted and assets transferred leaving no assets for administration of this estate.
2. Petitioner has performed all duties required with respect to the administration of the estate. The estate is now in a condition to be closed because there are no assets to be distributed.
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.
4. Need Petition to Terminate of further proceedings and for discharge of the personal representative per Pr. C. §12251.
5. Proposed order. 07/19/17

RECOMMENDATION:

Need to clear notes 3 and 4, then Court's discretion.

(cs)

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600732

CASE NAME: MTR OF THERESA VERONICA STONE

HEARING:

REPORT ON WVR OF Account and Report of LISA LAFFERTY and  
Petition for allowance of fees filed.

COUNSEL:

LISA LAFFERTY (PET)...DENHERDER GRIER &  
THERESA VERONICA STONE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for final distribution upon waiver of account and for fees by Executrix, Lisa Lafferty ["Petitioner"-daughter-Trustee-Trust Beneficiary].

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

1. Petitioner, as Trustee of the T. Veronica Stone Living Trust dated 10/03/07, waives accounting.
2. The will conditionally incorporates decedent's Trust. Need a certification of trust that meets the requirements in Pr.C. §18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
3. Accounting period 04/11/16 to
4. Assets on Hand \$222,013.73 consisting of \$218,013.73 in cash and a 2010 Chevy Aveo LT.
5. Petitioner waives statutory compensation.
6. Attorney requests statutory fees of \$7,709.33. Calculated.
7. Attorney requests reimbursement of costs of \$977.50. Itemized [LF, p5].
8. Petitioner requests authority to withhold \$5,000 as a reserve for closing costs.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear note 2 then Court's discretion. If approved, set next hearing for final discharge on **10/23/18**.

(nb)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700712

CASE NAME: BETTY JEAN WALLACE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BETTY JEAN WALLACE	(DEC)...
JAYNE ANN MANNING	(PET)...ELIZABETH A TRESP
JENNIFER LEE MANKE	(PET)...ELIZABETH A TRESP
JULIE LYN PADILLA	(PET)...ELIZABETH A TRESP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by issues, Jennifer K. Manke, Julie L. Padilla and Jayne A. Manning ["Petitioners"].

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

1. Inventory & Appraisal filed 07/17/17 does not include date or signatures by all petitioners. Need signatures of verification. Need corrected inventory
2. Petitioners request a determination that decedent's real property, located at Big Bear City in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's children and purported heirs.
3. Each petitioner claims a 1/3<sup>rd</sup> undivided interest in Decedent's 1/250 interest in real property. Does Court wish to require copy of vesting document? JTD.
4. ~Proposed Form Order 07/17/17

RECOMMENDATION:

Need corrected I&A then Court's discretion.

(nb)

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S35P  
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CASE#: RPR RS01153

CASE NAME: JONES FAMILY REVOCABLE TRUST

HEARING:

Accounting Review

COUNSEL:

CHRISTIE DAVIDSON	(HORSPPOOL
JONES FAMILY REVOCABLE TRUST	(TRU)...
LEE ANN HITCHMAN	(PET)...ERIC F BECKER
LEE ANN HITCHMAN	(STE)...ERIC BECKER &
MELODIE Z SCOTT	(PET)...HORSPPOOL &
MELODIE Z SCOTT	(PRO/PER
SANDRA EVERSON	(PET)...ERNEST M TAVERNIER
THE JONES FAMILY REVOCABLE TRU	(TRU)...
WILLIAM H DANE SR	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Fifth Accounting entered 10/20/15; sixth account now due.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)



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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

-----  
DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS0900143

**VACATE**

CASE NAME: CHERIE KENEALY

HEARING:

Accounting Review

COUNSEL:

CHERIE KENEALY (CEP)...PRO/PER

RAFAEL N KENEALY (CPE)...JAMES B CHURCH

**XREF: GARRS900101, RFLRS21568**

Ex Parte Petition to Dispense with Accounting forwarded to department for signature on 10/02/17.

(lh)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

**SEE ALSO 10**

HEARING:

Petition for Court-appointed attorney fees

COUNSEL:

ARTHUR A CAPPILLA	(CP )...HORSPOOL & HORSPOOL
ARTHUR A CAPPILLA	(CPE)...J. DAVID HORSPOOL
BARBARA E BOWERSOCK	(TP )...BARBARA E BOWERSOCK
EDWARD B. FISCHEL	(PET)...EDWARD B FISCHEL &
SHAWN P HUGHES	(CEP)...EDWARD B FISCHEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation  
THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Petitioner, Edward B. Fischel, was appointed on 11/12/14. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 01/09/15 to current.
- 2 Attorney requests fees of \$7,526. Billed at \$375 - \$395/hour for attorney time and \$110 - \$135/hour for paralegal time. Itemized, LF, p. 7 - 9.
- 3 Notice given.
- 4 Petitioner requests a Court order directing Conservator, Arthur Cappilla to pay requested sum.
- 5 ~Proposed Order: 09/05/17

RECOMMENDATION:

Court's discretion.

(cs)

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

-----  
DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

**SEE ALSO 9**

HEARING:

TWENTY-FOURTH CURRENT Account and Report of ARTHUR A CAPPILLA  
and Petition for allowance of fees filed.

COUNSEL:

ARTHUR A CAPPILLA	(CP )...HORSPOOL & HORSPOOL
ARTHUR A CAPPILLA	(CPE)...J. DAVID HORSPOOL
BARBARA E BOWERSOCK	(TP )...BARBARA E BOWERSOCK
EDWARD B. FISCHEL	(PET)...EDWARD B FISCHEL &
SHAWN P HUGHES	(CEP)...EDWARD B FISCHEL

**X-REF: FSB1302655**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Twenty-Fourth Account Current and Petition for Fees by PPF/Conservator of the Person and Estate, Arthur A. Cappilla ["Petitioner"].

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

1. Accounting period 05/01/16 to 04/30/17.
2. Assets on hand \$314,678.74 (\$66,678.74 in cash and \$248,000 in brokerage accounts).
3. Current bond of \$365,000. Insufficient. Suggest bond increase by \$27,000 for a total new bond of \$392,000. JTD.
4. Petitioner is seeking fees of \$2,400.00. Billed at \$125/hour for 19.20 hours. Itemized [LF, pgs. 24-25]. Petitioner is owed \$450 after periodic payments paid of \$1,950.00. JTD.
5. Petitioner is seeking court to continue to authorize future periodic payments of \$150 per month.
6. Attorney is requesting fees of \$6,557.00. Billed at \$395/hour for 16.60 attorney hours. Itemized [LF, pgs. 27-28]. JTD.
7. Last CI report 10/17/16.
8. Proposed Order 08/24/17 reflects bond of \$365,000.

## RECOMMENDATION

Court's discretion re: fees and bond. If approved, set hearing on the next accounting review for **06/26/18** (if one year) or **06/25/19** (if two years). Account to be filed 30 days' in advance of hearing.

(nb)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500332

CASE NAME: ANITA POIRIER

HEARING:

Petition for SUCCESSOR CONSERVATOR OF THE PERSON AND ESTATE

COUNSEL:

ANITA POIRIER	(CEE)...DONNASUE ORTIZ
DIANE LEE GIEBNER	(CE )...GREGORY T ANNIGIAN
DIANE LEE GIEBNER	(CPE)...MARIVEL M ZIALCITA
GREGORY T ANNIGIAN	(PET)...GREGORY T ANNIGIAN
JOEL RYAN HOLT	(CP )...GREGORY T ANNIGIAN
JONI LOVEGROVE	(CP )...MARIVEL M ZIALCITA
JONI LOVEGROVE	(CPE)...MARIVEL M ZIALCITA

GENERAL INFORMATION

Order entered 05/11/16, appointing Joel R. Holt as conservator of the person, only, and Diane Lee Giebner as conservator of the estate, only, current \$225,100 bond.

