



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 10/18/17**

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

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

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

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

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

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

09/19ww; 10/12/17h

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: 10/18/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1100881

CASE NAME: SPECIAL NEEDS TRUST OF RENEE BLUTREICH

**VACATED**

HEARING:

Accounting Review

COUNSEL:

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

SPECIAL NEEDS TRUST OF RENEE BLUTREICH (TRU)...

GENERAL INFORMATION

**Continued from 08/30/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 3<sup>rd</sup> Account for IRC Master Trust approved 09/02/15.
2. Need 4<sup>th</sup> Account beginning with 05/01/15.

RECOMMENDATION

Inquire status of accounting.

(ww)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1200623

CASE NAME: MARTHA SHOAF

HEARING:

Hearing re Final Discharge

COUNSEL:

PATRICIA O'HAGAN	(PET)...ROGER I. STEIN
MARTHA SHOAF	(DEC)...
BERNARD M BIDART	(TP )...

GENERAL INFORMATION

**Continued from 08/09/17.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Hearing appears to be inadvertently set as an Accounting review as the final accounting/distribution of Patricia O'Hagan, niece, was approved on 07/27/16.
2. Need receipt from Shirley Helmick.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status of receipt order.

(lc/lh/lc/lh)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

**SEE ALSO 4 5 6**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

CAROLYN MARSTON	(PET/PLA)...PRO/PER
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
KATIE SHIRLEY	(PET)...
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORP	
WOODROW SHIRLEY	

**XREF: CONDS1000212** (*Katie Shirley*)

GENERAL INFORMATION

OSC set when there was no appearance and continued to **05/10/17**.

**Continued from 06/21/17. Any supplement to be filed by 9/18/17.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration [12/14/16] with **full** authority under IAEA by Carolyn Marston, daughter.

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

1. Letters of Administration were issued to Carolyn Marston on 09/24/13, limited authority no bond. It appears petitioner **now seeks full** authority.
  - a. Petitioner states will waives bond; however, there is no will, yet Petitioner also states decedent died intestate.
  - b. Petitioner does not set forth value of the estate, nor has filed an Inventory and Appraisal in this case.
  - c. Petitioner waives bond for herself; however, no other bond waivers for full authority.
  - d. It appears that petitioner may be confused as to what is needed to complete her Inventory and Appraisal and accounting. Accounting [2/8/16] was not heard at time of review.
2. Need Notice to Petition to Administer Estate and proof of service if petitioner is amending authority per C.R.C § 7.53(a).

3. Need proof of publication if petitioner is amending authority per C.R.C § 7.53(a).
4. ~Proposed Form Order:12/14/16.

#### RECOMMENDATION

Need to clear notes 2-3. Court to determine if petition is moot as petitioner is already administrator.

(lc)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

**SEE ALSO 3 5 6**

HEARING:

SUMMARY Account and Report of CAROLYN MARSTON and Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSTON	(PET/PLA)...PRO/PER
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
KATIE SHIRLEY	(PET)...
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORP	
WOODROW SHIRLEY	

**XREF: CONDS1000212** (*Katie Shirley*)

GENERAL INFORMATION

Continued from **10/19/16 and 02/08/17**. No appearance. Court orders that Carolyn Marston be personally present in court on February 22, 2017. Notice by judicial assistant. **Continued from 02/08/17, 04/25/17, 06/21/17 and 08/30/17 to clear notes re accounting period 01/06/13 – 06/30/16.**

THIS CASE SET FOR HEARING ON **Amended (02/16/17 & 05/10/17)** Summary of Account by Carolyn Marston, daughter administrator.

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

1. Accounting period 01/06/13 to 06/30/16. However, accounting should begin at date of death; 01/05/13. Court may wish to deem as di minimis.
2. **Need** final Inventory and Appraisal where real property is appraised by probate referee, even though it has sold.
  - a. **Inventory and Appraisal submitted from conservatorship showing real property of \$881,090.80 and alleged probate property of \$275,000 [not appraised]. Petitioner alleges that there are no funds to get property appraised for date of death [Sup. 05/10/17 LFpg4-12].**
3. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. **Need** a proper summary of account and accounting schedules.

4. Amendment filed 05/10/17 is not verified per Pr.C. § 1021. **Need** verification.
5. Petitioner alleges that surplus of funds from sale of real property, \$8,938.42, was distributed **and distributions to beneficiaries totaling \$21,901.41 have been made.** A personal representative may only preliminary distribute personal property per Pr.C. § 10520., if it is pecuniary per terms **of a will** under \$10,000 and/or personal property under \$50,000. There is no will. Under what authority did petitioner distribute property? Need verified supplement explaining why the funds should not be paid back to the estate. **Amendment (02/16/17) indicates funds should not be paid back to the estate because it will have to be given back to petitioner and her sisters and would waste more time and money.**
6. Creditor's Claims by Emma Kresser, CPA \$2,135.00 Attorney Michael Maddux \$38,962.28 appear to be outstanding. Michael Maddux was allegedly hired pro bono.
7. A second petition for Administration was filed by administrator. ***Court to inquire as petitioner is already appointed with limited authority.***

#### RECOMMENDATION

Need to clear notes 2-4. Suggest petitioner seek legal advice.

(lc/nb/lh/lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

**SEE ALSO 3 4 6**

HEARING:

SUMMARY Account and Report of CAROLYN MARSTON and Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSTON	(PET/PLA)...PRO/PER
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
KATIE SHIRLEY	(PET)...
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORP	
WOODROW SHIRLEY	

**XREF: CONDS1000212** (*Katie Shirley*)

See notes on matter 4.



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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300430

CASE NAME: KATIE A SHIRLEY

**SEE ALSO 3 4 5**

HEARING:

ACCOUNTING SUMMERY Account and Report of CAROLYN MARSTON and  
Petition for allowance of fees filed.

COUNSEL:

CAROLYN MARSTON	(PET/PLA)...PRO/PER
KATIE A SHIRLEY	(DEC)...
MICHAEL C MADDUX	(PET)...
KATIE SHIRLEY	(PET)...
CITI MORTGAGE, A CORP.	(RES)...
CLEAR RECON CORP, A CORP	
WOODROW SHIRLEY	

**XREF: CONDS1000212** (*Katie Shirley*)

See notes on matter 4.

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400901

CASE NAME: George Lee Walker

HEARING:  
Accounting Review

COUNSEL:  
JOANN ROBERTS (PET)...CHO, SHEASBY, CHUNG & IGNACIO  
GEORGE LEE WALKER (DEC)...  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP )...PRO/PER

#### GENERAL INFORMATION

Continued from 02/10/16. Counsel stated there is property in Mississippi that needs to be probated first as this case has interest in the Mississippi.

**Continued from 10/19/16 and 02/15/17.**

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters of Administration issued to Joann Roberts, sister, on 1/20/15, \$237,000 bond.
2. Need final inventory & appraisal filed.
3. Need an accounting or status report filed. Need same.

#### RECOMMENDATION:

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

(sa/lc/ww)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500071

CASE NAME: MELODIE ANN RYLANDER

HEARING:  
Accounting Review

COUNSEL:  
ALLEN RYLANDER JR (PET)...JOELLE LEE A. NICHOL  
MELODIE ANN RYLANDER (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Allen Rylander, Jr., brother/executor, on 03/11/15, full authority, no bond.
2. Previous status report was approved on 10/12/16. Report referenced a related case CIVDS1601630. Does Court wish for a Notice of Related Case to be filed? JTD
3. Partial Inventory and Appraisal filed. Need final Inventory and Appraisal.
4. Need accounting or status report.

#### RECOMMENDATION

Need to clear note 3 & 4. Court's discretion re note 2.

(ww)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500520

CASE NAME: \*\* MASTER FILE\*\* LYLE LEROY MALLORY

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner  
RAYMOND SCOTT MALLORY

COUNSEL:

LYLE LEROY MALLORY	(DEC)...
RAYMOND SCOTT MALLORY	(PET)...JAMES L HEYWOOD & ASSOC
THE CHAPPY TRUST	(TRU)...
RICHEY LYLE MALLORY	(RES)...H FORD SHERIDAN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by James Heywood.

