



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 11/28/17

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

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

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

nb1101/1122

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: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500442

CASE NAME: CORRINE ELLEN HANSON

HEARING:

Accounting Review

COUNSEL:

CORRINE ELLEN HANSON

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Report of Status of Administration entered 11/22/16.
2. No accounting or updated status report, Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 1A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500520

CASE NAME: ** MASTER FILE** LYLE LEROY MALLORY
SEE ALSO 1B, 1C

HEARING:
Hearing Re: OSC RE DISMISSAL OF PETITIONS (RAYMOND MALLORY)

COUNSEL:
LYLE LEROY MALLORY (DEC)...
RAYMOND SCOTT MALLORY (PET)...PRO/PER
RICHEY LYLE MALLORY (RES)...H FORD SHERIDAN
THE CHAPPY TRUST (TRU)...

XREF PROPS1600146 (Non Master file ChappyTrust)

GENERAL INFORMATION;

Continued from **7/29/15** for Rick Mallory to serve a copy of the trust with all three amendments on all heirs. Written objections to be filed prior to next hearing.

Continued from 9/16/15 and 10/28/15 as Counsel reports a trust may be filed instead of a petition for probate.

Continued from 1/13/16 and 03/16/16 and 03/30/16. Cases PROPS1500520 and PROPS1600146 ordered consolidated. PROPS1500520 is master filed.

Continued from **06/09/16, 08/18/16, 10/31/16, 01/12/17, 03/16/17 and 07/20/17.**

Set at 11/09/17 hearing. Court sets OSC re dismissal of petitions filed by Raymond Mallory for Raymond Mallory's failure to appear at readiness hearing; court resets the exchange deadline to 4pm November 28, 2017. Court notes that if Raymond Mallory fails to appear for the OSC re dismissal set for November 28, 2017, court will dismiss the petitions filed by Raymond Mallory. Notice by Judicial Assistant.

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

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

1. Petitioner requests bond of \$178,200; however, estimated estate value is \$162,000.
2. Proof of service with copy of Trust and Amendments filed 08/12/15.
3. No objections filed as of review of this file.

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

4. ~Proposed form order: 6/10/15

RECOMMENDATION:

RFA, \$162,000 bond. If approved, set hearing for Accounting/Status Review on **02/07/19**. Any accounting to be filed at least 30 days in advance. Note Local Rule requirements.

(sa/lc/nb/lc/cs/lc/nb)

Future Hearing:

12/18/17 Court Trial

12/19/17 Court Trial

12/20/17 Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500520

CASE NAME: ** MASTER FILE** LYLE LEROY MALLORY
SEE ALSO 1A, 1C

HEARING:
Hearing Re: PETITION ON CHAPPY TRUST

COUNSEL:
LYLE LEROY MALLORY (DEC)...
RAYMOND SCOTT MALLORY (PET)...PRO/PER
RICHEY LYLE MALLORY (RES)...H FORD SHERIDAN
THE CHAPPY TRUST (TRU)...

GENERAL INFORMATION

Continued from **08/18/16, 10/31/16, 01/12/17, 03/16/17 and 07/20/17**. Mediation appointment was 02/08/17.

Continued from 11/09/17. Court sets OSC re dismissal of petitions filed by Raymond Mallory for Raymond Mallory's failure to appear at readiness hearing; court resets the exchange deadline to 4pm November 28, 2017. Court notes that if Raymond Mallory fails to appear for the OSC re dismissal set for November 28, 2017, court will dismiss the petitions filed by Raymond Mallory. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON Petition to Invalidate Amendment

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

1. Petitioner, Raymond Mallory, is the beneficiary of the Chappy Trust (the Trust). The original Chappy Trust was a one-page declaration of trust executed by Lyle and Vera Mallory. Vera died on 10/28/97. Lyle died in 2011.
2. On 1/14/02, Lyle executed a Restatement to the Chappy Trust (Restatement). On 8/11/06, Lyle executed a First Amendment and Restatement to the Chappy Trust (First Amendment). The original Chappy Trust and the Restatement were both notarized. The First Amendment, however, was not notarized. Instead, with was witnessed by H. Ford Sheridan and Adrienne Sheridan. H. Ford Sheridan was Lyle's estate planning attorney.

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

3. In August 2009, Lyle asked H. Ford Sheridan to prepare a second amendment and restatement (Second Amendment). It is unclear whether or not the Second Amendment was ever executed.
4. On 10/19/09, a Third Amendment and Restatement to the Chappy Trust was purportedly executed by Lyle. (Third Amendment). The Third Amendment was not notarized, but instead witnessed by Greg and Lori Ostrowski.
5. The Third Amendment changed Ricky Lyle Mallory as an equal beneficiary with petition to Ricky Lyle Mallory as the sole beneficiary, with petitioner receiving funds only if Ricky predeceased petitioner.
6. Petitioner alleges that Lyle lacked capacity to execute the Third Amendment. Petitioner also alleges that Ricky created the Third Amendment through forgery fraud, or undue influence.
7. Proofs of Subscribing Witness filed 05/31/16 and 10/25/16.

RECOMMENDATION

Court's discretion.

(oc/nb/lc/nb)

Future Hearing:

12/18/17 Court Trial

12/19/17 Court Trial

12/20/17 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500520

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

SEE ALSO 1A, 1B

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

LYLE LEROY MALLORY	(DEC)...
RAYMOND SCOTT MALLORY	(PET)...PRO/PER
RICHEY LYLE MALLORY	(RES)...H FORD SHERIDAN
THE CHAPPY TRUST	(TRU)...

See matter 1A.

(nb)

Future Hearing:

12/18/17 Court Trial

12/19/17 Court Trial

12/20/17 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500921

CASE NAME: BRAMMER FAMILY TRUST

HEARING:

Petition for MODIFICATION OF TRUST

COUNSEL:

ANDREW BRAMMER	(PET)...WILLIAM M NASSAR &
BRAMMER FAMILY TRUST	(TRU)...
CHARLES B BRAMMER	(PET)...WILLIAM M NASSAR &
CHELSEA P BRAMMER	(PET)...WILLIAM M NASSAR &
LUCA S BRAMMER	(PET)...WILLIAM M NASSAR &

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

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

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600010

CASE NAME: MICHAEL SLOAN LOGAN

SEE ALSO 4

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

BASELINE FINANCIAL SERVICES, I	(PET)...PAUL R KRAFT
BASELINE FINANCIAL SERVICES, I	(TP)...PAUL R KRAFT
LISA DELATORRE	(PET)...BETTY S CHAIN
MICHAEL SLOAN LOGAN	(DEC)...

Address: 1132 Edna St., Wrightwood, CA 92397

Appraised Value: \$250,000 – **Section 3c is blank. Need inventory and appraisal re: reappraisal for sale.**

Sale price: \$317,000

First overbid: \$333,350

Deposit: **Section 4d is blank. Need verified supplement.**

Commission: **Section 1c is blank. Need verified supplement.**

Additional bond: **Suggest bond in the amount of \$100,000. JTD.**

Reason for Sale: Necessary to pay debts and expenses of administration.

Exposure to Market: MLS used.

Notice: **Need Notice of Hearing with proof of service to include realtors and buyer; need proof of publication; and signed clerk's certificate.**

~Proposed Form Order 08/04/17

(nb)

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

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

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600010

CASE NAME: MICHAEL SLOAN LOGAN

SEE ALSO 3

HEARING:

Probate status report filed.

COUNSEL:

BASELINE FINANCIAL SERVICES, I	(PET)...PAUL R KRAFT
BASELINE FINANCIAL SERVICES, I	(TP)...PAUL R KRAFT
LISA DELATORRE	(PET)...BETTY S CHAIN
MICHAEL SLOAN LOGAN	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Limited Administrator, Lisa Delatorre ["Petitioner"].

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

1. Need verification signed by the personal representative. An attorney may not sign verification for a fiduciary. Pr.C. § 1023.
2. Petitioner alleges the estate is not in a condition to be closed as the disputed creditor's claim of Baseline Financial has gone to judgment in a separate action for a total judgment of \$52,637.97 as of 03/20/17. The residence was listed for sale and is in escrow subject to Court approval.
3. Petitioner requests an additional 2 months to close the estate.
4. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1& 4 then Court's discretion. If approved, set next hearing for **01/30/18.**

(nb)

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

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

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600643

CASE NAME: MTR OF BETTE RUIE DAVIS

HEARING:

Hearing Re: STATUS OF SETTLEMENT NEGOTIATIONS

COUNSEL:

BETTE RUIE DAVIS	(DEC)...
RICHARD DUBOISE	(OBJ)...JOAN
RICHARD DUBOISE	(PET)...JOAN
RONALD DAVIS	(PET)...MATTHEW E SHEASBY

XREF: PROPS1501045 (Bette Ruie Davis)

No notes – Status.

(nb)

Future Hearing:

07/02/18 Readiness calendar

07/02/18 Petition for removal of the trustee etc.

07/20/18 Court Trial

07/31/18 Court Trial

08/01/18 Court Trial

08/02/18 Court Trial

08/03/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600771

CASE NAME: JESSIE R. VEGA

HEARING:

WAIVER OF Account and Report of LUCILLE JIMENEZ and Petition for allowance of fees filed.

