



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 11/22/17**

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.

10/31/17 lh; 11/17/17lh

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: 11/22/17 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600482

CASE NAME: MTR OF JAMES A CLARK

HEARING:

Accounting Review

COUNSEL:

STEVEN B SCHALLHORN

(PET)...DAVID GRIGOLLA

JAMES A CLARK

(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Steven B Schallhorn

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

1. Letters Testamentary issued 09/19/16 to Steven B Schallhorn with limited authority, no bond.
2. Final Inventory and Appraisal filed 08/22/17. Need supporting bank statement with date of death value per Local Rule 20-908.
3. No accounting or status report of administration. Need same.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**ELDER ABUSE**

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DATE: 11/22/17      TIME: 8:30      DEPT: S36P  
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CASE#: CIF DS1600075

CASE NAME: ARCINIEGA VS RAMIREZ

HEARING:

Readiness Calendar

COUNSEL:

VIRGINIA TAPIA ARCINIEGA

(PP )...TETLEY LAW OFFICES

DEBRA JEANNE RAMIREZ

(RP )...LAW OFFICES OF JOHN SETLICH

SALATHIEL RAMIREZ

Future Hearing: 12/8/17 Court Trial

Readiness—no notes—JTD

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIF DS1600076

CASE NAME: ARCINIEGA VS RAMIREZ

HEARING:  
Readiness Calendar

COUNSEL:  
VIRGINIA TAPIA ARCINIEGA (PP )...FRANK O TETLEY  
SALATHIEL RAMIREZ (RP )...LAW OFFICES OF JOHN SETLICH

Readiness—no notes--JTD

Future Hearing: 12/8/17 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC**

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: CIV DS1614969

CASE NAME: ARCINIEGA-V-RAMIREZ

HEARING:  
Readiness Calendar

COUNSEL:

VIRGINIA TAPIA ARCINIEGA (PLA)...TETLEY LAW OFFICES  
DEBRA JEANNE RAMIREZ (DEF)...LAW OFFICES OF JOHN SETLICH

Readiness—no notes--JTD

Future Hearing: 12/8/17 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400624

CASE NAME: Lucretia May Medley

HEARING:

Accounting Review

COUNSEL:

LOUIS SCOTT YOUNG

(PET)...KEITH S WALKER

LUCRETIA MAY MEDLEY

(DEC)...

ELMER FRED GREEN JR.

(PET/OBJ)...KYLE A PATRICK,

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review by Elmer Fred Green, Jr.

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

1. Letters Testamentary issued to Elmer Fred Green, Jr, on 10/06/16 with full authority, no bond.
2. Reappraisal for Sale filed 05/19/17; however, item #5 is incomplete re tax certificate. Need completed form.
3. Need Final Inventory and Appraisal.
4. No accounting or status report of administration. Need same.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400701

CASE NAME: Simon Sybrandy Family Trust

HEARING:  
Trial Setting Conference

COUNSEL:

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

**X-REF: CONPS1400242**

TSC—no notes—JTD

Future Hearings: 04/25/18 Hearing Re: Trust Accounting, Hearing Re: Sybrandy Investment Accounting

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: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600466

CASE NAME: BEATRICE DORETTA CHISUM

HEARING:  
Accounting Review

COUNSEL:  
JEANNETTA LORETTA LOVE (PET)...MATTHEW SHEASBY  
BEATRICE LORETTA CHISUM (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review of Jeannetta Loretta Love

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

1. Letters Testamentary issued to Jeannetta Loretta Love on 09/14/16 with full authority, 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)



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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600916

CASE NAME: MTR OF ARTHUR HAROLD ARMSTRONG

**SEE ALSO 8**

HEARING:

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

COUNSEL:

MELINDA JACOBO	(PET)...GREGORY L ZUMBRUNN
ARTHUR HAROLD ARMSTRONG JR	(DEC)...
SHAWN GOLDEN	(PET/TP)...PRO/PER
MARC BOZIGIAN	

GENERAL INFORMATION

Continued from **11/02/16**. Shawn Golden and Marc Bozigian indicated they object. Objections to be filed on or before 12/20/16.

Temporary letters of administration denied on 01/18/17 for Shawn Golden and Marc Bozigian.

Continued from **01/18/17**. Attorney Roberta Taylor to respond to objections filed by 02/17.

