



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 12/04/17

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.

11/13 ww (11/15/17 cs; 11/28/17 cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1400663

CASE NAME: ERWIN B. KOWALSKI

HEARING: Re: 1ST ACCOUNT CURRENT & REPORT

COUNSEL:

MICHAEL J. KOWALSKI (PET)...PRO/PER
ERWIN B. KOWALSKI (DEC)...

Waiver of Court Fees and Costs filed by MICHAEL J. KOWALSKI is GRANTED
TOTAL FEES WAIVED TO DATE: \$465.00
Fee waiver amount due \$645.00
\$465.00 for probate petition filing fees on 08/12/14
\$90.00 for status report on 10/28/16
\$90.00 for ex parte hearing on 07/24/17

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First Account Current, by executor, Michael Kowalski, son

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

1. Inventory and Appraisal filed 03/21/17 does not include bank/financial statements per Local Rule 20-908. Need bank statement.
2. Need Petition or Report on Amended First Account current in accordance with Pr.C. §1064 and supporting schedules.
3. Accounting period 04/24/14 – 11/02/17
4. Beginning assets on hand do not reflect assets indicated on amended Inventory and Appraisal filed 07/14/15. Also totals entered for schedules A and D are not entered correctly. Need corrected summary of account.
5. Need findings regarding sole and separate property, per Local Rule 20-906.
6. Need manner of asset distribution per Local Rule 20-907.
7. Real property was sold during the administration. Need copy of closing escrow statement per Local Rule 20-910.
- 8. Need Notice of Hearing and proof of service on Rosemary Kowalski.**
9. Need statement regarding notice to Director of Health Care Services or notice per Pr.C. §9202(a).
10. Need Statement regarding notice to Director of California Victim's Compensation Board Pr.C. § 9202(b).

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.

11. Need statement regarding notice to Franchise Tax Board or notice per Pr.C.§9202(c)(1).
12. Need statement regarding creditor's claims.
13. Need financial statements supporting ending balance per Local Rule 20-908.
14. No proposed Order. Submit after hearing

RECOMMENDATION

This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. Need proper, amended account per Pr. C. § 1060 et seq. to be set on first check calendar no sooner than **02/05/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules
(cs)

Superior Court of Calif, County of San Bernardino
Page: 2
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500252

CASE NAME: MTR OF DAVID L LOFTUS

SEE ALSO 3 4

HEARING:

Hearing Re: 850 PETITION FILED ON 5/20/16

COUNSEL:

ERIN LOFTUS	(PET)...MERCY L HALL
DAVID L LOFTUS	(DEC)...
DANIEL LOFTUS	(PET/OBJ)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

Continued from 08/31/16, 11/07/16 and 03/06/17 at request of counsel. Waiting for status of appeal in Federal court.

THIS CASE IS SET FOR HEARING ON Pr. C. §850 Petition

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

1. Daniel Loftus alleges that he is the child of decedent, David Loftus. Erin Loftus is the surviving spouse of the decedent and the duly appointed administrator of the decedent's estate. Erin and the decedent were married for 5 years prior to the decedent's death.
2. Daniel alleges that the I & A that was filed 9/14/15 is incomplete as it does not include any of the decedent's tangible personal property. Daniel alleges that the decedent inherited a considerable amount of personal property from his father (petitioner's grandfather) as separate property. Daniel alleged that Erin is in possession of these items.
3. Petitioner alleges that there are at least 7 specific items (Petition at LF pg. 4).
4. Petitioner seeks a court order compelling Erin to transfer the 7 items and any other separate property from the decedent to him. He also seeks a court order compelling Erin to list said items on the I & A.
5. Notice complete. As of the date of this review, not objection has been filed.

RECOMMENDATION:

Court's discretion.

(oc/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500252

CASE NAME: MTR OF DAVID L LOFTUS

SEE ALSO 2 4

HEARING:

Accounting Review

COUNSEL:

ERIN LOFTUS

(PET)...MERCY L HALL

DAVID L LOFTUS

(DEC)...

DANIEL LOFTUS

(PET/OBJ)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

Continued from 08/31/16, 11/07/16 and 03/06/17 at request of counsel. Waiting for status of appeal in Federal court.

THIS CASE IS SET FOR HEARING ON Accounting/Status Review

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

1. Letters of Administration issued to Erin Loftus on 6/25/15, \$20,000 bond.
2. Need an accounting or status report.

RECOMMENDATION:

Inquire status.

(sa/lc/nb/cs)

Superior Court of Calif, County of San Bernardino
Page: 4
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500252

CASE NAME: MTR OF DAVID L LOFTUS

SEE ALSO 2 3

HEARING:

Spousal Property Petition hearing.

COUNSEL:

ERIN LOFTUS	(PET)...MERCY L HALL
DAVID L LOFTUS	(DEC)...
DANIEL LOFTUS	(PET/OBJ)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

Continued from **5/28/15** Court tentatively denies petition as to the VA litigation if it is personal injury litigation. Court requests title documents be filed as to other property. Continued from **07/01/15**. Daniel Loftus requested continuance to retain counsel. Request granted over petitioner's objections. Only one continuance granted to retain counsel.

Continued from **08/06/15, 09/17/15** and **11/05/15**. Court was informed that there is a signed settlement by a federal magistrate in this matter. Mr. Loftus and his counsel report they are not in agreement with settlement. Parties to confer with counsel in the federal matter to come to an agreement about what exactly have settled. If needed, return to federal court for clarification or motion to set aside settlement.

Continued from 3/24/16 for counsel are directed to file a joint statement prior to next hearing.

Continued from 08/31/16, 11/07/16 and 03/06/17 at request of counsel. Waiting for status of appeal in Federal court.

THIS CASE SET FOR HEARING ON Spousal Property Petition

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

1. Petitioner, Erin Loftus (also appointed administrator 05/06/15), seeks entire property left by decedent. Petitioner is requesting to confirm her half of the community property and acquire decedent's half.
2. Petitioner alleges per Family Code § 780 that the pending Veteran's Administration litigation proceeds are community property. Court to clarify what petitioner is actually seeking re Veteran's Administration. **Need verified**

supplement as to litigation per 5/28/15 minute order. Supp 06/25/15: Petitioner states that the proceeds from the Veteran's Administration are community property per Fam Code § 780. There are limited exceptions to the community property rule under the family code; however, petitioner and decedent were not living apart or subject to any dissolution.

3. Petitioner is seeking court confirm that personal property, 3 bank accounts, are community. Petitioner and decedent were married in 2009; 5 ½ years prior to death. **Supp 06/25/15:** Two accounts ending in 1583/3861 were opened prior to the marriage. Decedent's only income was Veteran's Administration benefits of \$300 per month. Petitioner alleges they opted not to add her to the account due to the nominal amounts. However, the benefits increased to \$1,547 in 2012. Petitioner alleges that she was added to the account in 10/2012. Question if petitioner is added to the account, how is it subject to this petition? **Supp 11/04/15: two Wells Fargo accounts are now held in petitioner's sole name and not subject to this petition. Court to inquire which bank accounts are not subject to this petition as it is not clear, nor has an amended order been filed.**
4. Petitioner is seeking the BMW automobile be transferred as community property. The vehicle was purchased with community funds. Petitioner is continuing making payments.
5. **Objection filed by Daniel Loftus, heir, to dispute petitioner's interpretation of the Family Code and its support for petitioner's assertion that the VA claim becomes community property distributable to petitioner. Objector asserts that the proceeds from the VA claim should not be included in the community property to be confirmed to petitioner. Objection was filed and served by mail on petitioner just days before this hearing. Court may wish to allow an opportunity for petitioner to file a Reply brief addressing the Opposition.**
6. Proposed Form Order: 04/14/15.

RECOMMENDATION

Court's discretion.

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

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500300

CASE NAME: ILA MAE BALDWIN

HEARING:
Accounting Review

COUNSEL:

JASON M WHITTAKER	(PET)...THOMAS W DOMINICK
ILA MAE BALDWIN	(DEC)...
CHRISTOPHER JOHN WHITTAKER	(TP)...ROBERT A KRASNEY
INHERITANCE FUNDING CO	(STEVEN D SCHROEDER)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting

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

1. Letters of Administration issued to Jason Whittaker, grandson, on 05/13/15, no bond.
2. Need an accounting or status report.

RECOMMENDATION:

Inquire status.
(cs)

Superior Court of Calif, County of San Bernardino
Page: 6
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500671

CASE NAME: JOULAN LU

HEARING:

FINAL Account and Report of WENSHENG XU and Petition for allowance of fees filed.

COUNSEL:

WENSHENG XU (PET)...FEI PANG
JOULAN LU (DEC)...

GENERAL INFORMATION:

Continued from **06/26/17** for review of supplement filed 06/22/17. Counsel indicates an amended final accounting may be filed. Court notes amended final accounting to be filed by 07/28/17.

Continued from **08/28/17** at request of court. Nothing new filed in this matter.

Continued from 10/16/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Final Accounting and Report of Personal Representative, Wenshen Xu ["Petitioner"].

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

1. Account period 01/01/16 – 10/06/17
2. Summary of account indicates assets on hand \$397,500.00 consisting of real property.
3. No compensation is requested.
4. Summary of Account filed 10/12/17, page 2, [Supp, LF, p.3], indicates receipts in the amount of \$801.87 for filing fees and is conflicting with Exhibit A attached, [LF, p. 6]. Need verified supplement clarifying.
5. Need findings re: known creditor; there is a creditor's claim from American Medical Response filed on 11/02/15. However, there is no allowances or rejection notices in the file regarding these claims. Supp. filed 10/12/17 indicates petition is still awaiting on a satisfaction and release from American Medical Response.

6. **Creditor's Claim filed by Franchise Tax Board in the amount of \$2,519.22; however, not in Laserfiche at time of review. Need allowance or rejection notice.**
7. **Unconformed Notice of Hearing, affixed to supplement filed 10/12/17, does not include parent(s) of minors or creditor, American Medical Response and does not give 15 days' notice. Need proper service.**
8. Decedent died intestate with 2 minor children (12 & 6) who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is separate property of decedent. Does Court wish to appoint counsel for minors? JTD.

RECOMMENDATION:

Need clear notes 5 - 7. If approved, set hearing on the filing of receipts and final discharge for **12/10/18**

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501121

CASE NAME: LUCY JOHNSON

HEARING:
Accounting Review

COUNSEL:
CAROLINE DALTON-ALVAREZ (PET)...GREGORY PAUL BENTON
LUCY JOHNSON (DEC)...

GENERAL INFORMATION:
Continued from 04/10/17, 08/14/17 and 10/16/17

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Letters of Administration issued to Caroline Dalton-Alvarez, daughter, on 06/09/16, limited authority, \$20,000 bond.
2. Need Final Inventory and Appraisal.
3. Declaration of attorney Gregory Benton filed 11/02/17 wherein he indicates the estate is not solvent and requests a continuance to come up with an agreement as to distribution. JTD

RECOMMENDATION:
Inquire status of accounting. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. (nb/ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600051

CASE NAME: DARLENE SUE WEST

HEARING:

Probate status report filed.

COUNSEL:

BONNIE L MAROWITZ	(PET)...JASON L GAUDY
DARLENE SUE WEST	(DEC)...
REBECCA L WEST	(PET)...ELISABETH KEMPE-OLINGER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report (filed 08/18/17).

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

1. Petitioner, Rebecca West (Administrator) alleges the estate is not in a condition to be closed as there are creditor's claims which she is diligently working to generate enough funds sufficient to cover all creditor's claims, fees and expenses so she can petition for final distribution and inherit the estate real property.
2. Petitioner should have all funds to close this probate within the next year and requests an additional 12 months to close the estate.
3. ~Proposed order submitted: 08/18/17

RECOMMENDATION:

Need to clear/Require notice. If approved, set next Accounting/Status Review for **12/10/18**.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 9
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600833

CASE NAME: ANDREW ALBRIGHT

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report
of APRIL JOHNSON and Petition for allowance of fees filed.

COUNSEL:

APRIL JOHNSON (PET)...PRO/PER
ANDREW R ALBRIGHT (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution on Waiver of
Account by April Johnson, spouse

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

1. Assets on hand: \$387,339.04 in real and personal property.
2. Petitioner waives statutory commissions.
3. Petitioner indicates that she is sole heir and waives accounting; however, it is unclear if assets are community property or separate property of decedent. Decedent left 2 minor children who would be entitled to a 1/3 share each if property is sole and separate of decedent. **Need** clarification as to how property is held.
 - a. Does Court wish to appoint a Guardian Ad Litem for the minor children, Sarah and Susan Albright? **JTD**
4. Estate does not appear to be ready to close as there are multiple creditors' claims filed by petitioner. **Need** Allowance/Rejection of Creditor's claim form submitted for each claim with copy of respective claim attached. [Pet. LF pg. 15]
 - a. Petitioner requests to reserve \$5,000 for closing expenses/taxes. **JTD**
5. **Need** bank/investment statements verifying date of death balances per Local Rule 20-908 in support of Final Inventory and Appraisal. .
6. **Need** verified supplement which includes address(es) of beneficiary(ies) receiving real property.
7. Petitioner indicates that California and federal estate taxes will be owed and that they will not exceed \$5,000.