COUNSEL:

JESSIE VEGA (DEC)...
LUCILLE JIMENEZ (PET)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION:

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

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

1. Sole beneficiary waives accounting.
2. Assets on Hand \$246,218.50 consisting of \$11,418.50 in cash held in attorney's IOLTA account and remaining in real property interests.
3. Petitioner waives statutory compensation.
4. Attorney requests statutory fees of \$8,505.77. Calculated.
5. Preliminary distribution consisting of cash and a vehicle was made without prior court authority. However, there does not appear to be harm to creditors or estate.
6. Petitioner requests authority to withhold \$1,500 as a reserve for closing costs.
7. Proposed Order 11/15/17 does not include address of beneficiary receiving real property

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge for 12/04/18.

(nb)

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

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700813

CASE NAME: SHIRLEY A. BOWMAN

HEARING:

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

COUNSEL:

MICHELE BOWMAN (PET)...LINDA ROBERTS ROSS
SHIRLEY A. BOWMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition of Lost Will for Letters of Administration WWA with full authority under IAEA by Michele Bowman ["Petitioner"-daughter].

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

1. Declaration re: Lost Will is not filed. When a will is lost and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it. Pr. C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. Need verified declaration to overcome presumption in Pr. C. § 6124.
2. Will waives bond. Estimated estate \$224,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(c).
3. Proof of publication filed.
4. ~Proposed Form Order/Letters 08/11/17

RECOMMENDATION:

Need to clear note 1 then Court's discretion. If approved, set future hearing for Accounting Review on **02/05/19**. Any account to be filed 30 days' in advance. Note requirements of Local Rule 20-908.

(nb)

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

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600782

CASE NAME: MTR OF RODOLFO SANZON

HEARING:

Hearing Re: ISSUE OF RESTRAINING ORDER ON SALE

COUNSEL:

JUAN M SANZON (PET)...MICHAEL C. MADDUX
RODOLFO SANZON (DEC)...

Request for Waiver of Court Fees and Costs filed by JUAN M SANZON is GRANTED

No notes – Judge to decide.
(nb)

Future Hearing:
10/02/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS0700302

CASE NAME: JOHN L. MILLER

HEARING:

Accounting Review

COUNSEL:

ANNE L. CHAVIS	(PCR)...PRO/PER
CONNIE K. EPPS	(SC)...
JOHN D. MICKUS	(CPE)...JOHN D MICKUS
JOHN L MILLER	(CEP)...PRO/PER
JOHN L. MILLER	(PCE)...JACK B. OSBORN
LAWRENCE A DEAN II	(CPE)...SHERRI L KASTILAHN
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review by Successor Conservator, Lawrence A. Dean, II.

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

- 1 Order Appointing Successor Conservator of the Person and Estate entered 11/15/16; first and current account now due.
- 2 Need final inventory and appraisal.
- 3 Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
- 4 No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500066

CASE NAME: MTR OF DAVID C JOHNSON

HEARING:

Accounting Review

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
CHRISTINA ERICKSON-TAUBE	(TC)...SHERRI L KASTILAHN
DAVID C JOHNSON	(CEP)...
DAVID JOHNSON	(PET)...CHRISTOPHER D MCINTIRE
JONI HAATVEDT	(CPE)...HORSPOOL & HORSPOOL
JONI T HAATVEDT	(CPE)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
SUSI PAYNE	(OBJ)...CHRISTOPHER D MCINTIRE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling First Account entered 01/31/17; second account now due.
2. No accounting or waiver of account filed. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500292

CASE NAME: SARA M KUNST

HEARING:
Accounting Review

COUNSEL:
JAMES KUNST (PET)...VALERIE ROSS
SARA M KUNST (CEE)...

GENERAL INFORMATION

Conservatee died on 12/05/16.

Continued from 05/23/17 and 09/12/17. Counsel states no assets were marshalled; court requires a verified statement that no assets were marshalled with a request that no accounting is required. Counsel to prepare verified statement with proposed order.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. James Kunst, son, appointed conservator of the person and estate on 08/31/16, \$38,000 bond posted 11/17/16; order and letters not signed/issued.
2. Question whether any assets were marshaled as to require an accounting? If no assets were marshaled, suggest Court require a verified statement that no assets were marshaled, in which case an accounting will not be necessary. Alternatively, require pre-death and post-death accountings per Pr. C. §2620(b).

RECOMMENDATION

Need verified statement.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600080

CASE NAME: GERALDINE HUANG

VACATED

HEARING:

Petition for & DECLARATION OF JOELLE LEE A NICOL RE ATTYS FEES

COUNSEL:

GERALDINE HUANG

(CEP)...MITCHELL I ROTH

GERALDINE HUANG

(PET)...SHERRI L KASTILAHN

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

XREF: CONPS1600079 (David T Huang)-husband

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600361

CASE NAME: MTR OF GUADALUPE RAMIREZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA RAMIREZ

COUNSEL:

GUADALUPE RAMIREZ	(CTP)...
HECTOR RAMIREZ	(CP)...PRO/PER
HECTOR RAMIREZ	(PET)...PRO/PER
MARIA RAMIREZ	(CP)...PRO/PER

GENERAL INFORMATION

Maria and Hector Ramirez (parents) appointed Co-Conservators of the Person on 05/02/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights filed.
- 2 Care Plan filed.
- 3 Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700281

CASE NAME: ASHLEY DARLENE BIEN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ASHLEY DARLENE BIEN	(CEE)...
DARLENE TRACY BIEN	(PET)...PRO/PER
RYAN P MEDINA	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 09/05/17. Court indicates it does not require court appointed counsel, a limited petition; court has reviewed the IRC report (a copy was provided to court by the petitioner and returned after review). Court deems the proof of service affixed to notice of hearing as deemed dated the date of the filing. Court clears note re citation as Ashley Bien is present in court. Matter is continued for petitioners to file verified supplement addressing if Ryan Medina is requesting to be co-conservator (Ryan Medina states he is intending to be appointed as the co-conservator). Petitioners are also to attend the conservatorship training class and turn in copy of certificate to the court. Petitioners state that there are errors on the Court Investigator report as follows: that the minor is not going to Upland High School, she is going to Montclair High School; and that on page 6 that the last visit 2017.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Darlene Bien (mother) and Ryan Medina (uncle) to appoint Darlene Bien

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

1. Petitioner seeks medical powers. Capacity Declaration filed 07/20/17.
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). **IRC report filed.**
3. Petition requests Darlene Bien be appointed conservator [See petition, 07/20/17, LFpg2]. Need verified supplement clarifying if Ryan Medina is requesting to be co-conservator? **(Ryan Medina states he is intending to be appointed as the co-conservator).**

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

4. Court Investigator report filed.
5. ~Proposed Form Order: 07/20/17

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **07/03/18** 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)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700292

CASE NAME: ALYSSA CISNEROS

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ALYSSA CISNEROS (CTP)...E. JOAN NELMS

MARIE CISNEROS (CP)...PRO/PER

GENERAL INFORMATION

Continued from 09/12/17 at request of petitioner. Notice given to petitioner by Attorney Nelms.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Marie Cisneros (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, limit right to contract and make and consent to all medical decisions. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 08/03/17.
4. Return of Citation filed 08/23/17.
5. Proposed conservatee is developmentally disabled. Need report of counsel E Joan Nelms.
6. Proposed conservatee is developmentally disabled. Need IRC report.
7. Need Certificate of Completion of the Conservatorship Training Class.
8. Court Investigator report filed.
9. ~Proposed Form Order: 08/03/17

RECOMMENDATION

Need to clear notes 5-7. If approved, set hearing for Compliance Review for **07/03/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700372

CASE NAME: MATTER OF HECTOR MANUEL ANAYA

SEE ALSO 16

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

MARIA GUADALUPE ZEPEDA DE ANAY (CP)...PRO/PER

HECTOR MANUEL ANAYA (CTP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MARIA GUADALUPE ZEPEDA DE ANAYA is GRANTED

No notes – Temporary Petition.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700372

CASE NAME: MATTER OF HECTOR MANUEL ANAYA

SEE ALSO 15

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA GUADALUPE ZEPEDA DE ANAY (CP)...PRO/PER

HECTOR MANUEL ANAYA (CTP)...PRO/PER

GENERAL INFORMATION

Ex Parte orders denied 10/23/17.

THIS CASE IS SET FOR HEARING ON **AMENDED** (11/08/17) Petition for Appointment of Conservatorship of Person by Maria Guadalupe Zepeda De Anaya ["Petitioner"-mother].

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

- 1 No bond – person only.
- 2 Medical powers are sought. Need Medical Capacity Declaration.
- 3 Need Court Investigator's Report.
- 4 Need return of Citation.
- 5 Need Notice of Hearing with proof of service to include father, who is not listed in Section 11 to petition [LF, p.8].
- 6 Confidential Conservator Screening Form, Sections 4c and 5c are incomplete and is not signed. Need complete screening form.
- 7 Need Certificate of Completion re Conservatorship Class.

RECOMMENDATION:

Need to clear notes 2-7. If approved, set hearing for Compliance Review for **02/05/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS00152

CASE NAME: IN THE MATTER OF JAMES PRENTICE

HEARING:

PETITION FOR SETTLEMENT OF ELEVENTH Account and Report of JOHN F PRENTICE and Petition for allowance of fees filed.

