



## Second/Final Check

Superior Court of California  
County of San Bernardino

### **Probate Notes for Calendar Date: 10/24/17**

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](mailto: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.

nb106/1018

**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: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 10/24/17    TIME: 8:30    DEPT: S35P  
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CASE#: PRO PS1500200

CASE NAME: KEVIN MAURICE BRELAND

HEARING:

Accounting Review

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV	(PRO/PER
JEANNE E KENNEDY	(TP )...CALDWELL, KENNEDY &
KEVIN MAURICE BRELAND	(DEC)...
NAKITA BRELAND	(PET)...TANYA L WILLIS
ROBERT JOHNSON	(PET)...ROSE C ROSADO

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 02/06/17, full authority, no bond.
2. Need final Inventory and Appraisal.

RECOMMENDATION:

Premature. Set next hearing for Accounting Review on **04/24/18**.

(nb)

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: 10/24/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600623

CASE NAME: MTR OF JACQUELYN M REDFORD

HEARING:

Accounting Review

COUNSEL:

HEATHER NORWOOD                      (PET)...PRO/PER

JACQUELYN M REDFORD                (DEC)...

Request for Waiver of Court Fees and Costs filed by HEATHER NORWOOD is GRANTED

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 09/06/16, full authority, \$20,000 bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600663

CASE NAME: MTR OF FRED VILLEGAS CHAVARRIA

**SEE ALSO 4**

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ALFRED CAMILO CHAVARRIA (PET)...PRO/PER

FRED VILLEGAS CHAVARRIA (DEC)...

#### GENERAL INFORMATION

Continued from **09/15/16** at request of parties.

Continued from **11/21/16**. Mark A Chavarria and Sandra G. Lemus object to petition.

Written objections to be filed by 02/27/17.

**Continued from 03/06/17. Matter is contested; parties are admonished that they are to exchange the list of witnesses, list of exhibits, copies of exhibits by 4PM on 10/10/17. Court makes admonishment that if a witness is not listed, an exhibit is not provided or listed, and the Court will not consider said witness or exhibit at trial.**

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

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

1. Notice filed 10/06/16 is the wrong type of notice. Need Notice to Petition to Administer Estate and proof of service.
2. Petitioner seeks no bond; however, section 3d is not completed. Need bond of \$300,000 absent bond waivers by decedent's other 3 children.
3. Proof of publication filed 10/06/16.
4. **Objections to Inventory List Accuracy and Plead to Dismiss Petition to Probate filed by Sandra Bocanegra Lemus and Mark Anthony Chavarria on 02/23/17.**
5. ~Proposed Form Order: 06/29/16.

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.

## RECOMMENDATION

Need proper notice then set for contested hearing. If approved, set Accounting/Status Review for **01/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/lh/nb)

Future Hearing:

11/07/17 Court Trial

11/08/17 Court Trial

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/24/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600663

CASE NAME: MTR OF FRED VILLEGAS CHAVARRIA

**SEE ALSO 3**

HEARING:

Readiness Calendar

COUNSEL:

ALFRED CAMILO CHAVARRIA      (PET)...PRO/PER

FRED VILLEGAS CHAVARRIA      (DEC)...

Request for Waiver of Court Fees and Costs filed by ALFRED CAMILO CHAVARRIA is GRANTED

No notes – Readiness.

(nb)

Future Hearing:

11/07/17 Court Trial

11/08/17 Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST  
**SEE ALSO 11**

HEARING:  
FIRST AND FINAL Account and Report of MICHAEL WALKER and  
Petition for allowance of fees filed.

COUNSEL:  
JAY JAY HENDERSON (OBJ)...THE GROSSMANLAW FIRM,  
MICHAEL WALKER (PET)...GAUDY LAW, INC  
POPPY ANN WALKER TRUST DATED (TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Successor Trustee, Michael Walker ["Petitioner"] aka Michael Ray Walker, Sr.

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

1. Accounting period 02/22/16 to 12/27/16.
2. Assets on Hand \$0.00. Prior assets on hand in the amount of \$278,498.76 distributed to petitioner per fourth amendment to the trust [LF, p. 40]
3. Petitioner requests ratification for reimbursement of costs advanced of \$22,507.20. Itemized [LF, p.62].
4. Compensation or fees are not requested.
5. During the accounting period, petitioner paid caretaker expenses of \$4,240.00. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
6. Petition is not signed by attorney for Trustee. Need same.
7. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
8. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
9. Need statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
10. Please file verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).

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11. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. § 1064 (a)(4). Need verified supplement.
12. Need findings re: sole and separate property
13. Need findings re: known creditors
14. Need findings re: all taxes have been paid, or reserve made for taxes.
15. No proposed order. Submit Order after Hearing.
16. **Objections filed 09/22/17 by Jay Jay Henderson.**

RECOMMENDATION:

Need to clear notes then set for contested hearing.

(nb)

Future Hearing:

05/22/18 Readiness calendar

05/22/18 Petition for lack of capacity undue etc.

06/18/18 Court Trial

06/18/18 Petition for lack of capacity undue etc.



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 12**

HEARING:

Petition for PRELIMINARY INJUNCTION ENJOINING TRUSTEE SALE

COUNSEL:

BILL GAUDREAU	(	)...
CAROL KILLEN	(	)...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JAY GAUDREAU	(	)...
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	(	)...
ROBERT GAUDREAU	(	)...
STEPHANIE GAUDREAU	(	)...
STEVEN GARUDRAU	(	)...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(PET)...	BROWN WHITE & OSBORN
WILLINE GAUDREAU	(RES)...	

Currently under review by Legal Research.

(LR)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700312

CASE NAME: MTR OF FREDERICK O'NEIL

**SEE ALSO 8**

HEARING:

Hearing Re: OSC RE DISMISSAL

COUNSEL:

FREDERICK O'NEIL (DEC)...

MICHAEL INGRASSIA (PET)...PRO/PER

GENERAL INFORMATION:

Ex parte orders denied without prejudice on 05/01/17.

Continued from **06/13/17 and 08/08/17** at request of petitioner to clear probate notes.

**Continued from 09/19/17 due to non-appearance. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Probate, Letters Testamentary with Full Authority under IAEA by Michael Ingrassia (executor/nephew)

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

1. Will waives bond. Estimated net value of estate is \$112,000. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Petition, item #8, is incomplete as to decedent's relatives. Need verified supplement including nephew Joseph Ingrassia.
3. Notice of Petition to Administer Estate filed 04/26/17 is incomplete. Need to file amended Notice to include item #5 as to request for authority to administer under IAEA, item #10 as to petitioner's contact information, and Proof of Service indicating notice was served on Joseph Ingrassia, nephew named in Will; siblings, Mary Lasker and Dennis O'Neil; and any other unidentified heirs who may be entitled to notice.
4. Proof of Publication filed 09/12/17 does not include IAEA language. Need proper publication per Pr.C. §§ 8100, 8120. The publication shall contain specific statutory wording re: IAEA. Court to require amended publication or alternatively, grant petition with no IAEA powers.
5. ~Proposed form Order: 04/04/17

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**RECOMMENDATION:**

Need to clear notes 3-4. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **01/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

**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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700312

CASE NAME: MTR OF FREDERICK O'NEIL

**SEE ALSO 7**

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY

COUNSEL:

FREDERICK O'NEIL      (DEC)...