**Continued from 03/29/17**. The objectors need to file written objections regarding the trust if they wish to pursue.

**Continued from 10/11/17. Matter is contested; court trial requested. Trial briefs, witness lists, exhibits to be filed. Readiness set for 11/22/17.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Melinda Jacobo niece/Trustee.

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

1. Will waives bond. Estate value \$173,800. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. Due diligence declaration filed for Tommy and John, nephews of predeceased spouse. on 10/26/16. JTD
3. Copy of Trust filed 11/07/16.
4. Melinda Jacobo was served through her attorney; Proof of Service of Summons filed 01/10/17.
5. Court to determine whether to refer to LR, as objectors are objecting to provisions of the inter vivos trust. Appears this is also a trust contest.

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

6. **Objections and will contest by Shawn Golden, niece, filed 12/13/16.**
7. ~Proposed Form Order: 09/14/16

#### RECOMMENDATION

Court's discretion re note 5. Court's discretion re bond. Matter is contested. If approved, set Accounting/Status Review for **01/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/ww/lh)

Future Hearing: 12/04/17 Court Trial

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600916

CASE NAME: MTR OF ARTHUR HAROLD ARMSTRONG

**SEE ALSO 7**

HEARING:

Readiness Calendar

COUNSEL:

MELINDA JACOBO	(PET)...GREGORY L ZUMBRUNN
ARTHUR HAROLD ARMSTRONG JR	(DEC)...
SHAWN GOLDEN	(PET/TP)...PRO/PER
MARC BOZIGIAN	

Waiver of Court Fees and Costs filed by SHAWN GOLDEN is GRANTED

Waiver of Court Fees and Costs filed by MARC BOZIGIAN is GRANTED

Readiness—no notes—JTD

Future Hearing: 12/04/17 Court Trial

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700195

CASE NAME: MTR OF IRA PETE ELLER TRUST

**SEE ALSO 10**

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status of Settlement

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

1. Matter set on 10/18/17; counsel indicated matter has settled. Notice was waived.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 01/01/18 Petition for Order Instructing Trustee to Distribute Rental Income to Beneficiary; For Immediate Suspension

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

-----  
DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700195

CASE NAME: MTR OF IRA PETE ELLER TRUST

**SEE ALSO 9**

HEARING:

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

COUNSEL:

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

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearing: 01/01/18 Petition for Order Instructing Trustee to Distribute Rental Income to  
Beneficiary; For Immediate Suspension

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700846

CASE NAME: RONALD G DEMMITT

HEARING:

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

COUNSEL:

DIANE DEMMITT (PET)...GREGORY T ANNIGIAN  
RONALD G DEMMITT (DEC)...

GENERAL INFORMATION:

Ex parte orders granted 08/28/17. Diane Demmitt appointed Special Administrator, full authority, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Diane Demmitt, spouse

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

1. All heirs waive bond. Estimated net value of estate is \$250,000, personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per pr. C. §8481(c). JTD
2. No proposed Order submitted.

RECOMMENDATION:

RFA. Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **01/30/19**. 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

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DATE: 11/22/17 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700854

CASE NAME: RANDOLPH JEFFREY GALLEGOS

HEARING:

Petition for LETTERS OF ADMINISTRATION A/LIMITED IAEA

COUNSEL:

KAREN AGUILERA (PET)...LAMB MORRIS & LOBELLO  
RANDOLPH JEFFREY GALLEGOS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with LIMITED authority under IAEA by Karen Aguilera (sister)

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

1. Petitioner requests minimum bond of \$20,000. Estimated net value of estate is \$1,017,200, consisting of \$4,000 cash and remaining in real property. JTD
2. ~Proposed form Order: 08/25/17

RECOMMENDATION:

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

(lh)

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

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DATE: 11/22/17 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS0800645

CASE NAME: DAVID E. TOBIN SPECIAL NEEDS TRUST

HEARING:

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

COUNSEL:

INLAND COUNTIES REG CNTR (PET/TEE)...STEVEN K BECKETT  
DAVID E TOBIN (BEN)...  
SPECIAL NEEDS TRUST OF DAVID E TOBIN (TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 9<sup>th</sup> Account Current and Petition for Fees