8. Proposed Order: 09/08/17; however need total of assets on hand (Local Rule 20-614c); findings re: notice to government entities; findings re: sole and separate property; findings re: known creditors; statement re: estate taxes does not match petition which indicates that they will be owed and have not been paid.

RECOMMENDATION:

Need to clear notes 4-6 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **02/11/19**

(ww)

Superior Court of Calif, County of San Bernardino
Page: 10
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601251

CASE NAME: Martin Williamson

HEARING: Petition for DETERMINATION OF ENTITLEMENT TO ESTATE
DISTRIBUTION

COUNSEL:

CHRISTINA MUCHA	(PET)...NICOLE A VETTRAINO
MARTIN WILLIAMSON	(DEC)...
SURETEC INSURANCE COMPANY	(TP)...
RENE M. BANKS	(JACKSON & EFTING)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Determination of Entitlement to Estate Distribution by Administrator, Christina Mucha ["Petitioner-sister"]. Pr. C. §11700

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

1. Petitioner is the Administrator of Decedent's estate and upon information and belief, believed Decedent to be an unmarried man on the petition for probate. After the probate began, the Attorney for Petitioner received a call from Rene Banks {"Rene"}, who informed the Attorney that the divorce between her and Decedent had never been finalized 17 years ago.
2. The Decedent was married to Rene in September 1992. On 06/20/99, the couple separated and on 04/19/05, Rene filed for divorce in the County of Los Angeles. Decedent purportedly filed a response and supporting documentation.
3. Petitioner states the assets in the probate include a house in Fontana (sold around 07/11/17 for \$303,000), a bank account with cash for about \$72,000 and a brokerage account for about \$20,000.
4. Petitioner alleges the title to the house was originally titled in the name of Decedent, as a single man; after refinancing in 2013, the title to the house remained in the decedent's name alone, as a single man; and as of date of death, the title to the house was in decedent's name alone. Deeds are affixed to petition at LF, pgs. 9-12. Petitioner further indicates the brokerage accounts were also titled in Decedent's name alone and were opened after the date of separation.

5. A dispute exists between Rene and Decedent's 6 siblings over whether a portion of the estate is considered separate or community property. . Rene alleges that this asset is community in character because it was purchased during her marriage to Decedent. The Decedent's siblings allege the probate estate is separate property because it was acquired after the Decedent separated from Rene in 1999.
6. Petitioner proffers Pr. C. §6401(a) "As to community property, the intestate share of the surviving spouse is the one-half of the community property that belongs to the decedent"; and Pr. C. §6401(c)(2)(B) "Where the decedent leaves no issue but leaves a parent or parents or their issue or the issue of either one of them."
7. A dispute also exists between Renee and Decedent's 6 siblings over which of them are entitled to distribution of a share of the Decedent's assets, including the Decedent's real property and other assets left in the estate.
8. Petitioner requests the court to determine whether the Decedent's property is considered separate or community and who is entitled to distribution from the estate.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Set for evidentiary hearing.

(nb)

Future Hearing:

05/03/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700673

CASE NAME: LUIS ALONSO ARROYO

HEARING:

Petition to determine succession to Real Property

COUNSEL:

ENRIQUE ALONZO ARROYO (PET)...PRO/PER
LUIS ALONSO ARROYO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition [Amended filed 11/09/17] to Determine Succession to Real Property by Enrique Arroyo, Robert Arroyo, Andy Arroyo, Samantha Arroyo, Eric Arroyo, Emily Arroyo, children

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

1. Petitioners seek 100% interest, 1/6th each, in decedent's 100% interest; in real property per intestate succession.
2. Amended Petition filed 11/09/17 appears to be a supplement. Does court wish to deem as supplement? If not, Court may wish to trail matter to 02/28/18. JTD
3. ~Proposed Form Order: 07/10/17

RECOMMENDATION

Court's Discretion re Amended petition filed, note 2.

(ww/cs)

Superior Court of Calif, County of San Bernardino
Page: 12
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700841

CASE NAME: MTR OF REGINA ABRAM

HEARING:

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

COUNSEL:

BRUCE FORD (PET)...PRO/PER
REGINA ABRAM (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Bruce Ford, son-in-law

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

1. All heirs waive bond. Net estate value is \$135,000 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b)).
2. Waiver of Bond by Heirs or Beneficiaries filed with petition; however, forms are not dated. Need completed forms.
3. Section 5(a)(7) of Petition indicates issue of a predeceased child; however, there is no issue listed in section 8. Need verified supplement clarifying.
4. Surviving children of decedent have higher priority Pr.C. §8461. Need Declination by each.
5. Need proof of publication.
6. ~Proposed Form Order: 08/21/17

RECOMMENDATION

Need to clear notes .2 – 5. Court's discretion re bond. If approved, set Accounting/Status Review for **12/10/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: SPR SS07243

CASE NAME: MTR OF MAGGIE BROWN

HEARING:

Hearing re Final Discharge

COUNSEL:

PATRICIA BROWN (PET)...HARTNELL, LISTER & MOORE
MAGGIE BROWN (DEC)...

GENERAL INFORMATION

Continued from 08/28/17

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final Account and Report by Patricia Brown approved on 06/20/16.
2. Need receipts from Donna Brown, Karen Demory, Paul Brown, Cedric Brown, Brandn "Bill" Swayne, Brian Swayne, Bezeairlu Brown, Clifford Brown, Delories, Swayne and Patricia Brown.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh/cs)

Superior Court of Calif, County of San Bernardino
Page: 13A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000426

CASE NAME: DANIEL ROMERO

HEARING:

Petition for Approval to purchase a 2010 Toyota Sienna van

COUNSEL:

INLAND COUNTIES REG CNTR (PET/TEE)...STEVEN K BECKETT
DANIEL ROMERO (BEN)...
SPECIAL NEEDS TRUST OF DANIEL ROMERO (TRU)...

Currently under review by Legal Research.

LR

Notice given

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

SEE ALSO 15 16 17

HEARING:

Hearing Re: STATUS OF SETTLEMENT AGREEMENT

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA
THE FAMILY TRUST OF ANNA RAMONA ACOSTA (TRU)...
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAR
NATIONSTAR MORTGAGE LLC (CC)...SONGSTAD RANDALL COFFEE & H
SANDRA YZAGUIRRE
AMERICAN MORTGAGE NETWORK INC
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)
FIRST AMERICAN TITLE INSURANCE
CLAUDIA ARROYO

GENERAL INFORMATION:

Continued from 08/07/17 at request of counsel to complete settlement agreement. Mr. Garcia ordered to personally appear at next hearing.

THIS CASE IS SET FOR HEARING ON Status

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

- 1 Counsel informed the Court they have reached a settlement agreement and are waiting for attorney Damian Garcia to approve and sign.
- 2 Judgment Quieting Title to Real Property pursuant to Stipulation for Entry of Judgment filed 10/30/17.
- 3

RECOMMENDATION:

Court's discretion.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 15
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA
SEE ALSO 14 16 17

HEARING:
Hearing Re: CROSS COMPLAINT

COUNSEL:
RAMON R ACOSTA (PET)...DAMIAN G GARCIA
THE FAMILY TRUST OF ANNA RAMONA ACOSTA (TRU)...
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAR
NATIONSTAR MORTGAGE LLC (CC)...SONGSTAD RANDALL COFFEE & H
SANDRA YZAGUIRRE
AMERICAN MORTGAGE NETWORK INC
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)
FIRST AMERICAN TITLE INSURANCE
CLAUDIA ARROYO

Currently under review by Legal Research.

(LR)

(ww)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 12/04/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

SEE ALSO 14 15 17

HEARING:

Hearing Re: OSC RE: WHY ACCOUNTING SHOULD NOT BE FILED

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA
THE FAMILY TRUST OF ANNA RAMONA ACOSTA (TRU)...
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAR
NATIONSTAR MORTGAGE LLC (CC)...SONGSTAD RANDALL COFFEE & H
SANDRA YZAGUIRRE
AMERICAN MORTGAGE NETWORK INC
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)
FIRST AMERICAN TITLE INSURANCE
CLAUDIA ARROYO

GENERAL INFORMATION

Continued from **01/14/16, 03/24/16, 7/21/16, 08/24/16 and 11/14/16**. Counsel indicates agreement reached.

Continued from 02/27/17, 05/08/17, 08/07/17 and 10/02/17 at request of counsel.

THIS CASE SET FOR HEARING ON OSC re Why accounting Should not be Filed by George Acosta.

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

1. On 10/15/15, Court set OSC on Cross-Complaint, Declaratory Relief hearing; why George Ramon Acosta should not be required to file an accounting.
2. Any objections as to why he should not shall be filed by 12/4/15. Reply to be filed on 12/28/15.
3. Notice of Non-response filed by George Ramon Acosta with points and authorities on 12/28/15.
4. Improper accounting filed by George Ramon Acosta on 01/25/16. No fees taken, no hearing date, etc. as accounting is not proper.

RECOMMENDATION

Court's discretion re OSC.

(lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/04/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1500296

CASE NAME: THE FAMILY TRUST OF ANNA RAMONA ACOSTA

SEE ALSO 14 15 16

HEARING:

Petition for RECOVER PROPERTY HELD BY TRUST

COUNSEL:

RAMON R ACOSTA (PET)...DAMIAN G GARCIA
THE FAMILY TRUST OF ANNA RAMONA ACOSTA (TRU)...
GEORGE RAMON ACOSTA (PET/OBJ)...LAW OFFICES OF CLARK GAR
NATIONSTAR MORTGAGE LLC (CC)...SONGSTAD RANDALL COFFEE & H
SANDRA YZAGUIRRE
AMERICAN MORTGAGE NETWORK INC
CHICAGO TITLE COMPANY (MEYLAN DAVITT JAIN AREVIAN & K)
FIRST AMERICAN TITLE INSURANCE
CLAUDIA ARROYO

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 12/04/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400071

CASE NAME: Christopher Ambrose Walsh

HEARING:

Accounting Review

COUNSEL:

MICHAELE GARNER

(PCR)...PRO/PER

CHRISTOPHER AMBROSE WALSH

(CEP)...MARK J. FLORY

GENERAL INFORMATION

Continued from 06/05/17 to clear probate notes. Counsel indicates he will give notice.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 11/18/16.
2. Accounting now due beginning 06/06/16.
3. Petition to Dispense with account filed and routed to probate examiners for review.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 12/04/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1400244

CASE NAME: MTR OF ELAINE BEAUCLAIR

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ELAINE BEAUCLAIR (CEP/CEE)...ROSE C ROSADO
CALDWELL KENNEDY & PORTER (PET)...CALDWELL, KENNEDY & PORTER

GENERAL INFORMATION

Continued from 01/04/16, 05/23/16, 11/14/16 and 04/03/17

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. PG appointed 10/20/14.
2. Notice of the Conservatee's Death filed.
3. Need First Account Current.

RECOMMENDATION:

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

(sa/dl/nb/cs)

Superior Court of Calif, County of San Bernardino
Page: 20
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600300

CASE NAME: MTR OF RAMON ARGUELLES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ANELY ARGUELLES

COUNSEL:

ANELY ARGUELLES (PCE)...
RAMON ARGUELLES JR (PCE)...PRO/PER
RAMON ARGUELLES (CTP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

- 1 Anely and Ramon Arguelles Jr, parents, appointed as limited co-conservators of the person only on 05/01/17.
- 2 **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
- 3 **Need** Care Plan in accord with Pr.C.§2352.5.
- 4 Notification of Conservatee's rights per Pr.C.§1830(c) filed 05/02/17; however, paternal and maternal grandparents must be noticed also. **Need** completed notice to Maria Vargas & Filomeno Ortiz (maternal grandparents) and Maria & Ramon Arguelles Sr. (paternal grandparents).

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 21

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700122

CASE NAME: MTR OF THEOLA HESS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
THEOLA HESS

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 06/16/18

THIS CASE IS SET FOR HEARING ON accounting review

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

- 1 Ex parte petition to dispense with 9th accounting by PG approved on 07/03/17.
- 2 Proof of service of 10th accounting filed 11/17/17; however, **Need** 10th accounting or waiver of accounting beginning with 09/01/16.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700216

VACATED

CASE NAME: VIOLETA MORENO

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
VIOLETA MORENO

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 12/17/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 23

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800026

CASE NAME: MARIA BRITTAIN

HEARING:
Hearing re Final Discharge

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARIA BRITTAIN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge by Public Guardian

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

1. First and Final Account was approved on 11/28/16. Need Order Settling First and Final account.
2. Need receipt for San Bernardino Public Guardian for conserved funds in the amount of \$10,608.92.
3. Need Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Need to clear notes.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800166

CASE NAME: TIM LAYNE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

TIM LAYNE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

Ex parte petition to dispense with 8th accounting and order approved and sent to department for signature on 11/14/17. Next Accounting Review hearing to be set 60 days out as accounting is overdue.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 25
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800170
CASE NAME: GEORGE Z MURANYI

HEARING: Fourth Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
GEORGE MURANYI (CEP)...MARK S MAHONEY

GENERAL INFORMATION:

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

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

1. Accounting period: 02/28/14 to 02/29/16.
2. Assets on Hand: \$5,037.98 of which \$37.98 is cash.
3. Public Guardian requests fees totaling \$4,035.00. Approving and confirming \$3,800.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; authorizing and confirming the fee of \$35.00; approving and confirming \$200.00 which was previously collected by petitioner. Generally itemized.
4. County Counsel request fees in the amount of \$2,035.00. Approving and confirming \$1,900.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; authorizing and confirming the fee of \$35.00; approving and confirming \$100.00 was previously collected by petitioner. Generally itemized.
5. Petitioner requests to defer currently owed CI fees of \$1,350. As there are insufficient funds to pay at this time. **JTD**
6. Proposed Order: 08/21/17; however, does not contain 3 lines of content above judge's signature per local rule 20-614(d).