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

1. Petitioner James Heywood wishes to be relieved as counsel for Raymond Scott Mallory, current petitioner for administration.
2. Petitioner alleges that Raymond has failed to pay attorney's fees as agreed and the attorney-client relationship has deteriorated. There appears to be an upcoming trial. Court to inquire what attorney's fees are due as probate is statutory in nature.
3. Need proof of service of Notice of Hearing re compliance with Rules of Court, rule 3.1362(d), including service of Notice of Motion, Declaration and Proposed Order.
4. No proposed order.

RECOMMENDATION

Need to clear note 3, then Court's discretion.

(lc)

Future Hearings: 11/09/17: Readiness Calendar, Hearing Re: Petition on Chappy Trust, Petition for Letters of Administration, 12/18/17-12/20/17: Court Trial

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600341

CASE NAME: BERNARD SCOTT GROVES

HEARING:  
Accounting Review

COUNSEL:

KATHERINE WILHITE (PET)...NANCY A. SHAW  
BERNARD SCOTT GROVES (DEC)...  
VERNICE GROVES (PET)...J. BENJAMIN SELTERS III  
RICHARD E GADD (TP )...NATHANIEL J TARVIN  
STATE OF CA FRANCHISE TAX BOARD

**XREF: FAMSS1200807** (Katherine Wilhite -N- Bernard Groves) **CIVDS1415971**  
(AAA Life Insurance vs Wilhite, et al)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Vernice Groves, sister, on 08/10/16; limited authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal. .

(ww)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23, 2011

**SEE ALSO 15**

HEARING:

Hearing Re: INFORMATION/DOCUMENTATION OF SHARON MCINTOSH  
WOOD

COUNSEL:

NORMA RUDAMETKIN	(PET)...CHRISTOPHER B JOHNSON
THE NINA WOOD IRREVOCABLE TRUST (TRU)...	
GARY WOOD	(OBJ)...SHARON M ANDERSON

See notes on matter 15

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700703  
CASE NAME: MTR OF NORMA MAE TINGLER

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

COUNSEL:

MICHELE D KELLEY (PET)...THOMAS W DOMINICK  
NORMA MAE TINGLER (DEC)...

**XREF: CONPS1200302** (*Norma Mae Tingler*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Lost Will and for Letters of Letters Testamentary with Full Authority under IAEA by Michele Kelley, granddaughter/executor/trustee

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

1. Will waives bond. The estate consists of \$323,000 in personal property. Petitioner is a non-resident. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. The original will is apparently lost. When a will is lost, and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it Pr.C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. Declaration re missing will is attached to the petition [LF pg. 14]. JTD if sufficient.
3. The will conditionally incorporates decedent's Trust. Copy of Trust filed 10/10/17.
4. ~Proposed Form Order: 07/17/17

RECOMMENDATION

RFA subject to Court's discretion re bond. If approved, set Accounting/Status Review for **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700710

CASE NAME: ASHER EMMANUEL

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

SABA MASIH (PET)...DALE K BETHEL  
ASHER EMMANUEL (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Saba Masih, spouse

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

1. Bond in the amount of \$150,000 is being requested. Ok.
2. Decedent is survived by 2 minor children- Shamir and Sharon. Age unknown.
3. **Need Notice to Petition to Administer Estate and proof of service to Shamir Asher and Sharon Asher per CCR 7.51(d).**
4. Need proof of publication
5. ~Proposed Form Order: 07/14/17

#### RECOMMENDATION

Need to clear notes 3 & 4. \$150,000 bond. If approved, set Accounting/Status Review **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)



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

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DATE: 10/18/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700711

CASE NAME: VENILAL H SUMARIA

HEARING:

Spousal Property Petition hearing.

COUNSEL:

DEBORAH A SUMARIA (PET)...JULIA E BURT  
VENILAL H SUMARIA (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Spousal Property Petition by Deborah Sumaria.

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

1. Petitioner, Deborah Sumaria, seeks court determine that property left by decedent is community and transfers to petitioner without administration per terms of will.

#### RECOMMENDATION

Court's discretion.

(lc)

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: 10/18/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23, 2011

**SEE ALSO 11**

HEARING:

OSC re: Financial information given to Norma Rudametkin filed by  
NORMA RUDAMETKIN

COUNSEL:

NORMA RUDAMETKIN (PET)...CHRISTOPHER B JOHNSON  
THE NINA WOOD IRREVOCABLE TRUST (TRU)...  
GARY WOOD (OBJ)...SHARON M ANDERSON

GENERAL INFORMATION

**Continued from 08/30/17. Court denied request to continue hearing re suspension of powers.**

THIS CASE SET FOR HEARING ON OSC re Financial Information given to Norma Rudametkin.

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

1. Matter set on 08/02/17 when Gary Wood and Sharon Wood were ordered to turn over any **financial documents, laptops, hard drives** etc to Norma Rudametkin. Deadline to turn over documents is 09/20/17.
2. On 08/30/17 Sharon McIntosh Wood was again ordered to turn over information and/or documentation re Trust to Counsel for Sole Trustee Norma Rudametkin.
3. Receipt filed re **external hard drive** and **keys to a trailer** from Gary Wood to Dilair Nafosi, ESQ.
4. **Supplement filed 10/04/17 (209 pages) filed by Sharon Wood with various exhibits including invoices, copy of trust, cancelled checks, and correspondence. JTD**

RECOMMENDATION

Court's discretion re OSC.  
(lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 10/18/17      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1200143

CASE NAME: JASON ROCHA

**VACATED**

HEARING:

Accounting Review

COUNSEL:

JASON ROCHA

(CEP)...MITCHELL I ROTH

MARINA VILLASENOR

(CPE)...DONNASUE ORTIZ

SABBY JONATHAN

(PET/TEE)...JULIA E BURT

DONNASUE SMITH ORTIZ

(PET)...DONNASUE ORTIZ

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5<sup>th</sup> **trust** Account for Sabby Jonathan, approved on 11/23/16.
2. Need 6<sup>th</sup> **trust** Account beginning with 08/31/16.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600153

CASE NAME: MTR OF MARITSA RAMIREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of LETICIA RAMIREZ

COUNSEL:

LETICIA RAMIREZ (CPE)...PRO/PER  
MARITSA RAMIREZ (CEE)...MELVIN L FRIEDLAND

GENERAL INFORMATION

**Continued from 09/06/17.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Leticia Ramirez, mother, appointed limited conservator of the person only on 02/01/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 10/04/17.
3. Care Plan in accord with Pr.C.§2352.5 filed on 07/25/17.
4. Determination of Conservatee's Appropriate Level of Care filed 10/04/17 is incomplete at item 4a as to measures necessary to keep conservatee in residence. Need verified supplement.

RECOMMENDATION

Need to clear note 4.

(ww/lh)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600382

CASE NAME: CARMEN MARQUEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SARA SHERMAN

COUNSEL:

SARA SHERMAN (PET)...GAUDY LAW, INC  
CARMEN MARQUEZ (CEP)...

GENERAL INFORMATION

**Continued from 09/06/17.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sara Sherman, daughter, appointed conservator of the person and estate on 02/01/17, No bond. However, **need** letters as none are in the file to issue.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.
5. **Need** final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. **If** the conservatorship estate holds interest in real property, **need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 1-7.

(ww)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700322

CASE NAME: MTR OF BILL TEAGUE

HEARING: Petition for Appointment of Conservator

COUNSEL:

GREGORY VINCENT TEAGUE (CPE)...DAVID M GROSSMAN  
BILL H TEAGUE (CEP)...

GENERAL INFORMATION

Gregory Teague appointed temporary Conservator person and estate, \$20,000 bond on 09/06/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Gregory Teague, son.

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

1. Petitioner seeks bond of \$150,000. Ok.
2. Proposed conservatee was residing in New Mexico until July of 2017. Court does not appear to have jurisdiction until after January 14, 2018 Pr.C. § 1993.
3. Petitioner seeks medical powers. Capacity Declaration filed 09/29/17 is incomplete at item #7b initials; page 1 signature is not dated. Need completed form.
4. Petitioner seeks dementia powers. Need appointment of counsel for report.
5. Need Court Investigator report.
6. Proof Completion of the Conservatorship Training Class filed 10/05/17.
7. Return of Citation with proof of service filed 09/29/17.
8. Conservatee appeared on 09/06/17.
9. ~Proposed Form Order: 08/24/17.

