



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 11/27/17**

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.

11/02 & 11/18 ww (11/21/17 cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 11/27/17      TIME: 8:30      DEPT: S35P  
-----

CASE#: PRO PS1600671

CASE NAME: CHARLES EDWARD CLARK

HEARING:

Accounting Review

COUNSEL:

CHARLES E HARRIS                      (PET)...FULLERTON LEMANN SCHAEFER & DO  
EDWARD CLARK                              (DEC)...  
BRYAN HARTNELL                      (TP )...HARTNELL LAW GROUP  
LIBERTY MUTUAL COMPANY  
STATE OF CA FRANCHISE TAX BOARD (PRO/PER)

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Charles Harris, step-son, on 11/28/16; full authority, \$250,000.00 bond.
2. Partial Inventory and Appraisal filed 01/27/17 indicates that it is for **all** assets. Does Court wish to deem it as the Final Inventory and Appraisal? **JTD**
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting. Court's discretion re note 2.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1600803

CASE NAME: MTR OF THOMAS FREDERICK LIEDBLAD

HEARING:  
Accounting Review

COUNSEL:  
DOUGLAS W LIEDBLAD (PET)...PRO/PER  
THOMAS FREDERICK LIEDBLAD (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Douglas Liedblad, on 09/21/16; full authority, no bond.
2. Final Inventory and Appraisal filed 01/18/17; however **need** bank statements in support of date of death balances for all accounts per Local Rule 20-908.
3. **Need** accounting or status report.

#### RECOMMENDATION

Need to clear note 2 & 3.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 11/27/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS0900844

**VACATED**

CASE NAME: DALE E CHANNELL

HEARING:

Accounting Review

COUNSEL:

KENNETH DECKER

(PET)...JOHN F WEBER

DALE E CHANNELL

(DEC)...

STATE OF CALIFORNIA FRANCHISE

(AGN)...PRO/PER

Future hearing dates: 02/06/18 First and final account and report of Kenneth Decker

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1200050

CASE NAME: ADOLPH ROBERT RIMPAU TRUST

HEARING:

FIFTH Account and Report of VERONICA LANUZA and Petition for allowance of fees filed.

COUNSEL:

|                      |                         |
|----------------------|-------------------------|
| JAMES R KOSTOFF      | (PET)...M DANIEL SAYLOR |
| ADOLPH ROBERT RIMPAU | (TRU/STE)...            |
| VERONICA LANUZA      | (PET)...M DANIEL SAYLOR |

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fifth Account Current and Report of Successor Trustee; Ratifying Acts of Successor Trustee; Allowing Trustee's Fees and Attorney's Fees ; and Decreasing Bond.

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

1. Accounting period: 07/01/16 to 06/30/17.
2. Assets on hand \$456,255.43 consisting of \$34,553.20 in cash and the balance in securities and real property.
3. Petitioner requests fees of \$4,186.00 billed at \$115/hour for a total of 36.40 hours. Itemized [LF pgs.17-22].
4. Attorney requests fees of \$4,357.50 billed for attorney at \$375/hour and paralegal at \$135/hour for a total of 24.1 hours. Generally Itemized [LF pgs. 23-24].
5. Current bond is \$1,135,000.00. Petitioner requests bond be decreased by \$50,000 for a total new bond of \$1,085,000.00. Appears sufficient. JTD.
6. Notice given.
7. ~Proposed order: 08/23/17

RECOMMENDATION:

Court's discretion. If approved, set hearing re Accounting Review for **12/03/18**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400376

CASE NAME: THE LUCILLE SABBATH GRIFFIN REVOCABLE TRUST

HEARING:

PETITION FOR APPROVAL OF THE THIRD Account and Report of YOLANDA QUAM and Petition for allowance of fees filed.

COUNSEL:

YOLANDA QUAM (PET/TEE)...MATTHEW E SHEASBY  
THE LUCILLE SABBATH GRIFFIN TRUST (TRU)...

**XREF CONPS1500124 LUCILLE SABBATH GRIFFIN**

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by Trustee, Yolanda Quam ["Petitioner"].

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

1. Second Account approved on 10/12/16. **Need** Order after Hearing.
2. Accounting period covers 02/01/16 to 02/28/17.
3. Assets on Hand \$626,848.93 consisting of \$326,848.93 in cash and \$300,000 in real property located in Corona, CA non-cash assets. Unable to confirm until receipt of order approving second account.
4. Current bond of \$725,000. Suggest bond increase by \$17,000 for a total bond of \$742,000 (includes recovery). JTD.
5. Petitioner requests compensation of \$1,940.00. Billed at \$40/hour for 48.5 hours' time. Itemized [see decl. filed 08/17/17]. JTD.
6. Attorney requests fees and costs of \$12,576.00 to be paid directly from the Trust. Billed at \$300/hour for attorney 48 hours' attorney time. Itemized [see decl. filed 08/17/17]. JTD.
7. Disbursements – Schedule C [LF, p25] reflects payment to Stardust Timeshare Maintenance. **Need** further clarification via verified supplement.
8. During the accounting period, petitioner paid to Allen Wideman for "mom care." **Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).

9. **Need** Notice of Hearing with proof of service. Proof of Service filed 11/17/17 does not include Notice of Hearing. JTD
10. Proposed Order 08/17/17 reflect incorrect hearing date and does not address bond.

RECOMMENDATION:

Need to clear notes 1, 7-9 then Court's discretion re: bond and fees. If approved, set next hearing for Accounting Review on **04/17/18**.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500644  
CASE NAME: MTR OF IRWIN MATSUMOTO TRUST

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

COUNSEL:

INLAND COUNTIES REG CNTR (PET)...LAYNE A BARTHOLOMEW  
IRWIN MATSUMOTO (TRU)...

