



Second/Final Check

Superior Court of California

County of San Bernardino

Probate Department

S37

Probate Notes for Calendar Date: 11/21/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb1031/1115

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: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500646

CASE NAME: CHERRAKEE LEE GROETZINGER

HEARING:

Accounting Review

COUNSEL:

CHERRAKEE LEE GROETZINGER (DEC)...
DEPARTMENT OF HEALTH CARE SERV (TP)...PRO/PER
LON M ANDERSON (PET)...PRO/PER
SUSAN C BUCKELEW (PET)...PRO/PER

GENERAL INFORMATION:

Set on **10/31/16** due to non-appearance. Notice by Judicial Assistant.

Continued from **01/09/17**. No appearance. Court notifies the Public Administrator of possible appointment.

Continued from 01/10/17 at request of counsel. Public administrator to conduct investigation.

Continued from **03/07/17**. Citation issued to Lon Anderson, who is cited to appear on 05/16/17 and show cause why FTA/failure to file required documents.

Matter set on **06/16/17**. An accounting is ordered to be filed by 07/01/17.

Continued **08/01/17**. Lon Anderson to file date of death bank statements with the Court. Court orders Susan Buckelew to be present personally or by court call at next hearing.

Continued from 09/26/17 to allow Lon Anderson to file an accounting and for Susan C. Buckelew to appear as previously ordered. Notice given by Mr. Parker.

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 08/24/15, full authority, no bond.
2. Final inventory and appraisal filed.
3. Declaration filed 05/16/17 by Lon Anderson.
4. No accounting or status report of administration. Need same.

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

RECOMMENDATION:

Inquire status.

(nb/lh/nb/lh)

Future Hearing:

09/04/18 Accounting Review (by Successor)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600156

CASE NAME: LILY MARTINEZ

HEARING:

Accounting Review

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
ESTHER GUARDADO	(PET)...FULLERTON LEMANN
INHERITANCE FUNDING COMPANY IN	(PRO/PER
LILY MARTINEZ	(DEC)...
MARY MARIN	(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **07/25/17**. The I & A filed 04/13/17 is deemed the final I & A.

Continued from 09/19/17 to file a final account.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Esther Guardado, on **03/08/17**; full authority, \$200,000 bond.
2. Accounting is not technically due as letters issued on 03/08/17.

RECOMMENDATION

Court may wish to continue the accounting review date as the letters were recently *issued*. If granted, continue the accounting review date to **05/08/18**.

(ww/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600222

CASE NAME: MTR OF RONALD WILLIAM ZECH

HEARING:

Probate status report filed.

COUNSEL:

BRANDON VINCENT (PET)...JAMES B CHURCH
RONALD WILLIAM ZECH (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Brandon Vincent ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as all of the intestate heirs of the decedent, except for La Verne Zech, have assigned their beneficial interest in the decedent's estate to Brandon Vincent. On 06/16/17, an offer letter was sent to La Verne Zech. A response from La Verne Zech has not been received. .
2. Petitioner requests an additional 6 months to close the estate.
3. ~Proposed Order 08/17/17.

RECOMMENDATION:

Court's discretion. If approved set next hearing for Accounting Review on **05/22/18**.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600500

CASE NAME: MTR OF ORAN WALKER PALMER

HEARING:
Accounting Review

COUNSEL:

DEBORAH PALMER MCCAIN	(PET)...PRO/PER
ORAN WALKER PALMER JR	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION

Continued from 09/19/17. No appearance. Court orders Deborah Palmer McCain to personally be present at the next hearing. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Deborah Palmer McCain, daughter, on 07/12/17; full authority, no bond.
2. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.

(cs/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: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600756

CASE NAME: ROBERT EDWARD MILLER

HEARING:

Hearing Re: Status/Trial Setting Conference

COUNSEL:

ROBERT EDWARD MILLER	(DEC)...
ROBERT WILLIAM MILLER IV	(OBJ)...MITCHELL I ROTH
RYAN EDWARD MILLER	(PET)...FULLERTON LEMANN SCHAEFER
W.A.(SAM) HLAVATY	(PET)...THOMPSON & COLEGATE

No notes – Status/TSC.