COUNSEL:

JAMES D PRENTICE (CEP)...
JAMES PRENTICE REVOCABLE TRUST (TRU)...
JOHN F PRENTICE (CPE)...GRESHAM SAVAGE NOLAN & TILDEN
JOHN F PRENTICE (TEE)...GRESHAM SAVAGE NOLAN & TILDEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Eleventh Account Current and Petition for Fees by Conservator and Trustee, John F. Prentice ["Petitioner"].

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

1. Account period 07/01/16 to 06/30/17.
2. Assets on hand \$1,138,283.77 consisting of \$89,864.13 in cash and the balance in securities and miscellaneous personal property.
3. No current bond. Suggest bond of \$1,318,000.00 [includes recovery]. JTD.
4. Petitioner's compensation totals \$17,920 and reimbursement of costs of \$232.80 which totals \$18,152.80. Billed at \$70/hour for 252 hours' service. However, Petitioner requests **the lessor amount of \$8,500** for all services and costs during this time period. Generally described [LF, p. 34]. JTD.
5. Attorney requests fees of \$3,488.50. Billed for attorneys at \$295-\$500/hour and paralegal at \$204-\$205/hour for a total of 12.7 hours. Itemized [LF p.38-44].
 - a. Attorney hourly rate exceeds community standard of \$275-\$400/hour. The current request for attorneys' fee is \$2,037.50. If billed at \$400/hour the fee for attorneys would be **\$2,240.00**.
 - b. Paralegal hourly rate exceeds community standard of \$50-\$150/hour. The current request for paralegal fee is \$1,461.00. If billed at \$150/hour the fee for paralegals would be **\$1,065.00**.
 - c. Court may wish to grant a total reduced fee of **\$3,305.00**. JTD

6. Petitioner has not used the mandatory Summary of Account (GC-400/405) Court may wish to direct petitioner to use the new mandatory form(s) on future accountings.
7. Petitioner requests the Court set future accounting reviews on a biennial basis. JTD.
8. Petitioner has not used Mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use mandatory form(s) on future accountings.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion re: fees and bond. If approved, set hearing re next Accounting Review for **08/26/18** (if one year) or **08/18/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 17A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS03123

CASE NAME: MTR OF MIRIAM Y. GIRON

HEARING:

Hearing Re: APPOINTMENT OF SUCCESSOR CONSERVATOR

COUNSEL:

JAZMIN K. GIRON	(CP)...PRO/PER
MARIA G GIRON	(CP)...
MIRIAM Y. GIRON	(CTP)...SHERRI L KASTILAHN
MIRIAM YESSICA GIRON	(CEE)...

GENERAL INFORMATION:

Jazmin K, Giron and Maria G. Giron appointed Limited Conservators on 10/28/10.

THIS CASE IS SET FOR HEARING ON OSC re Appointment of Successor Conservator.

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

1. Matter set on 11/09/17 after receipt and review of CI report, wherein, the Court ordered the Conservators to be personally present; re-appointed Jeanne Kennedy as Guardian ad Litem for conservatee; and requested that Jeanne Kennedy also be present for hearing. Need report by GAL, Jeanne Kennedy.
2. Court orders representative from Inland Counties Regional Center to be personally present at hearing.
3. Notice by Judicial Assistant.
4. Need Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Need to clear notes 1 & 4 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 11/28/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS0700834

CASE NAME: PATRICIA ANN LEWIS

HEARING:

FIRST AND FINAL Account and Report of DONALD KEVIN THOMAS and
Petition for allowance of fees filed.

COUNSEL:

DON THOMAS	(PET)...PRO/PER
DONALD KEVIN THOMAS	(PET)...JENNIFER M DANIEL
PATRICIA ANN LEWIS	(DEC)...
ROBERTA L TAYLOR	(TP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by DONALD KEVIN THOMAS is
GRANTED

Fee waiver amount due \$465.00 for first and final account on 05/16/17

GENERAL INFORMATION:

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

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

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

1. Accounting period 10/16/07 to 05/16/07.
2. Account is not verified ["signed under penalty of perjury under the laws of the State of California"]. Need same.
3. Need supplemental inventory and appraisal reflecting \$3,000 as referenced at LF, p. 5.
4. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614.
5. However, Receipts – Schedule A [LF, p.12] indicates vehicles were sold. Need further clarification via verified supplement.
6. Disbursements – Schedule B [LF, p.13] reflects reimbursements have been made but does not specify for what purpose. Need verified supplement.

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

7. Disbursements – Schedule B [LF, p.13] generally indicates disbursement to “creditors & misc.” but does not specify to whom or for what purpose. Need verified supplement.
8. Losses on Sale – Schedule C [LF, p14] reflects appraised values for vehicles instead of indicating difference between actual sale amounts. Need verified supplement.
9. Need proof of service to Notice of Proposed Action re: sale of 1985 Nissan King Cab Truck and 1994 Mitsubishi “S” Coupe.
10. Petitioner waives statutory compensation.
11. Attorney compensation requested in the sum of \$6,952.89, of which, \$1,450.00 has been paid, leaving a balance of \$5,502.89. Need statutory calculation.
12. Need findings re: sole and separate property.
13. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
14. Need copy of bank statement to support closing balance.
15. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended accounting to be set on first check calendar no sooner than **01/09/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100635

CASE NAME: ROLAND W HALL, SR

SEE ALSO 20

HEARING:

Hearing Re: ACCOUNTING OF MR. LEWELLYN RE PRACTICE OF R. HALL

COUNSEL:

BANK OF AMERICA-CA9-702-03-93

(TP)...PRO/PER

MILDRED I HALL

(PET)...GEORGE HOLLOWAY

ROLAND W HALL SR

(DEC)...

SAN BERNARDINO COUNTY PUBLIC A (SA)...CRAIG M PARKER

GENERAL INFORMATION:

Continued from 06/20/17. Court directs accounting to be filed by 4 PM on 10/30/17.

THIS CASE IS SET FOR HEARING ON Accounting by Mr. Lewellyn re Practice of R. Hall

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

1. Matter set at 03/14/17 hearing on court's motion.
2. Declaration of Larry D. Lewellyn requests more time to file either a detailed status report or an account current.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100635

CASE NAME: ROLAND W HALL, SR

SEE ALSO 19

HEARING:

Probate status report filed.

COUNSEL:

BANK OF AMERICA-CA9-702-03-93

(TP)...PRO/PER

MILDRED I HALL

(PET)...GEORGE HOLLOWAY

ROLAND W HALL SR

(DEC)...

SAN BERNARDINO COUNTY PUBLIC A (SA)...CRAIG M PARKER

GENERAL INFORMATION:

Continued from **02/19/15 and 02/11/16**. Referred to the Public Administrator for possible successor appointment.

Continued from **04/05/16 and 06/21/16**. The court orders Mr. Holloway to file a status report or accounting before the next hearing and to be personally present. Notice given by Craig Parker.

Continued from **09/20/16**. Counsel indicates that the administrator, Mildred Hall, has passed away. Court vacates date set for probate status report of October 13, 2016 and resets it for November 22, 2016. Account to be filed by counsel by October 22, 2016.

Continued from **11/22/16**. Court orders that Larry Lewellyn is to file with the court an accounting from the date of death to the present as well as a status report and is to provide these reports to Craig Parker (for public administrator) and George Holloway. Citation issued as to: Larry Lewellyn. **Court appoints the Public Administrator as the Successor Administrator with will annexed.**

No bond is required. No accounting or status report by Larry Lewellyn.

Continued from 03/14/17 and 06/20/17. Court directs accounting to be filed by 4 PM on 10/30/17.

THIS CASE IS SET FOR HEARING ON Status Report (filed 09/01/16) by former counsel, George Holloway, to deceased Executrix.

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

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

1. Larry Lewellyn appointed to be the Practice Administer on 09/15/11. Letters Testamentary issued to Mildred Hall on 12/06/11; full authority no bond.
2. Need final Inventory and Appraisal.
3. Status Report filed 09/01/16 indicates the estate cannot be closed until there are sufficient funds to pay for fees and costs; until all funds due to this estate are collected; and the Court Appointed Practice Administrator files a final report and accounting.
4. Counsel Holloway requests to be formally dismissed as counsel for Executrix, Mildred I. Hall. Does Court wish counsel to prepare a first and final account on behalf of deceased executrix? JTD.
5. Counsel does not request a specific time in which to close estate. Suggest one year. JTD.
6. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
7. Proof of Service as to Citation filed.

RECOMMENDATION:

Require proper notice and final I&A, then Court's discretion. If approved, set next hearing for **12/04/18**. Account to be filed 30 days' before hearing. Note requirements of Local Rules.

(lc/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 11/28/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400271

CASE NAME: GIBSON FAMILY TRUST***MASTER FILE*****

SEE ALSO 22, 23

HEARING:

Hearing Re: TRIAL (DAY ONE)

COUNSEL:

GIBSON FAMILY TRUST	(TRU)...
JANET K. HUNTER-GIBSON	(PET)...ALLEN M JOHNCOX
SANDRA LOUISE COBB	(PET)...LAYNE A BARTHOLOMEW
SANDRA LOUISE COBB	(RES)...LAYNE A BARTHOLOMEW

No notes – trial.

(nb)

Future Hearing:

11/29/17 Court Trial

11/20/17 Court Trial

12/01/17 Court Trial

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 11/28/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400271

CASE NAME: GIBSON FAMILY TRUST***MASTER FILE****

SEE ALSO 21, 23

HEARING:

Petition for Distribution of Trust Assets

COUNSEL:

GIBSON FAMILY TRUST	(TRU)...
JANET K. HUNTER-GIBSON	(PET)...ALLEN M JOHNCOX
SANDRA LOUISE COBB	(PET)...LAYNE A BARTHOLOMEW
SANDRA LOUISE COBB	(RES)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

Continued from **05/15/14** action consolidated with PROPS1400125.