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as fifth account current is overdue.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 26

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800212

CASE NAME: TRACY RAMOS

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
TRACY RAMOS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 04/08/18

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex parte petition to dispense with 2nd accounting by PG approved on 05/18/16.
2. **Need** 3rd accounting or waiver of accounting beginning with 01/01/16.

RECOMMENDATION:
Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800245

VACATED

CASE NAME: DANIEL LEWIS

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

DANIEL LEWIS

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

(ww)

Future hearing dates: 11/07/18 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 28
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS0900110

CASE NAME: ERIKA PATSY MAGADAN

HEARING:

Hearing Re: ISSUE OF POSSIBLE SUBSTITUTION OF CONSERVATOR

COUNSEL:

ERIKA BELINDA VENEGAS (PCR)...GASTONE BEBI
ERIKA PATSY MAGADAN (PCE)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Issue Of Possible Substitution Of Conservator

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

1. Matter was set on 10/30/17, wherein Court Investigator indicates they have not been able to get into contact with the conservator. Court referred matter to Public Guardian.
2. CI reports filed 10/17/17.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 29

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200102

CASE NAME: MTR OF DARTAINÉ GUSSMAN

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
DARTAINÉ GUSSMAN

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 05/12/18

THIS CASE IS SET FOR HEARING ON accounting review

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

3. 1st accounting by PG approved on 12/29/14.
4. **Need** 2nd accounting or waiver of accounting beginning with 07/03/14.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 30

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200119

CASE NAME: IRIS WHITE

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

IRIS WHITE

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 06/09/18.

Continued from 10/23/17 at request of counsel to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fourth Account entered 09/20/17;
2. Account or waiver of account now due beginning 07/01/16.

RECOMMENDATION:

Inquire status.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 31

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200209

CASE NAME: WILDA MAY

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
WILDA MAY

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **03/14/16**. Accounting should be a biennial account.
Continued from 03/13/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 2nd Account by PG approved on 08/03/15.
2. **Need 3rd Account now due for the period 02/01/15- 01/31/17.**
3. **Conservatee passed away on 05/09/16. Need pre and post death accounting.**

RECOMMENDATION

Inquire status of accounting.

(dl/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 32

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200234

CASE NAME: VINCENT A. CANO

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

VINCENT CANO

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

2nd Waiver of Account sent to department for signature on 11/29/17. Clerk's office to set next Accounting review for 12/31/18.

(lc/dl/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 33

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300048

CASE NAME: CHARLYE KING

HEARING:

Hearing Re: ACCOUNTING REVIEW ON SPECIAL NEEDS TRUST

COUNSEL:

DAVID HWANG (CPE)...ANDREW KIM
CHARLYE KING (CEP)...E JOAN NELMS

XREF: CIVDS1106399 HWANG -V- NARANJO

GENERAL INFORMATION

Continued from 05/23/17 and 06/21/17.

THIS CASE IS SET FOR HEARING ON accounting review (special needs trust).

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

1. Petition to Created special needs trust granted 9/14/15. Public Guardian appears to be named Trustee.
2. **Need**1st SNT accounting.

RECOMMENDATION

Inquire status of accounting.

(ds/lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 34

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300239

CASE NAME: Margaret S. Parham

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARGARET S PARHAM (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 01/09/18.

Continued from 08/29/16 02/10/17 and 04/29/17

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 04/25/16, Court approved the 1st account; 2nd accounting now due.
2. No accounting filed.

RECOMMENDATION:

Inquire status.

(lc/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 35

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300267

CASE NAME: JACQUELINE CHANDLER

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JACQUELINE CHANDLER (CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 12/02/17

Continued from 03/06/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

- 1 1st Account of PG approved on 04/25/16.
- 2 **Need** 2nd accounting beginning with 07/01/15.

RECOMMENDATION:
Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 36

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300322

CASE NAME: Diane M. Cope

HEARING: Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DIANE M COPE (CEP)...HARTNELL LAW GROUP

HEARING: Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DIANE M COPE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Order Granting Petition for Termination of Conservatorship entered 11/28/16.

Continued from 04/03/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review (by PG)

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

1. First Account Current approved on 11/07/16; need Order after Hearing.
2. Second and Final Account now due beginning 08/01/15 to 11/28/16.
3. No accounting. Need same.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/cs)

Future Hearing: 12/18/17: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 37

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400265

CASE NAME: MTR OF BONNIE GRANT

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
BONNIE GRANT (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from 07/20/15, 01/11/16, 09/20/16, 10/03/16 and 04/10/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. PG was appointed temporary conservator of the person/estate 9/22/14 and as permanent conservator on 10/17/14. The Court subsequently terminated the conservatorship on 1/6/15 and then set this review date.
2. **Need** 1st and Final Account for the period 9/22/14-current date.

RECOMMENDATION

Need to clear note 2.

(gls/lc/nb/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 38

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400352

CASE NAME: JULIANA CEBALLOS

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JULIANA CEBALLOS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expired 02/05/17.

Continued from 06/19/17 and 08/21/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing PG as Temporary Conservator of the person and estate entered 12/16/14; order on general appointment entered 02/06/15.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.
(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 39

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500163

CASE NAME: PETER GOMEZ

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
PETER GOMEZ (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 08/21/16.

Petition for Rehearing held on 02/19/16, wherein, the Court found that the conservatee is no longer disabled. The court will terminate the conservatorship.

Continued from 08/01/16 and 10/03/16 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed temporary conservator on 06/19/15 and general conservator on 08/21/15.
2. **Need** 1st and final accounting.

RECOMMENDATION

Inquire status of accounting

.

(nb/lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 40

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500318

CASE NAME: SUZETTE BROWN

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
SUZETTE BROWN (CEP)...LENITA A SKORETZ
MELODIE Z. SCOTT (CPE)...HORSPOOL & HORSPOOL

XREF: CONPS1100299 SUZETTE BROWN

GENERAL INFORMATION

Letters expire 09/15/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Guardian appointed temporary conservator on 08/16/16 of person and estate. General approved on 09/16/16.
2. Need 1st and final accounting.

RECOMMENDATION:

Need final accounting

(cs)

Superior Court of Calif, County of San Bernardino

Page: 41

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600021

CASE NAME: OLLIE RICE

HEARING:

Petition for Allowance of Compensation to Conservator and to his
Attorney

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
OLLIE RICE (CEE)...HARTNELL LAW GROUP

THIS CASE IS SET FOR HEARING ON Petition for Allowance of Compensation to
Conservator and to his Attorney by PG

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

1. Petitioner alleges that services have been rendered for which petitioner and
counsel has not been compensated.
2. Petitioner and County Counsel request fees of \$495.00, each. Generally
described.
3. Change of Status Memo filed 11/14/17; however, document image not available
for review.
4. ~Proposed Order: 09/05/17

RECOMMENDATION:

Court's discretion.

(ww)

Future Hearing: 2/26/18: Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 42
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700276
CASE NAME: MTR OF DAVID VIETH
HEARING: Petition for Appointment of Conservator

COUNSEL:
MATTHEW E SHEASBY (PET)...MATTHEW E SHEASBY
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID VIETH (CEP)...

GENERAL INFORMATION

Continued from 09/11/17 and 10/23/17.

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of person and estate by Matthew Sheasby (GAL) to appoint PG

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

1. No bond - PG.
2. Petitioner requests dementia powers. Report of appointed Counsel Janet Latourette filed 10/19/17.
3. Petitioner seeks medical and dementia powers. **Need** Capacity Declaration.
4. Dementia Attachment to petition is incomplete as to items 1b as to request to authorize administration of medications and item 4b as to restricted placement as requested in 1a. **Need** completed form via verified supplement.
5. Copy of original Citation filed 10/30/17; however, proof of service indicates that service was by mail and indicates that there is an attached mailing list.
 - a. No mailing list is attached.
 - b. **Need** original citation and completed proof of personal service as to proposed conservatee.
6. CI report filed 09/06/17.
7. ~Proposed form Order: 07/18/17

RECOMMENDATION:

Need to clear notes 3-5 then Court's discretion. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **02/11/19**. Any accounting to be filed 30 days in advance. (lh/ww)

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: 43

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1200239

CASE NAME: MTR OF RALPH E VIETH TRUST

HEARING:

Hearing Re: Status

COUNSEL:

TERESA MARSCH	(PET)...JAMES B CHURCH
RALPH E VIETH TRUST	(TRU)...
MARTHA L GAGLIARDI	(PET)...PRO/PER
DAVID VIETH	(PET)...MATTHEW E SHEASBY
STACY VIETH	(PET)...MATTHEW E SHEASBY
MATTHEW E SHEASBY	(PET)...MATTHEW E SHEASBY
DONALD VIETH	(OBJ)...HARTNELL LAW GROUP

XREF: PROPS1700199 RALPH E VIETH TRUST

GENERAL INFORMATION

Continued from **10/27/16**. Mr. Sheasby to contact the Veteran's Administration to determine if benefits are being paid and to collect any benefits on David Veith's behalf. Court vacates previous order that SNT be created on behalf of Stacy Vieth. Mr. Ordered to contact the title company on the San Jacinto property in question and determine how best to lift the cloud on the property. A separate recordable order clearing title to be filed and property/assets to be put into Stacy Vieth's estate instead of a SNT. SNT needs to be filed as to David Vieth only. Public Guardian requested to be appointed Conservator of David Vieth.

Continued from **01/05/17**. Status Report and five orders transferring real property signed. Petition for conservatorship of David Vieth requesting appointment of Public Guardian to be filed. Public Guardian to appear re possible appointment.

Continued from **03/16/17**. Counsel reported that a probate action has been filed as to Stacy Vieth and set for 05/03/17. Counsel were unsure of a conservatorship action re David Vieth; court determined not filed.

Continued from **07/05/17**. Court appoints the PG to represent David Vieth. Court orders the PG to appear at the next hearing.

Continued from **08/21/17** on Court's motion for all counsel to be present and trail CONPS1700276. Notice to be given by Mr. Sheasby.

Continued from 09/11/17 and 10/23/17.

THIS CASE SET FOR HEARING ON Status.

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

1. Melodie Scott was prior trustee; however, filed declaration stating that no assets were ever marshaled.
2. Martha Gagliardi was appointed Trustee of the SNT. All monies to be placed into blocked account with exception of \$7,500.
3. Layne Bartholomew to prepare/create SNT.
4. Petition for Probate filed re Stacy Vieth PROPS1700199.

RECOMMENDATION

Inquire status.

(lc/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 44

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

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SC SS01095

CASE NAME: IN THE MATTER OF PEDRO CALIXTO CLAVELO OLIVE

HEARING:

Accounting Review

COUNSEL:

PEDRO CALIXT OLIVE	(CEP)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
BERTHA CLAVELO OLIVE	(CPE)...PRO/PER

GENERAL INFORMATION

Continued from 10/03/16 and 03/27/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. On 02/24/14 Court approved the 13th account; 14th accounting now due.
2. Need accounting.

RECOMMENDATION:

Inquire status.

(lc/nb/cs)

Superior Court of Calif, County of San Bernardino
Page: 45
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SC SS01542

CASE NAME: MATTER OF CHRISTIAN D THROOP

SEE ALSO 45A

HEARING:

Hearing Re: STATUS OF COURT INVESTIGATOR REPORT

COUNSEL:

DOLORES N KITE	(CPE)...J. DAVID HORSPOOL
CHRISTIAN D THROOP	(CEP)...MARK J. FLORY
ROBERT W KITE	(CP)...J. DAVID HORSPOOL

GENERAL INFORMATION

Continued from 11/02/17. Mr. Kite's request to resign as Conservator is heard. Oral report given by J.David Horspool. Court refers matter to Public Guardian.

THIS CASE SET FOR HEARING ON Status of Court Investigator Report.

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

1. Robert Kite, step-brother, appointed successor Conservator of person only on 03/26/16.
2. Court Investigator report filed 10/02/17.
3. **Need** report of Counsel Mark Flory.

RECOMMENDATION

Need report of counsel then Court's discretion.