Ex Parte order granted on 08/29/17, appointing Joni Lovegrove, as temporary conservator of the person, only.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Successor Conservatorship of person, only, by Current Conservator of the Estate, Diane Lee Giebner and Current Temporary Conservator of the Person, Joni Lovegrove ["Petitioners – daughter & granddaughter"].

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

- 1 Petitioners request a bond of \$40,000 be fixed. However, this petition is for person, only. Need further clarification via verified supplement.
- 2 Petitioner seeks medical powers. Medical Capacity declaration previously filed in support on 05/11/16.
- 3 Court Investigator's Report filed.
- 4 Citation returned served.
- 5 Certificate of Completion re Conservatorship Class filed.
- 6 Petitioner requests dementia powers; need report of court appointed counsel, Donnasue Ortiz.
- 7 Need Notice of Hearing and proof of service.

- 8 Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
- 9 Conservatee resides in Riverside. Suggest transfer. If so, court to set control date.
- 10 ~Proposed Form Order/Letters 08/24/17

RECOMMENDATION:

Need to clear notes 6-8 then Court's discretion re: transfer to Riverside County. If approved, set hearing for Compliance Review for **05/22/18** 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)

Future Hearing:

11/15/17 Compliance review hearing

11/15/17 Accounting Review.

12/26/17 Motion re: to be relieved as counsel

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/17/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600251

CASE NAME: NATALIE KAY EASON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JAMES L EASON

COUNSEL:

DIANA K EASON

(CP )...WILLIAM M NASSAR & ASSOCIATES

JAMES L EASON

(CP )...WILLIAM M NASSAR & ASSOCIATES

NATALIE KAY EASON

(CTP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. James L. Eason and Diana K Eason appointed co-conservators of the person on 03/14/17.
2. Care Plan filed 08/22/16.
3. Determination of Conservatee's Appropriate Level of Care filed 03/20/17.
4. Notification of Conservatee's Rights filed.

RECOMMENDATION

None.

(lh/nb)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700191

CASE NAME: TIMOTHY STAHL

HEARING:

Hearing Re: PETITION FOR CONSERVATORSHIP

COUNSEL:

INLAND COUNTIES REGIONAL CENTE	(CPE)...LAYNE A BARTHOLOMEW
JOHN KEVIN STAHL	(CPE)...STEVEN K BECKETT
MARY ANN GOLDBERG	(OBJ)...KYLE E WOOLDRIDGE
MARY ANN GOLDBERG	(PET)... KYLE WOOLDRIDGE
TIMOTHY STAHL	(CEP)...JENNIFER M DANIEL

GENERAL INFORMATION

Ex parte hearing held 05/30/17. Inland Regional Center objects to the petition for conservatorship. Inland Regional Center to file competing petition by 07/18/17. Ex parte orders denied. Attorney Jennifer M. Daniel is appointed for Timothy Stahl. Court appoints Attorney J David Horspool as the Guardian Ad Litem for Timothy Stahl.

**Continued from 07/18/17.** Steven Beckett indicates that the father has contacted them and reports that father may consider having their recent petition amended to include him as a proposed co-conservator of Timothy Stahl. Court reset date of petition on 10/18/17 to 10/17/17. Amended petition to be filed by 10/03/17 or it will be deemed waived. Court sets trial dates with estimate of 1 week. Court makes Pretrial Orders.

**Ex parte orders granted on 09/14/17. Court appointed Inland Regional Center as temporary conservator of the person only.**

THIS CASE SET FOR HEARING ON

- Petition #1 [filed 05/23/17] for Appointment of Conservator person only **by Mary Ann Goldberg**
- Amended Petition #2 [filed 08/22/17] for Appointment of Conservator of person only by **IRC and John Kevin Stahl (father)**

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

**Petition #1 by Mary Ann Goldberg**

1. Proposed conservatee is developmentally disabled. It appears a Petition for Limited Conservatorship is appropriate.



2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
3. Petitioner seeks orders that conservatee be adjudicated to lack the capacity to make medical decisions under Pr. C. §2355. JTD
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. Petition alleges Mary Ann Goldberg (petitioner/mother) was appointed conservator of Timothy Stahlwas (proposed conservatee) in Suffolk County, New York on 05/30/97, index no: 4947/97. **Supp. filed 07/18/17. Conservatee was flown to Palm Springs, CA on 06/29/14. Need copy of Suffolk County Court Order fixing residence in California.**
6. **Need** report of J David Horspool, GAL.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** return of Citation.
9. **Need** Notice of Hearing and Proof of Service.
10. CI Report filed 07/13/17.
11. **Report of Jennifer Daniel filed 09/13/17.**
12. Supporting Declaration of Carole Lieberman, M.D.M.P.H. filed 09/14/17.
13. ~Proposed Form Order: 05/23/17

#### **Amended Petition #2 by IRC and John Kevin Stahl (father)**

14. Petitioner seeks powers re habilitation, treatment, training, medical etc under Pr. C. §2351.5. JTD
15. Petitioner seeks civil rights be limited. JTD
16. Petitioner seeks medical powers. Capacity Declaration filed 08/25/17.
17. Proposed conservatee is developmentally disabled. **Need** report of Counsel Jennifer Daniel as to general petition.
18. Proposed conservatee is developmentally disabled. **Need** IRC report.
19. Return of Citation with Proof of Personal Service filed 08/25/17; however, proof of service is incomplete as to date and time of service. **Need amended proof of personal service.**
20. **Need** Certificate of Completion of the Conservatorship Training Class.
21. **Special Report by Court Investigator filed.**
22. **Objection of Mary Ann Goldberg filed 09/08/17 with proof of service.**
23. ~Proposed Form Order: 08/22/17

#### RECOMMENDATION

##### **Matter is contested.**

Need to clear notes 4-9; 17-20. If approved, set hearing for Compliance Review for **05/22/18** 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)

Future Hearings:

07/24/18 Readiness calendar; 08/20/18-08/24/18 *Court Trial*

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700201

CASE NAME: JANETTE ILIANA GONZALEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CLAUDIA MARTINEZ (PET)...PRO/PER  
JANETTE ILIANA GONZALEZ (CEE)...MELVIN L FRIEDLAND

#### GENERAL INFORMATION

**Continued from 07/25/17 for Court to receive IRC report.**

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

#### 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 all confidential records, control right to contract, make and consent to medical decisions. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 07/25/17.
4. Proposed conservatee is developmentally disabled. **Need IRC report.**
5. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Melvin L. Friedland, filed.
6. Court Investigator report filed.
7. Proof of Completion of the Conservatorship Training Class filed 06/22/17.
8. Return of Citation with Proof of Personal Service filed 06/22/17.
9. ~Proposed Form Order: 05/30/17

#### RECOMMENDATION

Need to clear note 4. If approved, set hearing for Compliance Review for **05/22/18** 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)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/17/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700320

CASE NAME: MTR OF ROY O GONCE

**SEE ALSO 16**

HEARING:

Petition for EXCLUSIVE AUTHORITY TO GIVE CONSENT FOR MEDICAL  
TREATMENT

COUNSEL:

BECKY S BOMAN

(CPE)...SUZANNE M GRAVES

ROY O GONCE

(CEP)...CRAIG M PARKER

See notes on next matter #16.