THIS CASE IS SET FOR HEARING ON Third Account and Report of IRC and Petition for  
Approval of Trustee's Fees and for Attorney's Fees; Ratification and Approval of Payment  
of Trustee Fees; Request for Decrease of Bond, and Petition to Amend Trust to Include  
"Medicaid" Language

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

1. Accounting covers period: 06/01/16 – 06/30/17.
2. Assets on hand: \$152,247.94; cash.
3. Current bond is \$177,777.00. Petitioner requests that bond be decreased to  
\$168,000.00. Appears adequate. JTD
4. Petitioner requests approval of trustee fees already taken by Master Trust of  
California in the amount of \$3,158.19. Billed at \$1,250 for the first \$50,000; 2% of  
the next \$250,000; 1.65% of the next \$450,000, 1.50% of the next \$250,000 and  
1.25% on the balance over \$1,000,000. Services generally itemized. JTD
5. Petitioner requests authority to allow Master Trust to continue taking its annual fee  
according to its 2017 fee schedule in quarterly payments. JTD
6. Attorney requests fees of \$955 for 4.3 hours of paralegal and 2.1 hours of attorney  
services at \$100/250 per hour. Itemized [LF pgs. 42-43].
7. Petitioner requests to amend the trust to add provisions regarding "Medicaid"  
language as a new Article Nine of the trust. JTD. [LF pgs. 9-10]
8. Notice given.
9. ~Proposed Order: 08/21/17

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **12/03/18** (if  
one year) or **12/02/19** (if two years). Accounting to be filed 30 days in advance.

(ww)



Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

**SEE ALSO 6**

HEARING:

Petition for TO COMPEL ACCOUNTING FOR SUSPENSION OF TRUSTEE  
POWERS

COUNSEL:

|                                |                                |
|--------------------------------|--------------------------------|
| JASON LARSON                   | (PET)...MICHAEL B HICKEN       |
| MATTHEW LARSON                 | (MIN)...                       |
| JOSHUA LARSON                  | (MIN)...                       |
| THE GEORGE NEWMAN LIVING TRUST | (TRU)...                       |
| CHRISTINE LARSON               | (PET/RES)...LAYNE A BARTHOLOME |
| CHRISTINE LARSON, TRUSTEE      |                                |

Currently under review by Legal Research.  
(LR)

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

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

**SEE ALSO 5**

HEARING:

FIRST Account and Report of CHRISTINE LARSON and Petition for allowance of fees filed.

COUNSEL:

|                                |                                |
|--------------------------------|--------------------------------|
| JASON LARSON                   | (PET)...MICHAEL B HICKEN       |
| MATTHEW LARSON                 | (MIN)...                       |
| JOSHUA LARSON                  | (MIN)...                       |
| THE GEORGE NEWMAN LIVING TRUST | (TRU)...                       |
| CHRISTINE LARSON               | (PET/RES)...LAYNE A BARTHOLOME |
| CHRISTINE LARSON, TRUSTEE      |                                |

GENERAL INFORMATION:

Continued from **07/26/16, 10/11/16, 01/17/17 and 04/04/17** at request of counsel.  
Guardian ad litem represents parts of the funds are being recovered.  
Continued from **06/06/17 and 08/08/17**. Counsels are working on a settlement to be filed.  
**Continued from 10/10/17.**

THIS CASE IS SET FOR HEARING ON First Account Current by Successor Trustee, Christine Larson; Response and Objection to Petition for Removal of Trustee and Appointment of Successor Trustee for Redress of Breach of Trust including Punitive Damages.

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

1. Accounting period 06/30/11 to 02/29/16 (5.8 years).
2. Assets on Hand \$685,692.39 consisting of \$495,181.67 in cash and \$190,510.72 in equities, securities and bonds
3. Disbursements – Schedule C11 reflects multiple loans to Petitioner and payments from the trust in order to purportedly make ends meet during the dissolution of marriage proceedings and to enable Petitioner to settle demands for cash offsets by Jason Larson in the dissolution of marriage settlement [LF, p. 110]. Petitioner alleges she was advised that the sections titled “Trustee Self-Dealing – Loan, Buy, Sell” and Trustee and Executor Transactions – Self Dealing Permitted” and the section titled “Loan” of the trust allowed her to loan money to herself from the trust

for any purpose and that she did not have to provide any security for the loans.  
Copy of trust affixed to petition filed 12/09/15.

4. Schedule I1 [LF, p. 99-101] reflects funds to be reimbursed to Trust by Trustee totaling \$729,280.90 less offset of \$27,000 for trustee fees pursuant to trust provisions for a total sum of \$695,546.43 to be reimbursed .
5. Notice given.
6. **Need** settlement.
7. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion.

(nb/lh/nb/ww)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1601125

CASE NAME: MTR OF FAYE ESQUIVEL

HEARING:

Hearing Re: Petition for Letters of Administration

COUNSEL:

|                           |                        |
|---------------------------|------------------------|
| MARIA DORADO              | (PET)...JOHN R SETLICH |
| FAYE ESQUIVEL             | (DEC)...               |
| PAUL WILKINS              | (TP )...PRO/PER        |
| APPROVED INHERITANCE CASH | (PRO/PER)              |

GENERAL INFORMATION

Continued from **01/17/17**. Non-appearance by counsel and petitioner. OSC re: dismissal set for 03/28/17

Hearing on **03/28/17** re OSC. No appearance. Case dismissed.

Hearing on **08/07/17** re: motion to set aside dismissal granted. Dismissal reversed and petition placed back on calendar for 10/23/17.

**Continued from 10/23/17.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Maria Dorado, Daughter

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

1. No bond requested. **Need** mandatory bond waiver form DE-142 by Corina Esquivel. Net value of estate is \$227,795.23 with \$66,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(c).
2. **Need** Notice of Petition to Administer Estate.
3. **Need** Proof of Publication.
4. Waiver of notice and all future notices signed by heir Corina Esquivel as Attachment 3d(3) to petition (LF, pg. 9).
5. Section 8 of the petition fails to list all persons' relationships to the decedent. Court may wish to clarify on record or in alternative, need verified supplement as to Corina Esquivel.
6. ~Proposed Form Order: 11/10/16.

## RECOMMENDATION

Need to clear notes 1-3. Court's discretion re note 3 and bond. If approved, set Accounting/Status Review for **02/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

**SEE ALSO 9 10**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX  
PECOLIA MCFARLAND (DEC)...  
TONYA MICHAELS (PET)...PRO/PER  
MICHAEL MICHAELS (OBJ/PET)...MANSOUR LAW GROUP  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

GENERAL INFORMATION

**Letters of Special Administration issued to Penisha McFarland, daughter, on 01/31/17, no bond.**

Continued from **03/21/17**. Michael Michaels to retain counsel and file a competing petition. Court amends powers of the Special Administrator and removes the right to evict and removes the power to evict or access bank accounts or sell real property. Bond required \$50,000. Court notifies the Public Administrator of possible appointment. No bond or competing petition filed as of the review of this matter.

Continued from **06/13/17** to be heard with competing petition.