Continued from **08/21/14** and **10/16/14** by stipulation. Attempting to clear title.

Continued from **12/18/14, 3/19/15, 7/31/15, 9/4/15, 10/28/15, 12/16/15** and **02/24/16**.

Parties are still completing the settlement terms.

Continued from **4/13/16, 06/15/16, 11/17/16, 04/13/17** and **08/10/17**. Set for readiness. Court does not accept stipulations to continue trials, nor provides interpreters for trials.

Continued from 11/02/17. Attorney Bartholomew announces ready for trial

THIS CASE IS SET FOR HEARING ON Petition for distribution of trust assets, to determine title to real property, and for determination of community property interest in trust assets by Janet Hunter-Gibson.

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

1. Petitioner is Janet Hunter-Gibson, surviving spouse of deceased trustor.
2. Petitioner states that the original trust was executed in 1994 by trustor Robert Gibson and his then-wife Irene Gibson; that both trustors are deceased; that the trust was amended several times, that petitioner and Robert married in 1999; and that upon Robert's death in 2011, petitioner Janet became the successor trustee of the resulting survivor's trust and respondent Sandra Cobb became successor trustee of the bypass trust.
3. Petitioner states that respondent Sandra asserts rights as a bona fide purchaser for value of a community interest in certain Newberry Springs, CA trust real

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

- property. Petitioner asserts that upon Robert's death, Sandra became sole beneficiary of the remaining trust interest in that property.
4. Petitioner asserts community property interests in trust assets acquired during her 1999-2011 marriage with Robert, including rights to the Newberry Springs, CA real property, totaling \$157,000.
 5. Petitioner asserts rights to reimbursement for expenses and improvements contributed to trust assets including the Newberry Springs real property, of at least \$286,000.
 6. Petitioner makes allegations of an express partnership with Robert for early distribution of trust assets, as well as a net business loss to respondent and other trust beneficiaries.
 7. Petitioner alleges the 2009 transfer of a real property for the benefit of the bypass trust that was not disclosed in the other trust petition/case filed by Sandra (see other page this date).
 8. Petitioner alleges she is a bona fide purchaser for value of Adelanto, CA real property which was transferred from the trust in 2009. She also alleges a community property interest in the acquisition of the property.
 9. Petitioner requests a determination that the Newberry Springs, CA real property should be distributed to her in its entirety; that the Adelanto, CA real property is owned by petitioner individual and free and clear of trust claims; that petitioner is entitled to \$157,000 (community property) reimbursement from the trust subject to proof; that petitioner is entitled to \$286,000 (expense/improvements) reimbursements from the trust subject to proof; that the remaining trust real properties are properties of the survivor's trust; that any balance of the survivor's trust be distributed according to its terms; that the court approve termination of the family trust after distribution and accounting; for an accounting by Sandra of her partnership affairs with decedent/trustor Robert involving bypass trust assets; for a determination of the character of the subject real properties and other trust assets as community property or separate trust property; for reimbursement of expenses paid by petitioner for trust expenses; and for unspecified fees and costs.
 10. **Objection filed by Sandra Cobb, successor trustee.**

RECOMMENDATION

Matter contested. Inquire status re settlement.
(ds/nb/sa/lc/sa/lc/nb)

Future Hearing:

11/29/17 Court Trial

11/20/17 Court Trial

12/01/17 Court Trial

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

DATE: 11/28/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1400271

CASE NAME: GIBSON FAMILY TRUST***MASTER FILE****

SEE ALSO 21, 22

HEARING:

Petition for to Determine Title of Real Property, Determine
Questions of Construction of Instrument, etc

COUNSEL:

GIBSON FAMILY TRUST	(TRU)...
JANET K. HUNTER-GIBSON	(PET)...ALLEN M JOHNCOX
SANDRA LOUISE COBB	(PET)...LAYNE A BARTHOLOMEW
SANDRA LOUISE COBB	(RES)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

Continued from **8/21/14, 10/21/14, 12/18/14, 3/19/15, 7/31/15, 9/4/15, 10/28/15, 12/16/15** and **02/24/16**. Parties are working on settlement.

Continued from **4/13/16, 06/15/16, 11/17/16, 04/13/17** and **08/10/17**. Matter set for readiness. Court does not accept stipulations to continue trials, nor provides interpreters for trials.

Continued from 11/02/17. Attorney Bartholomew announces ready for trial

THIS CASE IS SET FOR HEARING ON Petition to determine title to trust real property, to determine questions of construction of trust instrument, to compel redress for breach of trust, and for instructions

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

1. Petitioner is Sandra Cobb, successor trustee of the bypass sub-trust.
2. Petitioner states that the subject family trust was executed in 1994; that the husband and wife trustors were the initial co-trustees; that the wife trustor died in 1994 and the husband trustor then acted as sole successor trustee; that the trust specifies that upon the death of the first settlor, the trust shall be divided into three sub-trusts for a survivor's share, a marital deduction share, and a non-marital share, each with specified assets and shares of the main trust; that the survivor's trust and bypass trust do not appear to have been funded upon the death of the wife trustor; that a first amendment to the trust was executed by the husband trustor in 1998 which refers to the survivor's trust; that the husband

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trustor remarried in 1999 to Janet Hunter-Gibson; that husband trustor executed a second trust amendment in 2001, a third trust amendment in 2003, and a fourth trust amendment in 2006, all of which also refer to the survivor's trust; that the husband trustor died in 2011; and that Janet Hunter-Gibson then became successor trustee of the survivor's trust and Sandra Cobb became successor trustee of the bypass trust.

3. Petitioner states that most of the real properties listed as trust assets on the attachment to the original trust instrument were deeded into the original trust but that they have not been segregated and transferred to the sub-trusts as required by the trust instrument. Instead, petitioner states that some real properties were sold and others were transferred out of the trust to Janet Hunter-Gibson. Petitioner seeks clarify ownership of the several real properties as between the survivor and bypass sub-trusts as specified in the petition. Petitioner adds that the allocation is essentially by default because the properties allocated to the bypass trust are the only real properties left, with those allocated to the survivor's trust having been sold or transferred by the husband trustor. Petitioner presents estimated values for the subject real properties and a calculation for allocation.
4. Petitioner also requests a determination of the construction of the trust instrument. Specifically, petitioner states that the husband trustor only had authority to amend the survivor's trust after the death of the wife trustor and therefore only property allocated to the survivor's trust could be affected. Therefore there is the question of the effect of the second and third trust amendments if a certain Newberry Springs, CA real property is allocated to the bypass trust. The second trust amendment purports to give a life estate on that property to Janet Hunter-Gibson, and the third trust amendment purports to give an outright gift of the property to her in fee simple. Petitioner seeks to invalidate those transfers.
5. Petitioner also reports that the fourth trust amendment provides that a certain Phelan, CA trust real property cannot be sold until five years after the death of trustor and may be sold with the agreement of three of the four grandchildren. Petitioner argues that this statement is ambiguous as to the word "and" and that the word "but" should have been used instead. Petitioner requests that the court interpret the language such that the real property can be sold five years after death so long as three of the four grandchildren agree.
6. Petitioner also requests redress of breach of trust in the form of the allocation of real properties addressed above plus a determination that a determination that any attempted allocation, transfer or gift by the husband trustor is void.
7. Petitioner requests an order authorizing transfer of the real properties per the division stated above.
8. Petitioner also requests unspecified fees and costs.
9. **Objections filed 04/08/14 by Janet K. Hunter-Gibson.**

RECOMMENDATION

If approved, no future dates need be set (the court is not extending ongoing supervision over the trusts).

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

(ds/nb/sa/lc/sa/lc/nb)

Future Hearing:

11/29/17 Court Trial

11/20/17 Court Trial

12/01/17 Court Trial

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

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400726

CASE NAME: Abraham C. Ramirez

HEARING:
Hearing Re: First and Final Account (Dorothy Harmon)

COUNSEL:
ABRAHAM C. RAMIREZ (DEC)...
DOROTHY R HARMON (PET)...JENNIFER M DANIEL
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **02/02/17 and 03/23/17**. Court order the administrator, Dorothy Harmon to pay back the administrator fees that she paid herself without prior court order. Court notifies the Public Administrator of possible appointment. If a proper accounting is not filed prior to the next hearing the court shall appoint the Public Administrator as the successor administrator.

Continued from **05/11/17**. A request for continuance was received. The court suspends the powers of the administrator. The Public Administrator is appointed as the Special Administrator. Notice by Judicial Assistant.

Continued from **07/11/17**. Craig Parker represents all assets were distributed to prior administrator. Matter is continued by the Court to allow petitioner to file proper accounting.

Continued from 09/12/17. Matter is continued. Dorothy Harmon states that she is retaining Attorney Jennifer Daniel. Dorothy Harmon is collecting the documents that counsel has requested.

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by prior administrator, Dorothy Harmon ["Petitioner"].

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

1. It cannot be determined if the accounting balances as it does not comply with Pr.C.§10900 and Pr.C.§1060 et. seq. Need a proper summary of account, report and accounting schedules.
2. There is no verification per Pr.C. § 1021.
3. Proposed order is not proper.

