



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 12/05/17

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.

nb1108

11/27 ww

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0800010

CASE NAME: MARY MARGARET ROWE

HEARING:

Accounting Review

COUNSEL:

ETHANAC ROADINVESTORS, A LIMIT	(TP)...DENNIS K HASTY
JOHN M BYLSMA	(PET)...ALLARD, SHELTON &
JOHN M BYLSMA	(PET)...KEITH S WALKER
MARY MARGARET ROWE	(DEC)...

CCP170.6 filed as to CYNTHIA LUDVIGSEN

GENERAL INFORMATION:

Continued from **09/05/17**. No appearance. Court orders personal representative and their counsel to be present in Court on 10/17/17.

Continued from 10/17/17 at request of counsel to file status report.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Approving Second Status Report entered 03/04/16; accounting now due.
2. No accounting or updated status report. Need same.

RECOMMENDATION:

Inquire status.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500462

VACATED

CASE NAME: MTR OF MARK ALAN OVERGAAUW

HEARING:

Accounting Review

COUNSEL:

MARK ALAN OVERGAAUW

(DEC)...

SHELLY R GUERRA

(PET)...PASQUALE P CAIAZZA

(ww)

Future hearing dates: 03/06/18 Probate Status Report Filed

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600302

CASE NAME: FLORENCIO G CHAVEZ

HEARING:

Hearing re Final Discharge

COUNSEL:

FLORENCIO G CHAVEZ (DEC)...

FLORENCIO G CHAVEZ JR (PET)...BRYAN C. HARTNELL

XREF: PROPS1600400 (Magdalena C Chavez)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Set at 10/17/17 hearing on status report, wherein, the Court deemed the Probate Status Report as a Petition to Terminate Further Proceedings. The Court granted the request to terminate further proceedings.
2. Counsel to prepare revised Order reflecting the above information. Need same.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600732

CASE NAME: MTR OF THERESA VERONICA STONE

HEARING:

REPORT ON WVR OF Account and Report of LISA LAFFERTY and
Petition for allowance of fees filed.

COUNSEL:

LISA LAFFERTY (PET)...DENHERDER GRIER &
THERESA VERONICA STONE (DEC)...

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Executrix, Lisa Lafferty ["Petitioner"-daughter-Trustee-Trust Beneficiary].

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

1. Petitioner, as Trustee of the T. Veronica Stone Living Trust dated 10/03/07, waives accounting.
2. The will conditionally incorporates decedent's Trust. **Certification of trust and copy of trust filed.**
3. Accounting period 04/11/16 to
4. Assets on Hand \$222,013.73 consisting of \$218,013.73 in cash and a 2010 Chevy Aveo LT.
5. Petitioner waives statutory compensation.
6. Attorney requests statutory fees of \$7,709.33. Calculated.
7. Attorney requests reimbursement of costs of \$977.50. Itemized [LF, p5].
8. Petitioner requests authority to withhold \$5,000 as a reserve for closing costs.
9. Notice of hearing filed 11/14/17.
10. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge on **10/23/18**.

(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.**

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600821

CASE NAME: MTR OF BIEMON BAGWELL

HEARING:

FIRST AND FINAL Account and Report of RUTH CHARD, DAVID BAGWELL
and Petition for allowance of fees filed.

COUNSEL:

BIEMON BAGWELL	(DEC)...
DAVID BAGWELL	(PET)... GUY A LEEMHUIS
RUTH CHARD	(PET)... GUY A LEEMHUIS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Executors, Ruth Chard and David Bagwell ["Petitioners"].

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

1. Accounting period 10/04/16 to 08/22/17.
2. Assets on Hand \$112,775.76 consisting of \$99,775.76 in cash and remaining in personal property.
3. Statutory compensation of \$5,173.00 requested. Calculated.
4. Need proofs of service as to Notice of Proposed Action(s).
5. Need bank statements to support date of death and closing balance per Local Rule 20-908.
6. Petition indicates the two motorcycles have not been able to be sold to date and the Personal Representative propose to take title to these remaining vehicles and provide 5% of their value to the third devisee, Diane Salings. Ms. Salings has purportedly agreed to this arrangement.
7. Proposed Order 08/22/17 reflects incorrect fee base for statutory fees; does not include findings re: sole and separate property; or include vehicle license number(s) and identification numbers.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, set next hearing for receipts and final discharge for **12/11/18**.