**Continued from 09/18/17 for matter to be heard by Judge Welch. Deadline of 11/03/17 for Counsel Maddux to file/serve supplement.**

THIS CASE IS SET FOR HEARING ON

- Petition 1 Petition for Letters of Administration with full IAEA by ***Penisha McFarland, daughter***
- Petition 2 Petition for Letters of Administration with full IAEA by ***Tonya and Michael Michaels, niece and nephew-in-law***

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

**Petitioner 1 Penisha McFarland, daughter**

1. Bond waived by Penisha McFarland (sole heir); Court has discretion to require bond per Pr. C. §8481(b). – **JTD**. General petition shows an estimated estate value of \$303,072, whereas Special petition alleges value unknown. Estate assets include

- real property. **NOTE: Order entered 01/31/17 does not include bond. However, on 03/21/17 court ordered \$50,000 bond as Special Administrator; bond filed.**
2. Final Inventory and Appraisal filed 10/10/17 showing all assets are real properties valued at a total of \$785,000.00
  3. **Objections filed 03/13/17 by Michael Michaels.**
  4. **Reply to Objection filed 04/03/17 by Penisha McFarland.**
  5. **Objections filed 06/06/17 by Tonya Michaels.**
  6. **Objections and opposition to Penisha's objections (Reply) filed 09/11/17; however, need verification per Pr.C. § 1021. JTD.**
  7. **Objections to Creditor's Claims and Final Appraisal by Tonya and Michael Michaels filed 11/15/17; however, need verification and proof of service.**
  8. ~Proposed form Order: 04/03/17

**Petitioner 2 Tonya and Michael Michaels, niece and nephew-in-law**

9. Petitioner requests bond of \$50,000. Estate value is currently unknown and will be determined.
10. Section 5a2 is incomplete as to spouse's status. Need verified supplement. **Supp (09/15/17) does not indicate whether no spouse due to divorce, never married or if spouse is deceased. Need amended verified supplement. Supp (11/15/17) has the same issue as above. Court may wish to clarify if decedent was ever married or if spouse is deceased. JTD**
11. Notice to Petition to Administer Estate and proof of service filed 06/08/17; however, section 10 is missing the names of the petitioners. Need corrected notice. **Supp (11/15/17) indicates that their names should be in section 10. (See note 12). JTD**
12. Notice of Petition to Administer Estate and proof of service filed on 11/15/17; however, section 3 is missing petitioners' names and section 10 indicates that address and telephone of petitioners are "same as above" when the party information in the caption heading does not publish on the proof of publication. **Need** completed notice.
13. **Objection by Penisha McFarland, special administrator, filed on 06/29/17; however, need verification by Penisha and proper proof of service of objections.**
14. ~Proposed Form Order: 06/06/17

**RECOMMENDATION**

Matter is contested. Need to clear notes 6, 7, 12 & 13 then Court's discretion re bond and remaining notes. If approved, set Accounting/Status Review for **02/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/nb/lh/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 9

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

**SEE ALSO 8 10**

HEARING:

Petition for DETERMINE TITLE TO REAL PROPERTY; OR IN THE  
ALTERNATIVE FOR UNJUST ENRICHMENT

COUNSEL:

PENISHA MCFARLAND (PET)...MICHAEL C MADDUX  
PECOLIA MCFARLAND (DEC)...  
TONYA MICHAELS (PET)...PRO/PER  
MICHAEL MICHAELS (OBJ/PET)...MANSOUR LAW GROUP  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)

Currently under review by Legal Research.  
(LR)

Notice:

Need return of served Summons per Pr. C. § 851 as to Respondent, Penisha McFarland.

(ww)



Superior Court of Calif, County of San Bernardino

Page: 10

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700026

CASE NAME: MTR OF PECOLIA MCFARLAND

**SEE ALSO 8 9**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

|   |                               |
|---|-------------------------------|
| PENISHA MCFARLAND                       | (PET)...MICHAEL C MADDUX      |
| PECOLIA MCFARLAND                       | (DEC)...                      |
| TONYA MICHAELS                          | (PET)...PRO/PER               |
| MICHAEL MICHAELS                        | (OBJ/PET)...MANSOUR LAW GROUP |
| STATE OF CALIFORNIA FRANCHISE TAX BOARD | (PRO/PER)                     |

See notes on matter 8.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 11

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700415

CASE NAME: EUNA S HARRIS LIVING TRUST

HEARING:

Petition for INSTRUCTIONS RE OWNERSHIP OF TRUST ASSET

COUNSEL:

BEVERLY PLUMMER (PET)...SAMUEL CROWE & ASSOCIATES  
EUNA S HARRIS LIVING TRUST (TRU)...

Currently under review by Legal Research

LR

Notice:

Continued matter- notice not re-reviewed.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 12

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700670

CASE NAME: MTR OF ESTABLISHING CHRISTOPHER LOPEZ SNT

HEARING:

Petition for ORDER ESTABLISHING SPECIAL NEEDS TRUST; & FOR ATTYS  
FEES

COUNSEL:

CHRISTOPHER LOPEZ (PET)...MARTHA JO PATTERSON

Currently under review by Legal Research

LR

Notice:

Continued matter- Notice not re-reviewed.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 11/27/17      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700686

CASE NAME: MTR OF NATALIA GUERRA

HEARING:

Hearing Re: Motion to Consolidate/ETC

COUNSEL:

ANGELICA GUERRA

(PET)...E. MARIE HENNING

NATALIA GUERRA

(DEC)...

No Notes- JTD.

(ww)

Future hearing dates: 11/05/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

-----  
DATE: 11/27/17      TIME: 9:30      DEPT: S36P  
-----

CASE#: CON PS1700385

***VACATED AND RE-SET IN S37 FOR ALL PURPOSES.***

CASE NAME: MTR OF DEBORAH LYNN SPECK FERDIE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MICHAEL FERDIE

DEBORAH LYNN SPECK FERDIE

(CPE)...BRIAN C MILES

(CEP)...MITCHELL I ROTH

See page 21A in Department S37.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 15

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: PRO PS1500139

CASE NAME: Linda D. Ontiveros

**SEE ALSO 16**

HEARING:

Hearing Re: STATUS ON PTN FOR C'SHIP ON LESLIE ONTIVEROS

COUNSEL:

|                    |                                       |
|--------------------|---------------------------------------|
| LESLIE ONTIVEROS   | (PET)...JOSEPHINE A. RICH             |
| LINDA D. ONTIVEROS | (DEC)...                              |
| LISA HOUCK         | (ADM)...EDWARD B FISCHER & ASSOCIATES |

No notes – Status.