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

1. Account period covers 05/01/16 to 06/30/17
2. Assets on hand \$73,102.70 consisting of \$65,102.70 in cash and \$8,000 in a pre-need burial trust.
3. Petitioner requests approval of fees already paid to Master Trust in the amount of \$1,287.24 taken pursuant to the fee schedule of \$1,000 for the first \$50,000 and 2% of the next \$250,000. JTD
4. Petitioner requests approval to continue taking quarterly fees of \$1,250.00 pursuant to the fee schedule. JTD
5. Attorney requests fees of \$1,200 billed for attorney/paralegal at \$250/\$100 per hour for a total of 8.70 hours. Itemization in Declaration of Steven K. Beckett filed 08/17/17. JTD
6. Petitioner alleges bond was not previously required and requests bond continue to be waived. However, bond is currently set at \$85,000 and appears to remain sufficient. JTD
7. Petitioner proposes a revised Master Trust of California Agreement to include reimbursement of any benefits paid by any other state's Medicaid program and notice to such other's state agencies to comply with Social Security regulations. JTD
8. Report indicates beneficiary continues to reside in Lynwood, Los Angeles County. Does Court wish to set re OSC why Trust should not be Transferred?



9. Proposed order submitted 08/17/17 does not comply with Local Rule 20-614(d) as no matter may appear after judge's signature. Need corrected order. Legal Research to review proposed trust revision.

**RECOMMENDATION:**

Court's discretion re bond and transfer. *If transferred*, set hearing re Status of Transfer. If case is *not transferred*, set next Accounting Review for **08/29/18**. Accounting to be filed 30 days in advance.

(lh)

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: 11/22/17 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1400370

CASE NAME: SPECIAL NEEDS TRUST OF NEAL SUAREZ

HEARING:

Third Account and Report of INLAND COUNTIES REGIONAL CENTER and  
Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REG CNTR PET/TEE)...STEVEN K BECKETT  
SPECIAL NEEDS TRUST OF NEAL SUAREZ (TRU)...

**X-REF: CONPS 0700254**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account and Report of Inland Counties  
Regional Center and Petitioner for Fees

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

1. Accounting covers 05/01/15 to 04/30/17
2. Assets on hand: \$33,723.42 in cash held in a pooled investment fund.
3. Petitioner requests approval of trustee's fees already taken in the amount of \$2,000.00, representing initial set-up fee, annual fee and 2% of the trust assets in quarterly fees. Generally itemized. JTD
4. Petitioner requests authority to take future annual fees in the amount of \$1,250/year for the first \$50,000 plus 2% of the trust assets for any amount in the trust over \$50,000 and up to \$250,000, payable quarterly. JTD
5. Attorney requests fees of \$1,550 for 9.8 hours for paralegal and attorney services at \$100/\$250 respectively. Itemized in separate declaration filed 08/17/17. JTD
6. Petitioner proposes a revised Master Trust of California Agreement to include reimbursement of any benefits paid by any other state's Medicaid program and notice to such other's state agencies to comply with Social Security regulations. JTD
7. Due to the amount of trust assets, Petitioner requests the next accounting review in 2 years. JTD.
8. Proposed Order received 08/17/17 does not comply with Local Rule 20-614(d) as no matter may appear after judge's signature. Need corrected order. Legal Research to review proposed trust revision.

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

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing re Accounting Review to **06/27/18** or biennial Accounting review for **06/26/19**. Accounting to be filed 30 days' in advance.  
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 11/22/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000069

CASE NAME: CARA HEATH COSSEY

**SEE ALSO 16**

HEARING:

Hearing Re: REMOVAL OF BETTER MILLER AS CONSERVATOR

COUNSEL:

BETTY L MILLER

(CP)...PRO/PER

CARA HEATH COSSEY

(CTP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON REMOVAL OF BETTER MILLER AS CONSERVATOR

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

1. Court appointed Walter Moore as GAL for conservatee Cara Heath Cossey upon receipt of emergency CI report on 09/21/17. Court ordered Office of the Public Guardian to appear on 09/25/17.
2. Matter set on 09/25/17 wherein Court suspended powers of conservatorship of Betty Miller until further order of the Court. Inland Regional Center to exercise its powers to find placement for the conservatee with the appropriate level of care.
3. Rose Rosado's office to prepare petition for appointment of successor conservator to be heard on 11/22/17.
4. Report of GAL filed 09/27/17.