(nb)

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

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700452

CASE NAME: MTR OF JUAN J DAVILA JR
HEARING:
Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

JUAN J DAVILA JR	(DEC)...
LAURA A QUIGLEY	(PET)...MATTHEW E SHEASBY
NATASHA MARIE AGUIRRE	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from **08/01/17**. Petitioner to file and serve the supplement to clear the probate notes by 4pm August 29, 2017.

Continued from 09/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by fiancé and step-daughter, Laura Quigley and Natasha M. Aguirre ["Petitioners"].

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

1. It appears decedent was survived by sons who have higher priority but whose addresses are purportedly unknown. However, death certificate [LF, p. 7] includes address for son, Juan Jose Davila III. Need Declinations to Serve by sons and nomination of these petitioners.
2. Question if Natasha is a step-daughter from a former relationship or if Natasha is Laura's daughter? Need further clarification via verified supplement.
3. Petition is missing page 3. Need complete petition.
4. Petitioners allege all heirs waive bond. However, no waivers by sons, Juan, Joey and Joseph Davila. Suggest bond of \$200,000. JTD.
5. Need proof of publication.
6. Need Notice of Petition to Administer Estate and Due Diligence Declarations.
7. ~Proposed Form Order/Letters 05/11/17.

RECOMMENDATION: Trail to 01/02/18

Need to clear notes 1-6, \$200,000 bond. If approved, set future hearing for Accounting/Status Review on **11/27/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

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.**

(nb)

Future Hearing:

01/02/18 Petition for probate of the lost will

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700621

CASE NAME: HYL A MARROW

HEARING:

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

COUNSEL:

HR TOPALIAN

(PET)...JILL BROUSARD

HYLA MARROW

(DEC)...

GENERAL INFORMATION

Continued from 09/19/17 at request of counsel.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by H.R. Topalian, Executor

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

1. Will waives bond. Estate value consists of \$160,000 in personal property.
2. Duties and liabilities filed, however, the telephone number for the proposed personal representative is missing. Need same.
3. The will conditionally incorporates decedent's Trust. Need a certification of trust that meets the requirements in Pr.C. §18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
- 4. Proof of publication filed.**
5. Proposed order not submitted.

RECOMMENDATION

Need to clear note 2, Court's discretion re bond. If approved, set Accounting/Status Review for **11/27/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700712

CASE NAME: BETTY JEAN WALLACE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BETTY JEAN WALLACE	(DEC)...
JAYNE ANN MANNING	(PET)...ELIZABETH A TRESP
JENNIFER LEE MANKE	(PET)...ELIZABETH A TRESP
JULIE LYN PADILLA	(PET)...ELIZABETH A TRESP

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by issues, Jennifer K. Manke, Julie L. Padilla and Jayne A. Manning ["Petitioners"].

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

1. Petitioners request a determination that decedent's real property, located at Big Bear City in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's children and purported heirs.
2. Each petitioner claims a 1/3rd undivided interest in Decedent's 1/250 interest in real property. Does Court wish to require copy of vesting document?
JTD.
3. ~Proposed Form Order 07/17/17

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700730

CASE NAME: MARK S OBERLY

HEARING:

Petition for LETTERS OF ADMINISTRATION W/ FULL IAEA

COUNSEL:

DANIEL OBERLY SR	(PET)...	R. STEVEN DERRYBERRY
MARK S OBERLY	(DEC)...	
SHANNON KELLY ORTEGA	(PET)...	KRING & CHUNG

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Shannon Kelly Ortega ["Petitioner"].

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

1. Petitioner requests bond to be determined. Suggest bond of \$1,015,000.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). JTD.
2. Section 3g(2), 3h(3) or (4) to petition [LF, p.3] are incomplete. Need verified supplement.
3. Section 8 to petition does not include decedent's wife. Need verified supplement.
4. Need proof of publication.
5. ~Proposed Form Order 08/22/17

RECOMMENDATION:

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

(nb)

Future Hearing:

11/08/18 Readiness calendar

11/08/18 Petition for letters of administration etc.

12/10/18 Court Trial

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

12/11/18 Court Trial
12/12/18 Court Trial
12/13/18 Court Trial
12/14/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700842

CASE NAME: DOROTHY L. CHRISMER

HEARING:

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

COUNSEL:

DARRELL CHRISMER (PET)...PRO/PER

DOROTHY L. CHRISMER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA.