No conservatorship petition filed for Leslie Ontiveros as ordered by Court at 08/22/17 hearing.

(ww)

Future Hearing: 8/28/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 16

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: PRO PS1500139

CASE NAME: Linda D. Ontiveros

**SEE ALSO 15**

HEARING:

Motion Re: TO BE RELIEVED 000100 Filed by 0001 \*\*\*

COUNSEL:

|                    |          |                               |
|--------------------|----------|-------------------------------|
| LESLIE ONTIVEROS   | (PET)... | JOSEPHINE A. RICH             |
| LINDA D. ONTIVEROS | (DEC)... |                               |
| LISA HOUCK         | (ADM)... | EDWARD B FISCHER & ASSOCIATES |

GENERAL INFORMATION

Continued from **08/22/17** at request of parties.

**Continued from 10/02/17 to be heard with status on petition.**

THIS CASE IS SET FOR HEARING ON Motion to be Relieved as Counsel by Josephine A. Rich ["Petitioner"].

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

1. Petitioner, Josephine A. Rich, makes this motion to be relieved as counsel under Code of Civil Procedure section 284(2) instead of filing consent under section 284(1) and alleges a breakdown in communication between Attorney and Ms. Leslie Ontiveros, has made it unreasonably difficult for the Attorney to carry out the representation of Ms. Leslie Ontiveros effectively. Also, Ms. Ontiveros is in breach of the engagement letter in this matter in that Ms. Leslie Ontiveros is unwilling to sign a substitution of attorney at this time.
2. ~Proposed Form Order 05/18/17.

RECOMMENDATION:

Court's discretion.

(nb/ww)

Future Hearing: 8/28/18: Hearing Re: Final Discharge

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S36P  
-----

CASE#: PRO PS1500385

CASE NAME: Andrea Lynn Ontiveros

HEARING:

Motion Re: TO BE RELIEVED Filed by Petitioner LESLIE ONTIVEROS

COUNSEL:

|                       |                                  |
|-----------------------|----------------------------------|
| LESLIE ONTIVEROS      | (PET)...JOSEPHINE A. RICH        |
| ANDREA LYNN ONTIVEROS | (DEC)...                         |
| SANDY TURNER          | (PET)...                         |
| LISA HOUCK            | (ADM)...EDWARD B FISCHER & ASSOC |

***XREF: PROPS1601147 (LESLIE ONTIVEROS)***

GENERAL INFORMATION

Continued from **08/22/17** at request of parties.

**Continued from 10/02/17 to be heard with other motion set same date.**

THIS CASE SET FOR HEARING ON Motion to be Relieved as counsel by Petitioner, Josephine Rich

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

1. Petitioner, Josephine Rich, seeks to be removed as counsel for Leslie Ontiveros, heir. Petitioner alleges she accepted this case as a pro bono case. Ms. Ontiveros has informed petitioner that attorney Sandy Turner (GAL) is her attorney and does not want petitioner to represent her anymore; however, she is unwilling to sign a substitution of attorney at this time.
2. ~Proposed Form Order: 05/18/17.

RECOMMENDATION

Court's discretion.

(cs/nb/ww)



Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO DS1000649

CASE NAME: PEGGY JEAN SMITH BADER

HEARING: THIRD Account and Report of JAMES M BADER and Petition for allowance of fees filed.

COUNSEL:

JAMES M BADER (PET)...JAMES BADER  
PEGGY JEAN SMITH BADER (DEC)...

GENERAL INFORMATION

Continued from **04/27/17, 06/26/17 and 09/18/17.**

THIS CASE SET FOR HEARING ON 3<sup>rd</sup> SNT Account of Mark Bader by James Bader, brother.

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

1. Accounting period 08/20/14 – 10/19/16.
2. Assets on hand \$99,097.42; cash. \$22,145.25 spent down from previous accounting.
3. Petitioner waives fees.
4. Accounting indicates there are no receipts, interest or gains.
5. Report is not verified. Need verification per Pr.C. § 1021.
6. Need notice of hearing with proof of service, including notice to the three state agencies per Pr.C. §§ 3604(a)(2), 3602(f), and 3611(c); Department of Health Services, Director of State Hospitals and Director of Developmental Services as it does not appear they were noticed at the creation of the SNT; only the probate for Peggy.
7. Petitioner requests accounting be heard every 2 years.
8. ~Proposed order submitted 10/12/17

RECOMMENDATION

Need to clear notes 6-7. If approved, set Accounting/Status Review for 12/03/18 (if one year) or 12/02/19 (if two years). Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200479

CASE NAME: CHARLES STERLING RAY

**SEE ALSO 3**

HEARING: First and final Account and Report of SHERYL HART-RAY and  
Petition for allowance of fees filed.

COUNSEL:

SHERYL HART-RAY (PET)...DANIEL C SEVER  
CHARLES STERLING RAY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account; Petition for allowance of  
Fees; and for Final Distribution, by Sheryl Hart-Ray, spouse

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

1. Accounting period 02/05/11 to 07/31/17.
2. Assets on Hand \$2,450.00 consisting of cash.
3. Petitioner is sole heir and waives accounting.
4. Inventory and Appraisal filed 08/24/17; however, need account statements verifying the balance of cash on hand per Local Rule 20-908.
5. No bank statement provided per local rule 20-908. Petitioner indicates she is sole beneficiary and not all available cash was invested in interest bearing accounts.  
JTD
6. Petitioner waives statutory and extra ordinary compensation.
7. Attorney requests statutory compensation of \$780.00 for services rendered.  
Calculated.
8. Personal representative does not seek any reserve.
- 9. Notice filed.**
10. Proposed Order submitted: 08/24/17.

RECOMMENDATION:

Need to clear notes 4, then Court's discretion. If approved, set hearing on the filing of  
receipts and final discharge for **12/03/18**.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1200479

CASE NAME: CHARLES STERLING RAY

**SEE ALSO 2**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

SHERYL HART-RAY (PET)...DANIEL C SEVER  
CHARLES STERLING RAY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Spousal Property Petition by Sheryl Hart-Ray

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

1. Petitioner, Sheryl/surviving spouse, seeks court to confirm her half of community property and determine that community property, specifically personal injury settlement, left by decedent passes to petitioner without administration.
2. Petitioner and decedent were married on 04/28/98. Decedent contracted mesothelioma which attributed to his death.
3. ~Proposed Form Order: 06/15/17.