(lc/ww)

Superior Court of Calif, County of San Bernardino
Page: 45A
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SC SS01542
CASE NAME: MATTER OF CHRISTIAN D THROOP

SEE ALSO 45

HEARING: Petition for Appointment of Successor Conservator

COUNSEL:

DOLORES N KITE	(CPE)...J. DAVID HORSPOOL
CHRISTIAN D THROOP	(CEP)...MARK J. FLORY
ROBERT W KITE	(CP)...J. DAVID HORSPOOL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Successor Conservator person only by Robert Kite, conservator/step-brother to appoint PG.

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

1. Robert Kite was appointed as successor conservator of the person only on 03/28/16. Conservator seeks to resign effective upon appointment of the PG as successor conservator as he is no longer able to fulfill the duties required. [LF pg. 5].
2. **Need** List of Required Contacts (Local form SB-12224).
3. **Need** Court Investigator Referral Report (Local form SB-360)
4. **Need** Notification of Court of Conservatorship Address. (Local form SB-14522)
5. **Need** Confidential Screening form.
6. **Need** Confidential Supplemental form.
7. **Need** Duties of Conservator and acknowledgement of receipt of handbook form.
8. **Need** return of Citation.
9. **Need** CII referral.
10. **Need** CI report.
11. Notice of hearing and proof of service filed 11/13/17.
12. No Form Order Provided.

RECOMMENDATION

Need to clear notes 2-10. If approved, set hearing for Compliance Review for **07/09/18** 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

(ww)

Superior Court of Calif, County of San Bernardino
Page: 46
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SG SS6572

CASE NAME: IN THE MTTR OF RONALD BLACKBURN

HEARING:

Thirty-Fifth Account and Report of PUBLIC GUARDIAN and Petition
for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RONALD BLACKBURN (CEP)...FRANK J PRAINITO

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 35th account current and petition for fees by
Public Guardian

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

1. Accounting period covers 02/28/14 to 08/31/16.
2. Assets on hand \$5,203.69 consisting of cash and pre-need burial trust.
3. Public Guardian requests fees in the amount of \$5,576.00.
4. County Counsel request fees of \$2,976.00.
5. ~Proposed Order submitted: 08/03/17

RECOMMENDATION:

Court's Discretion. If approved, Court may wish to set the next hearing re Accounting
Review for **12/10/18** or a biennial Accounting Review for **12/09/19** per Pr.C.§2620(a).
(cs)

Superior Court of Calif, County of San Bernardino

Page: 47

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS00573

CASE NAME: IN THE MATTER OF GREGORY WILSON

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

GREGORY WILSON

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 06/16/18

Continued from 01/23/17.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex parte petition to dispense with 18th accounting by PG approved on 02/25/15.
2. Proof of service of Petition for Order that Conservator need not present 19th Account filed.
3. 19th waiver of accounting submitted and send to Probate Examiner's for review on 11/16/17.

RECOMMENDATION:

Court's discretion.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 48

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS00849

CASE NAME: IN THE MATTER OF SARA HETZLER

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

SARA HETZLER

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

11th waiver of Account sent to department for signature on 11/14/17. Clerk's office to set next Accounting review for 11/19/18.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 49

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS00939

CASE NAME: IN THE MATTER OF WILLIE GILLARD

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLIE GILLARD

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 01/20/18.

Continued from 09/19/16 and 04/03/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTE/D:

1. Ex parte petition to dispense with 16th accounting by PG approved on 10/05/15.
2. **Need** 17th accounting or waiver of accounting beginning with 07/01/15.

RECOMMENDATION:

Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 50
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02303

CASE NAME: MTR OF DAVID KELLY

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DAVID KELLY (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:
Letters expired on 02/21/16.
Continued from 10/17/16 and 05/01/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:
1. Order Waiving Sixth Account Current entered 01/16/15 for period 08/27/13 – 12/01/14; Seventh and Final Account now due for the period of 12/02/14 – current date.
2. No account. Need same.

RECOMMENDATION
Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(dl/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 51

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS02940

CASE NAME: MTR RE SUZANNE MORDA

VACATED

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
SUZANNE MORDA

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

11th Waiver of Account sent to department for signature on 11/07/17. Clerk's office to set next Accounting review for 11/05/18.

(lc)

Superior Court of Calif, County of San Bernardino
Page: 52
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03204

CASE NAME: MTR OF HELEN ESCAMILLA

SEE ALSO 52A

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN

HELEN ESCAMILLA

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 02/13/18

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex parte petition to dispense with 8th accounting by PG approved on 08/24/17.
2. **Need** 9th accounting or waiver of accounting beginning with 08/01/16.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 52A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03204

CASE NAME: MTR OF HELEN ESCAMILLA

SEE ALSO 52

HEARING:

Petition for Authority to Establish an Irrevocable Burial Trust

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
HELEN ESCAMILLA (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters terminated on 02/13/18.

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust [Pr.C. §2459] by Public Guardian

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

- 1 Petitioner alleges the current assets on hand are \$4,857.48, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
- 2 Petitioner requests authority to deposit up to \$5,000 in an Irrevocable Burial Trust
- 3 Notice given.
- 4 ~Proposed Order 11/17/17

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 53

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: SLC SS9280

CASE NAME: IN THE MATTER OF GREG STANTON TUCKER

HEARING:

Accounting Review

COUNSEL:

PUBLIC GUARDIAN
GREGORY TUCKER

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/03/18.

Continued from 03/27/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

4. Ex parte petition to dispense with 12th accounting by PG approved on 01/17/17.
5. Proof of service of 13th waiver of accounting filed 11/17/17; however, **Need 13th** accounting or waiver of accounting beginning with 01/01/16.

RECOMMENDATION:

Inquire status of accounting.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 54 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/04/17 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300157

CASE NAME: MICHAEL LONDON

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MICHAEL LONDON (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION
Letters expire 07/10/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Third Account entered 12/27/16; account or waiver of account now due.

RECOMMENDATION:
Inquire status
(cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: CIP DS1700045

CASE NAME: Harley Reinhart

HEARING: OSC re: DISMISSAL OF PTN TO ESTABLISH BIRTH filed by JAMIE CHRISTOPHERSEN

COUNSEL:

JAMIE CHRISTOPHERSEN (PET)...PRO/PER
HARLEY PATRICIAROSE REINHART (MIN)...

GENERAL INFORMATION

Continued from 03/27/17.

Continued from 06/12/17, 08/07/17, and 10/23/17. No appearance by petitioner and probate notes need to be cleared.

THIS CASE IS SET FOR HEARING ON **OSC re dismissal of** Petition to Establish Fact, Time and Place of Birth by Jamie Christophersen (mother).

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

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

1. OSC set on 10/23/17 when petitioner failed to appear and probate notes have not been cleared.
2. Petitioner, Jamie Christophersen, requests the court to establish the fact, time, and place of birth in Apple Valley, CA, as to Harley Patricia Rose Reinhart.
3. Petitioner requests that the court make an order determining the at the birth of petitioner did in fact occur at the time and at the place stated, as shown by the Declaration in Support of Petition to Establish Fact, Time, and Place of Birth (filed 03/20/17), filed herewith, and by other proofs adduced at the hearing.
4. **Need** Notice of Hearing with proof of service to father, paternal grandparents and maternal grandparents.
5. No proposed order. **Need** California Dept. of Public Health Vital Records (CDPH Vital Records), the Order Establishing Fact of Birth (form VS 108)

RECOMMENDATION:

Require notice then Court's discretion re OSC.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 2
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0900240
CASE NAME: BRITTANY HERLONG S.N. TRUST

HEARING: PET TO SETTLE SIXTH Account and Report of HAROLD D HERLONG
and Petition for allowance of fees filed.

COUNSEL:

HAROLD D HERLONG (PET/TEE)...DENNIS M SANDOVAL
BRITTANY HERLONG SPECIAL NEEDS TRUST (TRU)...
DONNASUE SMITH ORTIZ (PET)...DONNASUE ORTIZ

XREF: RCRS00522 BRITTANY HERLONG TRUST

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 6th Account and Report of Harold D Herlong and
for Compensation to Attorney by Harold Herlong, trustee

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

1. Accounting covers period: 08/01/16 – 07/31/17.
2. Assets on hand: \$2,570,810.58 (of which \$1,448,389.23 is cash and the balance in carry value of securities)
3. Petitioner/trustee waives fees for this accounting period.
4. Attorney requests fees of \$11,102.50 for 47.90 hours at \$125/225/400 per hour for paralegal and attorney services. Itemized [LF pgs. 41-47]
5. Attorney requests reimbursement of costs advanced for filing of 6th accounting totaling \$230.00 [LFpg.46].
6. Current bond is \$1,519,000.00. Insufficient. Petitioner request a bond increase of \$137,000.00 for a total bond of \$1,656,000.00. **JTD**
7. **Need** bank/investment statements in support of accounting.
8. **Need** Notice of hearing and Proof of Service.
 - a. Court to see Memorandum of Points and Authorities filed 11/22/17 re as to why late Notice of Hearing to California Statement Departments.
9. ~Proposed Order: 09/05/17

RECOMMENDATION

Need to clear notes 7 & 8. Court's discretion re bond. If approved, set Accounting/Status Review for **12/10/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400536

CASE NAME: ELLEN R WHITE

HEARING:

Hearing re Final Discharge

COUNSEL:

BONNIE JONES	(PET)...	LAW OFFICES OF RYAN S CARRIGAN
ELLEN R WHITE	(DEC)...	
BERNARD M BIDART	(TP)...	

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Bonnie Jones, daughter, approved on 11/30/16.
2. No receipts needed as only real property remains.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b).

RECOMMENDATION

Inquire status.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500766

CASE NAME: JAMES A FLAGG

HEARING:
Accounting Review

COUNSEL:
BARBARA J FLAGG (PET)...PRO/PER
JAMES A GLAGG (DEC)...

GENERAL INFORMATION

Continued from 10/23/17 to file an accounting and final I&A

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to Barbara Flagg, sister, on /10/06/15; full authority, no bond.
2. Previous status report approved on 06/19/17
3. Supplemental Inventory and Appraisal filed 04/17/17. **Need** final Inventory and Appraisal
4. **Need** accounting or status report.

RECOMMENDATION

Need to clear note 3 & 4.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 5
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600216

CASE NAME: MTR OF SHARON LOUISE PEARCE SPECIAL NEEDS TRUST

HEARING:

FIRST Account and Report of LOREN ELIZABETH PEARCE and Petition
for allowance of fees filed.

COUNSEL:

LOREN ELIZABETH PEARCE (PET)...SELTERS & SELTERS
SHARON LOUISE PEARCE SPECIAL NEEDS (TRU)...

GENERAL INFORMATION:

Continued from 10/16/17 for supplement regarding an Abel Account and bond.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by
Trustee, Loren E. Pearce ["Petitioner"].

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

1. Accounting period 04/20/16 to 06/01/17.
2. Assets on Hand \$16,593.01 consisting of cash.
3. Current bond of \$73,000. Petitioner requests exoneration of bond, or in the
alternative, reduction in the amount of \$56,000 for a new bond in the amount of
\$17,000. Appears sufficient. **JTD.**
4. Petitioner waives compensation.
5. Attorney requests fees of \$3,795.00. Billed at \$275/hour for 13.8 hours'
attorney time. Itemized [LF, pg. 6]. **JTD.**
6. Attorney requests reimbursement of costs advanced of \$962.00. Itemized [LF,
pg. 4].
7. Petitioner requests future accounting not to be required per CRC 7.903(d).
8. ~Proposed Order 06/16/17.

RECOMMENDATION:

Court's discretion re fees and future accountings. If approved, set next hearing for
Accounting Review for **02/11/19**.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600695

CASE NAME: ROLANDO MAGDALENO

HEARING:
Accounting Review

COUNSEL:
ANA B MAGDALENO (PET)...DUANE P BOOTH
ROLANDO MAGDALENO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Ana Magdaleno, mother, on 01/05/17; full authority, \$20,000.00 bond.
2. Final Inventory and Appraisal filed 02/24/17; however section 5 re property tax certificate is incomplete. **Need** corrected Final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2 & 3.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600746

CASE NAME: DOLORES B BULLARD

SEE ALSO 11

HEARING:

Hearing Re: PETITION FOR INJUCTION

COUNSEL:

DIANA RENEE MINTERS (PET)...THOMAS M ALEXANDER

DOLORES B BULLARD (DEC)...

XREF: PROPS1700113 DOLORES B BULLARD TRUST

Currently under review by Legal Research.

(LR)

(ww)

Future Hearing:

04/05/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600875

CASE NAME: REVOCABLE LIVING TRUST OF SOPHIE SPEED

SEE ALSO 9

HEARING:

Petition for RELIEF FROM BREACH OF TRUST , ETC

COUNSEL:

LAURA GARCIA (PET)...ROBERT M EBINER
REVOCABLE LIVING TRUST OF SOPHIE SPEED (TRU)...
DANIEL GARCIA SR (PET)...MAUREEN MURATORE

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 9
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600875

CASE NAME: REVOCABLE LIVING TRUST OF SOPHIE SPEED

SEE ALSO 8

HEARING:

FIRST Account and Report of DANIEL GARCIA sr and Petition for allowance of fees filed.