RECOMMENDATION

Need to file a proper accounting and report.

(lc/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500314

CASE NAME: Clayton D Millspaugh

HEARING:

Hearing re Final Discharge

COUNSEL:

CLAYTON D MILLSPAUGH (DEC)...

RICKY DEAN MILLSPAUGH (PET)...RICHARD SCOTT STEWART

GENERAL INFORMATION

Continued from **08/22/17**. No appearance. Court continues matter and orders counsel to be present unless the ex parte petition for final discharge has been signed by Court.

Continued from 10/03/17. No appearances. Court orders Richy Dean Millspaugh or their attorney of record to appear hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Account for Ricky Dean Millspaugh approved on 08/16/16.
2. Need distribution receipts from Ricky Dean Millspaugh, Daniel Lee Millspaugh and Heather Lynn Weber.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500324

CASE NAME: ETHEL LAVADA GARNER AKA ETHEL L. MORGAN

HEARING:

Hearing re Final Discharge

COUNSEL:

CALIFORNIA VICTIM COMPENSATION (TP)...

ETHEL LAVADA GARNER (DEC)...

MELVIN DALE MORGAN (PET)...MARY M BADER

VACATE – final discharge order entered 01/30/17.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600246

CASE NAME: MTR OF HELEN Y GABLER

SEE ALSO 5

HEARING:

OSC re: DISMISSAL filed by SYLVIA DORADO

COUNSEL:

HELEN Y GABLER

(DEC)...

SYLVIA DORADO

(PET)...PRO/PER

GENERAL INFORMATION

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

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

Continued from 10/24/17. Petitioner not present. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Accounting Review

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

1. Letters of Administration with full authority issued 05/03/17, no bond.
2. Need final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. Need same.
4. **Declaration re Lack of Assets filed by PA on 10/31/17 indicates the real property at Fontana was sold at Trustee Sale on 06/13/16 with no excess proceeds; and alleges there are no other known assets at this time. Deed affixed [LF, p.3]**

RECOMMENDATION

Court's discretion

(lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600246

CASE NAME: MTR OF HELEN Y GABLER

SEE ALSO 4

HEARING:

Accounting Review

HELEN Y GABLER
SYLVIA DORADO

COUNSEL:

(DEC)...

(PET)...PRO/PER

See prior matter #4.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600744

CASE NAME: MTR OF ALICE L WALL

HEARING:

FIRST AND FINAL Account and Report of JENNIFER JUNE WALL WALSTEN
and Petition for allowance of fees filed.

COUNSEL:

ALICE L WALL

(DEC)...

JENNIFER JUNE WALL WALSTEN

(PET)...LUELLA G HAIRSTON

GENERAL INFORMATION

Continued from **03/30/17, 05/18/17 and 07/06/17** at request of counsel. The Court notes general letters testamentary were previously issued and therefore sets a Hearing Re: 1st accounting for general administrator on 3-29-18.

Continued from 10/17/17 at request of counsel. Sisters are in negotiations/to file accounting.

THIS CASE SET FOR HEARING ON **Amended (07/10/17)** First and Final Account of **Special Administrator** by Jennifer June Wall Walsten, daughter.

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

1. Letters of special Administration issued to June Wall Walsten on 10/28/16; **general letters** Testamentary issued 01/10/17; \$638,000 bond.
2. **Accounting period 05/12/11 to 01/10/17.** Needs to begin with date of death.
3. Assets on hand **\$505,252.73**
4. Partial and reappraisal for sale filed 03/23/17.
5. **Petition indicates a completed inventory has yet to be conducted as Petitioner has been unable to gain access to autos and the Bennet Avenue residence. However, Property on Hand [LF, p5] includes subject real and personal property. As this account is for special administration, Petitioner should only account for assets she has actually marshalled.**
6. Summary of account does not comply with Pr.C. § 1061. Need proper summary of account and schedules.
7. **Need Notice of Hearing with proof of service.**

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

RECOMMENDATION

Need proper accounting to be set on first check calendar no sooner than **01/11/18**. If continued, set on Thursday calendar as originally set. If approved, set next hearing for Accounting Review for **03/08/18**. Any account to be filed 30 days' in advance of hearing local rule 20-901. Note requirements of local rule 20-908.
(lc/nb)

Future Hearing:

03/29/18 1st accounting (General Administrator)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600850

CASE NAME: DAVID PAUL SPEYER

HEARING:

WAIVER OF Account and Report of PIETER DANIEL SPEYER and
Petition for allowance of fees filed.

COUNSEL:

DAVID PAUL SPEYER (DEC)...
PIETER DANIEL SPEYER (PET)...PIETER D SPEYER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Pieter D. Speyer ["Petitioner"-brother].

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

1. Sole heir waives accounting.
2. Petitioner/Attorney waives statutory compensation.
3. Assets on Hand \$1,234,148.80. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c).
4. Need statement regarding notice to Director of Health Care Services or notice per Pr. C. § 9202(a).
5. Need statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
6. Need legal description of the real property, including common address, if any, and assessor's parcel number via verified supplement.
7. Need vehicle license number(s) and description via verified supplement.
8. Need address of beneficiary/heir receiving real property via verified supplement.
9. Need copies of bank/financial statement to support date of death balances per Local Rule 20-908.
10. Proposed Order 08/22/17: Document received is not filed in accord with CRC Rule 2.111 in that the top of the page does not contain the name address and phone number of the person filing the document. Additionally, proposed order does not include Balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c);

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

Findings re: sole and separate property; Findings re: known creditors; Findings re: all taxes have been paid, or reserve made for taxes; Address of beneficiary/heir receiving real property. All judgments must be complete in themselves without reference to the petition on which they are based. Local Rule 20-614.

RECOMMENDATION:

Need to clear notes 3-10 then Court's discretion. If approved, set next hearing for final discharge on **12/04/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700299

CASE NAME: EDWARD LEE ROSENBERRY

SEE ALSO 8

HEARING:

Order to Show Cause RE: Sanctions (10/17/17 FTA) Rob Saslow

COUNSEL:

ALYSSA RIGGS (PET)...COSGROVE, CO SGROVE &
EDWARD LEE ROSENBERRY REVOCABL(TRU)...

GENERAL INFORMATION

Continued from **09/19/17**. Proof of bond has not been filed. Attorney Mitchell Roth will give notice.

Matter set on 10/17/17 for failure to appear by Rob Saslow and his attorney. Mr. Roth informed the Court that he has talked to Rob Saslow regarding the bond. Mr. Saslow was notified to appear at hearing by Mr. Roth. Notice printed for Rob Saslow and attorney.

THIS CASE SET FOR HEARING ON **OSC re Sanctions (FTA)** re: Proof of Bond

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

1. Rob Saslow, PPF appointed Successor Trustee of the Edward Lee Rosenberry Revocable Trust dated June 13, 2008 for the Benefit of Alyssa Riggs on 08/14/17, \$335,000 bond.
2. Need proof of bond.

RECOMMENDATION:

Inquire status.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700675

CASE NAME: MARILYN LOUISE DELASHMUTT

SEE ALSO 11

HEARING:

Hearing Re: Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DEBRA EHRLICH	(OBJ)...C BENJAMIN GRAFF
DEBRA EHRLICH	(PET)...C BENJAMIN GRAFF
DIANNA L THOMPSON	(PET)...PRO/PER
MARILYN LOUISE DELASHMUTT	(DEC)...

GENERAL INFORMATION

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

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Letters of Administration with full authority under IAEA by Dianna Thompson, daughter

Petition #2: Amended (10/16/17) Petition for Letters of Administration with full authority under IAEA by Debra Ehrlich, daughter

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

Petition #1 by Dianna:

1. All heirs waive bond. Net estate value \$591,264 with \$9,000 in personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD
2. Need Notice to Petition to Administer Estate and proof of service.
3. Need proof of publication.
4. Note: no written objections filed as of review.
5. Need Proposed Form Order:

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

Petition #2 by Debra:

1. Petition alleges all heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by Deborah L. Ehrlich and Petitioner. Alternatively, suggest bond in the amount of \$598,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(c). JTD.
2. Need Duties and Liabilities of Personal Representative Form.
3. Need proof of publication.
4. Need Notice of Petition to Administer Estate with proof of service.
5. No proposed order/letters. Submit after Hearing.

RECOMMENDATION

Need to clear notes 2 – 3 for petition #1 and notes 1-4 for petition #2. Court's discretion re bond. If approved, set Accounting/Status Review for **02/05/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lh/nb)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700675

CASE NAME: MARILYN LOUISE DELASHMUTT
SEE ALSO 10

HEARING:

Ex parte hearing re: ORDER GRANTING TEMP SPECIAL LETTERS OF ADMIN

COUNSEL:

DEBRA EHRLICH	(OBJ)...C BENJAMIN GRAFF
DEBRA EHRLICH	(PET)...C BENJAMIN GRAFF
DIANNA L THOMPSON	(PET)...PRO/PER
MARILYN LOUISE DELASHMUTT	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Ex Parte re Order Granting Temporary Special Letters of Administration.

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

1. Matter set 10/17/17, wherein, Ex Parte Orders were denied.
2. The Court ordered counsel to prepare an order stating neither party is to sell, negotiate or dispose of assets without the Courts approval. Need same.
3. The Court ordered counsel to contact lender and get information regarding foreclosure and report back to Court.
4. Court informs counsel and parties that they need to meet and confer regarding properties.