RECOMMENDATION

Court's discretion

(lc/cs)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1300097

CASE NAME: PAUL GERALD STIEGELMAR III

HEARING:  
Accounting Review

COUNSEL:

LESLIE F STIEGELMAR (PET)...PRO/PER  
PAUL GERALD STIEGELMAR III (MIN)...  
ROBIN SHEA (PET/TEE)...DENNIS M SANDOVAL  
PAUL GERALD STIEGELMAR III, S.N. TRUST (TRU)...  
CHRISTIE DAVIDSON (PET)...KARIN E HORSPOOL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review of Successor Trustee Christie Davison, PPF

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

1. Third and Current Account approved on 01/30/17; Fourth Account now due starting with 10/01/16.
2. No accounting or waiver of account. Need same.

RECOMMENDATION:  
Inquire status of accounting.

(cs)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500487

CASE NAME: LUNA 1994 FAMILY TRUST

HEARING:

Hearing Re: ACCOUNTING REVIEW (AS TO MR. BLICKENSTAFF)

COUNSEL:

|                        |                              |
|------------------------|------------------------------|
| LUNA 1994 FAMILY TRUST | (TRU)...                     |
| STEVIE ANDRADE         | (PET)...DIANE E ROBBINS      |
| CHRISTINE KOTULA       | (PET)...JOSEPH M. MONA       |
| TINA ROSCO             | (PET/TEE)...JOSEPH M. MONA   |
| LINDA CALLAWAY         | (PET)...JOANN JACKSON KALAMA |
| GWENDOLYN M. ANDRADE   | (PRO/PER)                    |
| SURETEC INSURANCE CO   | (PRO/PER)                    |

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Accounting Review of Trust by Kenneth Blickenstaff, PPF

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

1. Former trustee, Linda Callaway's Final Account and Report approved on 08/01/17 which covered period of 10/01/16 to 02/28/17
2. Kenneth Blickenstaff, PPF, was appointed as successor trustee on 02/06/17, bond \$457,000.00.
3. This accounting appears to be premature. JTD

RECOMMENDATION:

Court's discretion. Suggest to set accounting on 05/07/18.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 6

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1500879

CASE NAME: William Gordon Rosenberg

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report  
of THOMAS J. RICKER and Petition for allowance of fees filed.

COUNSEL:

THOMAS J. RICKER (PET)...PRO/PER  
WILLIAM GORDON ROSENBERG (DEC)...

GENERAL INFORMATION:

**Continued from 09/18/17.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Executor, Thomas J. Ricker ["Petitioner"-brother-in-law].

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

1. All beneficiaries waive accounting.
2. Assets on Hand: \$3,475 in cash.
3. Inventory and Appraisal received 02/07/17 has an incomplete caption. **Supp. (11/03/17) indicates that the Inventory and Appraisal previously filed should have the "Final" box marked. JTD**
4. Petitioner waives statutory compensation.
5. Petitioner requests authority to withhold \$3,475.00 as a reserve for closing costs. **JTD**
6. ~Proposed Order: 11/03/17

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**02/04/19.**

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1501059

CASE NAME: MTR OF BILLIE V JARVIS

HEARING:  
Accounting Review

COUNSEL:

|                         |                                  |
|-------------------------|----------------------------------|
| PETER VAN BUSKIRK       | (PET)...PRO/PER                  |
| BILLIE V JARVIS         | (DEC)...                         |
| CHRISTIE DAVIDSON       | (SPA/TEE)... HORSPOOL & HORSPOOL |
| KELLY ANN JARVIS BUTLER | (JOHN W SHORT)                   |

***XREF: CIVDS1611522 VAN BUSKIRK -V- CHRISTIE DAVIDSON***

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Special** Administration issued to Christie Davidson on 01/22/16; no authority, \$120,000 bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/cs)

Future Hearing: 2/02/18: Petition for Appointment of Successor Trustee

Superior Court of Calif, County of San Bernardino

Page: 8

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600298

CASE NAME: MTR OF MIATTA NATALIE O MASSAQUOI

HEARING:  
Accounting Review

COUNSEL:

GIFTY FOWLER (PET)...HOWARD R HAWKINS  
MIATTA NATALIE O MASSAQUOI (DEC)...  
COURTENAY VIVIAN ROGERS-WRIGHT (PET)...HOWARD R HAWKINS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Courtney Rogers-Wright, friend, on 11/22/16, full authority, \$75,000 bond.
2. **Need** Final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status  
(cs)



Superior Court of Calif, County of San Bernardino

Page: 9

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600748

CASE NAME: MTR OF BRADLEY H HANSSON

HEARING:  
Accounting Review

COUNSEL:

ASHLEY MEYERS (PET)...ASHLEY MEYERS  
CHERISE HANSSON (PET)...ASHLEY MEYERS  
BRADLEY H HANSSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Ashley Meyers and Cherise Hansson, daughters, on 09/19/16, full authority, no bond.
2. **Need** Final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status  
(cs)

Superior Court of Calif, County of San Bernardino

Page: 10

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600769

CASE NAME: MTR OF JOAN C KILBRIDE

HEARING:

FIRST AND FINAL Account and Report of MICHAEL D FOWLER and  
Petition for allowance of fees filed.

COUNSEL:

MICHAEL D FOWLER (PET)...ELISABETH KEMPE-OLINGER  
JOAN C KILBRIDE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by  
Michael Fowler, son/executor

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

1. Accounting period: 07/03/16-07/20/17
2. Assets on Hand: 259,580.65
3. Petitioner and Attorney request statutory fees of \$9,022.34 each. Calculated.
4. Attorney request extraordinary fees of \$2,500. Itemized. **JTD**
5. Petitioner requests to reserve \$2,000 for taxes and closing expenses. **JTD**
6. **Supplement filed 11/17/17 re corrected distribution amounts.**
7. Proposed Order: 11/17/17.

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge  
for **02/04/19**.

(ww)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1600987

CASE NAME: MTR OF THOMAS BACHMAN IRREVOCABLE TRUST

HEARING: FIRST AND FINAL Account and Report of NORTHSIDE BANK & TRUST  
CO INC and Petition for allowance of fees filed.