COUNSEL:

LAURA GARCIA (PET)...ROBERT M EBINER
REVOCABLE LIVING TRUST OF SOPHIE SPEED (TRU)...
DANIEL GARCIA SR (PET)...MAUREEN MURATORE

GENERAL INFORMATION:

Sophia Speed, Trustor, passed away on 01/0/93. Upon her death, her only child, Patricia J. Garcia, became the Successor Trustee and sole beneficiary of the Trust. Patricia J. Garcia was the wife of Petitioner, Daniel Garcia Sr. Successor Trustee, Patricia J. Garcia, passed away on 03/30/97, wherein Petitioner and his daughter, Laura Garcia were nominated to serve as Successor Co-Trustees.

Continued from **07/31/17**. Court order supplemental to be filed by 09/16/17. It is determined the assets on hand are listed under additional real property, this is the LA County rental properties.

Continued from 10/16/17.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Successor Co-Trustee, Daniel Garcia, Sr. ["Petitioner"].

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

1. Accounting period 03/30/97 to 12/31/16 [19.9 years].
2. Assets on hand \$10,009.29 in cash and a ¼ interest in rental property located in 33266 Condor Road, Newberry Springs, CA & mobile home. Suggest Court require a final inventory and appraisal. JTD.
3. Petitioner would like to reserve on the issues of a trustee fee and a property management fees for the 3 rental units over the past 20 years and asks the court to retain jurisdiction. Petition indicates that although Petitioner has never been paid a formal trustee fee, he has taken funds from the bank accounts in the same manner that he and Patricia (spouse) did when she was alive. Need

itemization for amounts taken in kind and owing, for services rendered via verified supplement.

4. Attorney Muratore would like to reserve on the issue of her attorney fees, and requests that the court retain jurisdiction over the same. JTD.
5. Summary of Account [LF, p. 12 does not include trust's ¼ interest in Newberry Springs property. Need amended Summary of Account.
6. **Need** copies of bank/financial statements per Local Rule 20-908.
7. Petition indicates that after Trustor Speed's death, Patricia paid the couples personal expenses from the account and treated the account as if it were community property assets. Patricia maintained Petitioner's name on the account and co-mingled their marital assets with the trust assets (ie: rent deposits). Patricia considered this account hers and told Petitioner the account belonged to him, as well. After Patricia died, Petitioner continued to use the account just as he had always done so. Matters were further exacerbated when parties invested in the Newberry Springs property, then transferred their interests to their own trusts. **Therefore, the accounting cannot and will not balance.**
8. Petitioner alleges he will later segregate this income; itemize payments; and seek credit in a supplement to this account. **Need** same.
9. Disbursements – Schedule B [LF, p. 26] requires further clarification as to the following via verified supplement.
 - a. Unnamed descriptions;
 - b. Distributions to Daniel Garcia Sr.; Karen Garcia; Daniel Garcia, Jr.; Laura Garcia; Jaime Orozco; Arnulelo Diaz;
 - c. Mission Capital Investment Group;
 - d. Husky & Brown, attorney fees, trust admin;
 - e. Cash Withdrawals;
 - f. Hydroscape;
 - g. Returned checks and NSF fees;
 - h. Transfer to Mastercard.
10. **Amended Account filed in the form of a supplement. Continue to first check calendar no sooner than 11/27/17.**
11. **Need** bond of \$300,000.00 by Daniel Garcia, Sr. per order of Court on 10/19/17.
12. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended accounting to be placed on first check calendar no sooner than **01/02/18**. This accounting does not appear to be a true and complete accounting of the trust and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 10
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601016

CASE NAME: MTR OF JACK CLEARWATERS

HEARING:

FIRST AND FINAL Account and Report of LON CLEARWATERS and
Petition for allowance of fees filed.

COUNSEL:

LON CLEARWATERS (PET)...HOFFMAN & ANDREWS
JACK CLEARWATERS (DEC)...
LIBERTY MUTUAL INSURANCE (TP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account; reimbursement of
costs advances; petition for fees and final distribution by Lon Clearwaters,
executor/brother

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

1. Assets on hand: \$953,979.23 of which \$9,162.82 is cash and the rest in
CDs.
2. Petitioner and Attorney request statutory fees of \$24,150.00 each.
Calculated. [LF pg. 34]
3. Attorney requests reimbursement for advanced costs in the amount of
\$1,681.00 which includes a future fee of \$28.00 for a certified copy of the
order on this accounting when filed. Itemized. **JTD**
4. Current bond is \$775,000.00 with \$179,816.41 in a blocked account for a
total amount of \$954,816.41. Ok.
5. Petitioner requests a reserve of \$15,000.00 to pay taxes and closing
expenses. **JTD**
6. Petitioner indicates that no family or affiliate relationships exist; except that
Tod Swindell, cousin/beneficiary, assisted in the preparation of one of the
California properties for sale in consideration of reduced rent. [LF pg. 7].
JTD
7. Court to inquire regarding fee of \$26.50 advanced on 02/07/17 for "Los
Angeles Superior Court- Certified Order (Margaret)" [LF pg. 23]. **Supp. filed
11/27/17 indicates certified copy of the Final Order of Distribution of**

the Estate of Margaret Eleanor Clearwaters was necessary prior to the sale of the real property in this matter.

8. Schedule D under "Oakdale Property Expenses" is missing the amount paid for "Greenway Junk Removal, property clean-up" on date of 04/12/17. Court may wish to inquire, or in alternative, need verified supplement. [LF pg. 26].
Supp. filed 11/27/17 indicates amount as \$1,800.00.
9. Petitioner requests that the Court order distribution of the assets of this case to him as personal representative of the Arizona probate. [LF pgs. 10-11]
JTD
10. **Supp. filed 11/27/17 indicates petitioner deposited \$179,816.41 in a blocked account in the name of the Estate of Jack Clearwaters and is requesting a specific order authorizing the release of those funds from the blocked account to petitioner.**
11. ~Proposed Order: 11/27/17

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **02/11/19**.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700113

CASE NAME: THE DOLORES B BULLARD TRUST, DATED SEPTEMBER 6, 2006

SEE ALSO 7

HEARING:

Petition for ORDER CONFIRMING TRUST AND TRUSTEE

COUNSEL:

DIANA RENEE MINTERS	(PET)...THOMAS M ALEXANDER
RICKY M BULLARD	(PET)...THOMAS M ALEXANDER
THE DOLORES B BULLARD	(TRU)...

XREF: PROPS1600746 DOLORES B BULLARD

Currently under review by Legal Research.
(LR)

Continued matter – notice not re-reviewed.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 12
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700874

CASE NAME: JOSEPH LUIS NAVARRO

HEARING:

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

COUNSEL:

MATTHEW LUIS NAVARRO (PET)...PRO/PER
JOSEPH LUIS NAVARRO (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Matthew Navarro, son

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

1. Petitioner resides in Missouri and requests that bond be determined by the Court. The estate consists of \$80,000.00 in real property. Suggest bond of \$80,000.00.
2. Section 8 of the petition fails to list all persons' relationships to the decedent. Court may wish to clarify on record or in alternative, need verified supplement as to Lorena and Marianne Navarro.
3. **Need** proof of publication
4. No Form Order Provided.

RECOMMENDATION

Need to clear note 3 then Court's discretion re note 2 and bond. If approved, set Accounting/Status Review **02/11/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 13
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700894

CASE NAME: EUGENE L. SMITH

HEARING:

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

COUNSEL:

BRENNITA B. JACKSON (PET)...PRO/PER
EUGENE L. SMITH (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full
Authority under IAEA by Brennitta Jackson, fiancé

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

1. All heirs waive bond, however, **need** bond waiver on mandatory judicial council form DE-142/DE-111 (A-3d) by Darion Smith, son . Estate value is currently unknown and will be determined. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Court to clarify if Cheryl Covington is an ex-wife of decedent as petitioner Brennitta indicates that she was his fiancé.
3. Public Administrator appears to have higher priority per Pr. C. § 8461(p). Court may wish to refer to Public Administrator.
4. As matter may be referred to Public Administrator, court may wish to continue matter to a Tuesday calendar.
5. **Need** proof of publication
6. ~Proposed Form Order: 09/08/17

RECOMMENDATION

Need to clear notes 1 & 5 then Court's discretion re note 2 and bond. If approved, set Accounting/Status Review **02/11/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

Superior Court of Calif, County of San Bernardino
Page: 13A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500139

CASE NAME: Linda D. Ontiveros

SEE ALSO 13B

HEARING:

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

COUNSEL:

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

No notes – Status.

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

(ww)

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

Superior Court of Calif, County of San Bernardino
Page: 13B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500139

CASE NAME: Linda D. Ontiveros

SEE ALSO 13A

HEARING:

Hearing Re: Motion Re: TO BE RELIEVED

COUNSEL:

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

GENERAL INFORMATION

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

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

On **11/20/17** the 11/27/17 hearing vacated and reset.

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

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

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

RECOMMENDATION:

Court's discretion.

(nb/ww)

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

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 12/04/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700626

CASE NAME: FEINSTEIN FAMILY TRUST,ORIGINALLY EST 04/23/1990

HEARING:

Petition for 1)DECLARE THE LAST AMENDMENT TO THE FEINSTEIN TRUS
T VOID FOR LACK OF CAPACITY ETC

COUNSEL:

ALLEN R BENNER (PET)...SCHOMER LAW GROUP, APC
FEINSTEIN FAMILY TRUST (TRU)...

Currently under review by Legal Research.
(LR)

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.

Notice given.
(ww)

Superior Court of Calif, County of San Bernardino
Page: 15
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIPS**

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN
SEE ALSO 16 17 18 19

HEARING:
Hearing Re: Kenia Orendayn's Account and Report/Petition

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED
Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

GENERAL INFORMATION:

Continued from **08/07/17**. Court orders proper accounting to be filed.
Continued from 10/23/17.

THIS CASE IS SET FOR HEARING ON Accounting and Report of Proposed
Conservator, Kenia Orendain ["Petitioner"-sister].

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

1. No inventory and appraisal. However, order or letters have not issued as to this petitioner.
2. Accounting period 12/28/12 to 12/24/15 (3 years).
3. Assets on Hand \$0.00.
4. No request for compensation or fees.
5. Petitioner requests reimbursement of costs advanced of \$43,508. **Need** itemization.
6. Summary of Account [LF, pg. 6] – Total Charges and Total Credits do not match. **Need** amended summary and affected schedules.
7. Attachment A – Receipts [LF, p19-20] reflects temporary and permanent disability payments. However, a total is not given.

8. Schedule C – Disbursements [LF, p18] does not include dates or check no's.
9. **Need** Notice of Hearing and proof of service.
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period.

(nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 16
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 15 17 18 19

HEARING:

Hearing Re: PTN FOR CONSERVATORSHIP OF THE PERSON AND ESTATE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION:

Continued from **6/23/15**. Court Investigator notified that there are competing petitions and requests report to address both petitions.

Continued from **8/6/15** at request of counsel. Notice to be given by Krishna Malhotra.

Continued from **9/29/15**.

On 10/2/15 **Christina Taube-Erikson appointed temporary conservator of estate** and successor GAL in Worker's Compensation Appeals Board action.

Continued from **1/25/16** Court notes that there are several competing petitions. All temporary orders to remain in full force and effect.

Continued from **6/7/16** at request of counsel.

Continued from 06/22/16. Court appoints Christina Erickson-Taube as temporary conservator of person; counsel to submit for signature revised/amended order and letters showing temporary conservator of person and estate.

Continued from **10/25/16** pending outcome of motion to be relieved.

Continued from **12/06/16 and 12/12/16**. Matter is continued for Kenia Orendayn Isaldo to file an accounting. Accounting to be filed by 01-27-17. Notice to be given by Attorney Mitchell Roth.

Continued from **02/27/17**. Court orders that Kenia Orendayn Isaldo file her accounting prior to the next hearing. If the accounting has not been filed court will strike her

petition and surcharge her for the full amount of the monies received for caregiver services. All temporary orders to remain in full force and effect until 04/24/17.

Continued from **04/24/17**. Court finds: All future payments from medical compensation are to be given to Christina Erickson-Taube. Mitchell Roth prepared order regarding funds. Kenia Orendayn Isaldo and counsel Richard Moss are ordered to appear at the next hearing. Accounting is to be filed no later than 5-19-17. No account filed.

Continued from 06/19/17 and 08/07/17 and 10/23/17 Maria Orendain withdraws per petition as to the estate. Petition for conservatorship by Kenia Orendayn Isaldo is withdrawn per agreement of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship 022717.