#### RECOMMENDATION

Inquire status of petition.

(lh)

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: 11/22/17      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000069

CASE NAME: CARA HEATH COSSEY

**SEE ALSO 15**

HEARING:

Hearing Re: PETITION FOR SUCCESSOR CONSERVATOR

COUNSEL:

BETTY L MILLER

(CP )...PRO/PER

CARA HEATH COSSEY

(CTP)...

No moving papers filed. See notes on previous matter #15.  
(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1300677

CASE NAME: WILFRIED JOHANN KREIDL

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report  
of ALEXANDER WILLIAM KREIDL and Petition for allowance of fees

COUNSEL:

ALEXANDER WILLIAM KREIDL	(PET)...PRO/PER
WILFRIED JOHANN KREIDL	(DEC)...
WILLIAM ALEXANDER KREIDL	(PET)...PRO/PER

Waiver of Court Fees and Costs filed by ALEXANDER WILLIAM KREIDL is GRANTED  
TOTAL FEES WAIVED TO DATE: \$555.00

GENERAL INFORMATION:

Continued from **05/17/16 and 08/02/16** (no appearance). Citation issues as to Alexander W. Kreidl who is cited and required to appear.

Continued from **10/04/16 and 12/20/16** to clear notes. Court recommends petitioner to seek legal advice.

**Continued from 04/11/17** due to no appearance. Alexander William Kreidl ordered to be present at next hearing. Notice by Judicial Assistant.

Continued from **05/30/17**. No appearance. Continued for petitioner to be present.

**Continued from 06/21/17**. Supplement to be filed by 08/23/17. Nothing new filed.

**Continued from 09/27/17. No appearance. Alexander William Kreidl ordered to be present at next hearing. Notice given by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees.

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

1. Purported account, consisting of 3 pages, filed 03/19/16, includes waiver of account by sole heir [LF, p4]. However, notwithstanding said waiver, petitioner must file a final report of administration per Pr. C. § 1064 and Pr. C., § 10954(c)(1). Need amended account.
2. Petitioner does not request compensation.

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

3. Need statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary (Pr. C. § 1064 (a)(4)). File verified supplement.
4. Please indicate if cash has been invested and maintained in an interest bearing account? Pr.C.§ 1064(a)(5).
5. Was a diligent search conducted to determine known or reasonably ascertainable creditors? Were any creditor's claims actually filed? If so, by whom, what was the amount of the claim, what was paid on the claim?
6. Need statement regarding notice to Director of Health Care Services. Alternatively, notice per Pr. C. § 9202(a).
7. Need statement regarding notice to California Victim and Compensation and Government Claims Board. Alternatively, notice per Pr. C. § 9202(b).
8. Need statement regarding notice to Franchise Tax Board. Alternatively, notice per Pr. C. § 9202(c)(1).
9. Need description of assets on hand per Local Rule 20-906.
10. Need manner of distribution per Local Rule 20-907.
11. Need bank/financial statements to support date of death and closing balances per Local Rule 20-908.
12. Need return of citation.
13. Status report filed and set for 06/21/17.

#### RECOMMENDATION

Need amended account. Court to continue matter to a Monday or Tuesday as originally set. Any account to be filed 30 days' before hearing. Note requirements of Local Rules. (nb/lh/lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1400008

CASE NAME: George Contreras, Sr.

HEARING:  
Hearing re Final Discharge

COUNSEL:

JESS CONTRERAS (PET)...KELLY L PEXTON  
GEORGE CONTRERAS Sr. (DEC)...

**X-REF: PROPS1100601 PROPS1300500**

GENERAL INFORMATION

Continued from **10/19/16** and **12/21/16**. No appearance. Jess Contreras ordered to be present if notes not cleared.

**Continued** from 03/15/17, 05/24/17 and 07/26/17.

**Continued from 09/20/17. No appearance. Jess Contreras and/or Kelly Pexton are ordered to be present at next hearing if final discharge is not filed. Notice given by Judicial Assistant.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Jess Contreras approved on 10/27/15.
2. Need receipts for George and Georgette.
3. Need Ex Parte Petition for Final Discharge and Order with recording information per Pr.C. § 11753(b).

RECOMMENDATION

Inquire status of receipts and discharge. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with C.C.P. §§ 128 & 1209.