MICHAEL INGRASSIA      (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MICHAEL INGRASSIA is GRANTED

See prior matter #7.

(nb)

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: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700363

CASE NAME: MTR OF RAYMOND G MACIAS  
HEARING:  
Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION  
TO ADMINISTER UNDER IAEA

COUNSEL:  
ELAINE MACIAS (PET)...PRO/PER  
RAYMOND G MACIAS (DEC)...

GENERAL INFORMATION:

**Continued from 06/27/17 and 09/26/17.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Elaine Macias (daughter)

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

1. Petitioner seeks to waive bond. Waivers of bond filed. Estimated net value of estate is \$250,000, annual gross income from real property. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Proof of publication filed.
3. Court to verify that Sam Macias is same person as Samuel D. Macias. JTD
4. **Need further clarification as to supplement filed 10/10/17 as following:**
  - a. **Petitioner requests that decedent's will and codicils, if any, be admitted to probate;**
  - b. **No executor is named in the will; caption does not indicate there is a Will;**
  - c. **Section 4 re will is marked.**
5. **Notice filed on 09/22/17 does not include Veterans Administration. Need proper service.**
6. ~Proposed form Order: 04/17/17

RECOMMENDATION:

Need to clear notes 4-5. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **12/04/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/cs/nb)

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

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DATE: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

HEARING:

Hearing Re: FRIST AND FINAL REPORT; ACCOUNTING, PETITION

COUNSEL:

JAMES STEVEN JONES (PET)... SHERYL S HAYASHI

REVOCABLE LIVING TRUST OF JAME (TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **AMENDED** (09/14/17) First and Final Account and Petition for Fees by Trustee, James S. Jones ["Petitioner"].

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

1. This trust does not appear to have been court-supervised; a formal probate has not commenced; and trust indicates that upon the death of both trustors, the trustee shall distribute the entire trust estate, equally to the grandchildren [LF, p34]. **Supp. (09/14/17) indicates that an accounting was submitted as not all the beneficiaries of the Trust agree to the amounts to be disbursed.**
2. Accounting period 09/30/14 to 03/09/17.
3. Assets on Hand \$178,628.18 consisting of cash.
4. Petitioner requests ratification of fees paid in the sum of \$2,500.00.
5. Petitioner requests reimbursement of costs advanced of \$250.00. Itemized.
6. Attorney requests fees and costs of \$8,631.98. Billed at \$300/hour for 26.6 hours' attorney time and \$100/hour for 4.5 hours' paralegal time. Itemized [LF, pgs. 56-61]. JTD.
7. Distributions [LF, p11] reflects preliminary distributions totaling \$68,503.37.
8. Petitioner requests authority to withhold \$10,000 as a reserve. JTD.
9. Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.
10. Need Notice of Hearing with proof of service as to amended account.
11. Proposed Order does not comply with Local Rule 20-614.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/30/18**.

(nb)

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Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700652

CASE NAME: MTR OF GARY J WAGNER

HEARING:  
Hearing Re: Bond Review

COUNSEL:  
GARY J WAGNER (DEC)...  
MATTHEW S WAGNER (PET)...DAVID T EGLI

**XREF: GARPS1700290**  
GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Bond Review

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

1. Order appointing Mathhew S. Wagner entered 09/26/17, limited authority, \$20,000 bond.
2. Need proof of bond.

RECOMMENDATION:  
Need proof of bond and subsequent letters.  
(nb)

Future Hearing:  
12/04/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700721

CASE NAME: CARLOS MARQUEZ

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

CARLOS MARQUEZ                      (DEC)...  
HENRY ROSALES                        (PET)...RICHARD S PRICE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Henry Rosales (friend)

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

1. All heirs waive bond. Estimated value of estate \$183,930; real property only. 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: 07/19/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **01/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 10/24/17 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1601072

CASE NAME: POPPY ANN WALKER SEPARATE PROPERTY TRUST

**SEE ALSO 5**

HEARING:

Petition for /to REMOVE TRUSTEE, APPOINT SUCCESSOR TRUSTEE,  
SURCHARGE TRUSTEE, AND ASSESS DOUBLE DAMAGES

COUNSEL:

JAY JAY HENDERSON

(OBJ)...THE GROSSMANLAW FIRM,

MICHAEL WALKER

(PET)...GAUDY LAW, INC

POPPY ANN WA LKER TRUST DATED

(TRU)...

Currently under review by Legal Research.  
(LR)

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

Future Hearing:

05/22/18 Readiness calendar

05/22/18 Petition for lack of capacity undue etc.

06/18/18 Court Trial

06/18/18 Petition for lack of capacity undue etc.

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17      TIME: 8:35      DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

**SEE ALSO 6**

HEARING:

Hearing Re: HEARING ON PRELIMINARY INJUNCTION

COUNSEL:

BILL GAUDREAU	(	)...
CAROL KILLEN	(	)...
HEIDI HUTLEY	(PET)...	JOSEPH A WALKER
JAY GAUDREAU	(	)...
JOHN A VANZANDT REVOCABLE LIVI	(TRU)...	
KATHRYN GAUDREAU	(	)...
ROBERT GAUDREAU	(	)...
STEPHANIE GAUDREAU	(	)...
STEVEN GARUDRAU	(	)...
SUN WEST MORTGAGE COMPANY INC	(WOLFE & WYMAN LLP	
WILLINE GAUDREAU	(PET)...	BROWN WHITE & OSBORN
WILLINE GAUDREAU	(RES)...	

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

-----  
DATE: 10/24/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1400043

CASE NAME: ALICE JIMENEZ

HEARING:

Hearing Re: PLACEMENT/BOND REVIEW

COUNSEL:

ALICE DONNA JIMENEZ	(CEP)...
ALICE JIMENEZ	(CEP)...WALTER T. MOORE
TINA JIMENEZ	(CPE)...PRO/PER
TONY JIMENEZ	(CPE)...PRO/PER

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Placement/Bond Review

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

1. Matter set at 04/14/17 hearing, wherein, conservatee was to have been moved from Baldwin Park (LA County). Court to inquire.
2. Need proof of \$20,000 bond.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

02/27/18 Accounting Review.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600222

CASE NAME: MTR OF MARCO ANTONIO FLORES

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARCO ANTONIO FLORES (CTP)...LENITA A SKORETZ

ROSA M FLORES (CP)...PRO/PER

SAUL FLORES JUAREZ (CP)...PRO/PER

GENERAL INFORMATION:

Ex Parte orders denied 08/04/16. Notice by Judicial Assistant.