(lh)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700320

CASE NAME: MTR OF ROY O GONCE

**SEE ALSO 15**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BECKY S BOMAN (CPE)...SUZANNE M GRAVES  
ROY O GONCE (CEP)...CRAIG M PARKER

GENERAL INFORMATION

Ex parte orders granted 08/29/17. Becky Boman appointed Temporary Conservator of the person and estate, no bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Becky Boman, daughter

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

1. Petitioner requests to waive bond. Suggested bond **\$552,924.66** per bond calculation.
2. Petitioner seeks orders for exclusive authority to give medical consent for treatment, that conservatee be adjudged to lack capacity to give consent for medical treatment, and for treatment to be performed by a licensed physician. JTD
3. Petitioner seeks medical powers. **Capacity Declaration filed.**
4. Need report of appointed Counsel Craig Parker.
5. Need Confidential Supplemental form.
6. Need return of Citation with Proof of Personal Service.
7. **Certificate of Completion of the Conservatorship Training Class filed.**
8. **Court Investigator Report filed.**
9. ~Proposed Form Orders: 08/24/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **05/22/18** for the filing of the required documents and hearing re Accounting Review for **12/31/18**. Any accounting to be filed 30 days in advance.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

-----  
DATE: 10/17/17 TIME: 9:35 DEPT: S35P  
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CASE#: CON PS1600341

CASE NAME: STEFANIE JOHNSON

HEARING:

Petition for ORDER TO ESTABLISH SPECIAL NEEDS TRUST; ETC  
(VERIFIED SUBSTITUTED JUDGMENT)

COUNSEL:

LOIS JOHNSON FALZONE	(PET)...PRO/PER
RICHARD FALZONE	(PET)...PRO/PER
STEFANIE JOHNSON	(CEE)...

Currently under review by Legal Research.  
(LR)

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

Future Hearing:  
11/20/17 Compliance review hearing  
06/25/18 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

**MISC.**

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DATE: 10/17/17      TIME: 1:30      DEPT: S35P  
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CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

**VACATED**

HEARING:

Hearing Re: Court Trial (2nd day)

COUNSEL:

BEN C LUNA REVOCABLE TRUST  
CAROLINE LUNA KRIEGER  
REGINA MARIE LUNA  
STELLA JAURIGUE  
THERESA BELTRAN

(TRU)..  
(PET)... AARON F GARCIA  
(MICHAEL C MADDUX  
(OBJ)...MICHAEL C MADDUX  
(PET)... AARON F GARCIA

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: 10/17/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1400364

CASE NAME: PEDRO M. SANCHEZ

HEARING:

PTN FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report of  
RAYMOND M SANCHEZ and Petition for allowance of fees filed.

COUNSEL:

PEDRO M SANCHEZ                      (DEC)...

RAYMOND M SANCHEZ                (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RAYMOND M SANCHEZ is  
GRANTED

Fee waiver amount due \$930.00

\$465.00 for first filing fees on 05/06/14

\$465.00 for ptn for final distribution on waiver of account on 05/04/17

GENERAL INFORMATION:

**Continued from 08/08/17 at request of petitioner.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account by Administrator, Raymond M. Sanchez ["Petitioner"-son].

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

1. Sole heir waives accounting.
2. Assets on hand \$72,000 consisting of real and personal property.
3. Petitioner waives statutory compensation.
4. Petition is not verified [signed under penalty of perjury under the laws of the State of California]. Need same.
5. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
6. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
7. Character of Property [account filed 05/04/17-LF, p3] indicates real property is held as "Pedro Mayen Sanchez and Julia Sanchez, husband and wife, as Joint Tenants."

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

Petition filed 05/06/14 [LF, p. 4] indicated spouse is deceased. Question date of death of spouse, Julia Sanchez? Need verified supplement.

8. Court to review sticky note [account filed 05/04/17-LF, p. 6].
9. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Need to clear notes 4-7. If approved, set next hearing for final discharge on **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: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400852

CASE NAME: RICHARD GERARD NELSON

HEARING:

FIRST AND FINAL Account and Report of DEBBIE A. NELSON and  
Petition for allowance of fees filed.

COUNSEL:

CAMRYN NICOLE NELSON	(MIN)...
CRYSTAL MACK	(OBJ)...JAMES B CHURCH
DEBBIE A NELSON	(PET)...E LAWRENCE BROCK
RICHARD A NELSON	(MIN)...
RICHARD GERARD NELSON	(DEC)...

**X-REF: FAMRS701771 (disso)**

GENERAL INFORMATION:

Continued from **04/26/16, 12/21/16 and 03/01/17**. Matter contested and set for trial.

Continued from **06/29/17**.

Continued from **07/05/17**. Court advances and hears Motion Re: Bifurcate the Trial Issue previously set on 08/14/17 to today's date. Arguments heard regarding Motion to Bifurcate. The Court grants Motion to Bifurcate. The first phase will be heard on 07/11/17 at 1:30pm. Counsel is informed trial will begin on 07/11/17 at 1:30pm. Discovery motion will be addressed at next hearing.

Continued from **07/11/17**. Court authorizes preliminary distribution for petitioner and attorney in amount of \$6,880.65. Counsel to prepare order on preliminary distribution.

**Continued from 08/29/17.**

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account; Petition for Determination of Property Passing to Surviving Spouse and for Confirmation of Property belonging to Surviving Spouse; and Petition for Fees.

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

1. Petitioner alleges she is the sole heir, as estate consists solely of community property assets, and waives account. Order Allowing Election to Administer Community Property under Pr. C. § 13502 granted 09/03/15.
2. Former Attorney, Thaddeus Culpepper, waives statutory compensation.
3. Statutory fees of \$8,600.82 requested. Calculated.

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

- a. **SUPP 06/19/17:** Petitioner requests that petitioner and attorney be allowed preliminary statutory fees \$6,880.65 (80%) of fees per CRC §7.701. Petitioner states 90% of the work has been completed. Petitioner seeks funds be released from blocked account for fees. In *Estate of Hilton (1996) 44 Cal.App.4th 890* the probate court allowed a 50% preliminary distribution. It later found that that the attorneys were over compensated. Court may wish to require a breakdown in services already rendered to earn the statutory fees. JTD
4. Petitioner requests that the property of this estate is property passing to the surviving spouse and belongs to the surviving spouse and that her ownership is confirmed. All property that is determined to be property passing to the surviving spouse shall be distributed wholly to petitioner, Debbie Nelson, as community property to which she is entitled.
5. Petitioner requests authority to distribute any assets determined to be the Community Property of decedent, not now known but late discovered to Debbie A, Nelson; and authority to distribute any assets determined to be the Separate Property of decedent, not now known but later discovered, to be distributed pursuant to the laws if intestate succession without further Order of this Court.
6. Petitioner requests a reserve of \$2,500.
7. Three Creditor's Claims rejected on 09/15/16 and 90 days have passed since the rejection. Other claims filed were not acted upon; however, appear to be deemed as rejected.
8. Creditor's Claim by Crystal Mack for \$12,018.17 was not denied or allowed. Litigation related to judgment continues in Texas.
9. **Objections filed 04/14/16 and 04/15/16 by GAL, Matthew Sheasby, requesting the Court sustain Objections until a full and fair determination of the nature and extent of the Decedent's community property and separate property interests can be discerned.**
10. **Objections filed 04/29/16 by GAL, Noreen T. Fontaine for Richard A. Nelson.**
11. **Objections filed by Crystal Mack, creditor, on 08/15/16.**
12. **Request for Judicial Notice filed 07/07/17.**

RECOMMENDATION:

Matter is contested. If approved, set next hearing for receipts and final discharge for **09/04/18.**

(nb/lc/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: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500595

CASE NAME: ORENE KNIGHT FAMILY TRUST

**SEE ALSO 4**

HEARING:

Hearing Re: PETITION TO COMPEL ACCOUNTING AND INSTRUCT TRUSTEE

COUNSEL:

JULY SPEAR (PET)...PRO/PER  
ORENE KNIGHT FAMILY TRUS T (TRU)...  
WILLIAM KNIGHT (MIN)...

GENERAL INFORMATION:

Continued from **08/30/16, 11/08/16 and 01/24/17**. Court orders James Lowery to file an accounting by 3/11/17. Petitioner to submit order.

Continued from **04/11/17**. Court finds that July Spear and William Knight have standing.

Court orders Jim Lowery to file a trust accounting by 05/11/17. Citation issued to: Jim Lowery who is cited and required to appear on 06/20/17.

Continued from **06/20/17**. Court recites Jim Lowery to appear and is ordered to file a trust accounting by 07/29/17. Citation issued to: Jim Lowery who is cited and required to appear on 08/29/17.