COUNSEL:

|                                  |                        |
|----------------------------------|------------------------|
| NORTHSIDE BANK & TRUST CO        | (PET)...KEVIN URBATSCH |
| THOMAS BACHMAN IRREVOCABLE TRUST | (TRU)...               |
| COMERICA BANK & TRUST, NA        | (STE)...PRO/PER        |

GENERAL INFORMATION:

Sole Beneficiary of the trust is Thomas Bachman (17 years old – date of majority is 08/24/17). Guardian ad litem is beneficiary's father, Steven Bachman.  
Continued from **04/24/17** at request of counsel. Notice to be given by Mr. Urbatsch.  
**Continued from 07/10/17 Court orders Comerica Bank & Trust to transfer this case to Los Angeles County. Court waives all of the County of San Bernardino's outgoing transfer fees be waived. Court also waives any and all incoming transfer fees required by the County of Los Angeles. Court approves the reduced attorney fee's o\$5,515.14. First And Final accounting approved/granted. Hearing continued to confirm case has been transferred to Los Angeles.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Current Trustee, Northside Bank & Trust Co. Inc.

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

1. First And Final accounting of North Side Bank & Trust Co., Inc (who resigned as trustee) was approved/granted on 07/10/17.
2. Comerica Bank & Trust, N.A. was appointed Successor Trustee. Order Approving Resignation of Trustee and Appointing Successor Trustee entered 03/24/17.
3. Court ordered Comerica Bank and Trust to transfer case to Los Angeles County. Matter was continued to confirm case has been transferred.
4. **Need** status of transfer to Los Angeles County.

RECOMMENDATION:

Inquire status

(nb/cs)

Future Hearing: 2/26/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 12

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700634

CASE NAME: MTR OF ELEANOR RAE NEWCOMER  
HEARING: Spousal Property Petition hearing.

COUNSEL:

TERRA HAGEL (PET)...BLAKE D THOMPSON  
ELEANOR RAE NEWCOMER (DEC)...

***XREF: PROPS1700089 (Richard A Newcomer)  
CCP section 170.6 Affidavit filed as to Judge Cynthia Ludvigsen.***

GENERAL INFORMATION:

Decedent passed away on 04/29/07.

**Continued from 10/16/17 to clear probate notes.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Personal Representative in related case, Terra Hagel ["Petitioner"].

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

1. Petitioner requests determination of property passing to the surviving spouse as community property. Specifically, real property located at Chino, CA, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were the parties married? How was the property interest acquired – with community funds, etc? **Supp. filed 11/09/17 indicates decedent and spouse were married on 05/16/93 and purchased said property during the marriage on or about 08/94. Despite the vesting of the property as tenants in common as to Richard and Eleanor, subject property is entirely community property and any interest Eleanor maintained therein at date of death passed to her husband, Richard as community property though interstate succession.**
2. **Need proof of service of First Supplement to the spousal property petition.**
3. Petitioner alleges the title vesting on said improved real property is held as "Tenants in Common" and claims Decedent's interest in the property passes to Richard A Newcomer, who died on 12/21/16, in the related case. **Copy of Grant Deed recorded 08/05/94 with vesting as "joint tenants filed. [Supp. filed 11/09/17, LF, p. 7] JTD.**

4. Petitioner states the subject property has been sold in the related case and during escrow, the vesting title was determined to be problematic and requests this Court determine ownership so that the sale can move forward.
5. **Notice filed 08/03/17 does not include decedent's son, Walter Ericson. Need proper service.**
6. **Notice of hearing and proof of service filed 11/09/17 as to spousal property petition includes Connie Erickson; with 3 different addresses; however, addresses are different from that of daughter Connie Ericson, listed on petition. Court to inquire.**
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need clear notes 2, 5, and 6, then Court's discretion.

(nb/cs)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700638

CASE NAME: MTR OF HOWARD LEE WHITEHEAD

HEARING: Petition for PROBATE OF WILL & FOR LTRS OF ADMINISTRATION W/  
WILL ANNEXED W/FULL IAEA

COUNSEL:

MARGARITA GAYO (PET)...LENITA A SKORETZ  
HOWARD LEE WHITEHEAD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Margarita Gayo, unknown relation

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

1. Petitioner requests bond of \$20,000 and that sales of real property be placed in a blocked account. Net value of the estate consists of \$514,000 in real property. Court may wish to require bond of \$514,000. JTD
2. Petitioner indicated that named executors have not acted and that the estate needs to be probated. Declination by Pearlil Matheney filed 10/11/17 and Boni Burns filed 11/15/17.
3. ~Proposed Form Order: 06/30/17

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **02/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(ww/cs)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700857

CASE NAME: MTR CARLOS ROMERO

HEARING:

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

COUNSEL:

OLGA ROMERO (PET)...PRO/PER  
CARLOS ROMERO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Olga Romero, spouse

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

1. All heirs waive bond. The court may for good cause require that a bond be given,  
either before or after issuance of letters. (Prob. Code §8481(b))
2. Section 3 (d) of petition re value of estate is incomplete. Need verified supplement  
indicating estimated value of the personal and real property of the estate.
3. Section 8 of petition is missing the alleged child(ren) of decedent. Need verified  
supplement indicating the name, age, and address of each.
4. Need Notice to Petition to Administer Estate and proof of service.
5. Need proof of publication.
6. ~Proposed Form Order: 08/28/17

RECOMMENDATION

Need to clear notes 2 - 5. Court's discretion re bond. If approved, set Accounting/Status  
Review for **02/04/19**. Any accounting to be filed 30 days in advance local rule 20-901.  
Note requirements of local rule 20-908.

(cs)

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: SPR SS06389

CASE NAME: EST OF MARY LOUISE TURNER

**SEE ALSO 16**

HEARING:

Hearing re Final Discharge

COUNSEL:

RUTH L HENRICKS (PET)...HARTNELL LAW GROUP  
MARY LOUISE TURNER (DEC)...  
STATE OF CALIF FRANCHISE TAX BOARD (TP )...

GENERAL INFORMATION:

Continued many times **since 6/16/08**.

Continued from **5/14/15** Law Firm of Bryan Hartnell is ordered to prepare and submit a written status report by the next hearing as to why this estate has not closed after 7 years.

Continued from **8/19/15** Counsel has failed to file a status report as ordered. Court sets matter for a hearing regarding sanctions pursuant to Code of Civil Procedure 177.5 for failure to comply with court order.

Continued from **09/30/15** at request of counsel to be heard with status report.