**Continued** from 09/20/16 for receipt of IRC report.

**Continued from 01/17/17.** Court accepts capacity declaration filed 08/25/16 clearing note 3.

**Continued from 04/18/17.** Court reviews copy of Conservatorship Class Certificate dated **03/03/17** and clears probate note 8. Matter is continued for petitioners to file amended petition for limited conservatorship.

**Continued from 08/08/17 for amended petition to be filed.**

THIS CASE IS SET FOR HEARING ON **Amended** [filed 08/15/17] Petition for Appointment of Limited Conservator person only by Rosa Flores, to appoint Rosa Flores and Saul Flores Juarez (parents)

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

1. No bond – person only.
2. Proposed conservatee appears to be developmentally disabled. However, petition, section 5f states proposed conservatee is **not** developmentally disabled. **Report of court-appointed counsel Lenita Skoretz filed 09/14/16.**
3. Capacity Declaration filed 08/25/16.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records,

**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.**

paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.

5. **Need return of Citation as to amended petition.**
6. CI Report filed 09/16/16 **and 10/16/17.**
7. IRC report filed 01/19/17.
8. Notice given.
9. ~Proposed order: 08/15/17

**RECOMMENDATION:**

Need to clear note 5. If approved, set hearing for Compliance Review for **05/29/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.  
(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/24/17      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1600230

CASE NAME: MARIA SOCORRO CEBALLOS

HEARING:

Conservatorship Compliance Review Hearing on SUPPLEMENTAL  
PETIITON FOR CONSERVATORSHIP of ARTURO CEBALLOS

COUNSEL:

ARTURO CEBALLOS	(CPE)...BUXBAUM & CHAKMAK
LUIS P CEBALLOS	(CPE)...BUXBAUM & CHAKMAK
MARIA SOCORRO CEBALLOS	(CEP)...MELVIN L FRIEDLAND

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Arturo Ceballos appointed Conservator of the person on 03/21/17.
2. Notification of Conservatee's rights filed 05/05/17.
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need Care Plan in accord with Pr. C. §2352.5.

#### RECOMMENDATION

Inquire status.

(lh)

Future Hearing:

05/29/18 Accounting Review.

**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

-----  
DATE: 10/24/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

HEARING:

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

COUNSEL:

CLIFFORD MOORE	(PET)...CHRISTINA FERRANTE
GLORIA MOORE	(CEE)...
JOHN MARANAN	(PET)...CHRISTINA FERRANTE
SANDY TURNER	(PET)...SANDRA TURNER
SURETEC INSURANCE COMPANY	( )...

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 11/01/16. Petitioner alleges services have been rendered for which counsel has not been compensated.
- 2 Attorney requests fees of \$8,732.50. Billed at the reduced rate of \$350/hour for 24.95 hours' attorney time. Itemized [LF, ].
- 3 Petitioner requests Court to direct and order Co-Conservators, John Maranan and Clifford Moore, to pay requested fees forthwith, from blocked account at Chino Commercial Bank, acct. # XXX9286 or any other account in the Conservatorship.
- 4 Notice filed 09/18/17 does not include conservatee. Need proper service.
- 5 ~Proposed Order 09/13/17.

RECOMMENDATION:

Need to clear note 4 then Court's discretion.

(nb)

Future Hearing:

04/17/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/24/17      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1700100

CASE NAME: JOE BAUTISTA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BERONICA BAUTISTA

(CPE)...PRO/PER

JOE BAUTISTA

(CEP)...JACK B OSBORN

MIGUEL BAUTISTA GONZALEZ

(CPE)...PRO/PER

Matter appears moot. Court appointed Beronica Bautista and Miguel Bautista Gonzales as co-conservators of the person on 09/05/17. Need issued Letters.  
(lh)

Future Hearing:

04/10/18 Compliance review hearing

**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: STANFORD E. REICHERT

-----  
DATE: 10/24/17 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700342

CASE NAME: ENOLA M MUNOZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ENOLA M MUNOZ (CTP)...PRO/PER  
MARIA DE JESUS MUNOZ (CP)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Maria De Jesus Munoz, mother

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

1. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
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 medical powers. Capacity Declaration filed 09/15/17.
4. Return of Citation filed 09/22/17.
5. Need Court Investigator report.
- 6. Certificate of Completion of the Conservatorship Training Class filed.**
7. Need Notice of Hearing and proof of mailed service to Inland Regional Center.
8. ~Proposed Form Order: 09/22/17

#### RECOMMENDATION

Need to clear notes 5 & 7. If approved, set hearing for Compliance Review for **05/29/18** 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)

**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: STANFORD E. REICHERT

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DATE: 10/24/17 TIME: 9:30 DEPT: S35P  
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CASE#: SC SS01183

CASE NAME: IN THE MATTER OF JOSHUA J ROBINSON

HEARING:

Accounting Review

COUNSEL:

JOSHUA J ROBINSON	(CEP)...MARK J. ANDREW FLORY
LUCILLE WILKES	(CPE)...CRAIG M PARKER
LUCILLE WILKES-GARVIN	(CPE)...CRAIG M PARKER

GENERAL INFORMATION

**Continued from 04/04/17 and 07/25/17 at the request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 9<sup>th</sup> Account for Lucille Wilkes-Garvin, approved on 09/22/15.
2. Need 10<sup>th</sup> Account beginning with 01/01/15.

RECOMMENDATION

Inquire status of accounting or status report.  
(lh/ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

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DATE: 10/24/17      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS1200767

CASE NAME: JOSE SANCHEZ

HEARING:

FIRST AND FINAL Account and Report of PUBLIC ADMINISTRATOR and  
Petition for allowance of fees filed.

COUNSEL:

JOSE SANCHEZ	(DEC)...
MAGDA YUDI GALAZ-PARRA	(OBJ)...PRO/PER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
SILVIA ORDAZ	(PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Accounting period 02/14/17 to 05/08/17.
2. Assets on Hand \$112,504.87 in cash.
3. Statutory fees of \$7,853.17 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in  
connection with the sale of real property. Billed at \$60/hour for a total of 8  
hours' time. Generally described [LF, p23]. JTD
5. Attorney requests extraordinary fees of \$3,185.00 for services rendered in  
connection with the sale of real property. Billed at \$350/hour for a total of 9.1  
hours' time. Itemized [LF, p.24 ] JTD
6. Notice does not include Attorney Helen McColl. Need proper service.
7. ~Proposed Order 07/17/17.