(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: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601106

CASE NAME: MTR OF MARGARET SYLVIA SWANSON

HEARING:

First and final Account and Report of MARK D SWANSON and
Petition for allowance of fees filed.

COUNSEL:

LIBERTY MUTAUL INSURANCE	(TP)...
MARGARET SYLVIA SWANSON	(DEC)...
MARK D SWANSON	(PET)...KATHLEEN B ALBREKTSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Mark D, Swanson ["Petitioner"-nephew].

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

1. Petition alleges all heirs waive accounting. Need waiver of account by Susan K. Swanson.
2. Accounting period 10/18/16 to 07/11/17.
3. Assets on Hand \$275,601.50 consisting of \$263,601.50 in cash and remaining in time share interests.
4. Current bond of \$313,244.00
5. Statutory compensation of \$8,783.82 requested. Calculated
6. Petitioner requests reimbursement of costs advanced of \$1,200.93. Itemized.
7. Attorney requests reimbursement of costs advanced of \$465.00. Itemized.
8. Petitioner requests authority to withhold the sum of \$1,000 as a reserve.
9. Petition does not include omnibus clause.
10. Proposed Order does not include omnibus clause.

RECOMMENDATION:

Need to clear notes 1 & 9 then Court's discretion. If approved, set next hearing for
receipts and final discharge for **11/27/18**.

(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 for clarification of the notes only - **no legal or procedural advice will be given.**

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

DATE: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700455

CASE NAME: ROSENBERRY TRUST* **SUB-TRUST FBO UNBORN HEIRS*

HEARING:

SECOND Account and Report of EDWARD LEE ROSENBERRY REVOCABLE TRUST and Petition for allowance of fees filed.

COUNSEL:

EDWARD LEE ROSENBERRY REVOCABL (PET)...JAMES B CHURCH
EDWARD LEE ROSENBERRY REVOCABL (TRU)...JAMES B CHURCH

XREF: PROPS1700454

XREF: CONDS1000118, PROPS1700454

GENERAL INFORMATION:

Continued from 10/03/17 by agreement of all parties. Notice waived.

THIS CASE IS SET FOR HEARING ON Second Account and Report by Successor Trustee, Katie Hernandez ["Petitioner"], of the "Sub-Trust FBO Unborn Heirs" of the Edward Lee Rosenberry Revocable Trust and Petition for Its Settlement [Pr. C. §§ 1060, 2620 and 17200(b)(5)].

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

1. Accounting period 05/01/16 to 12/31/16.
2. Assets on Hand \$127,017.46 consisting of \$22,146.64 in cash and \$104,870.82 in stocks.
3. Current bond of \$7,000,000.00 under the Administrative Trust created under the Edward Lee Rosenberry Revocable Trust. Petitioner requests a bond of \$142,459.70. Calculated. Suggest bond of \$142,500.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
4. Pursuant to the terms of the Trust, the Successor Trustee is authorized to pay herself and attorney compensation. However, specific compensation by petitioner or attorney is not addressed. Question whether fees are being waived for this account period? Need verified supplement.
5. Proposed Order 08/17/17 includes trustee and attorney fee language but does not specify fees; and includes blank lines before signature line

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

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set next hearing for Accounting Review on **03/01/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(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: 11/21/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700844

CASE NAME: MTR OF GRACE L ASHPAUGH

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full
Authority under IAEA.

COUNSEL:

GRACE L ASHPAUGH (DEC)...
MICHAEL K WEINSTEIN (PET)...SUSANNA T KINTZ

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Ancillary Petition for Letters of Administration W/WA and full authority under IAEA by Michael K, Weinstein ["Petitioner"- son-in-law, executor and successor trustee of sole beneficiary's trust].

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

1. Decedent was a nonresident of California and left an estate in this county.
2. First named executrix, Leila Weinstein aka Leila Feldman (daughter/sole beneficiary), will not act because of death. Consents to appointment affixed.
3. Will waives bond. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. § 8571. Estimated estate \$190,800. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
4. Exemplified copy of Arizona will [LF, p. 11], affixed to petition. Need Proof of Subscribing Witness.
5. Proof of Publication filed.
6. ~Proposed Form Order 08/22/17.