**Continued from 08/29/17 at request of Attorney Krasney.**

THIS CASE IS SET FOR HEARING ON Petition to Compel Accounting

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

1. Petitioner alleges that William Knight is a beneficiary of the Orene Knight Family Trust dated 1/2/07 and a beneficiary of life insurance policy from William's deceased father, Kurtis Knight (DOD: 10/1/13). Petitioner alleges that all funds are being held in California.
2. **William was born on 10/18/1997**, which makes him nearly 19 years old. He is no longer a minor. Question how petitioner has standing under Pr. C. §3919(a). **Petition to join petition filed by William Knight on 06/21/16. See next matter.**
3. Petitioner alleges that the Orene Knight Trust distributed 30% to Jim Lowery as trustee/custodian for William Knight. Petitioner separately attaches a copy of a proposed distribution letter and a copy of the Trust [6/25/15 Supplement LF p.5, 6].

4. The Trust provides that all funds left to minor, William, be held by Jim Lowery as custodian under the "Texas Uniform Transfer to Minors Act (UTMA)" and distributed upon William attaining age 21. The Trust designates Tami Price as alternate custodian. [6/25/15 Supplement LF p.9]. Although the transfer is made in another state, the transfer falls within the scope of Pr.C.§3902 as the transferring instrument uses the designation under UTMA per Pr.C.§3922(b).
  - a. Petitioner requests the court instruct Mr. Lowery to designate the distributed funds as under UTMA. Bank statements attached are not clear as to whether the accounts are held by a custodian under UTMA.
5. Petitioner alleges that Jim Lowry also received proceeds of a life insurance on behalf of minor, William. Petitioner provides a copy of a life insurance policy, but it is unclear if the policy was in effect and/or paid out and who was the designated beneficiary. [6/25/15 Petition LF p.6-16].
6. Petitioner requests the Court compel Jim Lowery to account for the received trust assets and insurance proceeds. Petitioner attaches copies of bank statements, but no accounting is provided (Pr.C.§3912).
7. Petitioner requests the Court determine the reasonableness of the fees taken as petitioner alleges that Jim Lowery has received compensation. However, petitioner does not state the amounts received (Pr.C.§3915).
8. Notice is complete.
9. **No accounting as of the review of this matter.**
10. **No proposed order. Submit Order after Hearing as directed by Court on 01/24/17.**
11. **Proof of served citation filed.**

RECOMMENDATION:

Need Order after Hearing.

(oc/lc/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: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500595

CASE NAME: ORENE KNIGHT FAMILY TRUST

**SEE ALSO 3**

HEARING:

Hearing Re: JOINDER AS TO WILLIAM KNIGHT

COUNSEL:

JULY SPEAR (PET)...PRO/PER  
ORENE KNIGHT FAMILY TRUS T (TRU)...  
WILLIAM KNIGHT (MIN)...

Request for Waiver of Court Fees and Costs filed by JULY SPEAR is GRANTED

GENERAL INFORMATION

**Continued from 11/08/16, 01/24/17. 04/11/17, 06/20/17 and 08/29/17.**

THIS CASE SET FOR HEARING ON Joinder as to William Knight.

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

1. William Knight, now 19, seeks to join petition to compel.
2. Notice given.

RECOMMENDATION

Court's discretion.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600206

CASE NAME: JEAN BARBARA WALKER

HEARING:

WAIVER OF Account and Report of RITA KUNZ and Petition for allowance of fees filed.

COUNSEL:

JEAN BARBARA WALKER (DEC)...  
RITA KUNZ (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Executrix, Rita Kuntz ["Petitioner"].

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

1. Sole beneficiary waives accounting.
2. Petitioner waives statutory compensation.
3. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614c.
4. I & A filed 03/28/17, sections 4 and statement about the bond section are incomplete. Court to determine if sufficient.
5. Petition does not address the status of a 2004 Nissan Titan or miscellaneous household goods. Need verified supplement.
6. Need bank statement to support date of death balances per Local Rule 20-908.
7. Petitioner requests authority to withhold \$2,000 as a reserve for closing costs.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear notes 3-6 then Court's discretion. If approved, set next hearing for final distribution on **10/23/18**.

(nb)

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

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600726

CASE NAME: GIOVANNI PURECO SPECIAL NEEDS TRUST

HEARING:  
Accounting Review

COUNSEL:

GIOVANNI PURECO	(MIN)...
GIOVANNI PURECO SPECIAL NEEDS	(TRU)...
INLAND COUNTIES REGIONAL CENTE	(PET)...LAYNE A BARTHOLOMEW
INLAND COUNTIES REGIONAL CENTE	(TEE)...LAYNE A BARTHOLOMEW
VIANEY TLAPALAMATL	(PET)...JACK H ANTHONY

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review for SNT.

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

1. Second Account of Inland Counties Regional Center, Trustee, approved on 10/17/16, \$207,085.51 bond.
2. Need Third Account beginning with 06/01/16.

RECOMMENDATION

Inquire status of accounting.

(cs)

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600744

CASE NAME: MTR OF ALICE L WALL

HEARING:

FIRST AND FINAL Account and Report of JENNIFER JUNE WALL WALSTEN  
and Petition for allowance of fees filed.

COUNSEL:

ALICE L WALL (DEC)...  
JENNIFER JUNE WALL WALSTEN (PET)...LUELLA G HAIRSTON

GENERAL INFORMATION

**Continued from 03/30/17, 05/18/17 and 07/06/17 at request of counsel. The Court notes general letters testamentary were previously issued and therefore sets a Hearing Re: 1st accounting for general administrator on 3-29-18.**

THIS CASE SET FOR HEARING ON **Amended (07/10/17)** First and Final Account of **Special Administrator** by Jennifer June Wall Walsten, daughter.

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

1. Letters of special Administration issued to June Wall Walsten on 10/28/16; **general letters Testamentary** issued 01/10/17; \$638,000 bond.
2. **Accounting period 05/12/11 to 01/10/17.** Needs to begin with date of death.
3. Assets on hand **\$505,252.73**
4. Partial and reappraisal for sale filed 03/23/17.
5. **Petition indicates a completed inventory has yet to be conducted as Petitioner has been unable to gain access to autos and the Bennet Avenue residence. However, Property on Hand [LF, p5] includes subject real and personal property. As this account is for special administration, Petitioner should only account for assets she has actually marshalled.**
6. Summary of account does not comply with Pr.C. § 1061. Need proper summary of account and schedules.
7. **Need Notice of Hearing with proof of service.**



## RECOMMENDATION

Need to clear notes. If continued, set on Thursday calendar as originally set. If approved, set Accounting/Status Review for **07/12/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

Future Hearing:

03/29/18 Hearing re: 1st accounting (general administrator)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700299

CASE NAME: EDWARD LEE ROSENBERRY

HEARING:

Hearing Re: Proof of Bond

COUNSEL:

ALYSSA RIGGS (PET)...COSGROVE, CO SGROVE &  
EDWARD LEE ROSENBERRY REVOCABL(TRU)...

GENERAL INFORMATION

**Continued from 09/19/17 Proof of bond has not been filed. Attorney Mitchell Roth will give notice.**

THIS CASE SET FOR HEARING ON Proof of Bond

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

1. Rob Saslow, PPF appointed successor trustee of the Edward Lee Rosenberry Revocable Trust dated June 13, 2008 for the Benefit of Alyssa Riggs on 08/14/17, \$335,000 bond.
2. Need proof of bond.

RECOMMENDATION:

Inquire status.

(cs)

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700476

CASE NAME: MTR OF JUAN JOSE CUEVAS 2015 TRUST

HEARING:

Petition for FIRST ACCOUNT CURRENT AND REPORT OF TRUSTEES PTN  
FOR ITS SETTLEMENT; FOR TRUSTEE AND ATTY FEES

COUNSEL:

DAWN MILLS	(PET)...TAMILA C JENSEN
JUAN JOSE CUEVAS	(TRU)...
NORINE BOEHMER	(PET)...TAMILA C JENSEN
SUSAN GHORMLEY	(PET)...TAMILA C JENSEN

**X-REF: CONPS1200063**

GENERAL INFORMATION:

**Continued from 09/05/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Successor Co-Trustees, Norine Boehmer, Dawn Mills and Susan Ghormley ["Petitioners"-PPF's].