RECOMMENDATION:

Need proper service then Court's discretion  
(nb)

**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

Page: 1

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

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: CIP DS1700108

CASE NAME: SHOW V SHOW

HEARING:  
Status Hearing on Petition

COUNSEL:  
JERROLD TODD SHOW (PET)...PRO/PER  
SHERRI DARLENE SHOW (RES)...PRO/PER

No notes – Status.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1500345

CASE NAME: RON JAMES SCARONE

HEARING:

Probate status report filed.

COUNSEL:

DAVID M. SCARONE	(PET)...PRO/PER
JEFF SCARONE	(RES)...CKB VIENNA, LLP
JEFFREY SCARONE	(RICHARD A KENNEDY
RON JAMES SCARONE	(DEC)...
STEPHEN SCARONE	(PET)...ALLARD SMITH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, David M. Scarone ["Petitioner"].

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

1. Petition indicates the estate is insolvent as the estate was liquidated without Court authority by heirs Jeffrey and Stephen, who fraudulently and unlawfully disposed of personal property items and liquidated banking accounts of the decedent.
2. Petition includes bank statements; cashiers checks and correspondence reflecting withdrawals of checking and savings accounts and a copy of a deed, for which the monies were purportedly used to purchase subject property in Idaho.
3. Petitioner requests this Court to find the two heirs, Jeffrey Scarone and Stephen Scarone breached their fiduciary duties; committed fraudulent actions; order for award of Double Damages; punitive damages, costs, other claims and attorney fees.
4. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
5. No proposed order. Submit Order after Hearing.

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.

**RECOMMENDATION:**

Require notice. Matter appears to be moot per minute order dated 10/04/17, which indicates parties have reached a settlement. Set hearing for Accounting Review as initially set on a Wednesday in 60 days.

(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: 10/24/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600246

CASE NAME: MTR OF HELEN Y GABLER

HEARING:  
Accounting Review

COUNSEL:  
HELEN Y GABLER (DEC)...  
SYLVIA DORADO (PET)...PRO/PER

#### GENERAL INFORMATION

Continued from **07/11/17**. No appearance. Court orders Sylvia Dorado to be present. Notice by Judicial Assistant.

**Continued from 08/14/17. Administrator states that her aunt and cousin would not allow her access to the property and were asserting powers under the Power of Attorney and has not been able to address the I & A or do an accounting. Court refers the matter to the Public Administrator to interview Sylvia Dorado and investigate the statements in court.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration with full authority issued 05/03/17, no bond.
2. Need final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

#### RECOMMENDATION

Inquire status.  
(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: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

**SEE ALSO 5, 6, 7,**

**HEARING:**

Hearing Re: STATUS RE SETTLEMENT

**COUNSEL:**

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

No notes – status.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

**SEE ALSO 4, 6, 7,**

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITIONS IF ALL TERMS MET

COUNSEL:

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

GENERAL INFORMATION:

**Continued from 07/18/17 and 09/12/17 at request of parties.**

THIS CASE IS SET FOR HEARING ON OSC re Dismissal of Petitions.

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

1. Matter set at 05/03/17 hearing, wherein, the Court noted that if all the terms of the agreement are met and completed, the petitions filed May 10, 2016 and April 18, 2017 will be dismissed with prejudice.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

**SEE ALSO 4, 5, 7,**

HEARING:

Hearing Re: PETITION FOR INSTRUCTIONS

COUNSEL:

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

#### GENERAL INFORMATION

Continued from **06/29/16**. Counsel stated a supplement was filed on 06/23/16.

Objections to be filed by next hearing date.

Continued from **09/08/16 and 11/09/16**. Parties wish to attend mediation.

Set on **05/03/17. Continued from 07/18/17 and 09/12/17 at request of parties.**

THIS CASE IS SET FOR HEARING ON Petition for Instructions

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

1. Copy of trust filed 06/23/16.
2. Petitioner alleges the Ruth Wade Trust was created on 11/14/91, with a First Amendment on 12/28/07 and Second Amendment 2/4/15. Ruth Wade died 3/5/15.
3. Petitioner alleges that he is the successor trustee of the Trust, but that the designation is in doubt as the successor trustee's authority is being challenged.
4. Petitioner alleges the Trust held title to two parcels of real property containing several addresses, but that the designation of the addresses is confused in the Trust Amendments.
5. Petitioner requests the Court find that the beneficiaries, Richard and Edward Wade are in "default" and "contest" under the terms of the Trust for their interference with the Trust Administration.
6. Petitioner requests the Court compel Richard and Edward to account for the rents collected on the Trust property.
7. **Response filed on 09/06/16 by Richard and Edward Wade.**

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.

8. No proposed order.

RECOMMENDATION:  
Set for evidentiary hearing.

(sa/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: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1600458

CASE NAME: RUTH P WADE TRUST

**SEE ALSO 4, 5, 6,**

HEARING:

Petition for TRANSFER OF PRITIES HELD BY ANOTHER FOR DAMAGES FOR  
BREACH OF TRUST ETC

COUNSEL:

EDWARD WADE

(PET)...CORY C BRENDEL

HARVEY WADE

(PET)...FULLERTON LEMANN SCHAEFER & DO

RICHARD WADE

(RES)...CORY C BRENDEL

RUTH

(TRU)...

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to Harvey Wade - Trustee and son of Settlor; Evelyn R. George – beneficiary and daughter of Settlor; and Richard A. Wade – beneficiary and son of Settlor.

(nb)

**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: 10/24/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600640

CASE NAME: MTR OF FRED AUSTIN YATES

HEARING:  
Accounting Review

COUNSEL:  
DEPARTMENT OF HEALTH CARE SERV (TP )...  
FRED AUSTIN YATES (DEC)...  
JAMIE WALDIE (PET)...BRYAN NADDAFI

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 08/16/16, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:  
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700244

CASE NAME: THE BAREA EZZEDDINE 2013 TRUST

HEARING:

Petition for INSTRUCTIONS/CONTINUING JURISDICTION  
TERMINATION OF TRUST/SUSPENSION OF TRUSTEE POWERS

COUNSEL:

ANGELA EZZEDDINE	(PET)...FITZGERALD YAP CREDITOR
TENA EZZEDDINE	(OBJ)...
THE BAREA ESSEDDINE 2013 TRUST	(TRU)...

Currently under review by Legal Research.  
(LR)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700360

CASE NAME: MTR OF JOSEPHINE ROMO VICTORINO

**SEE ALSO 10A**

HEARING:

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

COUNSEL:

JOSEPHINE ROMO VICTORINO      (DEC)...