RECOMMENDATION

Need to clear notes 3-5. Court may wish to continue matter until **01/18/18**. If approved, set hearing for Compliance Review for **05/23/18** for the filing of the required documents and hearing re Accounting Review for **12/26/18**. Any accounting to be filed 30 days in advance.

(lc/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/18/17      TIME: 9:30      DEPT: S35P  
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CASE#: SC SS00152

## **VACATED**

CASE NAME: IN THE MATTER OF JAMES PRENTICE

HEARING:

Accounting Review

COUNSEL:

JAMES D PRENTICE      (CEP)...

JOHN F PRENTICE      (CPE/TEE)...GRESHAM SAVAGE NOLAN & TILDEN

JAMES PRENTICE REVOCABLE TRUST (TRU)...

Eleventh Account and Report of John F Prentice filed 10/11/17.

**Future hearing date: 11/28/17 11<sup>th</sup> Account and Report of John F. Prentice**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/18/17      TIME: 9:30      DEPT: S35P  
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CASE#: SC SS00220

**VACATED**

CASE NAME: IN THE MATTER OF ARIC PEAVIE JR

HEARING:

Accounting Review

COUNSEL:

ARIC PEAVIE

(CEP/CEE)...

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

ARIC PEAVIE JR

(CTE)...

Fourteenth Account Current by Inland Regional Center filed 10/12/17.

**Future hearing date: 12/06/17 14<sup>th</sup> Account and Report by IRC**



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: 10/18/17 TIME: 10:30 DEPT: S35P  
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CASE#: CON DS1000281

**VACATED**

CASE NAME: SHANIKA LISTER

HEARING:  
Hearing Re: PRE-TRIAL CONFERENCE

COUNSEL:

VICKI LISTER	(CP/CPE )...HARTNELL LAW GROUP
STAN MANDELL	(CPE)...LAMB MORRIS & LOBELLO
CHRISTINA ERICKSON-TAUBE	(CP )...SHERRI L KASTILAHN
SHANIKA A LISTER	(CEP/CEE)...EDWARD B FISCHER & ASSO
EDWARD B FISCHER	(PET)...EDWARD B FISCHER & ASSOC
YO TASHI KO Y. TUCKER	(PET)...HARTNELL LAW GROUP
CARMELA C JOHNSON	(CP )...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
BANK OF THE WEST	(RANDOLPH M SHARON)

**XREF: PROPS1400134 (Vicki Lister) CIVDS1309039 (Hartnell -V- Lister)**

future Hearing: 10/25/17 Pre-Trial conference 11/16/17: Readiness Calendar (x2), Hearing Re: Petition for Conservatorships (x2),  
12/11/17-12/15/17: Court Trial, 4/19/18: 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: 10/18/17 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 (3rd day)

COUNSEL:

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

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

BEN C LUNA REVOCABLE TRUST (TRU)...

STELLA JAURIGUE (OBJ)...MICHAEL C MADDUX

REGINA MARIE LUNA (MICHAEL C MADDUX)

Trial- No Notes- JTD.

Future Hearings: 10/19/17-10/20/17: Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

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DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIV DS1509698

CASE NAME: NATIONAL GENERAL -V- MAXEY

HEARING:

Hearing Re: STATUS REVIEW

COUNSEL:

NATIONAL GENERAL INSURANCE COMPANY (PLA)...  
JIMMIE RAY MAXEY, JR. (DEF)...  
KIMBERLY S. MOORE (NEE MAXEY)  
COSSONDRA MAXEY  
JOHN MAXEY  
JESSICA VILLANUEVA  
LINDA CASTNER  
ESTATE OF JIMMIE RAY MAXEY (VARNER & BRANDT, LLP)  
ANN MARIE MAXEY

**XREF: PROPS1500446** (*Jimmie Ray Maxey*)

Status – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 3 4 5**

HEARING:

Petition for ORDR TO RECOVER POSSESSION OF PERSONAL PROPERTY  
BELONGING TO ESTATE

COUNSEL:

VINCENT EUGENE MURRAY (PET)...THOMAS W DOMINICK  
EVELYN JOYCE MURRAY (DEC)...  
KIMBERLY PATRICE MURRAY (PET/TP)... BRENT D GRIDER

GENERAL INFORMATION:

Continued from 5/16/16 and 08/03/16. Counsel request M.S.C.

**Continued from 10/19/16, 01/11/17 and 03/22/17. Trial requested.**

THIS CASE IS SET FOR HEARING ON Petition to recover possession of estate personal property (Pr.C. 850).

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

1. Vincent Murray, administrator, petitions for recovery of personal property allegedly belonging to the estate.
2. Petitioner alleges that respondent Kimberly Murray has retained possession of the subject personal property but does not have an ownership interest in those items. Petitioner adds that he has made written demand for the items but that respondent has failed to return the property.
3. Petitioner requests an order determining the estate ownership of the property, for return of the property by respondent within five days, for the issuance of a writ of possession for the property, for \$500/mo as reasonable use of the property, for double damages pursuant to Pr.C. 859, and for costs of suit.
4. The subject property is listed at Exhibit A to petition (furnishings, antiques, electronics, jewelry, etc.).
5. **Objection filed 5/12/16 by Kimberly Murray.**
6. ~Proposed Order 3/29/16.

RECOMMENDATION

Mater is opposed and set for trial.

(ds/sa/lc)

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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: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 2 4 5**

HEARING:

FIRST Account and Report of VINCENT EUGENE MURRAY and Petition  
for allowance of fees filed.

COUNSEL:

VINCENT EUGENE MURRAY (PET)...THOMAS W DOMINICK  
EVELYN JOYCE MURRAY (DEC)...  
KIMBERLY PATRICE MURRAY (PET/TP)... BRENT D GRIDER

GENERAL INFORMATION

**Continued from 3/30/16, 5/16/16, 08/03/16,10/19/16, 01/11/17 and 03/22/17.**

THIS CASE IS SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Fees

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

1. Letters of Administration issued 4/15/14, no bond.
2. Account period covers 12/12/13 – 12/31/15.
3. Assets on hand \$161,585.30 consisting of cash and personal property. However, some items listed are not appraised. Question why these items are not appraised or are these the items to be recovered. **Supp 05/06/16: Petitioner states that these items have yet to be marshalled and are the subject of the pending petition to recover them from Objector. If items are recovered, appraisals will be obtained.**
4. Petitioner alleges the estate is not in a condition to be closed as certain personal property that was removed from decedent's residence is yet to be recovered. Petitioner requests additional time in order to recover the property or file an 850 petition.
5. Petitioner requests an extension of 9 months in order to close the administration.
6. Petitioner and attorney request 70% of the \$11,823.48 statutory fees totaling \$8,275.00. JTD.
7. **Objections filed by Kimberly Murray on 03/09/16**
8. **Response to Objections filed 05/06/16 as "Supplement to First Account Current and Report of Administrator."**
9. ~Proposed order: 2/16/16

**RECOMMENDATION:**

Matter is contested. If approved, court to set hearing re accounting review for **01/31/18**.  
(sa/dl/sa/lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 2 3 5**

HEARING:

Trial Setting Conference

COUNSEL:

VINCENT EUGENE MURRAY	(PET)...	THOMAS W DOMINICK
EVELYN JOYCE MURRAY	(DEC)...	
KIMBERLY PATRICE MURRAY	(PET/TP)...	BRENT D GRIDER

TSC – No notes – JTD

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 2 3 4**

HEARING:

Trial Setting Conference

COUNSEL:

VINCENT EUGENE MURRAY (PET)...THOMAS W DOMINICK  
EVELYN JOYCE MURRAY (DEC)...  
KIMBERLY PATRICE MURRAY (PET/TP)... BRENT D GRIDER

TSC – No notes – JTD



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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400701

CASE NAME: Simon Sybrandy Family Trust

HEARING:

Hearing Re: PET FOR REIMBURSE/COSTS BY OLISLAGERS ETC..