(lc/ww/lc/lh)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500028

CASE NAME: ANGELA GAIL MATTHEWS

HEARING:  
Accounting Review

COUNSEL:

CHRISTOPHER K MATTHEWS (PET)...JOHN M WOODBURN  
ANGELA GAIL MATTHEWS (DEC)...

GENERAL INFORMATION

Continued from **5/3/16** Court is informed that the Civil Case has been settled and a Minor's Compromise case filed.

Continued from **08/15/16, 10/26/16, 01/04/17, 03/15/17** and **05/24/17**. Waiver to be filed.

**Continued from 07/26/17** Christopher Matthews and/or Counsel is ordered to appear if accounting or status report not filed with the court.

**Continued from 09/20/17 at request of Counsel to file accounting.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration with Limited IAEA issued to Christopher Matthews, spouse on 3/10/15, \$20,000 bond.
2. Need an accounting or status report.

RECOMMENDATION:

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

(sa/lc/ww/lc/lh)

Superior Court of Calif, County of San Bernardino

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501037

## **VACATED**

CASE NAME: CLARE IRENE BLOXHAM

HEARING:  
Accounting Review

### COUNSEL:

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

Second and Final Account and Report of Sandra Spachtholz filed 10/23/17.  
(lh)

Future Hearing: 11/29/17 Final Discharge, 12/13/17 Second and Final Account and Report,  
01/09/19 Accounting Review

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600249

CASE NAME: JOSE R CASTILLO

HEARING:  
Probate status report

COUNSEL:

MARTHA CHAVEZ ACEVEDO	(PET)...MADRID LAW FIRM
JOSE R CASTILLO	(DEC)...
AIDA E RODRIGUEZ	(OBJ)...LAW OFFICES OF JAMES A HAGAN
JOSE CASTILLO JR	(LAW OFFICES OF JAMES A HAGAN )
CASSANDRA CASTILLO	(LAW OFFICES OF JAMES A HAGAN )

GENERAL INFORMATION

**Continued from 10/04/17 at request of counsel to close estate.**

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Martha Chavez-Acevedo, spouse, on 08/01/17; full authority, \$30,000 bond.
2. Administrator seeks additional time to close the estate in order for the Pr.C. § 850 petition and elder abuse to settle.

RECOMMENDATION

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

(lc/lh)

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600659

CASE NAME: MARCELINO FLORES SPECIAL NEEDS TRUST

HEARING:

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

COUNSEL:

CELINA FLORES (PET)...JACK H ANTHONY  
MARCELINO FLORES (MIN)...JACK H ANTHONY  
MARCELINO FLORES SPECIAL NEEDS (TRU)...PRO/PER  
INLAND COUNTIES REG CNTR (PET/ADM)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd Account and Report of IRC and Petition for  
Approval of Trustee's Fees and for Attorney's Fees

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

1. Accounting covers period: 06/01/16 to 06/30/17
2. Assets on hand: \$194,206.13, cash held in a pooled investment fund.
3. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$3,811.15. Billed at \$1,000 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000.
4. Petitioner requests authority to allow Master Trust to continue taking its annual fee according to its fee schedule. JTD
5. Attorney requests fees of \$935.00 for 5.6 hours of paralegal and attorney services at \$100/250 per hour respectively. Itemized [acct, 0823/17, LFpg31].
6. Current bond is \$207,000. Petitioner requests bond increase to \$214,000. However, suggest bond increase to \$227,000 per calculation of cash on hand, annual income described in Schedule B1, plus recovery. JTD
7. Petitioner requests amendment to Trust to include Petitioner proposes a revised Master Trust of California Agreement to include reimbursement of any benefits paid by any other state's Medicaid program and notice to such other's state agencies to comply with Social Security regulations. JTD
8. Need Notice of Hearing and Proof of Service as to Jack Anthony, ESQ.
9. ~Proposed Order 08/23/17. Legal Research to review trust revisions.

## RECOMMENDATION

Need notice, then Court's discretion re bond. If approved, set hearing on the next accounting review for **08/29/18** (if one year) or **08/28/19** (if two years). Accounting to be filed 30 days in advance.

(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: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700690

CASE NAME: LUZ N ROBLEDO

HEARING:

Petition for PROBATE OF WILL LETTERS WITH FULL IAEA

COUNSEL:

ANNA M LEONARD (PET)...PRO/PER  
LUZ N ROBLEDO (DEC)...