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

1. Accounting period 04/25/16 to 03/31/17.
2. Assets on Hand \$6,041,358.47 consisting of \$587,083.98 in cash and \$5,454,263.49 in securities and Workers Compensation Claim.
3. Current bond of \$3,006,819. Petitioner requests bond be reduced by \$2,172,456 for a total bond of \$834,363.00 and not include non-cash assets. Appears sufficient if Court decides to not include non-cash assets. JTD.
4. Petitioners request ratification of disbursed funds, totaling \$5,150.00, to Beneficiary, or on his behalf.
5. Co-Trustees request payment for their services in the amount of \$3,683.50 for 41.60 hours' service. Billed at various rates not exceeding \$160/hour. Generally described [LF, pgs. 33-40]. Rate exceeds community rate of \$135/hour. JTD.
6. Attorney requests fees of \$3,165.50. Billed at \$400/hour for 2.60 hours' attorney time and \$195/hour for 10.90 hours' paralegal time. Itemized [LF, pgs. 43-44]. JTD.
  - a. Paralegal rate exceeds community rate of \$150/hour.

7. Torey Pines Bank Account should end in "0."
8. During this accounting period, petitioner paid for case manager expenses totaling \$7,082.07. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c) by Claudia Ordonez.
- 9. Proof of service to Notice filed on 10/03/17 is not dated at section 4a and second notice filed on 10/03/17 does not include son, Felipe Cuevas, Jr. Need proper service.**
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 8-9 then Court's discretion re fees & bond. If approved, set next hearing on Accounting Review for **05/29/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Future Hearing:

10/24/17 Petition for transfer trust proceedings to LA County

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/17/17      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700635

CASE NAME: MTR OF EARL WASHINGTON

HEARING:

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

COUNSEL:

EARL WASHINGTON

(DEC)...

JUANITA SAMS

(PET)...ELLIOTT LUCHS

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Juanita Sams, executor/step-daughter

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

1. Will waives bond. Net estate value is \$280,000. The court may for good cause require that a bond be given, either before or after issuance of letters. (Pr.C.§8481(c)).
2. ~Proposed Form Order: 06/29/17

#### RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **12/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700636

CASE NAME: MICHAEL PATTON

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MICHAEL PATTON (DEC)...  
ROBERT T PATTON (PET)...JEFFREY T SCHOENHERR

#### GENERAL INFORMATION

Ex parte order granted on 07/07/17. Robert Patton appointed special administrator, with special powers, no bond.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Robert Patton, brother

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

1. All heirs waive bond. Estate value consists of \$644,540 with \$24,540 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(c))
2. ~Proposed Form Order: 08/31/17

#### RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **12/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700640

CASE NAME: MTR OF HAGAN W RICHARDS

HEARING:

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

COUNSEL:

DANIEL WINFIELD RICHARDS (PET)...DONNASUE ORTIZ  
HAGAN W RICHARDS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Daniel Richards, executor/son

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

1. All heirs waive bond. Estate value consists of \$1,440,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(c)).
2. Need Proof of Subscribing Witness as decedent's will was drafted and executed in Marion County, West Virginia and not signed "under penalty of perjury under the laws of the State of California."
3. ~Proposed Form Order: 06/30/17

#### RECOMMENDATION

Need to clear notes 2 . Court's discretion re bond. If approved, set Accounting/Status Review for **12/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

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

CASE#: CON PS1300207

CASE NAME: Jack E. Kulju

HEARING:

Hearing re Final Discharge

COUNSEL:

ELSIE KATHLEEN TROXEL	(PCR)...TREVOR D MARTIN
ELSIE KATHLEEN TROXEL	(PET)...HARTNELL LAW GROUP
JACK E KULJU	(CEP)...PRO/PER

**XREF: CONPS1300206**

Proposed Order for Final Discharge received and forwarded to department for review/signature on 09/20/17.

(lh)



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

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

CASE#: CON PS1500116

CASE NAME: Robert Sanchez

HEARING:  
Accounting Review

COUNSEL:

ROBERT SANCHEZ	(CEP)...J BENJAMIN SELTERS III
SANDRA WILLIAMS	(OBJ)...PRO/PER
SYLVIA VALENZUELA	(PET)...AVILES & ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Matter set at 01/03/17 hearing, wherein, the Court approved the waiver of account that was received on 08/25/16; and set this matter for an OSC re termination of the conservatorship of the estate as estate assets consists of SSI funds. All other monies and property are held in the SNT in LA County. Petition to terminate the conservatorship of the estate granted on 05/16/17.
- 2 Need signed and conformed copy of Ex Parte Petition to Dispense with Accounting and Order received on 08/25/16.
- 3 Need account or waiver of account beginning 08/20/16 to 05/16/17.
- 4 Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
- 5 CI report filed 10/05/17.
- 6 Conservatee resides in Whittier, CA. Suggest transfer to LA County. If so, court to set control date.
- 7 ~Proposed Form Order 10/05/17.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion re transfer to LA County.  
(nb)

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

-----  
DATE: 10/17/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600104

CASE NAME: IN THE MATTER OF COREY CAPECE

HEARING:  
Accounting Review

COUNSEL:  
COREY CAPECE (CTE)...  
FRANK CAPECE (PET)...MELINDA S. BELL  
TERRI CAPECE (PET)...MELINDA S. BELL

GENERAL INFORMATION  
**Continued from 09/05/17 to file accounting.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Frank and Terri Capece, (parents) appointed conservators of the estate of Corey Capece on 07/19/16, limited conservatorship, no bond.
2. Need 1<sup>st</sup> Account beginning 07/19/17.

RECOMMENDATION  
Inquire status of accounting.  
(cs/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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

CASE#: CON PS1700146

CASE NAME: ANDREA ALVAREZ

**SEE ALSO 17, 18**

HEARING:

Petition for AUTHORITY TO ESTABLISH SPECIAL NEEDS TRUST

COUNSEL:

ANDREA ALVAREZ

(CTP)...JENNIFER M DANIEL

MARTIN ALVAREZ

(PET)...LAYNE A BARTHOLOMEW

MIREYA ALVAREZ

(PET)...LAYNE A BARTHOLOMEW

**X-REF: SCVSS 73491**

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 17

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

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

CASE#: CON PS1700146

CASE NAME: ANDREA ALVAREZ

**SEE ALSO 16, 18**

HEARING:

Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON AND ESTATE

COUNSEL:

ANDREA ALVAREZ	(CTP)...JENNIFER M DANIEL
MARTIN ALVAREZ	(PET)...LAYNE A BARTHOLOMEW
MIREYA ALVAREZ	(PET)...LAYNE A BARTHOLOMEW

#### GENERAL INFORMATION

Ex parte orders denied on 05/01/17. Attorney Jennifer Daniel appointed for Andrea Alvarez.

Court appointed Mireya and Martix Alvarez as temporary co-conservators on 09/14/17.

THIS CASE SET FOR HEARING ON **AMENDED** [filed 08/23/17] Petition for Appointment of Conservator person and estate by Mireya and Martin Alvarez, parents

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

1. Bond to be determined. Petition indicates a bond will be requested for a portion of the proceeds necessary for the conservatee's annual expenses and for the remaining proceeds to be placed in a blocked account.
2. Petitioner seeks medical powers. Capacity Declaration filed 08/23/17.
3. Proposed Conservatee is developmentally disabled. Need report of Counsel Jennifer Daniel.
4. Need Certificate of Completion of the Conservatorship Training Class.
5. Need Court Investigator report.
6. Need Notice of Hearing and proof of service to Inland Regional Center with 30 days' notice per Pr. C. §1461.4.
7. Return of Citation with Proof of Personal Service filed 09/19/17.
8. ~Proposed Form Order: 08/23/17

#### RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **05/22/18** for the filing of the required documents and hearing re Accounting Review for **12/31/18**. Any accounting to be filed 30 days in advance. (lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/17/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700146

CASE NAME: ANDREA ALVAREZ

**SEE ALSO 16, 17**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ANDREA ALVAREZ

(CTP)...JENNIFER M DANIEL

MARTIN ALVAREZ

(PET)...LAYNE A BARTHOLOMEW

MIREYA ALVAREZ

(PET)...LAYNE A BARTHOLOMEW

See notes on prior matter #17.