MARCELLA CRUZ                      (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **Amended** [filed 07/21/17] Petition for Probate, Letters Testamentary with Full Authority under IAEA by Marcella Cruz (daughter/executor)

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

1. Petitioner alleges will waives bond; however, a copy of will is not attached. Need verified supplement. Court also has discretion to require bond per Pr. C. § 8481(b).
2. Notice of Petition to Administer Estate with proof of service filed 07/21/17; however, notice is incomplete at item #4 as to request for will admitted for probate. Need corrected notice and proof of service.
3. Need Proof of Publication.
4. Need Receipt of will lodged with court.
5. ~Proposed form Order: 07/21/17

RECOMMENDATION:

Need to clear notes 1-4. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **01/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh)

**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  
Page: 10A ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700360

CASE NAME: MTR OF JOSEPHINE ROMO VICTORINO

**SEE ALSO 10**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JOSEPHINE ROMO VICTORINO (DEC)...  
MARCELLA CRUZ (PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 07/17/17 and 10/02/17 to be heard with amended petition above #10.**

THIS CASE IS SET FOR HEARING ON Petition Letters of Administration, Full Authority under IAEA, by Marcella Cruz, daughter/executor

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

1. Will waives bond. Estimated net value of estate is \$110,000. Court also has discretion to require bond per Pr. C. § 8481(b).
2. Petitioner seeks appointment as administrator with full authority; however, a Will is attached in which petitioner Marcella Cruz is the named executor. It appears a Petition for Probate of Will and for Letters Testamentary is appropriate.  
**Amended petition filed and set for 10/24/17.**
3. Need Notice of Petition to Administer Estate with proof of service (form DE-121).
4. Need Proof of Publication.
5. Need Receipt of will lodged with court.
6. No proposed Order submitted.

RECOMMENDATION:

Need to clear notes 2-5. Court may wish to trail to 10/24/17 as amended petition is set. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **09/24/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/nb)

**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: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700476

CASE NAME: MTR OF JUAN JOSE CUEVAS 2015 TRUST

HEARING:

Petition for TRANSFER TRUST PROCEEDINGS TO LOS ANGELES COUNTY.

COUNSEL:

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

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700656

CASE NAME: EUGENE MAURICE CHAMPION

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

EUGENE MAURICE CHAMPION      (DEC)...

PHILIP S CHAMPION                      (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Phillip S. Champion, sibling

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

1. All heirs waive bond. Estimated net value of estate is \$386,075, consisting of \$274,000 in cash and \$106,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code, § 8481(c). JTD
2. ~Proposed form Order: 07/05/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **01/08/19**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(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: 10/24/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700675

CASE NAME: MARILYN LOUISE DELASHMUTT

**VACATED**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANNA L THOMPSON (PET)... STEPHEN WORKMAN  
MARILYN LOUISE DELASHMUTT (DEC)...

GENERAL INFORMATION

**Continued from 09/05/17. Deborah Ehrlich objects and will be retaining Counsel and filing written objections.**

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

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

1. All heirs waive bond. Net estate value \$591,264 with \$9,000 in personal property.
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication.
4. Note: no written objections filed as of review.
5. Need Proposed Form Order:

RECOMMENDATION

Need to clear notes 2 - 3. Court's discretion re bond. If approved, set Accounting/Status Review for **01/08/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(cs/lh/nb)

FUTURE HEARING DATES:

11/28/17 Ex parte hearing re: order granting temp special letters of admin

11/28/17 Hearing Re: Petition for Letters of Administration

**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: 10/24/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: SPR SS04872

CASE NAME: ESTATE OF LILLIAN E MICHIK

HEARING:  
Accounting Review

COUNSEL:

LILLIAN E MICHIK	(DEC)...
RICHARD MICHIK	(PET)...JEFFORD C DAVIS
ROBERT MICHIK	(TP )...SHORE & WURM

GENERAL INFORMATION:

Continued many times since **10/3/11**.

**Continued from 02/01/16** for Counsel to prepare and file a written Status Report and/or Accounting by the end of the month. Court is informed that the estate cannot be closed because counsel has been unable to sell the Salton Sea property which is the only asset remaining. Counsel for the petitioner has contacted the neighbors/adjacent owners to see if they would put the property up for auction or be willing to take the property.

**Continued from 03/30/16, 06/09/16, 08/18/1,11/02/16 and 01/11/17** for a status report to be filed.

*Nothing new filed since 12/6/11.*

Continued from **3/22/17** at request of Counsel for sale of property to close.

**Continued from 08/15/17.**

THIS CASE IS SET FOR HEARING ON Accounting/Status review.

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

1. Letters Testamentary issued 08/21/08 to Richard Michik, son, full authority no bond.
2. On 10/28/10, Court deemed the accounting filed on 12/31/07 as a status report.
3. Copy of subpoenaed request filed on 05/09/16. However, it is unclear how the Chief Trial Counsel in Los Angeles is involved. Court to inquire.
4. Status report filed by counsel in the form of a declaration on **12/14/16**. **No fees paid**. Petitioner alleges the property is minimal and no one wants to purchase the property.
5. Ex parte letter appears to be filed to the Judge on 10/21/16 by Richard Michik.

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

6. Need notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

**RECOMMENDATION:**

Need notice and fees paid (note 4). If approved, set Accounting/Status Review for **03/20/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

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

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

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DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1200125

CASE NAME: MARY CHARM KUTCH

HEARING:

FOURTH AND FINAL Account and Report of ROBERT R KUTCH and  
Petition for allowance of fees filed.

COUNSEL:

JAMES KUTCH	(DINA I FARHAT, ESQ
JAMES KUTCH	(TP )...
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
MARY CHARM KUTCH	(CEP)...JAMES B CHURCH
ROBERT R KUTCH	(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Conservatee passed away on 09/13/16.

Continued from **05/02/17** and **07/11/17**. Attorney Dina Farhat represents objections were filed yesterday (7-10-17). The Court notes there was no authority to transfer assets because conservatee has passed away. The Court

further notes, the petitioner requests \$44,575.00 for conservatorship fees to provide respite care in the board and care according to the accounting. The Court further notes the supplement filed on 5-1-17 does not include receipts from the caregivers. Counsel is to provide receipts and/or bills from the caregivers by the next hearing date. The Court needs specifics on property maintenance, bookkeeping services, and charges for check imaging fees by the next hearing.

**Continued from 08/29/17. Parties are going to mediation.**

THIS CASE IS SET FOR HEARING ON Fourth and Final Account and Petition for Fees by Conservator, Robert R. Kutch.