#### GENERAL INFORMATION

**Continued from 10/04/17. Court orders petitioner filed a supplement explaining the difference in her name and the name of person named in the will. Petitioner to file declination of "Frank."**

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Anna Leonard, daughter

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

1. All heirs waive bond. The net estate consists of \$196,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. Will is not self-proving as there is no statement that the will was not signed under penalty and perjury of the laws of California. Declaration by Anna Leonard in lieu of proof of subscribing witness filed 09/26/17 as no witnesses can be located. JTD
3. ~Proposed Form Order: 07/10/17

#### RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **01/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (ww/lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 11/22/17      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700847

CASE NAME: NANCY LEE SEXTON AKA NANCY L. SEXTON

HEARING:

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

COUNSEL:

MARK LAROE SEXTON      (PET)...PRO/PER

NANCY LEE SEXTON      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Mark Sexton, son

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

1. Both heirs waive bond. Estimated value of assets is \$89,000, of which \$1,000 is cash and remaining is real property. The court may for good cause require that a bond be given, either before or after issuance of letters per pr. C. §8481(c). JTD
2. Need Proof of Publication.
3. ~Proposed form Order: 08/23/17

RECOMMENDATION:

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

(lh)

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

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700848

CASE NAME: BEVERLY JACOBSON

HEARING:

Spousal Property Petition hearing.

COUNSEL:

STACY JACOBSON	(PET)...PRO/PER
JASHANDA STANDIFER	(PET)...PRO/PER
BEVERLY JACOBSON	(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Stacy Jacobson (son) and Jashanda Standifer (unknown relation)

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

1. Petitioner, Stacy Jacobson (son) requests determination of decedent's property passing to surviving spouse without administration.
2. Petition also indicates Jashanda Standifer is the personal representative of Stacy Jacobsen in item #2. Court to inquire.
3. Attachment 7a indicates both parents/owners of subject real property are deceased, and indicates this petition was filed in an attempt to have title transferred to son's name.
4. Need verified supplement clarifying the following:
  - a. Decedent's date of death in item #3;
  - b. Jashanda Standifer and Kevin Roberts' relationship to decedent in item #9;
  - c. Whether a petition for probate has been filed as suggested in item #12.
5. Attachment 7 is missing real property information, including assessor's parcel number and legal description. Need verified supplement.
6. Need notice of hearing and proof of service (if required per note 3(b)).
7. ~Proposed form order: 08/23/17

RECOMMENDATION:

Need to clear notes.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 9A late add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 11/22/17 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600569

CASE NAME: MTR OF LILLIAN R FARRIS

HEARING:

Accounting Review

COUNSEL:

MARY ELLA FARRIS

(PET)...FULLERTON LEMANN SCHAEFER & DO

LILLIAN R FARRIS

(DEC)...

GENERAL INFORMATION

**Continued from 10/04/17.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to Mary Farris, executor, on 08/22/16; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. Timely filed Creditor's Claim filed by petitioner on 11/28/16 re funeral expenses does not appear to have been forwarded to the examiners for review. Need allowance or rejection form in order to preapprove.

RECOMMENDATION

Inquire status of Inventory and Appraisal and accounting.

(lc/lh)

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

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DATE: 11/22/17 TIME: 9:30 DEPT: S37P  
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CASE#: PRO PS1401080

CASE NAME: HOLLEY GRAHAM

HEARING:  
Accounting Review

COUNSEL:

JOHNE SEALS	(PET)...MITCHELL I ROTH
HOLLEY GRAHAM	(DEC)...
HUNTLEY GRAHAM	(PET)...MARK MOKTARIAN

***XREF: CONPS1200270 (Holley Graham)***

GENERAL INFORMATION

Continued from **07/27/16, 03/16/17, 05/31/17 and 08/09/17.**

Continued from **09/27/17 to file accounting. Notice to be given by Mr. Roth.**

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 will annexed issued to Johnie Seals, full authority, on 2/17/15; \$495,000 bond.
2. Partial Inventory and Appraisals filed. Need Final Inventory and Appraisal.
3. Need accounting or probate status report.

RECOMMENDATION

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

(ds/sa/lc/ww/lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIPS**

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DATE: 11/22/17      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1200088

CASE NAME: LESLEY EGAN

HEARING:

FIRST Account and Report of CHRISTINA RIEKER and Petition for allowance of fees filed.