Petition superseded by Amended Petition for Appointment of Conservator of the Person and Estate by Mireya and Martina Alvarez, parents, filed on 08/23/17.

(lh)

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

-----  
DATE: 10/17/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700325

CASE NAME: MUHAMMAD ALLAH

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MADINAH AARON (CP)...PRO/PER  
MUHAMMAD ALLAH (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Ex parte orders denied on 09/05/17. Attorney Walter Moore appointed for Muhammad Allah.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Madinah Arron (daughter)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 08/28/17 is not dated at signature on page one. Need same.
2. Petitioner seeks dementia powers. Need report of Counsel Walter Moore.
3. Petition is incomplete at item 11 list of relatives as to Muhammed Allah, Jr, grandson. Need verified supplement.
4. Petition indicates proposed conservatee is developmentally disabled in item #5f. Need verified supplement clarifying disability, if any.
5. List of required contacts lists relatives of proposed conservator Madinah Arron. Need amended list of contact information to include relatives of proposed conservatee Muhammed Allah.
6. Need Certificate of Completion of the Conservatorship Training Class.
7. Need Court Investigator report.
8. Return of Citation with proof of personal service filed 09/25/17.
9. ~Proposed Form Order: 08/28/17

RECOMMENDATION

Need to clear notes 1-6. If approved, set hearing for Compliance Review for **05/22/18** 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)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/17/17      TIME: 9:30      DEPT: S36P  
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CASE#: RC RS00134

CASE NAME: ISRAEL D MORENO

HEARING:

Accounting Review

COUNSEL:

AMERICAN CONTRACTORS INDEMNITY (PET)...PRO/PER

ELIZABETH MORENO

(CPE)...E LAWRENCE BROCK

ISRAEL D MORENO

(CEP)...ALTHOUSE & MCDONOUGH

ISRAEL F MORENO

(PET)...E LAWRENCE BROCK

GENERAL INFORMATION

**Continued from 06/27/17 and 08/29/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Second Account entered 07/19/16; third account now due.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 1

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

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: CON PS0900263

CASE NAME: THELMA LENK

HEARING:  
Hearing re Final Discharge

COUNSEL:

DARROLD SLAAMOD	(CPE)...BRYAN C. HARTNELL
DARROLD SLAAMOD	(CPE)...CARROLL M LAWSON
JEAN SLAAMOD	(CPE)...BRYAN C. HARTNELL
JEAN SLAAMOD	(CPE)...CARROLL M LAWSON
SANDY TURNER	(PET)...DAVID & TURNER
THELMA LENK	(CEP)...SANDY L. TURNER

GENERAL INFORMATION:  
**Continued from 08/08/17.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Third and Final Account entered 08/02/16.
2. Need receipts.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:  
Inquire status.  
(nb/lh)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/17/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1200299

CASE NAME: NELLY ASWAD

HEARING:      Probate status report filed.

COUNSEL:

NELLY ASWAD

(DEC)...

PARO ASTOURIAN

(PET)...ASTOURIAN & ASSOCIATES

RONEVA D DUNGER

(PET)...ROBERT W D'ANGELO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report

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

1. Petitioner alleges the Estate is not in a condition to close and requests the estate remain open to allow litigation to proceed in Lebanon in an attempt to recover decedent's assets from the fraudulent conveyance and criminal actions.
2. Petitioner requests an additional 12-18 months to close the estate.
3. Previous status report approved on 12/20/16. Need order.
4. ~Proposed Order submit: 07/20/17

RECOMMENDATION:

Need to clear note 3 then Court's discretion. If approved, set next hearing for Accounting review on **10/23/18**.

(cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 2A ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400539

CASE NAME: The Modic Family Trust

HEARING:

Hearing Re: SET CONTESTED MATTER filed by Petitioners MODIC

COUNSEL:

CHRISTOPHER M MODIC	(TEE)...PRO/PER
JEFFEREY MODIC	(LURIE, ZEPEDA, SCHMALZ &
JEFFEREY MODIC	(PET)...M. DAMIEN HOLCOMB
LYNN MODIC EDWARDS	(PET)...PRO/PER
LYNN MODIC EDWARDS	(STANLEY A HUTCHINSON
TANIA A MODIC	(PET)...M. DAMIEN HOLCOMB
TANIA A. MODIC	(LURIE, ZEPEDA, SCHMALZ & HOGAN)...
THE MODIC FAMILY TRUST	(TRU)...

Currently under review by Legal Research.  
(LR)

Future Hearing:

11/30/17 Readiness calendar

12/04/17 Court Trial

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1501018

CASE NAME: ROY E BRANSON

HEARING:

Probate status report filed.

COUNSEL:

DONNA L CARLSON (PET)...BRYAN C HARTNELL  
ROY E BRANSON (DEC)...

GENERAL INFORMATION:

**Continued from 07/11/17 and 08/29/17**

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Donna L. Carlson ["Petitioner"].

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

1. Need final inventory and appraisal.
2. Petitioner alleges the estate is not in a condition to be closed as Decedent owned real property located at Washington, D.C., for which, ancillary proceedings have commenced but not yet, completed.
3. Petitioner requests an additional 12 months to close the estate.
4. ~Proposed Order 04/24/17.

RECOMMENDATION:

Need to clear note 1 then Court's discretion. If approved, set next Accounting Review for **07/17/18**.

(nb/lh/cs)

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

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501189

CASE NAME: INGEBURG ELISABETH GOETZ

HEARING: Probate status report filed.

COUNSEL:

FRIEDJOF SCHWARZ (OBJ)...HOLGER SIEGWART  
HOLGER SIEGWART (PET)...SIEGWART GERMAN AMERICAN LAW I  
HOLGER SIEGWART (PET)...SIEGWART GERMAN AMERICAN LAW I  
INGEBURG ELISABETH GOETZ (DEC)...  
MELODIE Z SCOTT (PET)...RYAN J GALLANT

**XREF: PROPS1300322, CONPS1400211**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 07/20/17)

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 account of the Special Administrator (Melodie Z. Scott) has been recently filed. It is not in the best interest of the estate to file for final distribution until petitioner is able to review the Special Administrator's accounting and until the court has approved said accounting.
2. Petitioner requests an additional 3 months from the date of entry of this Court's order approving this report.
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.
4. Proposed order submit: 07/20/17

RECOMMENDATION:

Need to clear required notice. If approved, set next Accounting/Status Review for **10/16/18**.

(cs)

Future Hearing:

10/31/17 First and final account and report by Melodie Z. Scott

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600169

CASE NAME: BETTY LOUS SCHLAICH

HEARING:  
Accounting Review

COUNSEL:  
BETTY LOU SCHLAICH (DEC)...  
LINDI K DAYTON (PET)...CHRISTOPHER A SHUMATE

#### GENERAL INFORMATION

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 04/12/16 with full authority and no bond.
2. Inventory and Appraisal filed 04/28/16; however, no statement about the bond in item #6. Court to determine if sufficient.
3. No accounting or status report of administration. Need same.

#### RECOMMENDATION

Inquire status.  
(lh/cs)

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600907

CASE NAME: MTR OF YOUNG SOOK HAN  
HEARING: Re: AMENDED LTRS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

AE SOOK HAN	(PET)...RYAN A ELLIS
YOUNG SOO KO	(PET)...PRO/PER
YOUNG SOOK HAN	(DEC)...

GENERAL INFORMATION:

**Continued from 07/24/17 and 08/29/17**

THIS CASE IS SET FOR HEARING ON [**Amended filed 06/13/17**] Petition for Letters of Administration with full authority under IAEA by Young Soo Ko, brother-in-law, as petitioned by sister, Ae Sook Han.