COUNSEL:

SIDNEY SYBRANDY	(PET)...THOMPSON & COLEGATE
SIMON SYBRANDY FAMILY TRUST	(TRU)...
MARILYN SYBRANDY OLISLAGERS	(PET)...E. JOAN NELMS
IDA SYBRANDY	(PET/OBJ)...WILLIAM M NASSAR

**XREF: CONPS1400242** (Ida Sybrandy)

GENERAL INFORMATION

**Continued from 09/29/16, 01/19/17, 02/01/17 and 04/19/17. Matter set for TSC .**

THIS CASE SET FOR HEARING ON Petition for Reimbursement

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

1. Petition is brought by Marilyn Sybrandy Olislagers.
2. Marilyn acted as Ida's agent under her power of attorney for finances and health care directive. Marilyn seeks \$19,617.61 as reimbursement for cost she advanced as Ida's agent. Said fees include \$10,000 retainer to E. Joan Nelms for legal services. The costs advanced are itemized at Ex. F [LF 86-130].
3. Marilyn also seeks an order directed the trustee of the Sybrandy Family Trust to pay \$46,793.25 for attorney's fees that remain unpaid. Services are itemized at Ex. G [LF 132-147]. Attorney declaration is provided at Ex. H. [LF 149-152].
4. Sidney Sybrandy filed objections on 9/23/16.
5. Notice complete.

RECOMMENDATION

Matter is contested.  
(occ/lc).

Future Hearings: 4/25/18: Hearing Re: Trust Accounting, Hearing Re: Sybrandy Investments Accounting

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400826

CASE NAME: RODNEY L PARAMOURE JR

HEARING:

Probate status report filed.

COUNSEL:

MELANIE AJANWACHUKU (PET)...JAMES L HEYWOOD AND ASSOC  
RODNEY L PARAMOURE JR (DEC)...

GENERAL INFORMATION

**Continued from 08/23/17.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Melanie Ajanwachuku, creditor, on 12/19/14 [vacated] and reissued 06/09/16; full authority, \$20,000 bond.
2. Petitioner seeks an additional 180 days in order to discover if there are any other assets.
3. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Need notice. If approved, set Accounting/Status Review for **03/29/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500446

CASE NAME: JIMMIE RAY MAXEY

HEARING:

WAIVER OF Account and Report of KIMBERLY S MOORE and Petition  
for allowance of fees filed.

COUNSEL:

KIMBERLY S MOORE (PET)...VARNER & BRANDT  
JIMMIE RAY MAXEY (DEC)...

***XREF: CIVDS1509698 (National General V Maxey)***

#### GENERAL INFORMATION

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

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

1. All heirs waive accounting.
2. Petitioner and attorney request statutory fees of \$4,122.23 each. Ok.
3. Attorney requests extraordinary fees of \$7,290 for 24.3 hours at \$300 per hour. Itemized in separate declaration filed 06/29/17. JTD
4. Petitioner requests a reserve of \$1,500.
5. Proposed order 06/29/17; however, does not include 3 lines of "order content" above judge's signature per local rules. Submit order after hearing.

#### RECOMMENDATION

Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **10/24/18**.

(lc/lh)

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600455

CASE NAME: CHRISTOPHER LWOWSKI

HEARING:  
Accounting Review

COUNSEL:  
GREGORY S RISTER (PET)...BEWLEY, LASSLEBEN & MILLER  
CHRISTOPHER LWOWSKI (DEC)...

#### GENERAL INFORMATION

**Continued from 08/23/17 Counsel states that accounting is almost complete.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters Testamentary issued to by Gregory Rister, executor, on 07/06/16; full authority, no bond.
2. Final Inventory and Appraisal 05/24/17 and Supplemental filed on 06/28/17.
3. Need accounting or status report.

#### RECOMMENDATION

Inquire status of accounting or status report.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601036

CASE NAME: VIRGINIA RUTH BOOLS

HEARING:

FIRST AND FINAL Account and Report of BRENDA ASTA and Petition  
for allowance of fees filed.

COUNSEL:

BRENDA ASTA	(PET)...MY ATTORNEY LA
VIRGINIA RUTH BOOLS	(DEC)...
CALIBER HOME LOANS, INC.	(OBJ)...WRIGHT, FINLAY & ZAK

#### GENERAL INFORMATION

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

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

1. All heirs waive accounting.
2. Petitioner and attorney seek statutory fees of \$3,600 each. Ok.
3. Petitioner seeks a reserve of \$1,000.
4. No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **10/24/18**.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700195

CASE NAME: MTR OF IRA PETE ELLER TRUST

**SEE ALSO 12**

HEARING:

Hearing Re: Request for Additional Income

COUNSEL:

DOROTHY NOVELLA ELLER (PET)...DOWLING AARON INCORPORATED  
THE IRA PETE ELLER TRUST (TRU)...  
NATHAN PETE ELLER (OBJ)...GREGORY L ZUMBRUNN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Request for Additional Income.

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

1. Matter set on 08/09/17 when Trustee Nathan Eller was ordered to give the beneficiary Dorothy Eller [court to clarify beneficiary as minute order does not specify] an interim income of \$500 a month.

RECOMMENDATION

Court's discretion.

(lc)

Future Hearings: 12/28/17: Readiness Calendar, Petition for Order Instructing Trustee to Distribute Rental Income to Beneficiary; for Immediate Suspension Etc, 1/11/18: Court Trial for Miscellaneous Petition for Probate, Petition for Order Instructing Trustee to Distribute Rental Income to Beneficiary; for Immediate Suspension

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700195

CASE NAME: MTR OF IRA PETE ELLER TRUST

**SEE ALSO 11**

HEARING:

Petition for ORDER INSTRUCTING TRUSTEE TO DISTRIBUTE RENTAL  
INCOME TO BENEFICIARY; FOR IMMEDIATE SUSPENSION ET

COUNSEL:

DOROTHY NOVELLA ELLER (PET)...DOWLING AARON INCORPORATED  
THE IRA PETE ELLER TRUST (TRU)...  
NATHAN PETE ELLER (OBJ)...GREGORY L ZUMBRUNN

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearings: 12/28/17: Readiness Calendar, Petition for Order Instructing Trustee to Distribute Rental Income to Beneficiary; for Immediate Suspension Etc, 1/11/18: Court Trial for Miscellaneous Petition for Probate, Petition for Order Instructing Trustee to Distribute Rental Income to Beneficiary; for Immediate Suspension

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700644  
CASE NAME: WEI-MING CHAO

HEARING: Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

JEAN CHAO (PET)...BERNARD  
WEI-MING CHAO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Jean Chao, nominee

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

1. All heirs waive bond. The net estate consists of \$105,847.12 of which \$11,266.75 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. Petitioner is not listed in section 8. Does Court wish to clarify on record, or in alternative, require verified supplement? JTD
3. Proof of publication filed 08/16/17; however it mentions an AKA of *Peter Wei-Ming Chao* for the decedent that is not listed on the petition. Does Court wish for amended documents reflecting the AKA? JTD
4. Petitioner is nominated by heir Hunter Chao, son.
5. Duties and liabilities is missing telephone number of petitioner. **Need** same.
6. **Need** Notice to Petition to Administer Estate and proof of service.
7. ~Proposed Form Order: 06/30/17

RECOMMENDATION

Need to clear notes 5 & 6. Court's discretion re bond and notes 2 & 3. If approved, set Accounting/Status Review **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)



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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700646

CASE NAME: The Pat Family Trust

HEARING:

Petition for Appointment of Successor Trustee

COUNSEL:

KIMBERLY WHITE (PET)...CRAIG M PARKER  
THE PAT FAMILY TRUST (TRU)...

NOTICE:

Need 30 days' notice of hearing and proof of service.

Need copy of trust filed to determine notice per local rule 20-1502.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

-----  
DATE: 10/18/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000260

CASE NAME: NORMA BRACERO

HEARING: SIXTH Account and Report of GLEN D PRIOR and Petition for allowance of fees filed.

COUNSEL:

ARLENE T CHUNG

(CE )...HARTNELL LAW GROUP

NORMA BRACERO

(CTE/CEP)...MARK J. ANDREW FLORY

ROSA GILMA REY

(CE )...JACK B OSBORN

GLEN D PRIOR

(SC/CPE/CE )...KEVIN A MCKENZIE

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

**XREF: PRODS1100035** (*Digna Soto Family Trust*) **XREF: CONDS1000268** (*Norma Bracero letters expired 03/03/12*)

GENERAL INFORMATION

**Continued from 08/23/17. Court will reduce bond to \$1,123,995.08.**

THIS CASE IS SET FOR HEARING ON 6th Account Current and Petition for Fees by Glen Prior, PPF.