RECOMMENDATION:

Need to clear note 4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **01/29/19**. 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

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

DATE: 11/21/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700845

CASE NAME: THE JOHN P MCGLONE REVOCABLE TRUST

HEARING:

Petition for (VERIFIED) FOR DETERMINATION OF VALIDITY OF
PURPORTED TRUST DOCUMENTS ETC

COUNSEL:

MARGARET CLUKEY

(PET)...PRICE LAW FIRM APC

ROSEMARY HALEY

(PET)...PRICE LAW FIRM APC

THE JOHN P MGLONE REVOCABLE TR (TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 11/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400236

CASE NAME: Robert R Lara

HEARING:

Motion Re: Transfer of proceedings Filed by Petitioner VICTORIA
A CARR

COUNSEL:

JEANNE E KENNEDY (PET)...JEANNE E KENNEDY
ROBERT R LARA (CEP)...
VICTORIA A CARR (CPE)...PRO/PER

XREF: FAMVS1003497

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Transfer of Proceedings by Conservator of the Person and Estate, Victoria A. Carr ["Petitioner-sister"].

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

1. Conservatee resides in Ridgecrest, Kern County.
2. Petitioner requests proceedings to be transferred to Kern County as Conservatee now resides in Kern County.
3. Last CI report filed 08/31/15. Does Court wish to require an updated CI Report? JTD.
4. Need Notice of Hearing with proof of service.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 4 then Court's discretion.

(nb)

FUTURE HEARING DATES:

08/08/18 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 for clarification of the notes only - **no legal or procedural advice will be given.**

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600166

CASE NAME: RODRIGO R ROMERO

HEARING:

FIRST AND FINAL Account and Report of ALEJANDRO QUIROGA and
Petition for allowance of fees filed.

COUNSEL:

ALEJANDRO QUIROGA (CP)...FELIX M MARTIN
RODRIGO R ROMERO (CEE)...SANDY L. TURNER

Request for Waiver of Court Fees and Costs filed by RODRIGO R ROMERO is
GRANTED

Fee waiver amount due \$465.00 for petition for conservatorship on 06/20/16

Request for Waiver of Court Fees and Costs filed by ALEJANDRO QUIROGA is
GRANTED

Fee waiver amount due \$465.00 for petition for first and final on 06/06/17

GENERAL INFORMATION:

Conservatee passed away on 04/01/17.

Continued from 07/25/17 and 10/03/17 (no appearances). The Court orders the petitioner or his counsel of record to appear. Notice to be given by Ms. Turner. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Temporary Conservator of the Person, Alejandro Quiroga ["Petitioner"].

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

1. General order/letters to include estate powers granted on 03/01/17 have not issued.
2. Court to review report by court-appointed counsel, Sandy Turner, filed on 06/19/17.
3. Court to review sticky note at LF, p. 6.
4. Final Inventory and Appraisal does not include real property or personal property referred to in petition. Need amended inventory.
5. Accounting period 12/21/16 to 05/31/17 (pre & post death periods).

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6. Assets on hand \$0.00. Question the status of conservatee's home/real property? Need verified supplement.
7. No fees or reimbursement for costs are requested.
8. Petitioner requests bond of \$73,700 be exonerated. However, bond is not exonerated until entry of final discharge order.
9. Proposed Order 06/06/17 refers to Temporary Conservator and exonerates bond.

RECOMMENDATION:

Need to clear notes. If approved, set next hearing for receipts and final discharge for **11/27/18**.

(nb)

Future Hearing:

11/28/17 Compliance review hearing

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/21/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700294

CASE NAME: SUTTER D ZIELINSKI

HEARING:

Hearing Re: Proof of Letters/Post Move/CI report

COUNSEL:

MICHAEL J ZIELINSKI (CP)...PRO/PER

SUTTER D ZIELINSKI (CTP)...

VALERIE A ZIELINSKI (CP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Proof of Letters/Post-Move/CI Report

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

1. Matter set at 09/19/17 hearing for proof of letters, post-move notice; and CI Report.
2. Need CI Report.

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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: CON PS0900263

CASE NAME: THELMA LENK

HEARING:

Hearing re Final Discharge

COUNSEL:

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

GENERAL INFORMATION:

Continued from 08/08/17 and 10/17/17 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 Third and Final Account entered 08/02/16.
2. Need receipt by Personal Representative of the Estate of Thelma Lenk.
3. Ex-parte Petition/Order for Final Discharge received and forwarded for processing.