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

1. Accounting period 05/17/15 to 09/13/16. Need amended accounting to include post-death accounting period per Pr. C. § 2620. **Supp.: 05/01/17 alleges the Conservatorship was indebted to the Trust for over \$20,000 and on the passing of the Conservatee, the assets of the Conservatorship were**

**immediately transferred to the Trust. A “post-death” accounting will show that one transaction and a receipt by the Trustees will be filed with the Petition for Final Discharge. JTD.**

2. Assets on Hand \$20,717.32 consisting of \$7,217.32 in cash and \$13,500 in the carry value of a 2006 Honda EX.
3. Petitioner requests compensation of \$44,575.00. Billed at \$25/hour for 59 weeks to be paid by the Trustee(s) of the Conservatee’s Trust. Generally described [LF, p. 7]. JTD.
4. Attorney requests fees of \$14,817.50 to be paid by the Trustee(s) of the Conservatee’s Trust. Billed at \$250-\$425/hour for 30.1 hours’ attorney time and \$50-\$125/hour for 48.6 hours’ paralegal time totaling 78.7 hours. Itemized [LF, pgs. 40-47]. JTD.
5. Petitioner requests the current bond of \$210,000 be exonerated nunc pro tunc to the date of death, 09/13/16, as all assets have been transferred to the Trustees. JTD.
6. Petition proposes distribution transferring the remaining assets to the Co-Trustees of the Conservatee’s/Decedent’s trust via a Pr. C. § 13100 affidavit. Need same. **Supp. (05/01/17) indicates the Conservator is also one of the Successor Co-Trustees. After the death of the Conservatee, the Petitioner withdrew funds from Bank of America and opened a Trust Account with Co-Trustee, James T. Kutch. JTD.**
7. Proposed Order 03/22/17 discharges upon filing of receipts instead of upon entry of final discharge order.
8. **Objections filed by James Kutch on 07/12/17.**
9. **Reply to Objections by Robert Kutch on 09/25/17.**

RECOMMENDATION: Matter is contested.

Court’s discretion. If approved, set next hearing for receipts and final discharge for **07/17/18.**

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300175

CASE NAME: Margaret Mary Dyer

HEARING:

SECOND AND FINAL Account and Report of SHIRLEY R. EARL and  
Petition for allowance of fees filed.

COUNSEL:

KARL F SCHMIDT	(CPE)...PRO/PER
MARGARET MARY DYER	(CEP)...
MICHAEL A DYER	(CPE)...PRO/PER
SHIRLEY R. EARL	(OBJ)...FULLERTON LEMANN SCHAEFER

GENERAL INFORMATION:

Conservatee passed away on 11/10/16.

**Continued from 09/12/17 to clear notes.**

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Temporary Conservator, Shirley R. Earl ["Petitioner"].

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

1. Accounting period 11/01/14 to 12/31/16.
2. Assets on Hand \$275,409.58 consisting of \$271,409.58 in cash and \$4,000 in personal property.
3. Conservator seeks compensation of \$27,615.00 for the period 05/17/13 to 12/26/16. Billed at \$35/hour for 789 hours. Itemized [LF, pgs. 27- 33 & **supp. filed 10/03/17**]. JTD.
4. Attorney requests fees and costs of \$85,778.51 for period 10/02/13 to 07/26/17. Billed at \$200-\$350/hour for 330.55 hours' attorney time and \$95-\$110/hour for 171.65 hours' paralegal time. Itemized [LF, pgs. 34- 79 & **supp. filed 10/03/17**]. JTD.
5. Disbursements – Schedule C [LF, p. 25] includes miscellaneous expense reimbursement to Petitioner in the amount of \$2,300. **Supp. (10/03/17) indicates expense was for extraordinary travel expenses from Iowa to California for purposes of overseeing and managing the sale of Conservatee's residence in Highland, CA. Itemized [see supp. filed 10/03/17, LF, p. 20 & 22]. JTD.**

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



6. Disbursements – Schedule C [LF, p. 25] includes reimbursement to Petitioner for travel expenses that are not itemized, in the amount of \$276.80, that are normally not allowed when fees are being requested. **Supp. (10/03/17) indicates expense was for extraordinary travel expenses from Iowa to California for purposes of overseeing and managing the sale of Conservatee’s residence in Highland, CA. Itemized [see supp. filed 10/03/17, LF, p. 20 & 22]. JTD.**
7. Petitioner requests exoneration of bond and discharge upon filing of receipts. However, bond will not be exonerated until entry of final discharge order.
8. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court’s discretion. If approved, set next hearing for receipts and final discharge for **09/18/18.**

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS

**SEE ALSO 17A, 17B**

HEARING:

AMENDED FIRST REPORT AND Account and Report of VALARIE  
EVANS-BURBANK and Petition for allowance of fees filed.

COUNSEL:

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

GENERAL INFORMATION

**Continued from 02/02/17 and 10/18/17.**

THIS CASE SET FOR HEARING ON **AMENDED** (09/19/17) 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.

**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.**

7. Corrected Inventory and Appraisal filed **03/23/17**; however, first page is incomplete as to sections 1,2 and 5. **Corrected Inventory and Appraisal filed 05/24/17; however, the amounts are not correct. Need corrected Inventory and Appraisal with totals of both attachments on first page with all information completed. The Inventory and Appraisal should state \$570,917.53 (beginning of accounting), not a negative balance [\$-2,816.22].**
8. 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.
9. Disbursements indicated monthly allowance for Donna Osborn whom conservatee lives with [Acct.12/22 LFpg23].
10. Proposed Order: 12/22/16. Not reviewed as notes need to be cleared.

#### RECOMMENDATION

Need to clear note 7. 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/nb)

Superior Court of Calif, County of San Bernardino  
Page: 17A ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS  
**SEE ALSO 17, 17B**

**\*\*\*NOTE: NOTES CONTINUED BY CLERK'S OFFICE FROM [10/18/17].  
NOTES WERE NOT RE-REVIEWED BY LEGAL RESEARCH\*\*\***

HEARING:  
Hearing Re: OSC re Status of Rental Property

COUNSEL:

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

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.

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.

RECOMMENDATION

Need updated rental information.

(lc)

Superior Court of Calif, County of San Bernardino  
Page: 17B ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS  
**SEE ALSO 17, 17A**

**\*\*\*NOTE: NOTES CONTINUED BY CLERK'S OFFICE FROM [10/18/17].  
NOTES WERE NOT RE-REVIEWED BY LEGAL RESEARCH\*\*\***

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

COUNSEL:

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

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].

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

6. 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

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**

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

HEARING:

FIRST Account and Report of SHANNON M DEBENEDICTIS and Petition  
for allowance of fees filed.

COUNSEL:

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

Request for Waiver of Court Fees and Costs filed by SEAN E SITTLER is GRANTED  
Fee waiver amount due \$633.00  
\$555.00 for temp and general petitions on 04/21/16  
\$78.00 for 3 certified copies of the letters on 05/12/16

Request for Waiver of Court Fees and Costs filed by SHANNON M DEBENEDICTIS is  
GRANTED  
Fee waiver amount due 538.00  
\$73.00 for 3 certified copies of the letters on 07/14/16  
\$465.00 for first account current on 09/19/17

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by  
Conservator of the Person and Estate by Shannon DeBenedictis ["Petitioner"-sister].