- Petition 1 – for Conservatorship, person only, by **Maria Orendain Isaldo** (sister)
- Petition 2 – for Conservatorship, person and estate, by **Kenia Orendain** (sister)- **Withdrawn**
- Petition 2 – for Conservatorship, person and estate, by **Christina Erickson-Taube** (PPF)

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

Petitioner 1 – Maria Orendain Isaldo, sister

1. Matter transferred from Los Angeles County. Per LA minute order dated 12/04/14, it does not appear temporary or general orders were made.
2. Medical Capacity Declaration filed 10/6/15 supporting request.
3. Certificate of Completion re Conservatorship Class filed 07/08/16.
4. **Objections filed by competing petitioner Kenia on 06/19/15.**
5. **Petition filed by Kenia Orendayn Isaldo on 06/16/16; however, withdrawn per agreement of counsel on 10/23/17.**
6. Supplemental Report by Court-Appointed Counsel, Mitchell Roth, filed 05/09/17.
- 7.

Petitioner 2 – Christina Erickson-Taube, PPF/ temporary conservator of the person

8. Petitioner requests bond, but does not state an amount. Current bond of \$100,000 posted as to the Temporary Conservatorship. Estimated estate value is \$38,222. Based on estate value and cost of recover, Court may wish to require bond of \$43,000.
9. Medical powers sought. Capacity Declaration filed 10/6/15. Updated Capacity Declaration filed 09/29/16. Capacity Declaration filed 11/14/16.
10. Need return of Citation.
11. Court Investigator report filed on 7/22/15 as to petitioners Maria and Kenia. **CI report as to petitioner Christina Erickson-Taube filed 07/28/16.**
12. Consents to act filed 10/23/14 by mother, Ascencion Isaldo Diaz, and brother-in-law, Samuel Brambila; however, no petitions filed by them.
13. Report of LA court-appointed counsel filed 12/04/14. Report by Attorney Roth filed 8/6/15, 9/24/15 and 1/12/16. **Court to review supp. report by Attorney Roth filed 08/03/16.**
14. **Objections filed by Kenia Orendayn Isaldo on 06/16/16**

RECOMMENDATION:

Matter is contested. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 and Inventory & Appraisal with notice.

Set hearing re Accounting Review for **02/11/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(vet/lc/vet/abs/ds/nb/sa/nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 15 16 18 19

HEARING:

Hearing Re: Ptn for Conservatorship of the Person Only

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

See notes on matter 16.

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 15 16 17 19

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE ON SURCHARGE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Trial Setting Conference- No notes- JTD

(ww)

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

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

SEE ALSO 15 16 17 18

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner KENIA
ORENDAYN ISALDO

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE)...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
CHRISTINA ERICKSON-TAUBE	(PET)...SHERRI L KASTILAHN
ASCENCION ISALDO DIAZ	(TP)...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION

Hearing originally set for 07/06/17.

Continued from **08/07/17** for proper notice.

Continued from 10/23/17

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Richard Moss III.

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

1. Petitioner, Richard Moss III, seeks to be removed as Counsel for Kenia Orendain Isaldo due to attorney client relationship breakdown.
2. Proof of service filed; however, need proof of service of declaration and proposed Order in compliance with Rules of Court, rule 3.1362(d).
 - a. (d) Service *The notice of motion and motion, **the declaration, and the proposed order** must be served on the client and on all other parties who have appeared in the case. The notice may be by personal service, electronic service, or mail.*
3. No Proposed order.

RECOMMENDATION

Need to clear note 2.

(lc/nb/ww)

Superior Court of Calif, County of San Bernardino
Page: 20
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700314

CASE NAME: BRANDON O SERRANO LOZOYA

HEARING: Petition for Appointment of Conservator

COUNSEL:
ROSELIA SERRANO (PET)...PRO/PER
BRANDON O SERRANO LOZOYA (CEE)...MELVIN L FRIEDLAND

GENERAL INFORMATION

Continued from 10/16/17. Court orders IRC to file a report. Attorney Melvin Friedland appointed as counsel for Brandon.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Roselia Serrano (mother)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 08/21/17.
2. Petition indicates proposed conservatee is not developmentally disabled; however, refer to Supplemental Information and Capacity Declaration filed 08/21/17.
3. CI report filed 09/27/17.
4. Certificate of Completion of the Conservatorship Training Class filed 10/05/17.
5. **Need** IRC report.
6. Report of appointed Counsel Melvin Friedland filed 11/16/17.
7. Citation returned- served.
8. ~Proposed Form Order: 11/17/17

RECOMMENDATION

Need IRC Report. If approved, set hearing for Compliance Review for **07/09/18** 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/ww)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700344
CASE NAME: MTR OF ESTEBAN HERRERA

HEARING: Petition for Appointment of Conservator

COUNSEL:

NOEMI HERRERA	(CP)...SHENIECE J SMITH
GABRIEL HERRERA	(CP)...SHENIECE J SMITH
ESTEBAN HERRERA	(CTP)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Noemi and Gabriel Herrera (parents)

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

1. Petitioners seek orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re education. JTD
2. Petitioners seek orders limiting civil and legal rights. JTD
3. Petitioners seek medical powers. **Need** Capacity Declaration.
4. Proposed conservatee is developmentally disabled. Attorney Candice Garcia-Rodrigo appointed. **Need** report by Court appointed counsel.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Notice of hearing and proof of service filed 11/20/17 as to Inland Regional Center is insufficient. Per Pr.C. §1461.4 requires 30 days' notice. Need proper Notice.**
7. Report of no Report by CI filed 10/18/17 and CI report filed 11/20/17.
8. Certificates of Completion of the Conservatorship Training Class filed 10/05/17.
9. ~Proposed Form Order: 08/15/17

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **07/09/18** 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/ww)

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: 22
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS02786
CASE NAME: MTR OF ERNIE S PAREDES

SEE ALSO 23

HEARING:
Hearing Re: EXPARTE PTN TO DISPENSE WITH ACCTING (POST-DEATH)

COUNSEL:

PRISCILLA DAVIS (CPE)...HERB CHAVERS
ERNIE S PAREDES (CEP)...SHERRI L KASTILAHN
CHRISTIE DAVIDSON (SC)...HORSPOOL & HORSPOOL
CHRISTIE DAVIDSON (CPE)...SHERRI L KASTILAHN
INLAND VALLEY FEDERAL CREDIT UNION (TP)...ANDERSON, MCPHARLIN &
BETTY THAYER (PRO/PER)

Waiver of Court Fees and Costs filed by CHRISTIE DAVIDSON is GRANTED
Waiver of Court Fees and Costs filed by ERNIE S PAREDES is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of account (Pr.C.§2628) **Post-Death**
by Christie Davidson, conservator/PPF

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

1. This 8th post-death accounting period covers 05/07/17-07/31/17.
2. Assets on hand \$0.
3. Conservatee died on 05/07/17.
1. Petitioner petitions for waiver of accounting as a matter of law per Pr.C.§2628 on basis assets are less than \$15,000 and income was less than \$2,000 exclusive of public benefits. However, All final accountings, including estates qualifying under Pr. C. §2628, shall be set for hearing. Local Rule 20-1406. Need pre and post death accounting. Pr. C. §2620. **JTD**
- 2.

RECOMMENDATION:

Court's discretion. If approved, take **04/04/18** Accounting review off calendar and set Final discharge hearing on **12/10/18**.

(ww)

Future Hearing: 4/04/18 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 23
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS02786

CASE NAME: MTR OF ERNIE S PAREDES

SEE ALSO 22

HEARING:

Hearing Re: EXPARTE PTN TO DISPENSE WITH ACCTING(PRE-DEATH)

COUNSEL:

PRISCILLA DAVIS	(CPE)...HERB CHAVERS
ERNIE S PAREDES	(CEP)...SHERRI L KASTILAHN
CHRISTIE DAVIDSON	(SC)...HORSPOOL & HORSPOOL
CHRISTIE DAVIDSON	(CPE)...SHERRI L KASTILAHN
INLAND VALLEY FEDERAL CREDIT UNION (TP)	...ANDERSON, MCPHARLIN &
BETTY THAYER	(PRO/PER)

Waiver of Court Fees and Costs filed by CHRISTIE DAVIDSON is GRANTED

Waiver of Court Fees and Costs filed by ERNIE S PAREDES is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of account (Pr.C.§2628) **Pre-Death** by Christie Davidson, conservator/PPF

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

3. This 8th pre-death accounting period covers 02/01/16-05/06/17.
4. Assets on hand \$0.
5. Conservatee died on 05/07/17.
6. Petitioner petitions for waiver of accounting as a matter of law per Pr.C.§2628 on basis assets are less than \$15,000 and income was less than \$2,000 exclusive of public benefits.
- 7.

RECOMMENDATION:

Court's discretion. If approved, set Final discharge hearing on **12/10/18**.

(ww)

Future Hearing: 4/04/18 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 23A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500272
CASE NAME: MTR OF CHELSEA STOYKOVICH

HEARING: Hearing Re: CI REPORT (EMERGENCY HEARING)

COUNSEL:

MERLINA BURTON (PET)...PRO/PER
CHELSEA STOYKOVICH (PCE)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from **11/09/17**. Citation issued on Merlina Burton who is cited and required to appear and show cause why she should not be removed as conservator.

Continued from 11/20/17. After hearing Court appointed Rosa Rosado as guardian ad litem for conservatee.

THIS CASE SET FOR HEARING ON Hearing re: CI report (Emergency Hearing)

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

1. An emergency CI report was filed 11/08/17 and the hearing on 11/09/17 was set.
2. Court suspends the powers and letters of Merlina Burton, mother/limited conservator of person only.
3. Public Guardian appointed successor temporary conservator of Chelsea Stoykovich.
4. The Public Guardian has the power to remove Chelsea Stoykovich from her current residence and place her.
5. Attorney Roth is authorized to get the incident report from the Court Investigator concerning the memo filed yesterday.
6. Return of unserved citation by Sheriff's office on 11/15/17 indicating that a new date is required as the documents must be served 10 days prior to hearing. **JTD**
7. Does Court wish for a report to be filed by GAL Rose Rosado? **JTD**

RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 4/26/18: Conservatorship Compliance Review Hearing

Superior Court of Calif, County of San Bernardino
Page: 23B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700416

CASE NAME: MTR OF LESLIE ONTIVEROS

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LESLIE ONTIVEROS (CEP)...HORSPPOOL & HORSPPOOL

No Notes-Temporary hearing JTD.

Future Hearing: 1/22/18: Petition for Appointment of Conservator

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

DATE: 12/04/17 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1600916

CASE NAME: MTR OF ARTHUR HAROLD ARMSTRONG

VACATED

HEARING:

Court Trial set for PETITION FOR WILL AND LETTERS TESTAMENTARY
of MELINDA JACOBO

COUNSEL:

MELINDA JACOBO

(PET)...GREGORY L ZUMBRUNN

ARTHUR HAROLD ARMSTRONG JR

(DEC)...

SHAWN GOLDEN

(PET/TP)...PRO/PER

MARC BOZIGIAN

(ww)

Future hearing dates: 01/23/19 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 25 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 1:30 DEPT: S36P

CASE#: CON DS1000069

CASE NAME: CARA HEATH COSSEY

SEE ALSO 26

HEARING:

Hearing Re: REMOVAL OF BETTER MILLER AS CONSERVATOR

COUNSEL:

BETTY L MILLER (CP)...PRO/PER
CARA HEATH COSSEY (CTP)...

GENERAL INFORMATION

Continued from 11/22/17. Betty Miller states she objections to removal. Court sets trial for 12/04/17 at 1:30pm. Court notes that County Counsel and Counsel for IRC are not required to be present.

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

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

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

RECOMMENDATION

Inquire status of petition.

(lh/ww)

Superior Court of Calif, County of San Bernardino
Page: 26 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 12/04/17 TIME: 1:30 DEPT: S36P

CASE#: CON DS1000069

CASE NAME: CARA HEATH COSSEY

SEE ALSO 25

HEARING:

Hearing Re: PETITION FOR SUCCESSOR CONSERVATOR

COUNSEL:

BETTY L MILLER (CP)...PRO/PER
CARA HEATH COSSEY (CTP)...

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

(lh/ww)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0700079

CASE NAME: JULIA ANN SCHWALBACH

HEARING:

Hearing re Final Discharge

COUNSEL:

DWAYNE SCHWALBACH	(PET)...THOMAS V PRATT
JULIA ANN SCHWALBACH	(DEC)...
JOHN SCHWALBACH	(PET/OBJ)...E JOAN NELMS
KELLY SCHWALBACH	(PET)...LAYNE A BARTHOLOMEW
BOND SERVICES OF CA	(PRO/PER)
BERNARD M BIDART	(PRO/PER)
PUI CHI TSANG	(MIRIAM L WU)

GENERAL INFORMATION

Continued from **02/24/15 and 04/28/15**. Counsel to submit exparte petition for final discharge order and declarations in lieu of receipts today in the clerks' office.

Continued from **06/16/15**. Counsel states a beneficiaries passed away prior to distribution.

Continued from **08/18/15**. Counsel is to find a designated individual to accept funds for the deceased beneficiary.

Continued from **10/27/15** at request of counsel to file receipts and final discharge order.

Continued from **12/08/15** on Court's motion.

Continued from **2/08/16** at request of counsel to file a petition to place funds with County Treasurer.

Continued from **04/11/16 and 06/06/16** at request of counsel to file a petition to place funds with county treasurer.