COUNSEL:

ROBERT STACKHOUSE	(CPE/PET/TEE)...	JENNIFER M DANIEL
CHRISTINA RIEKER	(CPE/CP)...	JENNIFER M DANIEL
LESLEY EGAN	(CEP)...	
KARIN E HORSPOOL	(PET)...	KARIN E HORSPOOL
THE LESLEY EGAN SPECIAL NEEDS TRUST	(TRU)...	
CHRISTINA RIEKER	(PET)...	JENNIFER M DANIEL

**XREF: SBFSS81126** (*John Egan vs Lesley Egan*)

GENERAL INFORMATION

**Continued from 09/20/17 at request of Court for Counsel to be present. Notice given by Judicial Assistant.**

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

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

1. Accounting period 02/04/16 – 04/30/17.
2. Assets on hand \$109,941.34 of which \$67,183.49 is cash.
3. Attorney seeks fees and costs totaling \$7,117.50 for 22.5 hours at \$275 per hour, reduced from \$325. Itemized [Acct. 07/18 LFpg25-30 ]. JTD
4. Petitioner seeks a reduction of bond from \$150,000 to \$120,000. However, with annual income it appears bond is sufficient. **No bond calculation provided.**
5. Proposed order 09/07/17; however, bond calculation was not provided.

## RECOMMENDATION

Need to clarify note 4. If approved, set Accounting/Status Review for **08/15/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

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DATE: 11/22/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600048

CASE NAME: DOUGLAS HAROLD EATON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

WILLIAM R. FOLKMAR (PET)...PRO/PER  
DOUGLAS HAROLD EATON (CEE)...JAMES B CHURCH

#### GENERAL INFORMATION

William Folkmar appointed temporary Conservator on 3/9/16. Court authorized credit union to release \$5,000 to William to pay bills, caregiver, and residence. Attorney James Church appointed for proposed conservatee.

On **3/14/16**, court lifted restriction that temporary conservator not access more than \$5,000. William Folkmar is authorized to obtain statements/records from annuity but cannot accept annuity payments. Court suspended certain powers of attorney and advanced healthcare directives dated 11/11/5, 1/21/15, and 10/30/15.

Continued from **4/18/16, 6/29/16, 7/25/16.**

Continued from **10/05/16.** Return of Citation is waived by proposed conservatee's appearance this date. Further appearance by conservatee is waived.

Continued from **01/25/17.** Temporary Conservator was to provide amended order per 03/14/16 minute order. Citation issued to William Folkmar. Bench warrant may be issued.

Continued from **04/19/17** Petitioner is advised he needs approval of Court to remove conservatee from state. Court grants petitioner's request to take conservatee to Illinois.

The Court orders petitioner to file for conservatorship/guardianship there within 72 hours of returning to Illinois. They will return on 4/28/17. Petitioner is further ordered to serve a copy of Illinois petition on Mr. Church within a week of the filing. Mr. Church will file an ex parte requesting conservatee's return to California if Illinois petition not timely filed. Court recommends petitioner speak to counsel in Illinois for assistance

**Continued from 06/21/17** Conservator has not contacted Counsel as ordered. Counsel advised to contact APS in Illinois. The Court orders the conservatee, DOUGLAS HAROLD EATON, be returned to California within 24 hours. The Court orders letters of temporary conservatorship suspended pending further order of the court. WILLIAM R FOLKMAR is cited to appear. Should he fail to appear a bench warrant may be issued. Mr. Church to prepare order after hearing.

**Continued from 10/04/17. Bill Folkmar reported he is working on guardianship in Illinois but due to the number of issues he is juggling, the guardianship is not complete. Court advises Bill Folkmar that temporary conservatorship of Douglas Eaton was terminated due to Bill Folkmar's non-compliance with the Court. Court orders Bill Folkmar to file and serve proof of Illinois action by 11/10/17. Should proof not be filed as directed, Court will order Douglas Eaton to be returned to California within 48 hours and will notify Illinois equivalent of Adult Protective Services.**

THIS CASE IS SET FOR HEARING ON Petition for conservatorship, person and estate, by William Flokmar, cousin