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

1. Heirs appear to be citizens of Korea. Need Notice of Petition to Administer Estate with proof of service to include diplomatic or consular office per Pr.C. 8113.
2. Petition does not include estimated value of property at Section 3d; Section 3h re residency is incomplete; Section 5 (3) or (4) does not indicate if domestic partner exists and Section 5 (7) or (8) does not indicate if there is issue of a predeceased child. Need verified supplement.
3. All heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by each heir.
4. Duties and Liabilities of personal representative not dated and telephone number not listed at section 2. Need same
5. Need proof of publication.
6. Need Notice of Petition to Administer Estate with proof of service.
7. **Second Amended petition filed 09/28/17. Does Court wish to trail matter to 01/24/18? JTD**
8. ~Proposed Form Order: 06/13/17.

RECOMMENDATION:

Need to clear notes 1 - 6. Court's discretion re bond. If approved, set Accounting/Status Review for 12/31/18. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (cs/nb/cs)

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

-----  
DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601228

CASE NAME: MILDRED AMELIA NELMS

HEARING:

FIRST AND FINAL Account and Report of PAULETTE GRIMES and  
Petition for allowance of fees filed.

COUNSEL:

MILDRED AMELIA NELMS (DEC)...  
PAULETTE GRIMES (PET)...FULLERTON LEMANN SCHAEFER & DO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account by Executrix, Paulette Grimes ["Petitioner"-daughter].

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

1. Accounting period 02/16/17 to 07/15/17
2. Assets on hand \$102,232.30 in cash.
3. Petitioner waives compensation.
4. Petitioner does not request reimbursement for costs.
5. Attorney requests statutory compensation of \$8,200. Calculated.
6. Attorney requests extraordinary fees of \$1,548 for services rendered in connection with the sale of real property. Billed at the reduced rate of \$350/hour for a total of 3.7 hours' attorney time and \$110/hour for 2.3 hours' paralegal time. Itemized [LF, p24-25]. JTD.
7. Petitioner requests authorization to withhold \$1,500 as a reserve.
8. ~Proposed Order 07/25/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/23/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700579

CASE NAME: MTR OF RICHARD RAYMOND MARINEZ

HEARING:

Petition for PROBATE OF WILL & LETTERS OF ADMIN W/FULL  
AUTHORIZATION TO ADMINISTER UNDER IAEA

COUNSEL:

RICHARD RAYMOND MARINEZ (DEC)...  
RICHARD RYAN MARINEZ (PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Richard Marinez, executor/son

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

1. Petitioner seeks no bond on the basis that will waives bond and indicates all heirs waive bond; however, will does not indicate waiver of bond and Waiver of Bond form DE-142 by each beneficiary not filed. Petition indicates estate value consists of \$122,800 in personal with an unstated amount in real property. **Mandatory Waivers of Bond by Heirs, form DE-142/DE-111, filed.** The court may for good cause require that a bond be given, either before or after issuance of letters.(Prob. Code, § 8481(c))
2. The will conditionally incorporates decedent's Trust. A copy of Trust filed 10/02/17.
3. ~Proposed Form Order: 06/29/17

#### RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **12/31/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb/cs)



Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700737

CASE NAME: PATRICIA FRANCES MACRI

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARIE ANTOINETTE PRITCHETT (PET)...VARNER & BRANDT, LLP  
PATRICIA FRANCES MACRI (DEC)...

**X-REF: PROPS 0900309**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by sibling, Marie A. Pritchett ["Petitioner"].

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

1. Inventory & Appraisal attached to petition has the following issues:
  - a. Section 4 is incomplete;
  - b. Statement about the Bond Section is incomplete.  
Need corrected inventory.
2. Petitioner requests a determination that decedent's real property located in San Bernardino County, pass to petitioner without administration. Petitioner is decedent's sister and purported sole heir to decedent's estate. Does Court wish to require copy of vesting document? JTD.
3. ~Proposed Form Order 07/25/17

RECOMMENDATION:

Need corrected I&A then Court's Discretion.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

-----  
DATE: 10/17/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON DS1000109

CASE NAME: REBECCA H VAUGHN

**SEE ALSO 10A**

HEARING:

FIRST AND FINAL Account and Report of CHRISTINA OSEGUERA and  
Petition for allowance of fees filed.

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account of Temporary  
Conservator; First Account of Trustee and Petition for Fees by Conservator of the Person  
and Estate, Christina Oseguera ["Petitioner"/daughter/Trustee].

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

Temporary Conservatorship

1. Accounting period 05/10/16 to 07/13/16 (temporary period)
2. Assets on Hand \$461,652.78 in cash, CD's and money market fund [LF, p20].
3. Petitioner waives compensation.

General Conservatorship

4. Accounting period 07/14/16 to 06/30/17 (first account period).
5. Assets on Hand \$583,170.78 consisting of \$440,807.51 in cash, CD's and money  
market fund and \$122,886.93 in non-cash assets [LF, pgs. 39-43].
6. Petitioner claims the current bond of \$653,453.92 is excessive and request bond be  
reduced to \$650,418.95. Appears sufficient. JTD.
7. Petitioner waives compensation.
8. Petitioner seeks this Court's explicit authorization to sell, trade, or cash-in the bonds  
listed in the Supplemental Inventory and Appraisal filed 09/08/17. JTD.

9. Petition indicates the Conservatee has reported real property, in which Title has changed to be placed in Trust, as property on hand in this Accounting.

#### Trust Accounting

10. Accounting period 12/13/16 to 06/30/17
- 12 Assets on Hand \$594,959.45 consisting of \$24,959.45 in cash and remaining in real and personal property [LF, p66].
- 13 Petitioner requests bond be posted in the amount of \$600,329.40. Appears sufficient. JTD.
11. Petitioner waives compensation.
12. Petitioner requests reimbursement of costs advanced of \$3,000.00 as for a minimum retainer to counsel. JTD.
13. Attorney requests fees of \$23,100 for conservatorship and Trust services, less \$3,000 advanced by petitioner, leaving a balance owing of \$20,630.00. Billed at the reduced rate of \$350/hour for 66 hours' attorney time. Itemized [LF, pgs. 70-79]. JTD.
14. Attorney requests reimbursement of costs advanced of \$530.00. Itemized [LF, pgs. 81-82].
15. Proposed Order 09/11/17 indicates trust has cash assets in the amount of \$116,709.45 which differs from accounting.

#### RECOMMENDATION:

Court's discretion. If approved, *set separate hearings* on the next Accounting Review for **08/28/18** (if one year) or **08/27/19** (if two years). Account to be filed 30 days in advance.

(nb)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON DS1000109

CASE NAME: REBECCA H VAUGHN

**SEE ALSO 10**

HEARING:

Hearing re Final Discharge

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge re prior Conservator, George H. Vahn as executed by Attorney Linda J. Gladsdon.

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

1. George H. Vaughn passed away on 04/13/16.
2. Order Dispensing with Accounting entered 08/09/16.
3. Ex-Parte Petition/Order for Final Discharge received and forwarded to department on 10/10/17.
4. ~Proposed Form Order 10/04/17.

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: TARA REILLY

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0800317

CASE NAME: AARON EDGAR CALDERON

HEARING:

Hearing Re: TRANSFER TO RIVERSIDE

COUNSEL:

AARON EDGAR CALDERON (PCE)...KARIN HORSPOOL  
MILAGROS MARTINEZ (PCR)...PRO/PER

GENERAL INFORMATION:

**Continued from 12/16/16.** No appearances. Notice by Judicial Assistant.  
Continued from 03/07/17 on Court's motion. No appearance. Court order Milagros  
Martinez to appear at the next hearing dated 5/9/17. Notice by Judicial Assistant.  
**Continued from 05/09/17. Ms. Horspool ordered to prepare an Order for transfer.  
Court orders Court Investigator report be mailed to petitioner. Petitioner's  
appearance waived at next hearing.**

THIS CASE IS SET FOR HEARING ON Transfer to Riverside

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

1. Matter set upon review and receipt by CI that Conservatee now resides in  
Riverside, CA.
2. CI report filed 12/07/16.
3. Notice of Change of Address filed 05/09/17 does not include proof of service. Need  
to file Post-Move Notice of Change of Address form MC-080 per Pr.C. §2352 and  
CRC 7.1013(c).
4. Need Order for transfer per minute order.