RECOMMENDATION:

Need to clear note 2.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700855

CASE NAME: DOROTHY J SNYDER

HEARING:
Petition for SPOUSAL PROPERTY PETITION

COUNSEL:
DOROTHY J SNYDER (DEC)...
JEFFREY L SNYDER (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Jeffrey L. Snyder ["Petitioner"].

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

1. Petitioner requests a determination of property passing to surviving spouse as community property for real property at Rialto, CA in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? Need verified supplement.
2. Need Notice of Hearing with proof of service.
3. ~Proposed Form Order 08/25/17.

RECOMMENDATION:

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

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700856

CASE NAME: ROLF SAUTTER

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

CURT SAUTTER (PET)...MIHELL LAW
ROLF SAUTTER (DEC)...

GENERAL INFORMATION:

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

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

1. Estimated value of the estate is \$291,500. Suggest bond of \$292,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
2. Phone number is missing on page 2 to Duties form. Need complete duties form.
3. Need proof of publication.
4. Notice filed on 08/30/17 is the wrong type of notice. Need Notice of Petition to Administer Estate with proof of service to include German Consulate.
5. ~Proposed Order/Letters 08/25/17.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **02/05/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 11/28/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700850

CASE NAME: LAWRENCE E CATRON REVOCABLE TRUST

HEARING:

Petition for INSTRUCTIONS RE CONSTRUCTION OF DISTRIBUTION
PROVISIONS OF TRUST

COUNSEL:

LAWRENCE E CATRON REVOCABLE TR (TRU)...

US BANK NA

(PET)...JEREMY J. OFSEYER

Currently under review by Legal Research.

(LR)

Notice given

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300160

CASE NAME: Louise Evelyn Garde

HEARING:

Accounting Review

COUNSEL:

GILBERT M GUTIERREZ	(PET)...
GILBERT M GUTIERREZ	(PET)...
JENNIFER M. DANIEL	(PET)...JENNIFER DANIEL
LOUISE E. GARDE	(CEP)...JENNIFER DANIEL
LOUISE EVELYN GARDE	(CEP)...JENNIFER M DANIEL
MELODIE Z SCOTT	(CPE)...J. DAVID HORSPOOL
NEIL GARDE	(CPE)...KEVIN A MCKENZIE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Fifth Account entered 06/30/16; sixth account now due.
2. No account. Need same.

RECOMMENDATION:

Inquire status

(nb)

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

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS

HEARING:

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

COUNSEL:

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

GENERAL INFORMATION

**Continued from 02/02/17, 10/18/17 and 10/24/17 at request of Attorney Roth.
Objections filed. Court clears note 7. Notice given by Attorney Roth.**

THIS CASE SET FOR HEARING ON **AMENDED** (09/19/17) 1st Account Current,
Petition for Authority to Sell Real Property, allowance of Fees and Reduction of Bond
by Valarie Evans-Burbank.

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

1. Accounting period 07/15/15 – 04/30/16.
2. Assets on hand \$568,877.24 of which \$293,827.24 is cash.
3. Petitioner is seeking authority to sell personal residence of conservatee. Pr.C. § 2590 powers were granted with exception of the sale of conservatee's residence. Court to require petitioner to file a separate petition and require a report of counsel and/or Court Investigator report.
4. Attorney requests fees of \$21,486 for 87.6 hours at \$250/295 per hour with a balance owing \$10,686. Itemized [Acct.12/22 LFpg27-41].
5. Attorney requests reimbursement of costs totaling \$3,621.88. Itemized [Acct.12/22 LFpg42].
6. Petitioner requests reimbursement of attorney costs advanced of \$10,800 and bond premium of \$1,210 for a total of \$12,010.

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

7. Current bond is \$300,000. Petitioner seeks a reduction to \$221,733.65. Legal fees are approximately \$75,000. Bond calculation does not include 10% recovery. Court to require bond of \$244,000.
8. Disbursements indicated monthly allowance for Donna Osborn whom conservatee lives with [Acct.12/22 LFpg23].
9. **Objections filed on behalf of conservatee on 10/23/17. Need signed proof of service.**
10. **Response to Objections filed by Valarie Evans-Burbank.**
11. Proposed Order: 12/22/16. Not reviewed as notes need to be cleared.

RECOMMENDATION

Matter is contested. If approved, set hearing on the next accounting review for **06/28/18**. Accounting to be filed 30 days in advance.

(lc/nb)

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

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500116

CASE NAME: Robert Sanchez

HEARING:
Accounting Review

COUNSEL:

ROBERT SANCHEZ	(CEP)...J BENJAMIN SELTERS III
SANDRA WILLIAMS	(OBJ)...PRO/PER
SYLVIA VALENZUELA	(PET)...AVILES & ASSOCIATES

GENERAL INFORMATION

Continued from 10/17/17 on courts motion. Need waiver of account.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Matter set at 01/03/17 hearing, wherein, the Court approved the waiver of account that was received on 08/25/16; and set this matter for an OSC re termination of the conservatorship of the estate as estate assets consists of SSI funds. All other monies and property are held in the SNT in LA County. Petition to terminate the conservatorship of the estate granted on 05/16/17.
- 2 Need signed and conformed copy of Ex Parte Petition to Dispense with Accounting and Order received on 08/25/16.
- 3 Need account or waiver of account beginning 08/20/16 to 05/16/17.
- 4 Need to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
- 5 CI report filed 10/05/17.
- 6 Conservatee resides in Whittier, CA. Suggest transfer to LA County. If so, court to set control date.
- 7 ~Proposed Form Order 10/05/17.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion re transfer to LA County.
(nb)

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

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

HEARING:
Hearing Re: EMERGENCY HEARING (CI MEMO)

COUNSEL:
JOYCE ELLEN GOBBEL (CEP)...CRAIG M PARKER
MARIE J HUMPHREY (PET)...HARTNELL LAW GROUP
THOMAS BEFERT (PET)...HARTNELL LAW GROUP

Request for Waiver of Court Fees and Costs filed by JOYCE ELLEN GOBBEL is GRANTED

GENERAL INFORMATION:

Continued from 11/21/17 for Attorney Parker to be present.

THIS CASE IS SET FOR HEARING ON Emergency Hearing (CI Memo)

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

1. Matter set after receipt and review of CI Interoffice Memo filed on 11/15/17.

RECOMMENDATION:

Court's discretion

(nb)

Future Hearing:

03/14/18 Compliance review hearing

10/17/18 Accounting Review.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600166

CASE NAME: RODRIGO R ROMERO

SEE ALSO 19A

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ALEJANDRO QUIROGA

COUNSEL:

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

GENERAL INFORMATION

Continued from 10/04/17 at request of counsel to file brief. Notice waived.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. **Conservatee passed away on 04/01/17.**
2. Alejandro Quiroga, nephew, appointed temporary conservator of the person and estate on 12/21/16 and general conservatorship on 03/01/17, \$ \$73,700.00 bond. There does not appear to be an order and letters for general conservatorship.
3. Notification of Conservatee's rights per Pr.C.§1830(c) filed 06/15/17.
4. Care plans now moot.
5. Final Inventory and Appraisal filed indicating \$0 assets.

RECOMMENDATION

Inquire status of order and letters as Conservator has not been discharged.

(lc/nb)

Superior Court of Calif, County of San Bernardino
Page: 19A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600166

CASE NAME: RODRIGO R ROMERO

SEE ALSO 19

HEARING:

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

COUNSEL:

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

Request for Waiver of Court Fees and Costs filed by RODRIGO R ROMERO is
GRANTED
Fee waiver amount due \$465.00 for petition for conservatorship on 06/20/16

Request for Waiver of Court Fees and Costs filed by ALEJANDRO QUIROGA is
GRANTED
Fee waiver amount due \$465.00 for petition for first and final on 06/06/17

GENERAL INFORMATION:

Conservatee passed away on 04/01/17.

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

Continued from 11/21/17 to be heard with other pending hearing.

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

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

1. General order/letters to include estate powers granted on 03/01/17 have not
issued.
2. Court to review report by court-appointed counsel, Sandy Turner, filed on
06/19/17.
3. Court to review sticky note at LF, p. 6.

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

4. Final Inventory and Appraisal does not include real property or personal property referred to in petition. Need amended inventory.
5. Accounting period 12/21/16 to 05/31/17 (pre & post death periods).
6. Assets on hand \$0.00. Question the status of conservatee's home/real property? Need verified supplement.
7. No fees or reimbursement for costs are requested.
8. Petitioner requests bond of \$73,700 be exonerated. However, bond is not exonerated until entry of final discharge order.
9. Proposed Order 06/06/17 refers to Temporary Conservator and exonerates bond.