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

1. Accounting period 04/01/16 – 03/31/17.
2. Assets on Hand \$2,226,796.01 consisting of \$15,959.25 in cash, remaining in life insurance, real and personal property.
3. Current bond is \$1,454,000. Petitioner seeks a \$330,004.92 reduction for a total bond of \$1,123,995.08. Ok.
4. Petitioner requests compensation of \$4,330.00 for 43.3 hours at \$100 per hour. . Itemized [Acct. 07/06/17 LFpg9-10].
5. Attorney requests fees of \$3,750 for 23.71 hours at \$100/300 per hour for paralegal and attorney services. Itemized [Acct. 07/06/17 LFpg11-27].
6. Petitioner has paid Lisa Tucker for accounting services as it allegedly greatly reduces fees. Court to inquire how \$6,244.59 is greatly reducing fees. **Supp 10/06/17 itemizes bookkeeping and accounting services charged at \$50.00/hour and \$75/hour. JTD**
7. ~Proposed Order: 07/27/17.

RECOMMENDATION:

Court's discretion re fees. If approved, set hearing on the next accounting review for **06/27/18** (if one year) or **06/28/19** (if two years). Accounting to be filed 30 days' in advance of hearing.

(lc/lh)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/18/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS0900106

CASE NAME: CANDICE MAY SIMMERS

HEARING:

Fifth Account and Report of MARY ANN SIMMERS and Petition for allowance of fees filed.

COUNSEL:

GEORGE J SIMMERS	(CPE)...CALDWELL, KENNEDY & PORTER, A.
CANDICE MAY SIMMERS	(CEP/CTP)...
MARY ANN SIMMERS	(CPE)...JEANNE E KENNEDY
SANDRA L. TURNER	(PET)...DAVID & TURNER
G. DAN JOHNSON	(PET)...CALDWELL, KENNEDY & PORTER, A.
ALICE LANDAU JOHNSON	(CEE)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 5<sup>th</sup> SNT Account Current and Petition for Allowance of Fees by Mary Ann Simmers, Trustee/Conservator.

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

1. Accounting period 07/01/15 – 03/31/17.
2. Assets on hand \$229,928.44, cash.
3. Attorney seeks fees of \$3,660 for 21.6 hours at \$150/300 per hour for paralegal and attorney services. Itemized. [Acct. 09/13LFpg17-20]. Attorney fee prayer of \$3,600 does not match body/itemization of \$3,660. Court to clarify.
4. Need verification per Pr.C. § 1021.
5. Current bond is \$256,000. Ok.
6. Proposed order 09/03/17: Attorney's fees of \$3,360 do not match petition for \$3,660.

#### RECOMMENDATION

Need to clear note 4. If approved, set hearing on the next accounting review for **07/25/18** (if one year) or **07/24/19** (if two years). Accounting to be filed 30 days in advance.  
(lc)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1100065

CASE NAME: SOFIA GONZALEZ

HEARING:  
Accounting Review

COUNSEL:  
GLORIA E. GONZALEZ (CPE/CP/GE)...PRO/PER  
SOFIA GONZALEZ (CEP/CPE)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 5<sup>th</sup> Account for Gloria Gonzalez, daughter, approved on 01/18/17.
  - a. **Need** Order on 5<sup>th</sup> Accounting submitted for signature.
2. **Need** 6<sup>th</sup> Account beginning with 07/19/16.

#### RECOMMENDATION

Need 6<sup>th</sup> account and Order on 5<sup>th</sup> account.

(ww)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS

**SEE ALSO 19**

HEARING:

Hearing Re: OSC re Status of Rental Property

COUNSEL:

JOYERIA LEDAY	(CP )...ARMENTA LAW
VALARIE EVANS-BURBANK	(CE )...ARMENTA LAW
GALE STINSON	(PET)...ARMENTA LAW
DONNA OSBORN	(CPE)...LAYNE A BARTHOLOMEW
ROSE MARY WILLIAMS	(CTE/CEP/CEE)...MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 06/15/17. Court questions the rent being \$700 when Mr. Armenta previously stated the rental rate is \$1200 in Hesperia. Property Manager to get a better idea of rental rate.

**Continued from 08/03/17. Voting rights restored for conservatee.**

THIS CASE SET FOR HEARING ON OSC re Status of Rental Property.

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

1. Valerie Evans Burbank, daughter, appointed Conservator of estate on 04/16/15 \$300,000 bond and Donna Osborn as Conservator of person only. OSC set on 03/30/17.
2. Court Investigator report filed 04/28/17.
3. Declaration filed by Michael Armenta on 06/13/17 re rental property. Court to clarify why Joyeria Le Day, daughter, is mentioned as petitioner as it does not appear Joyeria is a Conservator. Need updated declaration regarding rents.

RECOMMENDATION

Need updated rental information.

(lc)

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

-----  
DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS

**SEE ALSO 18**

HEARING:

FIRST REPORT & Account and Report of GALE STINSON, JOYERIA LEDAY, VALARIE EVANS-BURBANK and Petition for allowance of fees filed.

COUNSEL:

JOYERIA LEDAY	(CP )...ARMENTA LAW
VALARIE EVANS-BURBANK	(CE )...ARMENTA LAW
GALE STINSON	(PET)...ARMENTA LAW
DONNA OSBORN	(CPE)...LAYNE A BARTHOLOMEW
ROSE MARY WILLIAMS	(CTE/CEP/CEE)...MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH

GENERAL INFORMATION

**Continued from 02/02/17.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current, Petition for Authority to Sell Real Property, allowance of Fees and Reduction of Bond by Valarie Evans-Burbank.

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

1. Accounting period 07/15/15 – 04/30/16.
2. Assets on hand \$568,877.24 of which \$293,827.24 is cash.
3. Petitioner is seeking authority to sell personal residence of conservatee. Pr.C. § 2590 powers were granted with exception of the sale of conservatee's residence. Court to require petitioner to file a separate petition and require a report of counsel and/or Court Investigator report.
4. Attorney requests fees of \$21,486 for 87.6 hours at \$250/295 per hour with a balance owing \$10,686. Itemized [Acct.12/22 LFpg27-41].
5. Attorney requests reimbursement of costs totaling \$3,621.88. Itemized [Acct.12/22 LFpg42].
6. Petitioner requests reimbursement of attorney costs advanced of \$10,800 and bond premium of \$1,210 for a total of \$12,010.
7. Current bond is \$300,000. Petitioner seeks a reduction to \$221,733.65. Legal fees are approximately \$75,000. Bond calculation does not include 10% recovery. Court to require bond of \$244,000.

8. Disbursements indicated monthly allowance for Donna Osborn whom conservatee lives with [Acct.12/22 LFpg23].
9. Proposed Order: 12/22/16. Not reviewed as notes need to be cleared.

#### RECOMMENDATION

Need to clear note 7, court may wish to trail **10/24/17** hearing. If approved, set hearing on the next accounting review for **01/31/18** (if one year) or **07/19/18** (if two years). Accounting to be filed 30 days in advance.

(lc/lh)

Future hearing dates: 10/24/17 Amended 1<sup>st</sup> Report and Account by Valarie Evans-Burbank



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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500020  
CASE NAME: JOSEPH G EVANS SR  
HEARING: FIRST Account and Report of JOSEPH G EVANS JR and Petition for allowance of fees filed.

COUNSEL:

JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR
MARY TURCOTTE EVANS	(OBJ)...PRO/PER

**CASE TO REMAIN IN S36**

GENERAL INFORMATION

**Continued from 06/14/17 and 08/09/17. Court will allow \$14,000 be transferred to the attorney client trust account of Layne Bartholomew pending allocation of fees.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees by Joseph Evans, son.

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

1. Accounting period 02/04/15 – 12/18/16.
2. Assets on hand \$71,942.34 of which \$27,942.34 is cash.
3. Attorney requests fees of \$7,503 for 47 hours at \$120/350 per hour for paralegal and attorney services. Itemized [Acct. 03/29 LFpg 57-60]. JTD
4. Petitioner requests fees of \$32,012.50 for 1280.5 hours at \$25 per hour. Itemized [Acct. 03/29 LFpg 85-92]. JTD
5. Joyce Evans-Sandin [Joyce] paid herself \$71,515.83 in caregiver services and repaid the estate \$43,045, leaving caregiver services paid to her totaling \$28,470.73. Petitioner and Joyce are now aware that the payments were inappropriate without a court order. Petitioner requests ratification of services totaling \$28,470.73. JTD
6. Petitioner requests that Joyce's caregiver fees of \$5,700 be ratified. Itemized [Acct. 03/29 LFpg 91-92]. JTD
7. Petitioner requests reimbursement of expenses totaling \$14,803.42 of which \$9,744.19 have already been reimbursed leaving a balance of \$5,059.23. Expenses include mostly hotel stays and meals. Itemized [Acct. 03/29 LFpg 93-99]. JTD Also see next note.