RECOMMENDATION:

Need to clear note 2.

(nb/lh/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: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400768

CASE NAME: (MF)ANTONIA LUNA REVOCABLE TRUST DATE 9/8/09

HEARING:

Hearing Re: REQUEST TO RELEASE FUNDS & FINALIZE THE MATTER

COUNSEL:

ALL UNKNOWN OCCUPANTS	()...
ANTONIA LUNA REVOCABLE TRUST D	(TRU)...	
LOUIS HERNANDEZ	(DEF)...	
LUIS ESTRADA	(PET)...	PRO/PER
OFELIA PARAMO	(PLA)...	WILLIAM M GARRETT, JR
VICTOR M HERNANDEZ	(PLA)...	WILLIAM M GARRETT, JR

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Request to Release Funds & Finalize Matter

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

1. Matte set at Ex Parte Hearing held on 10/17/17 hearing, wherein, petition was denied with the exception of the request for reimbursement of the costs to obtain the permits and work done to the residence as long as the petitioner provides counsel with valid proof of permits and receipts for the work done on the residence. Court will allow legitimate written objections by counsel if necessary.
2. No objections as of the review of this matter.

RECOMMENDATION:

None.

(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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501187

CASE NAME: MTR OF MARY HELEN RAMIREZ

HEARING:

First and Final Account and Report of ROBERT RICK RAMIREZ and
Petition for allowance of fees filed.

COUNSEL:

MARY HELEN RAMIREZ (DEC)...
ROBERT RICK RAMIREZ (PET)...DIANE E ROBBINS
ROBERT RICK RAMIREZ (PET)...ROBBINS & HOLDAWAY

GENERAL INFORMATION:

Continued from 09/19/17 at request of counsel for objection to be filed/meet and confer.

THIS CASE IS SET FOR HEARING ON First and Final Report and Petition for Fees by
Administrator, Robert. E. Ramirez ["Petitioner"- son].

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

1. Accounting period 07/12/15 to 06/30/17.
2. Assets on Hand \$701,223.39 consisting of \$667,806.02 cash and remaining in receivables from Sandra Gonzales.
3. Statutory compensation of \$18,115.46 requested. Calculated.
4. Attorney requests extraordinary fees of \$3,430.00 for services rendered in connection with the sale of real property and unlawful detainer proceedings. Billed at \$350/hour for a total of 9.80 hours' attorney time. Generally described. Need itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
5. Petitioner requests reimbursement of costs advanced of \$12,816.73. Itemized [LF, pgs. 28-30].
6. Attorney requests reimbursement of costs advanced of \$2,744.00. Itemized [LF, p13].
7. Petitioner requests authority to withhold \$30,000 as a reserve for unpaid income taxes and bond premium. JTD.
8. Petitioner states receivables in the amount of \$33,417.37 are owed by daughter, Sandra Gonzales for unlawful detainer proceedings; unpaid rents; and removal

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of personal property. Petition indicates Sandra's distribution will be reduced by this amount.

9. Proposed Order 06/30/17 reflects a different amount for cash on hand and does not include omnibus clause.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set next hearing for receipts and final discharge for **11/27/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600169

CASE NAME: BETTY LOUS SCHLAICH

HEARING:

Hearing Re: POSTING OF BOND/PROOF OF PAYMENT TO CREDITORS

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Posting of Bond/Proof of Payment to Creditors.

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

1. Matter set at 10/17/17 hearing, wherein, the Court required bond of \$1000,000 and indicated if counsel filed proof that all the creditors have been paid, then bond would not be required.
2. Declaration re Allowances to Creditor's Claims and No Bond Requirement filed 10/26/17 states all creditors' claims (3) were paid on or about 08/23/17, after the court approved the administrator's creditor's claim.
3. Counsel indicates bond is not required for the creditors' claims that are filed in this estate since they have already been paid from the estate.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

10/16/18 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 for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600688

CASE NAME: MTR OF RAUL MIRANDA

HEARING:

Ex parte hearing re: PETITION FOR PRELIMINARY INJUNCTION
ENJOINING SALE

COUNSEL:

HEATHER MIRANDA	(PET)...JACK B. OSBORN
NATIONSTAR MORTGAGE LLC	(OBJ)...
RAUL MIRANDA	(DEC)...