RECOMMENDATION:

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

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700005

CASE NAME: HAYLEY MARIE ALVILLAR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THERESA ANN ALVILLAR-EULBERG

COUNSEL:

THERESA ANN ALVILLAR-EULBERG (CP)... RONALD A STONE

HAYLEY MARIE ALVILLAR (CTP)...JAMES B CHURCH

GENERAL INFORMATION

Theresa Ann Alvillar-Eulberg appointed Limited Conservator of the person in 05/31/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C.§1830(c).
2. Need Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
3. Need Statement of Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700046

CASE NAME: MTR OF RAUL TORALES

HEARING:

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

COUNSEL:

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

GENERAL INFORMATION

Continued from 10/24/17 on courts motion. Attorney Turner reports she has had no contact with the conservator.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS02145

CASE NAME: MATTER OF ABEL A SANCHEZ

HEARING:

Accounting Review

COUNSEL:

ABEL A SANCHEZ	(CEP)...MARK J. FLORY
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G DEBELLEFEUILLE
GEORGIANA D SANCHEZ	(CP)...CRAIG M PARKER
GEORGIANA SANCHEZ JENNINGS	(CP)...CRAIG M PARKER
MARK J. ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
RAUL SANCHEZ	(CE)...CRAIG M PARKER
RAUL SANCHEZ	(PET)...ANNETTE G DEBELLEFEUILLE

XREF: SGSS03708 (Ashley N Sanchez), **SCV099443**

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Third Account entered 03/01/16; fourth account now due.
2. No account or waiver of account. Need separate accountings for conservatorship estate and SNT Estate.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of S/an Bernardino/

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 11/28/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS8750

CASE NAME: IN THE MATTER OF DIANE JEAN DI BIASE

VACATED

HEARING:

Accounting Review

COUNSEL:

DIANE JEAN DI BIASE	(CEP)...
JOHN DIBIASE	(CPE)...PRO/PER
PATRICIA WOLHART	(CPE)...PRO/PER

FUTURE HEARING DATES:

08/15/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 1 ADD ON

CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900337

CASE NAME: ISAAC PRUDHOLME S.N. TRUST

HEARING:

Hearing Re: PAYMENT OF BURIAL PLOT

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV	()...
ISAAC PRUDHOLME SPECIAL NEEDS	(TRU)...PRO/PER
KATIE HERNANDEZ	(PET)...HARTNELL LAW
LOS ANGELES COUNTY PUBLIC GUAR	()...
MELODIE SCOTT	(TEE)...SHERRI L KASTILAHN
RICKY PRUDHOLME	(PET)...PRO/PER

XREF: SCVSS19171 (Bennet et al – v-Holliday)

GENERAL INFORMATION:

Continued from **09/12/17** on court's motion for proof of payment.

Continued from 10/31/17. The Court notes that section 4.8 of the trust puts the State in the 1st and 2nd place for distribution. Ricky Prudholme has still been unable to get proof of payment for burial plot/expenses. Matter continued once again for proof of payment to be submitted to the Court. Once proof of payment has been submitted, the Court intends to grant this request

THIS CASE IS SET FOR HEARING ON Payment of Burial Plot.

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

1. Matter set at 07/03/17 hearing, wherein, Tamsen Bennett was ordered to provide the Trust with proof of payment made for the burial plot for Issac Prudholme. Once proof of payment is provided, the Trust will reimburse Ms. Bennett her 1/2 of the costs related to the plot or her 1/2 of the costs related to the plot or portion of the plot for Issac Prudholme. Need same.

RECOMMENDATION:

Court's discretion

(nb)

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

Future Hearing:

01/09/18 Petition for transfer deceased SNT found etc.

01/09/18 Petition for motions to court

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

Superior Court of Calif, County of San Bernardino
Page: 1A
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900607

CASE NAME: ETHEL J GROSS
HEARING:
Petition for REQUEST FOR STAY OF ACTIONS

COUNSEL:

CHRISTOPHER R. OLEARY SR	(PET)...DAVID L NAPLES
CHRISTOPHER R. OLEARY SR	(RES)...DAVID L NAPLES
ETHEL . GROSS TRUST	(TRU)...
ETHEL J GROSS	(DEC)...
MARY LEMOS	(PET)...JERRY LA CUES
SHARON L. VOLLA	(PET)...RICHARD A HIGBIE
WILLIAM SEEFELDT	(PET)...DAVID HIERSEKORN
WILLIAM SEEFELDT	(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Request for Stay of Actions by son, William Seefeldt ["Petitioner"].

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

1. Petitioner requests that the Court appoint a Public Administrator; alleges the Administrator has failed in his fiduciary duties and distributed money to numerous other parties not mentioned in his "Will"[LF, p.6]; and protests any payment without an accounting of what Christopher O'Leary already billed along with his attorney David Naples.
2. Petitioner further requests that the Surety Bond for \$330,000 issued by US Specialty Insurance c/o Bond Services of California be granted to him; and requests the Court release any portion of the remaining \$54,000 to him, while he pursues the remaining missing funds of \$400,000.
3. Response to letter of "objection" filed by Administrator, Christopher R. O'Leary, Sr. on 10/30/17.

RECOMMENDATION:

Court's discretion
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200918

CASE NAME: SARAH J. MCCLASKEY

HEARING:
Hearing re Final Discharge

COUNSEL:

LARRY PARKER (PET)...RICHARD I GONZALEZ
SARAH J MCCLASKEY (DEC)...

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

GENERAL INFORMATION:

Continued from **07/28/15** and **09/22/15** to determine where or whom the funds are to be distributed to as Counsel states there is a pending probate case in Ireland for an heir.

Continued from **12/01/15** to retain attorney service in Ireland to retrieve documents.

Continued from **02/09/16** Counsel still investigating re sister (heir) in Ireland.

Continued from **04/12/16, 6/13/16, 8/22/16 and 11/07/16.**

Continued from **06/27/17**. Amended order to be filed. Matter continued for Counsel to further verify son's and son's counsel's identity. Counsel has determined there is no Irish probate filed.

Continued from 08/22/17 on Court's motion to contact Irish Consulate. If proof of probate, bank account information and proper identification is not provided by a certain deadline, monies may be held. Notice to be given by Mr. Gonzalez.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 07/29/14.
2. No receipts filed. Need same.
3. Need Ex-Parte Petition/Order for Final Discharge.
4. Declaration filed 02/03/16 alleges Lillian Thompson may be deceased and requests additional time to further investigate when/if Ms. Thompson died.
5. Notice filed 11/04/16 does not give 15 days' notice. Need proper service.

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

6. Notice filed 11/04/16 affixes a declaration by Attorney Richard L. Gonzalez regarding final distribution, which indicates that an amended order is forthcoming. **Need amended Order.**
7. **Need verified supplement identifying son and son's counsel.**

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(nb/dl/sa/lc/nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600738

CASE NAME: PAUL BARCELONA SPECIAL NEEDS TRUST

HEARING:

Petition for AUTHORIZATION TO PURCHASE RESIDENCE

COUNSEL:

CLARISSE VILLALPANDO	(PET)...MICHELS & LEW
PAUL BARCELONA	(MIN)...PRO/PER
PAUL BARCELONA SPECIAL NEEDS T	(TRU)...
WESTAMERICA BANK	(PET)...RANDOLPH M SHARON

Currently under review by Legal Research.
(LR)

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

Future Hearing:
12/05/17 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601168

CASE NAME: ROBERT V BANDURRAGA & ARMIDA M BANDURRAGA TRUST

HEARING:

Petition for ORDERS: REMOVING MARY IRENE LEON AS TRUSTEE ETC

COUNSEL:

JAMES M BANDURRAGA	(PET)...MICHAEL C MADDUX
MARY IRENE LEON	(OBJ)...BANKS GARCIA & JANIS
ROBERT & ARMIDA BANDURRAGA REC	(TRU)...

Currently under review by Legal Research.
(LR)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700308

CASE NAME: Dorothy Marie Oberg

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

DOROTHY MARIE OBERG (DEC)...

LEONARD OBERG (PET)...FARHAT LAW FIRM, APC

Notice taking hearing off calendar forwarded to department for consideration.
(nb)

Future Hearing:

08/21/18 Accounting Review.

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

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700437

CASE NAME: MTR OF ANDY GASCA

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
ANDY GASCA (DEC)...
EDWARD F CORNEJO (PET)...LAW OFFICE OF DAVID T EGLI

GENERAL INFORMATION:
Continued from 10/31/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Order appointing EXECUTOR, EDWARD F CORNEJO appointed with FULL IAEA. Bond FIXED AT \$330,000.00
2. Need proof of bond.

RECOMMENDATION:
Need proof of bond.
(nb)

Future Hearing:
11/20/18 Accounting Review.

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700618

CASE NAME: STANLEY MARK DRISDOM

SEE ALSO 8

HEARING:
OSC re: Dismissal

COUNSEL:
JEFFERY RAY DRISDOM (PET)...PRO/PER
STANLEY MARK DRISDOM (DEC)...

GENERAL INFORMATION

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

Continued from 10/31/17 due to no appearance. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Jeffery Ray Drisdome, brother

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

1. Net estate value consists of \$14,000 with \$5,000 in personal property. Petitioner requests bond not be required because decedent was his brother and he was his caretaker until his death. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by all heirs. Alternatively, suggest minimum bond of \$20,000. JTD.
 - a. Waiver of Bond by Frankie Ellington filed.
2. Section 8 to petition [LF, p. 5] does not specify relationships of Donna Drisdome Sparks and Frankie Ellington. Need verified supplement.
3. Need Notice to Petition to Administer Estate and proof of service.
4. Need proof of publication.
5. ~Proposed Form Order: 06/23/17

RECOMMENDATION

Need to clear notes 1 - 4. Court's discretion re bond. If approved, set Accounting/Status Review for **02/05/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.
(cs/nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700618

CASE NAME: STANLEY MARK DRISDOM

SEE ALSO 7

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

JEFFERY RAY DRISDOM (PET)...PRO/PER

STANLEY MARK DRISDOM (DEC)...