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

1. Accounting period 07/27/16 to 08/15/17. However, accounting should begin as of day of appointment on 07/12/16. Does Court wish to require amended accounting? JTD.
2. Assets on Hand \$66,384.13 consisting of \$17,884.13 in cash and \$48,500 in personal property.
3. Current bond of \$18,000. Suggest bond increase by \$108,000 for a total bond of \$126,000 (includes recovery). JTD.
4. Initial and Amended Inventory and Appraisals do not include any bank account(s) as reflected in accounting. Need amended inventory.

**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.**



5. Petition indicates Conservator is receiving \$2,200 per month for conservatee's care and services. It does not appear this has been authorized by Court. Does court wish to ratify monthly payments and make a formal order authorizing same? JTD.
6. Question whether any receipts were received during the period 07/12/16 to 03/01/17? Need verified supplement.
7. Need Schedule E, Non-Cash Assets on Hand at End of Account period via verified supplement.
8. Need Notice of Hearing with proof of service.
9. Proposed Order 09/19/17 reflects wrong judge and does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c).

**RECOMMENDATION:**

Need to clear notes then Court's discretion re bond and fees. If approved, set hearing on the next accounting review for **10/23/18** (if one year) or **10/22/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700046

CASE NAME: MTR OF RAUL TORALES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIA D LUEVANO

COUNSEL:

MARIA D LUEVANO	(CP )...PRO/PER
RAUL TORALES	(CTP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Maria D. Luevano appointed Conservator of the person on 03/21/17.
2. Need Notification of Conservatee's rights per Pr. C. §1830(c).
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need Care Plan in accord with Pr. C. §2352.5.

#### RECOMMENDATION

Inquire status.

(lh)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/24/17 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS02736

CASE NAME: MTTR OF WAYNE ALLAN DORRANCE

**VACATED**

HEARING:  
Accounting Review

COUNSEL:

ARLENE DEYOUNG (CPE)...PRO/PER  
ARLENE DEYOUNG (PET)...HARTNELL  
WAYNE ALLAN DORRANCE (CEP)...LENITA A SKORETZ

Request for Waiver of Court Fees and Costs filed by ARLENE DEYOUNG is GRANTED

Request for Waiver of Court Fees and Costs filed by WAYNE ALLAN DORRANCE is GRANTED

Future hearing  
09/24/19 Accounting Review.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300187

CASE NAME: MTR OF JEANNE Y BYRD

HEARING:

Hearing re Final Discharge

COUNSEL:

JEANNE Y BYRD

(DEC)...

MICHAEL E. BYRD

(PET)...LAWRENCE E CLARK

GENERAL INFORMATION:

Matter set on **04/26/16** due to no appearances. Court orders Attorney Lawrence Clark to personally be present at the next hearing. Notice by Judicial Assistant.

Continued from **06/28/16**. No appearance. The court imposes sanctions on Attorney Lawrence C Lark in the amount of \$ \$250.00 payable to the court on or before 08/28/16. Citation issued to: Lawrence Clark who is cited and required to appear on 09/13/16. File routed to clerks' office for service of citation.

Continued from **09/13/16**. Michael Byrd is cited to appear at next hearing to explain why final discharge has not been filed.

Continued from **11/29/16 and 01/31/17**. Counsel is to submit a declaration regarding cancelled checks before the next hearing date.

**Continued from 04/25/17 and 06/27/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Accounting entered 04/30/15.
2. Need receipts by J.D. Byrd, J.R. Byrd and J.Q. Bryd.
3. Ex-parte Petition/Order for Final Discharge returned for corrections. Need same.
4. Need return of citation. Affidavit of Unsuccessful Service filed 10/13/16.
5. **Need declaration as directed by Court on 01/31/17.**

RECOMMENDATION:

Inquire status.

(nb)

**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

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DATE: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600537

CASE NAME: MTR OF EUGENE L WILKINSON

HEARING:

Petition for LINDSEY NAYLOR TO ESTABLISH RIGHTS TO SHARE OF  
DECEDENT'S ESTATE AS AN OMMITED CHILD ETC

COUNSEL:

DEBORAH WILKINSON (PET)...MORTENSEN & REINHEIMER, PC

EUGENE L WILKINSON (DEC)...

JANET WILKINSON (OBJ)...PETER M BOCHNEWICH

LINDSEY NAYLOR (PET)...PETER M BOCHNEWICH

Currently under review by Legal Research.  
(LR)

Future Hearing:

11/13/17 Petition for invalidity of specific directive of etc.

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: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601090

CASE NAME: MTR OF CORA L DAWSON

HEARING:

FIRST AND FINAL Account and Report of MARY MCDANIEL and Petition for allowance of fees filed.

COUNSEL:

CORA L DAWSON

(DEC)...

MARY MCDANIEL

(PET)...J. DAVID HORSPOOL

GENERAL INFORMATION:

**Continued from 10/03/17. Counsel to provide statements from Voya; proposed order is to include all information.**

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

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

1. Sole beneficiary waives accounting.
2. Attachment 2 to Inventory and Attachment filed 04/04/17 [LF, p. 5] includes fine jewelry and a silver service that were valued by administrator without documentation. Tangible personal property should be appraised by Probate Referee and include a general description of the personal property together with any estimates of value, per Pr.C. §8902 and The Probate Referee Guide, Rev. 04/15. Need corrected inventory. **Supp. (09/28/17) alleges it would be of no discernable value to require the Probate Referee to correct the inventory since the beneficiary came up with those values and has accepted those values. JTD.**
3. Petition does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614c. **Supp. (09/28/17) request Court waive this local requirement as petitioner is the sole beneficiary. JTD.**
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$9,816.67. Calculated.
6. Proposed Order 10/10/17 indicates assets on hand of \$252,019.12 in cash, though not specified in accounting. However, accounting does not address real

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and personal property. Accounting does not include; legal description of the real property, including common address, if any, and assessor's parcel number; vehicle license number(s) and description; vehicle license number(s) and description; or address of beneficiary receiving real property. **Supp. (09/28/17) requests Court sign the proposed order as originally presented as petitioner is the sole beneficiary. JTD.**

#### RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/30/18.**

(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: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700079

CASE NAME: \*\*\*MF MTR OF JAMES ODELL ROBINSON\*\*\*

**SEE ALSO #5**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

EVELYN L ROBINSON	(PET)...PRO/PER
EVELYN L. ROBINSON	(CHRISTOPHER B JOHNSON
GERALDINE SIMMONS	(OBJ)...MARA C ALLARD
GERALDINE SIMMONS	(PET)...MARA C ALLARD
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC

**X-REF: PROPS 1700759 & PROPS1700775** (vacated)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Petitioner, Geraldine Simmons (daughter), proposed Personal Representative of spouse, Lily Mae Robinson.