8. Disbursements appear to list more lodging/vacations than average. Court to inquire [Lfpg45].
9. Petitioner seeks ratification of expenses paid to Joyce totaling \$15,431.34 Itemized [Acct. 03/29 LFpg 100-106]. JTD
10. Disbursements indicate gifts to family and friends on 02/27/15 totaling \$2,000. Need further explanation[Lfpg29]. **Supp 06/20: paid to Gladys Miles as a gift allegedly promised prior to conservatorship.**
11. Disbursements indicated \$32,900 transferred to account ending in 6652 [Lfpg34]. Question what account ends in 6652 as it does not appear to be listed? **Supp 06/20: Petitioner alleges she made periodic disbursements between her person accounts and conservatorship accounts. Petitioner reportedly transferred back \$30,500. Court to inquire if petitioner is commingling funds.**
12. Petitioner requests current bond of \$39,425 to \$68,000. Ok.
13. ~Proposed Order: 03/29/17.

#### RECOMMENDATION

Court's discretion re fees/reimbursement. If approved, set hearing on the next accounting review for **02/28/18** (if one year) or **02/27/19** (if two years). Accounting to be filed 30 days in advance.

(lc)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

**VACATED**

HEARING:

Accounting Review

COUNSEL:

SEAN E SITTLER	(CEP)...PRO/PER
SHANNON M DEBENEDICTIS	(CPE)...HARTNELL LAW GROUP
SEAN E SITTLER	(CEP)...PRO/PER

GENERAL INFORMATION

**Continued from 08/24/17.**

THIS CASE SET FOR HEARING ON Accounting review

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

1. Shannon DeBenedictis, sister, appointed conservator of the person and estate on 07/14/16, no bond.
2. Amended Final Inventory and Appraisal filed 06/28/17.
3. Need first accounting.

RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700025

CASE NAME: BETTY J ALTHER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JANET E SACKWAR

COUNSEL:

JANET E SACKWAR (CPE/CEP)...JOELLE LEE A. NICHOL  
BETTY J ALTHER (CEP)...PRO/PER  
LIBERTY MUTUAL INSURANCE (TP )...

GENERAL INFORMATION

**Continued from 06/21/17. Inventory and Appraisal with the probate referee.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Janet Sackwar, sister, appointed conservator of the person and estate on 04/24/17, \$1,091,021.00 bond.
2. Determination of Conservatee's Appropriate Level of Care form, Care Plan filed 05/24/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed on 06/28/17.
4. Proof of recorded letters filed on 06/28/17 per Pr.C.§2313 as conservatee owns real property in Los Angeles County.
5. Final Inventory & Appraisal per Pr.C.§2610 filed.
6. Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610 filed..

RECOMMENDATION

None.

(lc/ww)

Future hearing: 5/02/18: Accounting Review

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS00486  
CASE NAME: THOMAS CHARLES RICHARDS  
HEARING: TENTH Account and Report of DANIEL G STUBBS and Petition for allowance of fees filed.

COUNSEL:

ASUNCION RICHARDS (PET)...LAYNE A BARTHOLOMEW  
DANIEL G STUBBS (PCR/ CE/CPE)...HORSPOOL & HORSPOOL  
THOMAS CHARLES RICHARDS (PCE/CTE/CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 10<sup>th</sup> Account Current and Petition for Fees by Daniel Stubbs, PPF.

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

1. Petitioner, Daniel Stubbs PPF, was appointed Conservator of estate only; Asuncion Richards, mother, was appointed Limited Conservator, person only.
2. Account period covers 04/01/16 – 06/30/17.
3. Assets on hand \$1,015,112.10 consisting of \$370,112.90 in cash and the balance in real property and a vehicle.
4. Per prior Court order Asuncion Richards was paid \$250/month for caregiver services and \$250/month to petitioner as advanced compensation. Petitioner requests to continue these payments.
5. Petitioner requests compensation of \$7,846.25 less \$3,750.00 already paid leaving a balance of \$4,096.25 for 81.5 hours at \$30/200 per hour. Itemized [LF p.30-40]. Court to determine reasonableness of case management fee as it exceeds the community standard of \$125/hour. JTD
6. Attorney requests fees of \$3,950.00 for 7.9 hours at \$315/295 Itemized [LF p.41-42]
7. Petitioner seeks current bond of \$500,000 be increased to \$587,000. Ok
8. ~Proposed order: 09/07/17.

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **09/26/18** (if one year) or **09/25/19**(if two years). Accounting to be filed 30 days in advance.  
(lc)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS0900588

CASE NAME: LASHONDA HOWARD

HEARING:

SEVENTH Account and Report of INLAND COUNTIES REGIONAL CENTER,  
INC and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTER (PET)...LAW OFFICE OF STEVEN K B  
LASHONDA HOWARD (BEN)...  
LASHONDA HOWARD (TRU)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 7<sup>th</sup> Account and Report of IRC and Petition to Amend Trust, for Approval of Trustee's Fees and for Attorney's Fees.

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

1. Accounting covers period: 06/01/16 – 05/31/17.
2. Assets on hand: \$59,264.48; cash.
3. Petitioner seeks to amend trust to include specific language re "Medicaid" where "Medical" is referenced.
4. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$1,203.05. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000.
5. Petitioner requests authority to allow Master Trust to continue taking its annual fee according to its fee schedule. JTD
6. Attorney requests fees of \$1,320 for 9.9 hours at \$100/250 per hour for paralegal and attorney services. Itemized in separate declaration.
7. Current bond is \$67,000. Appears adequate.
8. IRC Report in support of 7<sup>th</sup> Account filed 10/03/17.
9. ~Proposed Order: 07/26/17; however, needs post hearing review by legal research.

#### RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **09/12/18** (if one year) or **09/11/19** (if two years). Accounting to be filed 30 days in advance.

(lc/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.

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400925  
CASE NAME: \*\*\*MASTER FILE THE KERBY TRUST  
HEARING: Spousal Property Petition hearing.

COUNSEL:

LARRY E HOOVER	(PET)...SU P CHEAH
THE KERBY TRUST	(TRU)...
BRENDA SUE LAWER	(PET)...EDWARD B. FISCH
ZINA MICHELLE KERBY	(PET)...PRO/PER
CHARLES A KERBY	(OBJ)...JEANNE E KENNEDY
PUBLIC GUARDIAN	(COUNTY COUNSEL)

GENERAL INFORMATION:  
**Continued from 08/21/17.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Zina Kerby  
[“Petitioner”].

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

1. Petitioner requests a determination and confirmation of property passing to the surviving spouse as community property. Specifically real property at Victorville, CA, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? Need verified supplement.
2. Section 1a re determination is blank but section 1a and 1 b are complete.
3. Section 8 indicates there exists a written agreement between the deceased spouse and the surviving spouse. Need copy of the agreement as Attachment 8.
4. Section 9 to petition does not include ages of Natalie and Mathew Lawer or relationship and age of Nicole Lawer. Need verified supplement.
5. Section 10 indicates petitioner is named as executor in the decedents will. Need copy of will as Attachment 10.
6. Section 12 indicates a petition for administration of the decedent’s estate was filed on 12/10/14. However, review of documentation indicates Order Granting Petition to Accept Resignation of, and to Succeed San Bernardino County Public Guardian as Trustee; and Petition to Enjoin Foreclosure and Trustee Sale Proceedings was entered on 04/18/17, wherein, the Court appointed Brenda Sue Lawer, as Third Successor Trustee of the Kirby Trust.

7. Need Notice of Hearing with proof of service.
8. **Objection to Spousal Property Petition filed by Third Successor Trustee, Brenda Sue Lawer.**
9. ~Proposed Form Order 06/05/17.