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

1. Petitioner alleges that petitioner is the sole beneficiary and waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Petition indicates decedent has a will at section 2a and that decedent was a citizen of a country other than the U.S. at section 3b. Need further clarification via verified supplement.
3. Need proof of publication.

RECOMMENDATION:

Need to clear note 2-3. If approved, set future hearing for Accounting/Status Review on **02/19/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700843

CASE NAME: THE PACHECO TRUST DATED 11/21/12

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS

COUNSEL:

MANUEL PACHECO JR

(PET)...BEZAIRE LEDWITZ &

ROSEMARIE ANDERSON

(PET)...BEZAIRE LEDWITZ &

THE PACHECO TRUST DATED NOVEMB(TRU)...

Currently under review by Legal Research.

(LR)

Notice:

Need Notice of Hearing with proof of service to Settlor's 6 issue, specifically, Susan Hernandez; Carol Quiroz; Sylvia Fontes; Rachel Lucero; Rosemarie Anderson; and Manuel Pacheco, Jr. Also, to each grandchild (not named) and Trustee(s)(not named) of Separate Share Trust(s), if any.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000092

CASE NAME: Jennifer Sue Vieyra

HEARING:

SECOND AND FINAL Account and Report of JOHN B VIEYRA, ANTHONY W VIEYRA, MARGARET (PEGGY) HARMON and Petition for allowance of fees filed.

COUNSEL:

ANTHONY W VIEYRA	(CPE)...E. AVERY CRARY
ANTHONY W VIEYRA	(CPE)...MESERVE MUMPER &
JENNIFER SUE VIEYRA	(CEP)...MARK J. ANDR EW FLORY
JOHN B VIEYRA	(CTE)...E. AVERY CRARY
JOHN BENJAMIN VIEYRA	(CE)...MESERVE MUMPER &
MARGARET (PEGGY) HARMON	(CTP)...E. AVERY CRARY
MARGARET HARMON	(CPE)...MESERVE MUMPER &

X-REF: CIVRS 906905

GENERAL INFORMATION:

Conservatee passed away on 06/22/17.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Co-Conservator of the Estate, John B. Viera and Co-Conservator of the Person and Estate, Anthony W. Viera and Co-Conservator of the Person, Margaret P. Harmon ["Petitioners"-siblings].

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

1. Accounting period 08/02/16 to 07/19/17. Need separate post-death accounting for period beginning 06/23/17 per Pr. C. § 2620(b)
2. Assets on Hand \$6,176.02 consisting of cash.
3. Current bond of \$17,300. Petitioner requests bond to be exonerated. However, bond is not exonerated until entry of final discharge order.
4. Petitioners waive any and all compensation/fees for services rendered for the period of this account.
5. Petitioners' attorneys waive any fees from the conservatorship estate assets for services rendered to the conservatorship estate or the person of the conservatee.

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

6. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c) via verified supplement.
7. Cash Assets at Beginning of Account Period reflected on Summary of Account [LF, p. 14] does not reflect Property on Hand at End of prior account period. Need corrected Summary of Account and affected schedules via verified supplement.
8. Cash Assets on Hand at End of Account – Schedule E [LF, p.22] reflects value entered on first account. Need corrected schedule that reflects current amount of 401(K) plan via verified supplement.
9. Petitioners state the conservatee's predeceased mother, Carol Vieyra, is the named beneficiary for the conservatee's American Building Supply, Inc. 401(K) Retirement Plan XXXX52-01, Participant ID XXX9557. The Conservatee's two adult daughters, Jacquelyn M. Vieyra and Sheridan N. Viera, are her intestate heirs. The Co-Conservators request that the Court determine that this should be distributed outright in equal shares to Jacquelyn M. Vieyra and Sheridan N. Viera. Question why subject 401(K) account should not be distributed to predeceased mother's estate? Need verified supplement.
10. Petitioners request authorization to distribute assets held at JPMorgan Chase Bank, Acct. No., XXX3604, to intestate heirs, Jacquelyn M. Vieyra and Sheridan N. Viera, outright in equal shares. Suggest Court require Pr. C. § 13100 petition. JTD.
11. Need Notice of Proposed Action with proof of service as to proposed distributions.
12. Notice filed on 10/27/17 does not include court-appointed attorney, Mark Flory. Need proper service.
13. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended account to be set on first check calendar no sooner than **01/09/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700001

CASE NAME: ROLAND LEVONE HAMILTON JR

SEE ALSO 14

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROLAND LEVONE HAMILTON

COUNSEL:

JACQUELYN M HILL (CPE)...PRO/PER
ROLAND LEVONE HAMILTON JR (CTP)...PRO/PER

See next matter #14.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700001

CASE NAME: ROLAND LEVONE HAMILTON JR

SEE ALSO 13

HEARING:

Hearing Re: OSC RE SANCTIONS FOR FAILURE TO FILE

COUNSEL:

JACQUELYN M HILL (CPE)...PRO/PER

ROLAND LEVONE HAMILTON JR (CTP)...PRO/PER

GENERAL INFORMATION

Matter set at 09/19/17 hearing due to non-appearance and failure to file. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for Failure to File** on Compliance Review.

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

1. Jacquelyn Hill appointed Conservator of the person.
2. Need Notification of Conservatee's rights per Pr. C. §1830(c).
3. Need a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355).
4. Need Care Plan in accord with Pr. C. §2352.5.

RECOMMENDATION

Inquire status.

(lh/nb)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700291

CASE NAME: MTR OF ULISES ROMERO
HEARING:
Petition for Appointment of Conservator

COUNSEL:
JACKIE ROMERO (CP)...PRO/PER
ULISES ROMERO (CTP)...

GENERAL INFORMATION

Continued from 09/19/17 for petitioner to clear notes. Court clears note re citation as Ulises Romero is present in court today. Court does not require amended petition - probate note 1 is cleared; Court does not require IRC Report.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Jackie Romero, mother.

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

1. Proposed conservatee is developmentally disabled. **Court to appoint counsel and require report for proposed conservatee per Pr.C. §1470.**
2. Petitioner does not request medical powers; however, indicates in item 9 that proposed conservatee lacks capacity to consent to medical treatment.
 - a. Need verified supplement clarifying powers sought.
 - b. Need Capacity Declaration.
3. **Court Investigator report filed.**
4. **Certificate of Completion of the Conservatorship Training Class filed.**
5. Need Notice of Hearing and Proof of Service.
6. ~Proposed Form Order: 08/03/17

RECOMMENDATION

Need to clear notes 1, 2, & 5. If approved, set hearing for Compliance Review for **07/10/18** 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)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700383

CASE NAME: MTR OF TONY BRANDON KWON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

MIRELIA VELAZQUEZ (CP)...PRO/PER
TONY BRANDON KWON (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by Mirelia Velazquez ["Petitioner"-mother].

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

1. Proposed Conservatee may be a minor and section 5a does not include date of birth. Need verified supplement that includes date of majority.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. Need report by court-appointed counsel, Craig Parker.
4. Medical Capacity Declaration filed.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
6. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
7. Need return of Citation.
8. Need Court Investigator Report.
9. Need Inland Regional Center Report.
10. Certificate of Completion re Conservatorship Class filed.

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 Notice of Hearing with proof of service to include Inland Regional Center or Due Diligence Declaration(s).
12. ~Proposed Form Order/Letters 10/19/17.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **07/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700392

CASE NAME: JOHN MANUEL FLORES JR

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DARLINE YVETTE SMITH (CP)...PRO/PER
JOHN MANUEL FLORES JR (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Darline Yvette Smith ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Need appointment of counsel and report by same.
3. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
4. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
5. Medical Capacity Declaration filed.
6. Citation returned SERVED.
7. Section 11 to petition does not include sibling, Destinie Lozano if 18 or older. Need verified supplement.
8. List of Required Contact Information does not include petitioner. Need complete form.
9. Conservator Screening Form, section 2a; 2b; and 16 are blank. Need verified supplement.

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

10. Need Court Investigator Report.
11. Need Inland Regional Center Report.
12. Need Notice of Hearing with proof of service to include Inland Regional Center.
 - a. Due Diligence Declarations filed as to father and paternal grandparents.
JTD.
13. Certificate of Completion re Conservatorship Class filed.
14. ~Proposed Form Order/Letters 10/24/17

RECOMMENDATION:

Court to appoint counsel then need to clear notes 2, 7-12. If approved, set hearing for Compliance Review for **07/10/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700421

CASE NAME: PATRICIA ANN HANLEY

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

KAREN MICHELLE BRENNAN (PET)...PRO/PER
PATRICIA ANN HANLEY (CEE)...MATTHEW E SHEASBY

No Notes- JTD.