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

1. Petitioner requests confirmation of property passing to the surviving spouse as community property. Specifically, six parcels of improved and unimproved real properties in San Bernardino County. Petition indicates parties were married on 11/14/56 but does not set forth facts sufficient to establish a community property interest in the California real properties. How was the property interests acquired – with community funds, etc? Need verified supplement.
2. Does Court wish to require a copy of vesting documents? JTD.
3. Need Notice of Hearing with proof of service.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1-2 then Court's discretion.

(nb)

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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: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700458

CASE NAME: MARIE T. KNOTT LIVING TRUST

HEARING:

Petition for OBJECTIONS TO TRUSTEE'S ACCOUNT DATED 01/24/17  
PETITION FOR RELIEF, SURCHARGE, AND REMOVAL ETC

COUNSEL:

MARIE T KNOTT LIVING TRUST DAT (TRU)...  
SHRINERS HOSPITALS FOR CHILDRE (PET)...KEITH L MEEKER

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/24/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700759

CASE NAME: LILY MAE ROBINSON

**SEE ALSO #3**

HEARING:

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

COUNSEL:

GERALDINE SIMMONS (PET)...JONATHAN BRADLEY SMITH  
LILY MAE ROBINSON (DEC)...

**X-REF: PROPS 170079 & PROPS1700775** (vacated)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Geraldine Simmons ["Petitioner"].

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

1. All heirs waive bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. § 8571. Estimated estate valued at \$320,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Need proof of publication.
3. ~Proposed Form Order/Letters 07/28/17

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **01/08/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino  
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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 10/24/17 TIME: 9:30 DEPT: S37P  
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CASE#: CIF DS1700109

CASE NAME: SPECK VS SPECK

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

CAROLE SPECK	(RP )... GUY A LEEMHUIS
DEBORAH LYNN SPECK FERDIE	(PP )...PRO/PER
MICHAEL FERDIE	(PET)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

**X-REF: FAMSS 1703119 (dissolution)**

Response to Request for Elder or Dependent Adult Abuse Restraining Orders filed 10/04/17 by Respondent Carole Speck Weinstein.

Need report by GAL, Mitchell Roth.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

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DATE: 10/24/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1100089

CASE NAME: JOSE PEREZ JR

**SEE ALSO 7**

HEARING:

Hearing Re: RECONSIDERATION OF PETITIONER'S FEE REQUEST

COUNSEL:

JEANNE E KENNEDY

(PET)...

JOSE PEREZ jr

(CEP)...PRO/PER

JOSE PEREZ JR

(DEC)...MITCHELL I ROTH

KATIE C HERNANDEZ

(CPE)...HARTNELL LAW GROUP

No notes – Judge to decide.

(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: 10/24/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1100089

CASE NAME: JOSE PEREZ JR

**SEE ALSO 6**

HEARING:

Hearing Re: CHC

COUNSEL:

JEANNE E KENNEDY

(PET)...

JOSE PEREZ jr

(CEP)...PRO/PER

JOSE PEREZ JR

(DEC)...MITCHELL I ROTH

KATIE C HERNANDEZ

(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CHC

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

1. Matter set at 09/18/17 hearing, wherein, the Court appointed counsel, Attorney Mitchell I Roth, to represent Conservatee based on CI report dated 09/13/17.
2. Need report of court appointed counsel, Attorney Mitchell I Roth.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Need to clear note 2.

(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: 10/24/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600117

CASE NAME: MTR OF JEFFREY CRAIG ANDERSON

HEARING:

Conservatorship Compliance Review Hearing on 1st Amended  
PETITION FOR CONSERVATORSHIP of DOUGLASS LEE GROVES

COUNSEL:

DOUGLASS LEE GROVES (CPE)...RONALD W ASK  
JEFFREY CRAIG ANDERSON (CEP)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Douglas Lee Groves appointed Limited Conservatorship of the person and estate,  
\$20,000 bond.

**Continued from 07/11/17 and 08/29/17 to clear probate notes.**

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

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

1. Notification of Conservatee's Rights filed.
2. Statement of Care Plan filed..
3. Appropriate Level of Care filed.
4. Final Inventory and Appraisal filed.
5. Instructions for Objection filed.

RECOMMENDATION:

None.

(nb/lh/nb)

Future Hearing:

12/05/17 Accounting Review.

**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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/24/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700168

CASE NAME: HUMBERTO AGUILAR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALMA MARRUJO DE SMITH (PET)...PRO/PER

HUMBERTO AGULIAR (CEE)...WALTER T. MOORE

#### GENERAL INFORMATION

**Continued from 06/20/17.** Walter Moore is appointed for Humberto Aguilar. Court requests IRC provide a report to the Court. Clerk's office to notify IRC. Page 9 of Petition and page 1 of Confidential Screening Form completed in Court. Amended paged filed. Petitioner shows proof of completion of conservatorship class in court. Court notes notice to father and Capacity Declaration need to be filed.

**Continued from 08/08/17. Notice to be given to Humberto Lopez, father. Counsel will assist in providing notice to father.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Alma Marrujo De Smith (mother)

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

1. Petitioner seeks orders related to powers under §2351.5 to fix residence, access confidential records, control right to contract, and to 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 08/03/17.
4. Proposed conservatee is developmentally disabled. Need report of Counsel Walter Moore.
5. Need Notice of Hearing and proof of mailed service as to father, Humberto Lopez.
6. IRC report filed 06/20/17.
7. CI Report filed 06/20/17.

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8. Proof of completion of Conservatorship Training Class filed 06/06/17.
9. Return of Citation filed 05/18/17.
10. ~Proposed Form Order: 05/05/17

#### RECOMMENDATION

Need to clear notes 4-5. If approved, set hearing for Compliance Review for **05/29/18** 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)



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: 10/24/17 TIME: 1:30 DEPT: S37P  
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CASE#: PRO PS1700180

CASE NAME: THE PATRICK CAMERON LANE TRUST DATED 01/14/17

HEARING:

Hearing Re: Proveup (1 hour)

COUNSEL:

BRIAN LANE	(PET)...JOSEPHINE A. RICH
CINDY LANE	(PET)...HORSPOOL & H ORSPOOL
ERIC LANE	(PET)...JOSEPHINE A. RICH
ROBERTA LAHR-DOLGOVIN	(RES)...FARHAT LAW FIRM, APC
THE PATRICK CAMERON LANE TRUST	(TRU)...

No notes – Judge to decide.  
(nb)

Future Hearing:  
12/12/17 OSC re: Contempt as to Cindy Jones