RECOMMENDATION:

Need to clear notes then set for contested hearing. If continued, ***set matter on a Monday or Tuesday as originally set.***

(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: 10/18/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1500087

## **VACATE**

CASE NAME: Jean-Jacques Ackermann

HEARING:

Hearing re Final Discharge

COUNSEL:

DAVID M WILSON

(PET)...RACHEL J HARRIS

JEAN-JAQUES ACKERMANN

(DEC)...

Ex Parte Petition for Final Discharge and Order forwarded to department for review on 10/12/17.

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500217

CASE NAME: CHARLINE MCFARLING

HEARING:  
Accounting Review

COUNSEL:  
COLLIN CHARLES MUNRO (PET)...GARY H BLAYLOCK  
CHARLINE MCFARLING (DEC)...  
BRANDON MUNRO (PET)...NANCY E LOFDAHL

#### GENERAL INFORMATION

Continued from **05/24/17**. Counsel Gary Blaylock ordered to prepare an accounting to the best of his ability as he is unable to find his client.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to **Collin Munro**, son, on 09/14/15; full authority, no bond. Collin was removed as administrator on 10/19/16. **Brandon Munro**, son was appointed temporary, then later successor administrator and letters issued 03/06/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting by Gary Blaylock for Collin Munro Pr.C. § 10953.

#### RECOMMENDATION

Need to clear notes 2 & 3.

(lc/ww/lc/ww)

Future Hearing: 05/14/18 Accounting Review for **Brandon Munro**

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: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501037

CASE NAME: CLARE IRENE BLOXHAM

HEARING:

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

COUNSEL:

MALCOLM VICTOR SMITH	(PET)...CRAIG E WILSON
CLARE IRENE BLOXHAM	(DEC)...
SANDRA SPACHTHOLZ	(PET)...CRAIG E WILSON
LIBERTY MUTUAL INSURANCE	(TP )...

GENERAL INFORMATION

Letters of special administration issued to Sarah Spachtholz on 04/17/17; \$464,000 bond filed on 04/11/17.

**Continued from 08/24/17.**

THIS CASE SET FOR HEARING ON **Successor** Petition for Probate, Letters Testamentary with Full Authority under IAEA by Sandra Spachtholz, named alternate executor/friend.

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

1. Letters Testamentary issued to Malcolm Smith, brother, on 03/09/16, no bond. Malcolm passed away on 09/21/16 creating a vacancy as personal representative.
2. Will waives bond. Bond of \$464,000 filed on 04/11/17 for special administrator. The estate consists of \$430,697 in personal property. JTD
3. ~Proposed Form Order: 06/06/17

RECOMMENDATION

RFA. If approved, set Accounting/Status Review for **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lc/ww)

Future Hearing: 10/04/17: Accounting Review, OSC Re: Why Administration Should not be Suspended, 11/29/17: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501067

CASE NAME: MTR OF MARILYN MILLER

HEARING:

FIRST AND FINAL Account and Report of WAYNE FAWCETT and Petition  
for allowance of fees filed.

COUNSEL:

WAYNE FAWCETT  
MARILYN MILLER

(PET)...J. PETER WAKEMAN  
(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Wayne Fawcett/Trustee.

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

1. Petitioner waives accounting and statutory compensation as trustee.
2. Attorney requests statutory fees of \$36,216.50. Ok.
3. No proposed order. Submit after hearing.

#### RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **10/24/18**.

(lc)

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: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600167  
CASE NAME: GLORIA DIANNE DICK  
HEARING: WAIVER OF Account and Report of GEOFFREY ALLEN DICK and  
Petition for allowance of fees filed.

COUNSEL:

GEOFFREY ALLEN DICK (PET)...ROSE C ROSADO  
GLORIA DIANNE DICK (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Geoffrey Dick, son

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

1. Petitioner and attorney request statutory fees of \$8,685.99 each. Ok.
2. Attorney seeks extraordinary fees of \$1,200 for 7 hours at \$150/300 per hour for paralegal and attorney's fees. Itemized [Acct. 07/25 LFpg13-15]. JTD
3. All heirs waive accounting; however, need verified supplement re the following issues:
4. Petitioner seeks a reserve of \$2,500.
5. ~Proposed Order: 07/25/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **10/24/18**.  
(lc/lh/lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601119

CASE NAME: MTR OF DANIEL D ZUNIGA

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

RICHARD A ZUNIGA	(PET)...JACQUELINE PELAEZ
DANIEL D ZUNIGA	(DEC)...
ESTHER ZUNIGA	(PET)...JOHN F WEBER

GENERAL INFORMATION

Continued from **03/07/17**. Counsel request petition filed by Mr. Zuniga be denied. Petition filed by Richard Zuniga on 11/08/16 is denied without prejudice.

Continued from **06/27/17** court gives tentative decision of granting petition and ordering a bond of \$325,000.

**Continued from 08/22/17. Request for dismissal as a no asset estate may be filed.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration, full authority, by Esther Zuniga, spouse.

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

1. Petitioner alleges that she is sole heir and waives bond. The estate consists of \$324,960 in personal property that consists of unclaimed joint and p.o.d accounts being held by the state.
2. ~Proposed Form Order/Letters 12/21/16.

RECOMMENDATION:

RFA. Court's discretion re: bond. If approved, set Accounting/Status Review for **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/nb/lh/cs/nb/ww)

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

-----  
DATE: 10/18/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700747  
CASE NAME: MTR OF BEVERLY JEAN DYER

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

COUNSEL:

WILLIAM H DYER	(PET)...JOHN F WEBER
MARILYN DYER KRUSE	(PET)...JOHN F WEBER
BEVERLY JEAN DYER	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by William Dyer & Marilyn Dyer Kruse, son & daughter/co-executors/co-trustees

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

1. Will waives bond. The estate consists of \$435,000 of which \$335,000 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. The will conditionally incorporates decedent's Trust. Copy of decedent's trust attached. [LF pg. 10-42]
3. Notice to Petition to Administer Estate and proof of service filed 08/10/17; however, **need** notice to Linda Brown and Carmen Kennedy.
4. ~Proposed Form Order: 07/26/17

RECOMMENDATION

Need to clear note 3. Court's discretion re bond. If approved, set Accounting/Status Review for **12/26/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/lh)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

**SEE ALSO 11**

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS PETITION TO  
COMPEL ACCOUTNING ETC

COUNSEL:

RUTH ANITA BELL	(PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON	(PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST	(TRU)...
CHRISTINA BROWN	(PET)...PRO/PER

Currently under review by legal research

(LR)

30 Days' notice filed. Court to inquire if real property has an encumbrance, if so court may wish to require notice to mortgage company.



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

-----  
DATE: 10/18/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

**SEE ALSO 10**

HEARING: FIRST Account and Report of CHRISTINA BROWN and Petition for allowance of fees filed.

COUNSEL:

RUTH ANITA BELL	(PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON	(PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST	(TRU)...
CHRISTINA BROWN	(PET)...PRO/PER

***CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.***

GENERAL INFORMATION

**Continued from 09/13/17. Christina Brown's name to be changed to Christina Barnes. Counsel Church stated escrow is pending. Money cannot be withdrawn from Trust Account without attorney and through court order. Counsel Church to submit order re name correction.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees by Christina Barnes, Trustee.

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

1. Accounting period 09/23/15 – 04/13/17.
2. Assets on hand \$4,888.82 in cash.
3. Real property in Pico Rivera is not included in accounting.
4. Christina Barnes' name appears to be Christina Brown on the record. Additionally, first line of report states Kristine Merrill is successor Trustee. Need verified supplement clarifying parties.
5. Page 2 of report is highly illegible. Court may wish to require new page.
6. Need list of beneficiaries per California Rule of Court 7.902.
7. **Objections filed by Ruth Bell and Valerie Johnson on 08/23/17, supplemental objections filed 09/07/17.**
8. **Reply to Objections filed by Christina Michaele Barnes on 09/21/17.**
9. No proposed order. Submit after hearing.

## RECOMMENDATION

Need to clear notes 4-6; matter is contested. *If court retains jurisdiction* of trust, set next Accounting review for **06/13/18**.