XREF: GARPS1600219

Currently under review by Legal Research.
(LR)

Future Hearing:

12/14/17 Spousal property petition
01/25/18 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 for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601269

CASE NAME: ALICE THOMAS GILL

HEARING:

FIRST & FINAL REPORT OF ADMIN ON WVR OF Account and Report of
TERRON THOMAS and Petition for allowance of fees filed.

COUNSEL:

ALICE THOMAS GILL	(DEC)...
CA	(TP)...
TERRON THOMAS	(PET)...GARY A FOLTZ

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator, Terron Thomas ["Petitioner"-son].

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

1. All heirs waive accounting.
2. Accounting period 04/02/15 to 07/08/17.
3. Assets on Hand \$240,000 consisting of real property.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$7,800.00. Calculated.
6. ~Proposed Order 08/18/17 does not include legal description of the real
property, including common address, if any, and assessor's parcel number;
findings re: sole and separate property; and address of heirs receiving real
property.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for final discharge on **11/27/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700008

CASE NAME: MICHAEL LEVENTHAL

HEARING:

PET FOR SETTLEMENT ON WVR OF Account and Report of DAWN JASS and
Petition for allowance of fees filed.

COUNSEL:

DAWN JASS (PET)...LISA J FRISELLA
MICHAEL LEVENTHAL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Administrator, Dawn Jass ["Petitioner"-daughter].

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

1. Sole heir waives accounting.
2. Assets on Hand \$228,835.31 consisting of cash.
3. Current bond of \$311,300.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$9,793.75. Calculated.
6. Attorney requests reimbursement of costs of \$1,192.50. Itemized.
7. Need copies of bank/financial statements reflecting date of death balances per
Local Rule 20-908.
8. Petition indicates real property was sold during this account period but does not
indicate whether there were any gains or losses. Need verified supplement.
9. Petitioner requests discharge upon filing of receipts and Ex Parte Petition and
Order for Final Discharge. However, discharge and bond exoneration do not
occur until entry of final discharge order.
10. Proposed Order 08/18/17 includes multiple blanks; discharges petitioner upon
filing of receipts and Ex Parte Petition and Order for Final Discharge, instead of
upon entry of final discharge order.

RECOMMENDATION:

Need to clear notes 7-8 then Court's discretion. If approved, set next hearing for final
discharge on **11/27/18**.

(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 for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/21/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700839

CASE NAME: MTR OF: FRANK ARTHUR ARNOLD

HEARING:

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

COUNSEL:

FRANK ARTHUR ARNOLD (DEC)...

JAMES ARNOLD (PET)...DIANA J CARLONI

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by James Arnold ["Petitioner-son"].

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

1. Non-Resident Petitioner requests bond in the amount of \$207,000. Appears sufficient.
2. Section 8 to petition [LF, p. 5] indicates decedent's deceased spouse's name is William S. Robb, Jr. However, will [LF, p. 12] names husband's name as Wilmer S. Robb, Jr. Need verified supplement.
3. Proof of publication filed.
4. ~Proposed Form Order 08/22/17.

RECOMMENDATION:

Need to clear note 2, \$207,000 bond. If approved, set future hearing for Accounting Review on **01/29/18**. 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

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 11/21/17 TIME: 8:35 DEPT: S37P

CASE#: SPR SS01247

CASE NAME: IN THE MATTER OF THE GEORGE AND EVA BELL STOVER

HEARING:

Petition for MODIFYING TRUST A TO THE GEORGE AND EVA BELL STOVER FAMILY TRUST

COUNSEL:

EVA BELL STOVER	(DEC)...
GEORGE STOVER	(DEC)...
LYNDA K. SAVAGE	(PET)...PHILLIP M SAVAGE III
RICHARD H. STOVER	(PET)...PHILLIP M SAVAGE III
THE GEORGE AND EVA BELL STOVER	(TRU)...PRO/PER

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: TARA REILLY

CONSERVATORSHIP

DATE: 11/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800317

CASE NAME: AARON EDGAR CALDERON

SEE ALSO 11

HEARING:

Hearing Re: TRANSFER TO RIVERSIDE

COUNSEL:

AARON EDGAR CALDERON (PCE)...KARIN HORSPOOL

MILAGROS MARTINEZ (PCR)...PRO/PER

See next matter #11

(nb)

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

DATE: 11/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800317

CASE NAME: AARON EDGAR CALDERON

SEE ALSO 10

HEARING:
OSC re: Dismissal

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

GENERAL INFORMATION:

Continued from 12/16/16. No appearances. Notice by Judicial Assistant.
Continued from 03/07/17 on Court's motion. No appearance. Court order Milagros Martinez to appear at the next hearing dated 5/9/17. Notice by Judicial Assistant.
Continued from 05/09/17. Ms. Horspool ordered to prepare an Order for transfer. Court orders Court Investigator report be mailed to petitioner. Petitioner's appearance waived at next hearing.
Continued from 10/17/17. No appearances. Court orders counsel to appear in court if proof of the Transfer to Riverside is not filed with the court prior to the next hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Transfer to Riverside

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

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

RECOMMENDATION:

Need to clear notes 3-4, then Court's discretion.
(nb/lh/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 for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500338

CASE NAME: SUSAN R. KOVACEVICH

HEARING:

Petition for order fixing compensation & authorizing payment of attorney's fees for Court-appointed atty

COUNSEL:

CRAIG M PARKER	(PET)...CRAIG M PARKER
DENNIS SHOGRUN	(CPE)...HARTNELL LAW GROUP
DENNIS SHOGRUN	(CPE)...RYAN J GALLANT
SUSAN R. KOVACEVICH	(CPE)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-Appointed Attorney, Craig M. Parker ["Petitioner].

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

- 1 Petitioner was appointed on 11/30/15. Petitioner alleges that services have been rendered for which counsel has not been compensated for the period 11/30/15 to 10/10/17.
- 2 Attorney requests fees of \$8,085.00. Billed at \$350/hour for 23.10 hours' attorney time. Itemized [LF, p. 7-8]. JTD.
- 3 Petitioner request the Court authorize and direct Dennis Shogrun, Conservator of the person and estate, to pay requested sum for services rendered.
- 4 ~Proposed Order 10/11/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

02/04/19 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 for clarification of the notes only - **no legal or procedural advice will be given.**

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

DATE: 11/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600067

CASE NAME: MTR OF ROSARIO BERNAL RADOS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALEXANDER ORONOS

COUNSEL:

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

GENERAL INFORMATION

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

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

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

Continued from **06/20/17**. Matter continued to trial other hearings set.

Continued from 10/17/17 on courts motion.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Alexander Oronos, son appointed conservator of the person and estate on 05/18/16, \$200,000 bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/07/16.
3. Determination of Conservatee's Appropriate Level of Care filed 12/7/16.
4. Care Plan in accord with Pr.C.§2352 filed 12/7/16.
5. Need final Inventory & Appraisal per Pr.C.§2610.
6. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. Proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313 filed 06/01/16.

RECOMMENDATION

Inquire status.

(lc/lh/nb/lh/nb)

Future Hearing:

01/23/18 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 for clarification of the notes only - **no legal or procedural advice will be given.**

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

DATE: 11/21/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DENISE TIBKE (CP)...PRO/PER
MADISON LEANN TIBKE (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **08/01/17**. Attorney Walter Moore appointed for Madison Leann Tibke.
Continued from 09/26/17. No appearances. Notice by Judicial Assistant.

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

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

1. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Proposed conservatee is developmentally disabled. Need report of Walter Moore.
5. Proposed conservatee is developmentally disabled. **IRC report filed.**
6. Court Investigator report filed.
7. Petition, items 11, list of relatives does not include Denise Tibke (petitioner); however, it is clear she is the mother.
8. List of Required Contact Information form is missing paternal grandparents. Need completed form.
9. Need Certificate of Completion of the Conservatorship Training Class.
10. Need Notice of Hearing and Proof of Service to include 30 days' notice to Inland Regional Center.

11. Need return of Citation.

12. ~Proposed Form Order: 06/05/17

RECOMMENDATION

Need to clear notes 4; 8-11. If approved, set hearing for Compliance Review for **06/26/18** 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/nb)