Continued from **08/15/16 and 10/17/16**. Counsel reports there is one beneficiary who will not sign a 13100 because he is not sure that what he would be signing is accurate. They further report he will sign as soon as the judge makes orders. The Court suggests that that beneficiary come to the next hearing so the Court can explain the procedure.

Continued from **12/20/16** at request of counsel to prepare declaration.

Continued from **03/07/17 and 05/01/17**. Set for after distribution.

Continued from **07/17/17**. Mr. Flory to file and serve on Mr. Bartholemew a status report by 07/20/17. At next hearing if distribution has not occurred, a written status report is to be filed.

Continued from 10/02/17 Counsel to provide Judgment from 2011 court trial.

THIS CASE SET FOR HEARING ON Hearing re Final Discharge.

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

1. Final account/distribution approved on 02/25/14.
2. Need 8 receipts.
3. Need Ex Parte Petition for Final Discharge and Order.
4. **Declaration of Mark J. Flory regarding status of distribution filed 07/21/17. Does Court wish to deem Declaration as a Status Report? If so, need proper notice.**

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.

(cbr/vet/dl/dl/dl/nb/lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1100318

CASE NAME: ANNA MAE L ALBARRAN

HEARING:
Hearing re Final Discharge

COUNSEL:
JOE PADILLA (PET)...HARTNELL LAW GROUP
ANNA MAE L. ALBARRAN (DEC)...

GENERAL INFORMATION:

Continued from **03/06/17 and 05/08/17** at request of counsel.

Continued from **07/17/17**. Waiting for final receipt.

Continued from 10/02/17

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Amended Judgment Settling First and Final Account entered 12/05/16.
2. Need receipts.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb/lh/cs)

Superior Court of Calif, County of San Bernardino
Page: 3
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300488

CASE NAME: MARY LOU LIRA

HEARING: FIRST AND FINAL Account and Report of PATRICIA A LAROH and
Petition for allowance of fees filed.

COUNSEL:

PATRICIA A LAROH	(PET)...	J BENJAMIN SELTERS III
MARY LOU LIRA	(DEC)...	
PRIMO S LIRA	(OBJ)...	STEVEN S GOHARI
TOYOTA MOTOR CREDIT	(SCOTT WELTMAN)	
MICHAEL C MADDUX	(MICHAEL C MADDUX)	

Waiver of Court Fees and Costs filed by PATRICIA A LAROH is GRANTED
Waiver of Court Fees and Costs filed by PRIMO S LIRA is GRANTED
TOTAL FEES WAIVED TO DATE: \$1245.00

XREF: CIVDS1611047 *in re 17022 DOLPHIN STREET, FONTANA , CA.*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Petition for
allowance of Fees and for Final Distribution, by executor Patricia Laroh,
daughter/executor

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

- 1. Supplement filed 11/28/17; however not in Laserfiche at time of review.**
2. Accounting period 05/01/12 to 09/11/17
3. Assets on Hand \$82,514.27 consisting of cash.
4. Need financial statements per Local Rule 20-908.
5. Need Omnibus clause re distribution of any future assets.
6. Petitioner waives statutory fees.
7. Petitioner, Patricia A. Lorah received fee waivers in the amount of \$1,466.50 which should be ordered paid out of her share of distribution. [Itemized LFp. 10.]
8. Attorney Selters has paid to Primo Lira and Michael Maddox their settlement proceeds, per order dated 07/12/17, except for the amount of \$802.00 of which is the total amount of filing fees waived this case. Request is made to order his

waived filing fees be paid from his proceeds or to release said sum to Primo Lira. [Itemized LF p. 11]

9. Attorney requests statutory fees in the amount of \$3,355.18. Calculated, [LFp 13].
10. Attorney requests extraordinary fees in the amount of \$9,900.00 for services rendered in connection with the contested proceedings to recover the estate's portion of the foreclosure proceedings. Billed at \$300/hour for a total of 33 hours' attorney time. Itemized [LF, p. 12]. Attorney is also requesting reimbursement of costs in the amount of \$1,636.00. JTD.
11. Notice given.
12. ~Proposed Order 10/06/17 does not include Omnibus clause re distribution of any future assets;

RECOMMENDATION

Need to clear notes 3 and 4. Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **12/10/18**.

(cs)

Future Hearing: 6/15/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300977

CASE NAME: THEODORE B. REDINGER FAMILY TRUST

HEARING:

Hearing Re: ACCOUNTING REVIEW OF CURRENT TRUSTEE

COUNSEL:

MICHELLE L. REDINGER (PET)...PRO/PER
STEFFEN W. REDINGER (PET)...STEPHEN A LINDSLEY
THEODORE B. REDINGER FAMILY TRUST (TRU)...
MICHELLE L. REDINGER (PET)...PRO/PER
JANET L REDINGER (PET/RES)...KEITH S WALKER

Waiver of Court Fees and Costs filed by JANET L REDINGER is GRANTED

XREF: PROPS1400188 (Theodore Redinger)

GENERAL INFORMATION:

Continued from 10/02/17 Court admonishes Mr. Redinger regarding his failure to comply with filing a Second Accounting. If failure to comply with Court orders and Probate Procedures, Mr. Gary Redinger will be suspended as trustee. Second accounting is to be filed by 11/06/17.

THIS CASE IS SET FOR HEARING ON Accounting Review (by Gary Redinger. Successor Trustee)

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

4. Order Appointing Gary Redinger Successor Trustee entered on 01/20/15.
5. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status. When the trustee fails to file an accounting as ordered, the court may take action as specified in Pr.C. § 800 and C.C.P. § 128.

(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600107

CASE NAME: MTR OF KATHRYN LUCILLE KAME

HEARING:
Accounting Review

COUNSEL:
CALIFORNIA JAY MCKAY (PET)...HARTNELL LAW GROUP
KATHRYN LUCILLE KAME (DEC)...

GENERAL INFORMATION:
Continued from 06/26/17 and 09/18

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to California McKay, daughter/executor on 05/12/16, full authority, \$20,000 bond.
2. Need Final Inventory and Appraisal.
3. Need Accounting or status report.

RECOMMENDATION:

Inquire status of accounting and Final Inventory and Appraisal. . When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.
(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600689

CASE NAME: PAUL SAMUEL AGOSTA

HEARING:
Accounting Review

COUNSEL:
TERESA LYNN AGOSTA (PET)...VICTOR J HERRERA
PAUL SAMUEL AGOSTA (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Teresa Agosta, daughter on 06/01/17, full authority, no bond.
2. Need Final Inventory and Appraisal.
3. Need Accounting or status report.

RECOMMENDATION:

Inquire status of accounting and Final Inventory and Appraisal.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700277

CASE NAME: ANNE BATTLE KERR

HEARING: First and Final Account and Report of KIMERA KERR-BEDNEY and
Petition for allowance of fees filed.

COUNSEL:

KIMERA KERR-BEDNEY (PET)...FULLERTON LEMANN SCHAEFER & DO
ANNE BATTLE KERR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final on Waiver of account, Petition for Allowance of Fees and for Final Distribution, by executor, Kimera Kerr-Bedney, daughter

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

1. Petition is not signed by petitioner, Kimera Kerr-Bedney. Need same.
2. Final I & A filed 05/30/17
3. Assets on Hand \$209,361.76 consisting of cash.
4. Sole heir waives accounting.
5. Petitioner waives statutory fees.
6. Attorney requests statutory fees in the amount of \$10,310.20. Calculated.
7. Attorney requests extraordinary fees of \$1,521.75 for services rendered in connection with the sale of real property. Billed at \$325/hour for a total of 3.45hours' attorney time and paralegal time billed at \$120/hour for a total of 1.90 hours. Itemized [LF, p. 19 and 20]. JTD.
8. Personal representatives seek a reserve of \$1,500.
9. ~ Proposed Order 10/10/17

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **12/10/18**

(cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700677

CASE NAME: MTR OF DINWIDDIE FAMILY TRUST

HEARING:

Petition for ORDER DETERMINING TITLE TO REAL PROPERTY

COUNSEL:

KIMBERLY DIANE LEISGANG	(PET)...JENNIFER L FIELD
DAVID ROGER DINWIDDIE	(PET)...JENNIFER L FIELD
DINWIDDIE FAMILY TRUST	(TRU)...

Currently under review by Legal Research.
(LR)

Notice complete.
(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700679

CASE NAME: SUSIE C CONTRERARAS AKA SUSIE CONTRERAS

VACATED

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

ANTHONY GALVAN

(PET)...JOSEPHINE A RICH

SUSIE C CONTRERAS

(DEC)...

STATE OF CALIFORNIA FRANCHISE

(TP)...

VACATE. Proof of Bond filed 10/04/17.

Future Hearing: 12/10/18: Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 10
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701008

CASE NAME: CHARLES L HARDWAY

HEARING:

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

COUNSEL:

KELLY HARDWAY (PET)...KAYSER PAHORATTORNEYS, LLP
CHARLES L HARDWAY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with
Will Annexed, Full Authority under IAEA by Kelly Hardway, daughter

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

1. Will waives bond. Estate value consists of \$420,500.00 with \$500.00 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)).
2. Declination of Barbara Ann Smart filed 10/06/17.
3. Petition section 5(a)(8) indicates no issue of predeceased child; however, grandchildren are mentioned in section 8. Court to clarify.
4. Petitioner submitted an outdated form (2008). JTD
5. No proposed Form Order. Submit after hearing:

RECOMMENDATION

Need to clear notes 3-4, Court's discretion re bond. If approved, set Accounting/Status Review for **12/10/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 12/04/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS03958

CASE NAME: MTR OF THE BAILY ANN MCNEIL SPECIAL NEEDS TRST

HEARING:

Hearing Re: GUARDIAN AD LITEM'S REPORT

COUNSEL:

BAILY ANN MCNEIL (MIN)...JUDITH RUNYON
DIANE D HARKISON (PET)...M DANIEL SAYLOR
THE BAILY ANN MCNEIL SPECIAL NEEDS TRUST(TRU)...
MELODIE Z. SCOTT (APP/PET/TEE)...HORSPOOL & PARKER
KIRK HOFFMAN (PET)...M DANIEL SAYLOR
PUBLIC GUARDIAN (COUNTY COUNSEL)
BOND SERVICE OF CALIF/DARNELL (PRO/PER)
AMERICAN CONTRACTORS INDEMNITY

GENERAL INFORMATION:

Continued from 09/18/17 for report to be filed.

THIS CASE IS SET FOR HEARING ON Guardian ad Litem's Report.

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

1. Matter set at 06/26/17 hearing, wherein, the Court appointed Mitchell Roth as GAL.
2. Need report by GAL, Mitchell Roth.

RECOMMENDATION:

Inquire status.
(nb/cs)

Future Hearing:

7/02/18: Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 12/04/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701009

CASE NAME: MTR OF EMMETT D WATTS REVOCABLE TRUST

HEARING:

Petition for ORDER DESIGNATING REAL PROPERTY TO BE AN ASSET
OF THE LIVING TRUST

COUNSEL:

DEBORAH LYNN REYNOLDS (PET)...ELDER LAW CENTER
DENISE LEE WATTS (PET)...ELDER LAW CENTER
THE EMMETT D WATTS REVOCABLE TRUST(TRU)...

Matter referred to Legal Research.
(LR)

Notice given.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300069

CASE NAME: ERIK GRADY

HEARING: TENTH Account and Report of ARTHUR A CAPPILLA and Petition for allowance of fees filed.

COUNSEL:

ARTHUR A CAPPILLA (CPE)...JOHN D MICKUS
ERIK GRADY (CEP)...BERNITA S BORGES
AMERICAN CONTRACTORS INDEMNITY (TP)...PRO/PER
US DEPT OF VETERANS AFFAIRS (ALAN K ACHEN)
ARTHUR A CAPPILLA (BARBARA E BOWERSOCK)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Tenth Account Current and Petition for Fees by Arthur Cappilla, PPF

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

1. Accounting covers 08/01/15 to 07/31/17.
2. Assets on hand: \$72,888.65 in cash.
3. Petitioner requests fees of \$6,647.50, of which \$3,450.00 has been paid. The fee request is based on 21 hours for case management work at \$85/hour and 38.90 for conservator work at \$125/hour. Itemized [LF, pgs. 27- 29]. JTD.
4. Petitioner was authorized per Order dated 11/09/15 to pay himself periodic compensation for services at the rate of \$150/month. Petitioner requests continual periodic compensation at the rate of \$150/month, not to exceed 26 months, commencing 08/01/17. JTD.
5. Current bond set at \$126,000.00. Petitioner requests bond increase of \$15,000.00, total of \$141,000.00. Appears adequate.
6. Attorney requests fees of \$2,590.00. Billed at \$350/hour for 6.8 hours' attorney time and \$105/hour for 2 hours' paralegal time. Itemized [LF, p 31- 32]. JTD.
7. Notice given, no objections.
8. No proposed Order. Submit after hearing.

RECOMMENDATION:

Court's discretion re fees and bond. If approved, set hearing on the next accounting review for **12/10/18** (if one year) or **12/09/19** (if two years). Accounting to be filed 30 days' in advance.