(lc/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: 10/18/17      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

**SEE ALSO 13 14**

HEARING:

Hearing Re: TO BE RELIEVED BY MICHAEL MADDUX

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO (TRU)...	
NORA J MORALES	(PET)...SKAPIK LAW GROUP
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

No notes – JTD

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

-----  
DATE: 10/18/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

**SEE ALSO 12 14**

HEARING:

Hearing Re: PTN TO INTERVENE AND FOR DEC RELIEF

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO (TRU)...	
NORA J MORALES	(PET)...SKAPIK LAW GROUP
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

No notes – JTD

(LR)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/18/17 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

**SEE ALSO 12 13**

HEARING:

Hearing Re: APPLI FOR OSC RE: COTEMPT

COUNSEL:

JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE NACCARATO (TRU)...	
NORA J MORALES	(PET)...SKAPIK LAW GROUP
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
HELLEN BUSH	(PET/INT)...PRO/PER

No notes – JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

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DATE: 10/18/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1300209

CASE NAME: Carol Ann Gerola

HEARING: SECOND AND FINAL Account and Report of BRIAN WATSON and Petition for allowance of fees filed.

COUNSEL:

BRIAN WATSON

(CPE)...LENITA A SKORETZ

CAROL ANN GEROLA

(CEP)... WALTER T. MOORE

PAUL R. HORNAK

(PET)...RAUSCHL P.C. & HORNAK

CHELSE WATSON

(PRO/PER)

Waiver of Court Fees and Costs filed by CHELSE WATSON is GRANTED TOTAL FEES WAIVED TO DATE: \$40.00

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> and Final Account and Petition for Allowance of Fees by Brian Watson, son.

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

1. Conservatee passed away on 02/07/17.
2. Assets on hand \$86,074.09, cash.
3. Accounting period 07/25/15 – 02/07/17, pre-death; 02/08/17 – 08/31/17, post-death
4. Attorney seeks reimbursement of costs totaling \$872. **Supp 10/11/17 itemization of costs. JTD**
5. There is no proposed distribution. Need verified supplement regarding remaining assets. **Supp 10/11/17 proposes to distribute directly to deceased conservatee's heirs, however, need proper Pr. C. §13100 petition. Also, question if predeceased sons are survived by issue?**
6. Current bond is \$20,000 and remainder is in blocked account.
7. Conservator is not seeking fees.
8. Attorney seeks fees of \$8,625 for 28.75 hours at \$300 per hour. Itemized [Acct. 09/08/17LFpg21-24].
9. Proposed order 09/08/17: Assets on hand are incorrect in number 3 and there is no distribution clause. Submit order after hearing.

## RECOMMENDATION

Need to clear note 5. If approved, set hearing on the filing of receipts and final discharge for **10/24/18**.

(lc/lh)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600009

CASE NAME: LARRY WRIGHT JR

HEARING:

WAIVER OF ACCOUNT and Report of GLORIA BLAKELY-JONES and  
Petition for allowance of fees filed.

COUNSEL:

GLORIA BLAKELY-JONES (CPE)...GREGORY L ZUMBRUNN  
LARRY WRIGHT JR (CEE)...

GENERAL INFORMATION

**Continued from 08/23/17.**

THIS CASE SET FOR HEARING ON Petition for Waiver of Account per Pr.C. § 2628 by  
Gloria Blakely-Jones, mother.

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

1. Accounting period 03/09/16 – 04/30/17.
2. Petitioner waives conservator fees.
3. Court to inquire if a court has jurisdiction of the SNT (with Center for SNT  
administration) and whether accountings are being reported.
4. Petitioner states that estate qualifies for a waiver per Pr.C. § 2628. There are \$0  
assets on hand.
5. ~Proposed Order: 07/10/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **10/24/18**. Any  
accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule  
20-908.

(lc)



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

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DATE: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600338

CASE NAME: MTR OF NATHANIEL GABRIEL MENDOZA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MAUREEN MENDOZA

COUNSEL:

MAUREEN MENDOZA (CPE)...PRO/PER  
NATHANIEL GABRIEL MENDOZA (CTP)...JENNIFER DANIEL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maureen Mendoza, mother, appointed limited conservator of the person only on 03/15/17.
2. Determination of Conservatee's Appropriate Level of Care; Care Plan filed 10/11/17.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed 10/05/17.

RECOMMENDATION

None.

(ww/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: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700272

**VACATED**

CASE NAME: MTR OF LLOYD H DODD, JR

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

LLOYD H DODD III	(CPE)...PRO/PER
CONSUELO C DODD	(CPE)...PRO/PER
LLOYD H DODD JR	(CEP)...MITCHELL I ROTH

**XREF: CIFDS1700018** (*Dodd v. Richardson*)

Bond posted and letters issued.

Future Hearings: 3/28/17: Conservatorship Compliance Review Hearing, 10/31/18: Accounting Review

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700328

CASE NAME: JOHN GOMEZ

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
YASBET PENALOZA GOMEZ (PET)...PRO/PER  
JUAN GOMEZ (PET)...PRO/PER  
JOHN GOMEZ (CEE)...MARK J. FLORY

#### GENERAL INFORMATION

Yasbet and Juan Gomez, parents, appointed temporary Conservators of person on 09/06/17. Mark Flory appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Yasbet and Juan Gomez, parents.

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

1. Petitioner seeks medical powers even is proposed conservatee objects subject to limits per Pr.C. § 2356. Capacity Declaration filed 09/08/17.
2. Need report of Counsel Flory.
3. Certificate of Completion of the Conservatorship Training Class filed re Juan on 09/06/17. Need proof of class for Yasbet.
4. Need notice of hearing and proof of service.
5. Need Court Investigator report.
6. Citation returned served.
7. **Letter from IRC filed 10/05/17 requests 30-day continuance.** JTD
8. ~Proposed Form Order: 08/30/17.

#### RECOMMENDATION

Need to clear notes 2-5. Court's discretion re IRC request for continuance. If approved, set hearing for Compliance Review for **05/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/lh)

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS00690

CASE NAME: IN THE MATTER OF INEZ O ALNER

HEARING:  
Accounting Review

COUNSEL:

INEZ O ALNER	(CEP)...DUANE P BOOTH
DIANA MILLER	(CPE)...HARTNELL HORSPOOL & FOX
JUNE SCHAFFRAN	(CPE)...HORSPOOL & H ORSPOOL

GENERAL INFORMATION

**Continued from 04/19/17 and 06/21/17.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 9<sup>th</sup> Account of Diana Miller, daughter, approved on 05/13/15 for period ending 12/31/14.
2. Proposed order to dispense with accounting received on 08/02/17 indicates conservatee passed away on 05/03/15.
3. Need final accounting for pre-death and post-death accounting periods beginning on 01/01/15, per Pr. C. §2620.

RECOMMENDATION

Inquire status of accounting. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(lc/ww/lh/ww)

Future Hearings:

10/30/17: Hearing Re: Ex-Parte Petition to Dispense w/ Accounting 1/01/14-05/03/15,  
Hearing Re: Ex-Parte Petition to Dispense w/ Accounting 5/04/15-06/30/17

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/18/17 TIME: 9:30 DEPT: S37P  
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CASE#: VC VS408

CASE NAME: IN THE MATTER OF TOM W BROWN JR

HEARING:  
Accounting Review

COUNSEL:

GRACE BROWN	(CPE)...DIANA J. CARLONI ATTORNEY AT L
TOM W BROWN	(CEP)...SHERRI L KASTILAHN
TOM W BROWN JR	(CPE)...DIANA J CARLONI

GENERAL INFORMATION

Continued from **03/22/17** and **05/31/17**. Accounting to be filed by 07/02/17.  
**Continued from 08/02/17 to file accounting and resolve bonding issue.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 12<sup>th</sup> Account of Grace Brown, mother, approved on 05/23/16.
2. **Need** 13<sup>th</sup> Account beginning with 11/01/15.

RECOMMENDATION

Inquire status of accounting. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(lc/ww)

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: 10/18/17 TIME: 9:35 DEPT: S37P  
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CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

HEARING:

Hearing Re: REQUEST FOR TREATMENT PROGRAM

COUNSEL:

CHRISTIE DAVIDSON	(CPE/CTE)...KARIN E HORSPPOOL
TODD L KOERBER	(CEP)...JAMES B CHURCH
TODD L. KOERBER SPECIAL NEEDS TRUST (TRU)...	
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
TODD KOERBER	(TP )...VANCE & BLAIR LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Request for Treatment Program.

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

1. Matter set at 09/06/17 accounting hearing. Counsel requested hearing re special report filed re conservatee's request for treatment program.

RECOMMENDATION

Court's discretion.

(lc)