RECOMMENDATION:

Need to clear notes 3-4, then Court's discretion.

(nb/lh)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1200138

CASE NAME: MTR OF ASHLEY KERNS

HEARING:

Petition for TO TERMINATE CONSERVATORSHIP

COUNSEL:

ASHLEY KERNS	(CEP)...MARK J. FLORY
BOBBIE KERNS	(CPE)...PRO/PER
JOHN KERNS	(CPE)...PRO/PER

GENERAL INFORMATION:

Continued from **10/21/16**. No appearances. Notice by Judicial Assistant.

Continued from **01/10/17, 03/14/17 and 05/16/17**. Counsel reports a petition to terminate conservatorship will be filed today.

**Continued from 07/25/17. The Court orders IRC to prepare a report on termination of conservatorship for the court. Donnasue Ortiz is appointed as Guardian ad Litem for conservatee. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Request to Terminate Conservatorship.

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

1. Matter set for hearing upon receipt and review of CI report filed 08/22/16 on the issues of conservatee's request to terminate conservatorship.
2. Need IRC Report.
3. Need report by GAL, Donnasue Ortiz.

RECOMMENDATION:

Need reports then Court's discretion.

(nb)

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400057

CASE NAME: MTR OF BETTY JEAN MARTIN

HEARING:

Petition for PAYMENT OF ATTORNEY FEES TO COURT APPOINTED COUNSEL  
FOR CONSERVATEE

COUNSEL:

BETTY JEAN MARTIN	(CEP)...SANDRA TURNER
DEBBIE JEANNE KROL	(SC )...PHYLLIS M GALLAGHER
LISA A BURGESS-PEEBLES	(CPE)...PRO/PER
MICHELE LEANN REED	(SC )...PRO/PER
SANDY TURNER	(PET)...SANDRA TURNER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Court-Appointed Counsel. Sandy Turner ["Petitioner"].

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

1. Petitioner was appointed on 03/06/14. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 03/04/16 to 09/12/17.
2. Attorney requests fees of \$25,760.00 (since appointment in March 2014). Billed at the reduced rate of \$350/hour for 45.70 hours' attorney time. Itemized [LF, pgs. 9-12]. JTD.
3. Reimbursement shall be made to the County for any and all sums previously received.
4. Petitioner requests an order directing and ordering Conservator, Ms. Krol, to pay requested attorney's fees, forthwith.
5. Petitioner requests to be relieved.
6. Notice filed 09/18/17 does not include conservatee or conservator, Ms. Debbie J. Krol. Need proper service.
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion  
(nb)

Future Hearing:

11/20/17 Hearing re: Amended accounting current and report etc.

01/31/18 Compliance review hearing

09/05/18 Accounting Review.



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

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1400307

CASE NAME: DORIS KATHLEEN BARNES

HEARING:

Second Account and Report of MARK A BARNES and Petition for allowance of fees filed.

COUNSEL:

CRAIG M PARKER	(PET)...CRAIG M PARKER
DORIS KATHLEEN BARNES	(CEP)...CRAIG M PARKER
GARY LEE BARNES	(CPE)...CHRISTOPHER A SCHUMATE
MARK A BARNES	(CPE)...CHRISTOPHER A SCHUMATE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees by Conservator of the Estate, Mark A. Barnes ["Petitioner"-son].

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

1. Accounting period 04/11/16 to 04/13/17.
2. Assets on Hand \$697,674.81 consisting of \$43,106.60 in cash and remainder in real and personal property.
3. Current bond of \$457,173.20. Insufficient. Suggest bond in the amount of \$865,000 (includes recovery). JTD.
4. Petitioner requests compensation of \$4,742.00. Billed at \$20/hour for 237.10 hours of service. Itemized [LF, pgs. 133-137]. JTD.
5. Attorney requests fees and costs of \$10,733.68. Billed at \$350-\$380/hour for 19.2 hours' attorney time and \$90-\$125/hour for 17 hours' paralegal time. Itemized [LF, pgs. 122-131]. JTD.
6. Attorney requests reimbursement of costs advanced of \$465 for filing fees. Itemized.
7. Total Property on Hand at Beginning of Account Period differs from Assets on Hand at End of Prior Accounting. Need corrected Summary of Account and affected schedules via verified supplement.
8. Disbursements – Schedule C [LF, p34] includes travel expenses to Mark Barnes totaling \$2,460.99, which is normally not allowed when compensation is requested. JTD.

9. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
10. Notice filed on 09/21/17 does not include Conservatee. Need proper service.
11. Last CI report filed 02/25/16.
12. Proposed Order 09/08/17 does not address bond.

**RECOMMENDATION:**

Need to clear notes 7-10 then Court's discretion re fees and bond. If approved, set hearing on the next accounting review for **06/19/18** (if one year) **or 06/18/19** (if two years). 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: TARA REILLY

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DATE: 10/17/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

**SEE ALSO 16, 17**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ALEXANDER ORONOZ

COUNSEL:

ALEXANDER ORONOZ                      (CPE)...JACK B. OSBORN  
ROSARIO BERNAL RADOS                (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from **12/14/16**.

Continued from **01/17/17**. Matter trailing other hearing set.

**Continued from 03/21/17** at request of counsel. Attempting settlement.

**Continued from 06/20/1. Matter continued to trial other hearings set.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alexander Oronos, son appointed conservator of the person and estate on 05/18/16, \$200,000 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/07/16.
3. Determination of Conservatee's Appropriate Level of Care filed 12/7/16.
4. Care Plan in accord with Pr.C.§2352 filed 12/7/16.
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. 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 filed 06/01/16.

RECOMMENDATION

Inquire status.

(lc/lh/nb/lh)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/17/17    TIME: 9:30    DEPT: S37P  
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CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

**SEE ALSO 15, 17**

HEARING:

Petition for DETERMINE COMMUNITY PROPERTY INTEREST IN PROCEEDS  
FROM SALE OF MARITAL RESIDENCE

COUNSEL:

ALEXANDER ORONoz                      (CPE)...JACK B. OSBORN

ROSARIO BERNAL RADOS              (CEP)...DONNASUE ORTIZ

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: TARA REILLY

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

CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

**SEE ALSO 15, 16**

HEARING:

Accounting Review

COUNSEL:

ALEXANDER ORONOS                      (CPE)...JACK B. OSBORN

ROSARIO BERNAL RADOS                (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 8      Order Appointing Conservatorship of the person and estate entered 05/18/16, \$200,000 bond.
- 9      Need final inventory and appraisal.
- 10     No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/17/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700339

CASE NAME: MTR OF MARGARITA DEL PILAR FLORES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARGARITA DEL PILAR FLORES (CTP)...JANET LATOURETTE  
MARISOL C FLORES (CP)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Marisol Flores, 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, limit right to contract. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 09/11/17.
3. Petitioner seeks civil rights not be limited without court order.
4. Proposed conservatee is developmentally disabled. Need appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. Need IRC report.
6. List of Required Contact Information filed 09/11/17 is missing petitioner. Need completed form.
7. Notice of Hearing and Proof of Service filed 09/25/17. However, need proper service as to Inland Regional Center providing 30 days' notice.
- 8. Certificate of Completion of the Conservatorship Training Class filed.**
- 9. Court Investigator report filed.**
10. Return of Citation filed 09/25/17.
11. ~Proposed Form Order: 09/11/17

## RECOMMENDATION

Need to clear notes 4-7 If approved, set hearing for Compliance Review for **05/22/18** 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)