Request for Waiver of Court Fees and Costs filed by JEFFERY RAY DRISDOM is GRANTED

See prior matter #7.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700729

CASE NAME: MTR OF MARY M JOSEPH

HEARING:

Hearing Re: STATUS OF TRANSFER

COUNSEL:

MARY M JOSEPH (DEC)...

NICOLE IDA JOSEPH (PET)...PRO/PER

VACATE - Notice of Acknowledgment of Receipt of Transfer filed 08/16/17.
(nb)

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700789

CASE NAME: FRANCIS LEAMOIN PARIS, JR.

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
FRANCIS L PARIS III (PET)...FULLERTON LEMANN SCHAEFER
FRANCIS LEAMOIN PARIS JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond.

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

1. Matter set at 10/31/17 hearing on appointment, wherein, the Court required a bond in the amount of \$110,000.
2. No bond. Need same.

RECOMMENDATION:

Need bond.
(nb)

Future Hearing:
01/08/19 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700858

CASE NAME: MTR OF ELEANOR WILLIS

HEARING:

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

COUNSEL:

ELEANOR WILLIS (DEC)...
PAUL WILLIS (PET)...MARK STEPHEN SMITH

GENERAL INFORMATION:

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

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

1. Section 8 to petition [LF, p. 5] does not include relationships to decedent and does not include petitioner. Need verified supplement.
2. Petition alleges all heirs waive bond for estate estimated at \$81,000. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111 by petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(c).
3. Waivers of Notice of Probate, Publication and Estate affixed to petition [LF, pgs. 6, 8] are barely legible. However, notice and publication are required per code.
4. Need proof of publication per Pr. C. §8121.
5. Need Notice of Petition Administer Estate [DE-121] with proof of service per Pr.C. §8110.
6. Need Duties and Liabilities of Personal Representative form.

RECOMMENDATION:

Need to clear notes 1-2, 4-6 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **02/05/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700859

CASE NAME: JONG SUK HAHN

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ALICE A HAHN (PET)...LAMB & KAWAKAMI
JONG SUK HAHN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Alice A. Hahn ["Petitioner"].

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

1. Petitioner requests determination and confirmation of property passing to the surviving spouse as community property. This Petition affects title to 4 real properties; title to personal property consisting of an E Trade Financial Investment Account.; a Bank of America Checking Account; title to all right title and interest in and to Hong Suk Hahn, M.D.
2. Petition states parties were married on 02/22/80 and accumulated all of their property from marital partnership earnings of the parties. Petitioner proffers decedent's will [LF, pgs. 5-13]; Grand Deeds [LF, p. 16-25]; Financial Investment Statement [LF, pgs. 26-33]; Statement of Information with Secretary of State [LF, pgs. 34-36]; and Bank statement [LF, pgs. 37-42].
3. ~Proposed Form Order 09/19/17.

RECOMMENDATION:

Court's discretion

(nb)

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

DATE: 11/28/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700908

CASE NAME: MARY BETH STOCKSTAD

HEARING:

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

COUNSEL:

JULIA L STOCKSTAD (PET)...DALE K BETHEL
MARY BETH STOCKSTAD (DEC).

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by daughter/named executrix, Julia L. Stockstad ["Petitioner"].

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

1. Will waives bond. Estate valued at \$410,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Need proof of publication.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **02/05/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700108

CASE NAME: PATRICIA MAE LAWERENCE PARK

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

JUDITH KATHLEEN PARK (RP)...
PATRICIA MAE LAWERENCE PARK (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

XREF: CONPS1600269 (Patricia Mae Lawrence Park)
CIFMS1600004 (Janice Park-v-Judith Park)

Notice:

Need Notice of Hearing and proof of personal service on Respondent, Judith K. Park.
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600248

CASE NAME: CONNIE R ROWLAND

SEE ALSO 16

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHERYL ANDERSON

COUNSEL:

CHERYL ANDERSON (PET)...PRO/PER
CONNIE R ROWLAND (PCE)...J. DAVID HORSPOOL
ROBERT C GARNETT JR (OBJ)...

GENERAL INFORMATION

Continued from 09/19/17 on Courts motion.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Cheryl Anderson appointed Conservatee of the person and estate on 06/27/17, no bond.
2. Notification of Conservatee's Rights filed 06/29/17.
3. **Determination of Conservatee's Appropriate Level of Care and Care Plan filed.**
4. **Final Inventory and Appraisal filed.**
5. Need proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.

RECOMMENDATION

Need to clear note 5.

(lh/nb)

Future Hearing:

09/04/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600248

CASE NAME: CONNIE R ROWLAND

SEE ALSO 15

HEARING:

Hearing Re: INFORMAL ACCTG RE: MISSING MONIES (MR. GARNETT)

COUNSEL:

CHERYL ANDERSON (PET)...PRO/PER

CONNIE R ROWLAND (PCE)...J. DAVID HORSPOOL

ROBERT C GARNETT JR (OBJ)...

Request for Waiver of Court Fees and Costs filed by CONNIE R ROWLAND is GRANTED

Request for Waiver of Court Fees and Costs filed by ROBERT C GARNETT JR is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Informal Accounting re Missing Monies (Mr. Garnett).

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

1. Matter set at 06/27/17 hearing, wherein, Mr. Horspool reported that Mr. Garnett did turn over bank statements and cash in the amount of \$5,785. Counsel further reports that leaves approximately \$8,800 money missing from the sale of the mobile home and the car. Mr. Horspool requested Mr. Garnett provide a list of receipts showing that the missing monies were spent for the benefit of Connie Rowland. Need same.
2. Robert Garnett Jr is cited to be present at next hearing. Need return of citation.
3. **Proof of Unsuccessful Service filed.**

RECOMMENDATION:

Need to clear notes.

(nb)

Future Hearing:

09/04/18 Accounting Review.

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Superior Court of Calif, County of San Bernardino

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

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600278

CASE NAME: JOSEPH DIAB

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SAMER DIAB

COUNSEL:

JOSEPH DIAB	(CEE)...MELVIN L FRIEDLAND
MICHLINE DIAB	(PRO/PER
SAMER DIAB	(CPE)...E. JOAN NELMS

XREF: SGSS05306 (Joseph Diab)

GENERAL INFORMATION

Samer Diab (father) appointed Conservator of the Person and Estate on 04/25/17,
\$255,000 bond, remaining in blocked accounts.

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

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

1. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
2. Need Statement of Care Plan in accord with Pr.C.§2352.5.
3. Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
6. If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

07/03/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: SG SS3997

CASE NAME: IN THE MATTER OF PATSY JANE RYAN

HEARING:

Hearing Re: OSC RE: MS. WACHHOLZ FAILURE TO FOLLOW COURT ORDER

COUNSEL:

LAWRENCE A DEAN II	(CPE)...HORSPPOOL & HORSPPOOL
MELODIE Z SCOTT	(PRO/PER
PATSY JANE RYAN	(CEP)...PRO/PER
PATSY JANE RYAN	(INC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re: Failure to Follow Court Order by Ms. Wachholz.

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

1. Matter set at 09/19/17 hearing, wherein, the Court ordered Pamela Wachholz to be present at hearing to explain why VA benefits are not being turned over to the conservator or why an accounting is not being filed.
2. Mr. Horspool reports Ms. Wachholz has retained counsel and they will meet to attempt resolution. If issue resolves, Ms. Wachholz need not be present.

GENERAL INFORMATION:

Court's discretion

(nb)

Future Hearing:

02/26/19 Accounting Review.

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

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

DATE: 11/28/17 TIME: 9:30 DEPT: S37P

CASE#: RC RS00170

CASE NAME: IN THE MATTER OF TIMOTHY ERIC JOHNSON

HEARING:

SEVENTH Account and Report of DONALD JOHNSON, JESSIE JOHNSON and
Petition for allowance of fees filed.

COUNSEL:

DONALD JOHNSON	(CPE)...CHARLES S ALTHOUSE
JESSIE JOHNSON	(CPE)...CHARLES S ALTHOUSE
TIMOTHY ERIC JOHNSON	(CEP)...
TIMOTHY ERICJOHNSON LITIGATION	(TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Sixth Account Current of Trustees (SNT),
Donald P. Johnson and Jessie L. Johnson (parents); and Petition for Fees.

THE FOLLOWING ISSUES/DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting covers 03/01/15 to 02/28/17.
2. Assets on hand: \$133,372.86 (cash of \$122,488.97 and \$10,883.89 in the carry value of an annuity and two life insurance policies.).
3. Current bond of \$215,000. Petitioner requests bond be increased by \$35,143 for a total bond of \$250,243.00. Appears sufficient. JTD.
4. Petitioner waives compensation.
5. Attorney requests fees of \$2,360.00. Billed at \$295/hour for 8 hours' attorney time. Itemized [LF, p.50]. JTD.
6. Need residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5).
7. During the accounting period, petitioner paid Blanca Giron for caregiver services. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
8. Last CI report filed 10/01/14. Need updated CI Report.
9. Petition indicates the principal place of administration of this trust is Lake Elsinore and Conservatee now resides in Riverside County. Does Court wish to transfer matter to Riverside County? If so, Court to set control date. JTD.

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10. Proposed Form Order 08/25/17 does not indicate petitioners waive compensation.

RECOMMENDATION:

Need to clear notes 6-8 then Court's discretion re fees; bond; and transfer. If approved, set next accounting review for **04/24/18** (if one year) or **04/2319** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)