**Continued from 11/17/15, 10/04/16, 03/21/17 and 05/30/17 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. Final accounting approved 6/11/07.
2. Need receipts of distribution.
3. Need Ex-parte petition/order for final discharge.
4. Creditor Claim filed 2/25/08 by the Franchise Tax Board. Court may wish to inquire the status of this claim and receipt if applicable. **Supp. (09/29/15) alleges the FTB claim was not timely filed; disputed; and has since been determined no monies are owed to the FTB.**
5. Status re final discharge filed 11/6/08. Petitioner indicates that an ancillary administration was commenced in New Mexico. Court may wish to inquire status. **Supp. (09/29/15) alleges the New Mexico ancillary probate administration has not been settled. Question how this case can be closed? Need verified supplement.**



**RECOMMENDATION:**

**Need to clear notes.**

(kra/gls/kra/cbr/tax/cbr/kra//vet/lh/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 16

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

-----  
DATE: 11/27/17 TIME: 8:30 DEPT: S37P  
-----

CASE#: SPR SS06389

CASE NAME: EST OF MARY LOUISE TURNER

**SEE ALSO 15**

HEARING:

Probate status report filed.

COUNSEL:

RUTH L HENRICKS (PET)...HARTNELL LAW GROUP  
MARY LOUISE TURNER (DEC)...  
STATE OF CALIF FRANCHISE TAX BOARD (TP )...

GENERAL INFORMATION:

**Continued from 05/30/17 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Ruth L. Hendricks.

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 there are pending Unclaimed Property Claims in the name of Decedent's predeceased spouse, Paul E. Turner, which are assets belonging to the Decedent's estate. Petitioner states that until these claims have been resolved, this matter needs to remain open. In addition, petition indicates the New Mexico ancillary probate administration has not been settled.
2. Petitioner requests an additional 12 months to close the estate.
3. ~Proposed Order 03/21/17 indicates notice of hearing has been dispensed with.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **12/03/18**

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 17

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

-----  
DATE: 11/27/17 TIME: 8:35 DEPT: S37P  
-----

CASE#: PRO PS1700849

CASE NAME: MARY E SHEDDEN FAMILY TRUST DATED 9/21/1995

HEARING:

Petition for TO DECLARE TRUST INVALID FOR UNDUE INFLUENCE & LACK  
OF CAPACITY

COUNSEL:

SCOTT MCMILLAN (PET)...KLEIN,DENATALE,GOLDNER,COOPER,  
MARY E SHEDDEN FAMILY TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice

Need Notice of Hearing and Proof of Service on Scott Adam McMillan.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

-----  
DATE: 11/27/17      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON DS1000075

CASE NAME: KENNETH WAYNE NEWTON

HEARING:

THIRD Account and Report of DAVID NEWTON and Petition for allowance of fees filed.

COUNSEL:

|  |                                     |
|--|-------------------------------------|
| KATHRYN NEWTON                                     | (CPE)... EDWARD B FISCHEL & ASSOC   |
| DEBORAH COOKSEY                                    | (CPE)...PRO/PER                     |
| GLORIA ROMAN                                       | (CEP)...GEORGE F DICKERMAN          |
| PUBLIC GUARDIAN                                    | (CEP)...RALPH K HEKMAN              |
| JULY CURD  | (CPE)... EDWARD B FISCHEL & ASSOC   |
| EDWARD B FISCHEL                                   | (PET)...                            |
| DONALD NEWTON                                      | (CPE)... EDWARD B FISCHEL & ASSOC   |
| LYNDA ROYSTER                                      | (CPE)... HORSPOOL & PARKER          |
| BONZA-RHEE MURRAY                                  | (CPE)...PRO/PER                     |
| CLAUDETTE SMITH                                    | (CPE)...PRO/PER                     |
| WOODROW NEWTON                                     | (PET)...MILES & HATCHER             |
| PEGGY WALLACE-NEWTON                               | (PET)...MILES & HATCHER             |
| KENNETH WAYNE NEWTON                               | (CEP/CTE/CEE)...                    |
| MAZIO D ROYSTER                                    | (CPE)...HORSPOOL & H ORSPOOL        |
| E JOAN NELMS                                       | (PET)...MARK J. FLORY               |
| DAVID NEWTON                                       | (CPE/CE)...EDWARD B FISCHEL & ASSOC |
| ETHEL L NEWTON                                     | (PET/CE)...PRO/PER                  |
| KENDRA NEWTON-FRANCISCO                            | (CP )...                            |
| AMERICAN CONTRACTORS INDEMNITY (CRAIG P BRONSTEIN) |                                     |
| BOND SERVICES OF CALIFORNIA (PRO/PER)              |                                     |

Waiver of Court Fees and Costs filed by BONZA-RHEE MURRAY is GRANTED

Waiver of Court Fees and Costs filed by DAVID NEWTON is GRANTED

TOTAL FEES WAIVED TO DATE: \$3437.00

**XREF: CONPS1300213** (*Bertha Mae Chatman*)

GENERAL INFORMATION:

**Continued from 10/16/17 Court orders Mr. Fischel to serve a copy of his petition to Ethel Newton and David Newton. Court orders any and all objections to accounting**

---

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.

**must be served on all parties. Court deems the ex parte petition filed by Mr. Fischel as an objection to the accounting. Need notice to Ethel Newton And David Newton. Court orders all objections to be filed and served by 11/06/17. Reply to objection must be filed by 11/20/17.**

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by Conservator of the Person and Estate, David Newton ["Petitioner"].

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

1. Accounting covers 10/01/14 to 09/30/16.
2. Assets on hand: \$157,504.30 (of which \$2,114.30 is cash, \$115,000 in carry value of real property and the balance in carry value of personal property)
3. Current bond posted in the amount of \$80,000. Appears sufficient.
4. Petitioner requests to exonerate bond. JTD
5. Petitioner does not request fees.
6. Disbursements – Schedule C includes bookkeeper fees of \$800.00. JTD.
7. Acknowledgment of satisfaction of Judgment by Edward Fischel filed 10/19/17.
8. Report of non-payment of court approved attorneys' fees filed 10/10/17.
9. Need Notice of Hearing and proof of service to U. S. Specialty Insurance Company who requested Special Notice and Walter T. Moore.
10. Need conformed copy of Notice of Hearing and proof of service.
- 11. Per minute order of 10/16/17 Petition to Surcharge Co-Conservators and their bond filed 09/22/17 by Edward Fischel is deemed an objection to third accounting. Need notice to Ethel Newton And David Newton**
- 12. Response to Objection of Karin Horspool attorney for prior conservator, filed 10/27/17 by David Newton, current co-conservator.**
- 13. Written objections filed 11/06/17 by Karin Horspool attorney for prior conservator, Lynda Royster.**
14. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Need to clear notes 9 & 10 then Court's discretion. If approved, set next hearing for Accounting Review on **12/03/18**.