(cs)

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: 14

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500159

CASE NAME: THELMA S. MATWEECHA

VACATED

HEARING:

Hearing re Final Discharge

COUNSEL:

NATHAN VACA (PET)... SUSAN L WINDSOR
MARK CURRY (PCR)... SUSAN L WINDSOR
THELMA S MATWEECHA (PCE)...
LIBERTY MUTUAL INSURANCE (TP)...PRO/PER
ROSE C ROSADO

XREF: PROPS1600082 THEODORE B. REDINGER FAMILY TRUST

VACATE. Ex Parte Petition for Final Discharge and Order was approved on 02/17/17.

Superior Court of Calif, County of San Bernardino
Page: 15
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600277

CASE NAME: ALEX PAEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA G PAEZ

COUNSEL:

MARIA G PAEZ (CPE)...KIRK MCINTOSH
ALEX PAEZ (CEP)...PRO/PER
U.S. SPECIALTY INSURANCE CO (TP)...

GENERAL INFORMATION

Continued from 10/02/17 to clear probate notes. Counsel indicates Personal Injury Claim is still pending litigation.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Paez, spouse, appointed conservator of the person and estate on 02/27/17, \$50,000 bond.
2. Determination of Conservatee's Appropriate Level of Care filed 10/04/17.
3. **Need** Care Plan in accord with Pr.C.§2352.5.
4. Notification of Conservatee's rights per Pr.C.§1830(c) filed 10/04/17.
5. Partial Inventory and Appraisal filed 07/24/17. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610 filed on 07/24/17.

RECOMMENDATION

Need to clear notes 3-5.

(ww/cs)

Superior Court of Calif, County of San Bernardino
Page: 16
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700209

CASE NAME: SAMANTHA LORENZO

SEE ALSO 17

HEARING:

Hearing Re: AMENDED PETITION FOR APPOINTMENT OF CONSRVATOR

COUNSEL:

MARIA FLORES DE LORENZO (PET)...PRO/PER
SAMANTHA LORENZO (CTP)...JAMES B CHURCH
RANULFO LORENZO ROJAS (CP)...PRO/PER

GENERAL INFORMATION

Continued from 07/17/17. Amended petition requesting father be added as a co-conservator may be filed. It has come to the Court's attention that James Church was appointed to represent Samantha Lorenzo per order filed 07/13/17. Notice given by Judicial Assistant.

Continued from 10/02/17 to clear notes and to file Amended petition adding Ranulfo Lorenzo Rojas

THIS CASE SET FOR HEARING ON [Amended 10/24/17] Petition for Appointment of Limited Conservator, person only, by Maria De Lorenzo and Ranulfo Rojas (mother and father)

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

1. Amended petition filed 10/24/17 adding Ranulfo Rojas as proposed co-conservator.
2. Proposed conservatee appears to have reached age of majority one week after petition was filed. Court's discretion.
3. Petitioners seek orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, consent/withhold medical consent, and make educational decisions. JTD
4. Petitioner seeks civil rights not be limited without court order. JTD
5. Petitioner seeks medical powers. Capacity Declaration filed 06/05/17.
6. Proposed conservatee is developmentally disabled. Report of Counsel James Church filed 10/02/17.
7. Proposed conservatee is developmentally disabled. Need IRC report.
- 8. Court Investigator report filed.**

9. Court to see Confidential Conservator Screening form filed 10/23/17 by Ranulfo Rojas, [LF p. 2]
10. Confidential Conservator Screening form filed 10/23/17 by Ranulfo Rojas is incomplete as to items 6(b)(c). Also, need attachment 6 for the response provided at 6(a).
11. Need 30 days' notice to Inland Regional Center. Pr.C. §1461.4.
12. Amended Petition indicates Clara Rojas Roman (pgm) resides in Mexico; however, attachment 3(f)(1) indicates she is deceased. Need verified supplement clarifying status of Clara Rojas Roman.
13. Need Return of Citation with Proof of Service of Amended Petition.
14. Need notice of hearing and proof of service of Amended Petition.
15. Proof of Completion of the Conservatorship Training Class filed.
16. ~Proposed Form Order: 10/24/17

RECOMMENDATION

Need to clear notes 10 - 14. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5.
(lh/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700209

CASE NAME: SAMANTHA LORENZO

SEE ALSO 16

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MARIA FLORES DE LORENZO	(PET)...PRO/PER
SAMANTHA LORENZO	(CTP)...JAMES B CHURCH
RUNULFO LORENZO ROJAS	(CP)...PRO/PER

This matter appears moot as amended petition has been filed. Court to see note on previous matter number 16

Superior Court of Calif, County of San Bernardino
Page: 18
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700287

CASE NAME: LINDA YVONNE IBARRA

HEARING: Petition for APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

PABLO IBARRA (CP)...PRO/PER
LINDA YVONNE IBARRA (CTP)...JENNIFER M DANIEL
ADA IBARRA (CP)...PRO/PER

GENERAL INFORMATION

Continued from 09/18/17 Pablo Ibarra not being present the Court orders his petition for conservatorship off calendar. As to Ada Ibarra's petition: Referred to Court Investigator for investigation and report. Attorney Jennifer M. Daniel is appointed for Linda Yvonne Ibarra.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, person only, by Ada Ibarra (mother)

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

1. Petitioner did not request powers. However, indicates conservatee is developmentally disabled and requests special orders to place conservatee in a secured facility. Question if petitioner seeks medical powers?
2. Proposed conservatee is developmentally disabled. **IRC report filed 09/07/17.**
3. Proposed conservatee is developmentally disabled. Need report of counsel Jennifer Daniel.
4. Petition is incomplete at item #11 list of relatives. Need completed form to include father and brother.
5. List of Required Contact information is missing father and brother. Need completed form.
6. Need Notice of Hearing and proof of service.
7. Need return of Citation.
- 8. Court Investigator reports filed 11/28/17.**
9. Certificate of Completion of the Conservatorship Training Class filed.
10. Capacity Declaration filed 08/08/17.
11. ~Proposed Form Order: 08/08/17

RECOMMENDATION

Need to clear notes 3 - 7. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700289

CASE NAME: MTR OF JUNE M FULLER

HEARING: Petition for Appointment of Conservator

COUNSEL:

W A HLA VATY	(CP)...REYNOLDS, JENSEN, SWAN & PERSH
JUNE M FULLER	(CTP)...
ROSE ROSADO	(GAL)

XREF: PROPS1700404 FULLER FAMILY TRUST

GENERAL INFORMATION

Temporary orders denied on 08/09/17. Lynne Purkey agrees that petitioner should be Conservator of person **and** estate. GAL Rose Rosado objects to appointment.

NATALIE BLICKENSTAFF is appointed the temporary conservator of the person of JUNE FULLER on 09/18/17.

Continued from **09/13/17** at request of counsel. Counsel stipulate to sub in Ms. Natalie Blickenstaff as conservator of person. Notice waived.

Continued from 09/18/17 Stipulation to substitute Ms. Blickenstaff as conservator of the person filed. The court finds that temporary conservatorship is in the best interest. Natalie Blickenstaff is appointed the temporary conservator of the person of JUNE FULLER.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by ~~W.A. Hlavaty, PPF~~ **Natalie Blickenstaff, PPF.**

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

1. Declaration filed in support of conservatorship by Lynne Purkey, daughter, on 08/04/17.
2. Need Notification to Court of Address on Conservatorship form.
3. Petitioner seeks medical powers. Need Capacity Declaration.
4. Petitioner seeks dementia powers. Need appointment of counsel for report.
5. Need dementia attachment.
6. **Need notice of hearing and proof of service to GAL, Rose Rosado; brother, Albert C. Greisz; nominees in trust, Richard Kine and Gerry Olson, Gabriele Sitzenstock and Jay Escobar (administrator).**

7. Citation returned served.
8. Court Investigator report filed.
9. No proposed order submitted.

RECOMMENDATION

Need to clear notes 2-8. If approved, set hearing for Compliance Review for **07/09/18** 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.
(lc/nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700309

CASE NAME: ZEFERINA S VALDEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

TERESA VALDEZ C (CP)...PRO/PER
ZEFERINA S VALDEZ (CTP)...EDWARD B FISCHEL

GENERAL INFORMATION

Ex parte orders granted on 08/23/17. Teresa Valdez appointed Temporary Conservator of the person and estate of Zeferina Valdez. Petitioner may move Zeferina Valdez to her home only pending further order of the Court. Zeferina Valdez is not to be removed from the state of California without further order of the Court. Attorney Edward Fischel appointed for Zeferina Valdez. Notice given by Judicial Assistant.

Continued from 10/02/17 to clear notes. Court advises all parties written objections are to be filed with the Court prior to next hearing. No Oral objections will be accepted.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Teresa Valdez (daughter)

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

1. Dementia orders are not requested in petition; however, dementia attachment is included [petition, 08/16/17, LFpg10]. Need verified supplement clarifying if requesting dementia orders; if so, need completed dementia attachment. **Supp. filed 10/18/17 indicates Dementia involuntary medication powers are not necessarily requested and involuntary placement powers are not requested; however, Exhibit B indicates requesting special orders re dementia, [LF, p. 8].**
2. Petitioner seeks medical powers. **Capacity Declaration filed 10/18/17 is incomplete** as follows: item 3 re who is completing form. On Capacity Declaration Attachment (form GC-335) filed 08/23/17 item #9b administration of dementia medications, #9b(2) description of mental deficit, and #9b(5)

- reasons conservatee would benefit from prescribed psychotropic medication; form is not dated at signature on page 1. Need completed form.
3. Need List of required contacts (Local form SB-12224) including all the information for Teresa Valdez, Guadalupe Gonzales, and Antonia Valdez.
Proof of mailing attached to Supp. filed 10/18/17, [LF p. 13-15] is insufficient
 4. Notice of Hearing and Proof of Mailing filed 10/10/17 indicates Notice of Conservatee's Rights were served. Need proper notice of hearing and proof of service.
 5. Certificate of Completion of the Conservatorship Training Class filed.
 6. Need return of citation.
 7. **Report of Counsel Edward Fischel filed.**
 8. **Court Investigator report filed.**
 9. See Confidential Screening form filed 08/16/17.
 10. ~Proposed Form Order: 08/16/17

RECOMMENDATION

Need to clear notes 2-4. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5 (lh/nb/cs)

Superior Court of Calif, County of San Bernardino
Page: 21
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700397

CASE NAME: Brandon Alvarado
HEARING: Petition for Appointment of Conservator

COUNSEL:

DALIA MONTOYA (CP)...
BRANDON ALVARADO (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Dalia Montoya, 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 consent to all medical decisions. JTD
2. Petitioner seeks powers re habilitation, treatment, training, medical etc. JTD
3. Petitioner seeks civil and legal rights be limited. JTD
4. Petitioner seeks medical powers. **Capacity Declaration filed 11/22/17; however, section A – C and section 4(b) re continued treatment are incomplete. Need completed form.**
5. **Citation returned served.**
6. Proposed conservatee is developmentally disabled. Need report of court appointed counsel, Candice Garcia-Rodrigo.
7. Proposed conservatee is developmentally disabled. Need IRC report.
8. **Proof of service filed 11/22/17 includes Arlyss Alvarado (sister); however, section 8 of petition does not include siblings. Need verified supplement listing all required information of second-degree relatives.**
9. Need Court Investigator report.
10. Section 3(f) of petition is not completed; however, attachment 3(f)(2) is attached. JTD
11. Certificate of Completion of the Conservatorship Training Class filed 11/02/17.
12. ~Proposed Form Order: 10/27/17

RECOMMENDATION

Need to clear notes 6 - 10. If approved, set hearing for Compliance Review for **07/09/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS01747

CASE NAME: MATTER OF JESSE MUNOZ

VACATED

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

DANIEL RIVAS	(PET)...JOHN D MICKUS
JOHN D MICKUS	(PET/CE)...JOHN D MICKUS
JESSE MUNOZ	(CEP/CTE)...SHERRI L KASTILAHN
VERLENE CAMERON	(SC/CE/CPE)...JOHN D MICKUS
HARRY LIEBERMAN	(CPE/SC)...HARTNELL LAW GROUP

VACATE. Proof of Bond filed 10/27/17.

Future Hearing: 4/26/18: Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 23

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

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS6647

CASE NAME: IN THE MTTR OF CICI C ROBERTSON

HEARING:

Accounting Review

COUNSEL:

CICI C ROBERTSON (CEP)...
HARVEY C ROBERTSON (CPE)...EDWARD B FISCHEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Harvey Robertson, spouse, appointed conservator 1/9/84, no bond.
2. On 03/07/16 Court approved the 24th Waiver of account for the period ending 09/30/15.
3. Need an accounting or waiver of account.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 23 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/04/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700119

CASE NAME: JONES -VS- RUFFINS

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:
ARNESIA JONES (PET)...PRO/PER
CASEY JONES JR (PP)...PRO/PER
SHANITA JONES RUFFINS (RP)...

Need notice to Shanta Ruffins, respondent.
(cs)