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

1. Petitioner requests no bond. No attachment 1C is provided and the estimated value of the estate at Section 3e(2) is not completed. **Need** verified supplement.
2. Petitioner requests medical powers. **Need** capacity declaration.
3. Petitioner requests dementia powers (meds only).
  - a. Petitioner completed Section 1b of dementia attachment to petition but not Section 4 (both re meds). Does court wish to require clarification of dementia meds request?
  - b. **Need** dementia attachment to medical capacity declaration.
4. **Need** notice of hearing with proof of service.
5. **Need** return of citation on petitioner William Folkmar.
6. Certificate of Completion of the Conservatorship Training Class filed 04/19/17.
7. Court Investigator report filed 4/5/16.
8. Report of counsel, James Church, filed 3/11/16; supplemental report filed 01/24/17.
9. Order suspending temporary conservator of person and estate filed 06/22/17.
10. **Need proof of Illinois guardianship.**
11. ~Proposed form order and letters 3/14/16.

#### RECOMMENDATION

Inquire status of Illinois guardianship.

Need return of citation and to clear notes 1-5. If approved, set hearing for Compliance Review for **06/27/18** 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 and Inventory & Appraisal with notice. Set hearing re Accounting Review for **01/30/19**. Any accounting to be filed 30 days in advance.

(ds/sa/nb/sa/lc/lh/lc/ww/lh)

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

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DATE: 11/22/17 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600051

CASE NAME: ANDREW B HUBBARD

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JOSEPH HUBBARD

COUNSEL:

JOSEPH HUBBARD	(PCR)...MATTHEW J SINGER
MARIA MINDA HUBBARD	(PCR)...MATTHEW J SINGER
ANDREW B HUBBARD	(CEE)...PRO/PER

GENERAL INFORMATION

Continued from **01/18/17** and **04/05/17**. No appearance at last hearing. Conservators ordered to appear.

Continued from **06/07/17**. Counsel reports that Joseph Hubbard, Conservator/father, has passed away.

Continued from 08/09/17 **and 09/27/17**.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Joseph & Maria Hubbard, parents, appointed conservator of the person only on 09/14/16. **Need** amended letters as to Maria only.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 06/21/16; however, proof of service is not dated or signed. Additionally, section 5 is incomplete as to service of the order. **Need** corrected proof of service.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 1-4.

(lc/ww/lh)

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

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DATE: 11/22/17 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS8937

CASE NAME: MATTER OF CONSTANCE S HAWKINS

**SEE ALSO 15**

HEARING:

Accounting Review

COUNSEL:

CONSTANCE SUZANNE HAWKINS  
MARY HAWKINS  
KATHY ANNE IVINS  
CONSTANCE SUZANNE HAWKINS

(CPE)...DUANE P BOOTH  
(CEP)...BRYAN C. HARTNELL  
(CPE/SC/TEE)...DONNASUE ORTIZ  
(CEP)...DUANE P BOOTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re *Conservatorship* of Estate

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

1. Kathy Anne Ivins was appointed Successor Conservator of the person and estate on 01/20/06.
2. Twelfth Account Current re conservatorship approved on 11/23/15.
3. Notice of Death of Conservatee filed 05/24/17 indicates conservatee passed away on 05/01/17.
4. Need Final Accounting for pre-death and post-death accounting periods per Pr. C. §2620.

RECOMMENDATION

Inquire status.

(lh)



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

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DATE: 11/22/17 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS8937

CASE NAME: MATTER OF CONSTANCE S HAWKINS

**SEE ALSO 14**

HEARING:

Accounting Review

COUNSEL:

CONSTANCE SUZANNE HAWKINS	(CPE)...DUANE P BOOTH
MARY HAWKINS	(CEP)...BRYAN C. HARTNELL
KATHY ANNE IVINS	(CPE/SC/TEE)...DONNASUE ORTIZ
CONSTANCE SUZANNE HAWKINS	(CEP)...DUANE P BOOTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re *Trust*

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

1. Kathy Anne Ivins was appointed Successor Trustee on 01/20/06.
2. Order approving 4<sup>th</sup> Account Current of Successor Trustee entered 11/23/15.
3. Notice of Death of Conservatee filed 05/24/17 indicates conservatee passed away on 05/01/17.
4. Need Final Accounting for pre-death and post-death accounting periods per Pr. C. §2620.

RECOMMENDATION

Inquire status.

(lh)