(nb/cs)

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1200057

CASE NAME: CRAIG DONVILLE

HEARING:

INTERIM SECOND Account and Report of MARCIA L CAMPBELL and  
Petition for allowance of fees filed.

COUNSEL:

|                   |                                  |
|-------------------|----------------------------------|
| LAWRENCE DONVILLE | (CE/CPE )...STEPHEN K HALL       |
| VICTORIA DONVILLE | (CE/CPE )...STEPHEN K HALL       |
| CRAIG DONVILLE    | (CTE/CEP/OBJ)...CRAIG M PARKER   |
| MARCIA L CAMPBELL | (PCR)...WILLIAM M NASSAR & ASSOC |

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> Interim and Petition for Allowance of Fees for  
Marcia Campbell, successor conservator of estate only.

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

1. Accounting period: 07/01/16- 06/30/17.
2. Assets on hand \$4,148,993.51 of which \$228,806.61 is cash.
3. Petitioner requests fees of \$35,310.10 of which \$17,263.30 has been paid (\$1,500 per month), owing \$18,046.80. Billing appears to be at varying rates between \$1-325 per hour for a minimum of 352.30 hours. Itemized [LF pgs.105-143]. **JTD**
4. Attorney requests fees of \$10,085.25 to be paid. Billed at \$160/350 per hour for 39.55 hours of paralegal and attorney time. Itemized [LF pgs.172-177]. **JTD**
5. Current bond \$2,259,826.48. Appears ok as petitioner does not have Pr.C. § 2590 powers.
6. Notice given.
7. Proposed Order: 10/16/17; however, missing assets on hand, and title reflects "First" accounting when it should indicate "Second".

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **12/03/18**(if one year) or **12/02/19** (if two years). Accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 20

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600177

CASE NAME: ARNETTA BROOKS

HEARING:  
Accounting Review

COUNSEL:  
ALESIA SONYA DIGGS (PET)...PRO/PER  
ARNETTA BROOKS (CEP)...MITCHELL I ROTH

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review .

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

1. Alesia Diggs, appointed temporary conservator of the person and estate on 07/07/16, no bond. Thereafter appointed general conservator of the person and estate on 09/19/16, \$20,000 bond. **Need general order and letters.**
2. **Need** Inventory and Appraisal per Pr.C. §2610.
3. **Need** proof of service of Inventory and Appraisal including Instructions for Objection per Pr.C. § 2610.
4. **Need** notice of death of conservatee per Pr.C. §2361.
5. **Need** 1<sup>st</sup> and Final and post death Accountings beginning with 07/07/16.

#### RECOMMENDATION

Inquire status of accounting.  
(cs)

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1700298

CASE NAME: MTR OF SKYE LIM

HEARING: Petition for Appointment of Conservator

COUNSEL:  
JULIE LIM (CP )...GISSELLE M AMINI  
SKYE LIM (CTP)...

**X-REF FAMSS1502471 Dissolution of marriage**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Julie Lim, mother

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, consent/withhold consent to marriage, limit right to contract, control social/sexual contacts, and make decisions re: education. JTD
2. Petitioner seeks civil rights be limited. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 09/19/17.
4. Proposed conservatee is developmentally disabled. Report of Counsel Mitchell Roth filed 10/12/17.
5. Proposed conservatee is developmentally disabled. IRC report filed 10/13/17.
6. Need return of Citation.
7. **Certificate of Completion of the Conservatorship Training Class filed.**
8. Declaration of Julie Lim regarding maternal grandfather and paternal grandfather. Does Court wish to excuse notice? JTD
9. CI Report filed 09/12/17.
10. **Objection filed 11/01/17 by Rueben Lim, Sr. (father).**
11. Competing petition filed by father. Court may wish to trail matter to 12/14/17. JTD
12. ~Proposed Form Order: 08/02/17



## RECOMMENDATION

Need to clear note 6. Contested matter. Court's discretion re note 11 re trailing matter to 12/14/17.

If approved, set hearing for Compliance Review for **07/02/18** 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/cs)

Superior Court of Calif, County of San Bernardino

Page: 21A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 11/27/17      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS1700385

## **VACATED**

CASE NAME: MTR OF DEBORAH LYNN SPECK FERDIE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MICHAEL FERDIE

(CPE)...BRIAN C MILES

DEBORAH LYNN SPECK FERDIE

(CEP)...MITCHELL I ROTH

At temporary hearing on 11/02/17 Court ruled that it will not grant a conservatorship to husband when there are dissolution proceedings pending. Court denies Michael Ferdie's petition for permanent conservatorship.

Future hearing dates: 12/06/17 Petition for Appointment of Conservator of Person & Estate (by Carol Speck Weinstein)

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

-----  
DATE: 11/27/17 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1700387

CASE NAME: DUGLAS HERNANDEZ

HEARING: Petition for Appointment of Conservator

COUNSEL:

MARIA ESTHER HERNANDEZ (CP)...PRO/PER  
DUGLAS HERNANDEZ (CTP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by Maria Hernandez, mother

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

1. Petitioner is seeking conservatorship of her son, Douglas Hernandez due to medical reasons as proposed conservatee is unable to provide care and requires assistance with basic common day to day needs. However, petition does not indicate any specific powers sought. Court to clarify.
2. It appears that LPS conservatorship would be appropriate. Court to see Confidential Supplement Information form filed 10/20/17.
3. Does court wish to appoint counsel for report.
4. Section 3g of petition is incomplete regarding has a conservatorship or equivalent proceeding been filed in another jurisdiction. Need verified supplement clarifying.
5. List of required contacts is missing required contact information of first and second degree relatives. Need completed form.
6. Need Capacity Declaration (form GC-335).
7. Need return of citation.
8. Need notice of hearing and proof of service.
9. Need Duties (form GC-348).
10. Need Certificate of Completion of the Conservatorship Training Class.
11. Need Court Investigator report.
12. ~Proposed Form Order: 10/20/17

## RECOMMENDATION

Need to clear notes 4-11 . If approved, set hearing for Compliance Review for **07/02/18** 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.

(cs)