(ww)

Future Hearing:

01/03/18 Petition for appointment of conservator

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/05/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS02092

CASE NAME: MTR OF SAM J. MINEO

HEARING:

Accounting Review

COUNSEL:

JOSEPH C. MINEO

(CPE)...D. HERSHEL W ILSON

SAME J. MINEO

(CEP)...

GENERAL INFORMATION

Continued from 09/19/17. Court orders that either Joseph Mineo or their counsel is to be present at next hearing date. Notice by Judicial Assistant.

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 10/14/15; **final account now due beginning 08/29/15 to 12/27/15 (pre-death) to 12/28/15 to present (post-death) per Pr. C. § 2620 and Local Rule 20-1406(b).**
2. **CI Special Report filed**
3. **Conservatee passed away on 12/27/15 .**
4. **Proposed Form Order 11/08/17 cannot be used as a final account. See note 1.**

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 1

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: CIV DS1600795

CASE NAME: TAPIA VS RAMIREZ

HEARING:

Hearing Re: Matter to be taken under submission

COUNSEL:

ELAINE TAPIA (PLA)...SALLY ANNE COX
RICHARD RAMIREZ (DEF)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RICHARD RAMIREZ is GRANTED

XREF: PROPS1400857 (Petra Amador Ramirez)
CIVDS1610559 (Richard Ramirez vs Elaine Tapia et al)

No notes – Judge to decide.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: CIV DS1610559

CASE NAME: RICHARD RAMIREZ -V- ELAINE TAPIA, ET AL

HEARING:

Hearing Re: TAKE MATTER UNDER SUBMISSION

COUNSEL:

ALEX RAMIREZ	()...
ELAINE TAPIA	(DEF)	...
ESTHER ARCHULETA	()...
JESSE RAMIREZ	()...
PATRICIA RAMIREZ	()...
RICHARD RAMIREZ	(PLA)	...PRO/PER
RUBY MACIAS	()...
RUDY RAMIREZ	()...
THE ESTATE OF PETRA AMADOR RAM	()...
VALERIE RAMIREZ	()...

Request for Waiver of Court Fees and Costs filed by RICHARD RAMIREZ is GRANTED

XREF: PROPS1400857 (Petra Amador Ramirez)
CIVDS1600795 (Tapia vs Ramirez)

No notes – Judge to decide.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0701036

CASE NAME: MARIA ANNA SCHULTZE

HEARING:

Petition for PRELIMINARY DISTRIBUTION

COUNSEL:

LUCIEN SCHULTZE	(PET)...GREGORY L ZUMBRUNN
MARIA ANNA SCHULTZE	(DEC)...
RICHARD SCHULTZE	(OBJ)...DIANA J CARLONI
S.B. COUNTY PUBLIC ADMINISTRAT	(SA)...CRAIG M PARKER

GENERAL INFORMATION:

Public Administrator appointed Successor on 10/20/14, full authority, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Preliminary Distribution by son/beneficiary/objector, Richard Schultz ["Petitioner"].

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

1. Petitioner indicates he suffered an at-work injury; having difficulty returning to work; and is making plans for early retirement. The plans include leaving the State of California to a location with a lower cost of living. Petitioner states he has taken a loan from his retirement fund in August of 2017, which must be repaid within six months or he will suffer a serious tax consequence.
2. Cash on Hand of \$71,270.01 per first account order entered 11/08/16.
3. Petitioner seeks a preliminary distribution in the amount of \$25,000 to repay his retirement account and be able to move. Petitioner alleges the preliminary distribution would not prejudice the estate and would not prejudice the other beneficiary, Lucien Schultze, or the fees due Administrator. JTD.
4. Petitioner also requests that the preliminary distribution of \$25,000 be allocated \$12,500 to Petitioner as beneficiary and \$12,500 payable to Lucien as beneficiary and assigned to Petitioner, pursuant to the settlement agreement that will result in partial satisfaction of the assignment filed with the court on 01/06/17. JTD.
5. The aggregate of all property distributed under such a petition shall not exceed 50% of the net value of the estate. Net value is calculated as all inventory and

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appraisals minus all creditors' claims and lien and encumbrances recorded or known by the personal representative. Pr.C. § 11623(a)(2).

6. Petitioner request the Administrator be ordered to pay requested sum to Petitioner upon filing of court order approving this petition.
7. Need Notice of Hearing with proof of service. Filed 09/07/17; however, image not available at time of review. Clerk's office notified on 11/29/17.
8. ~Proposed Order 09/05/17.

RECOMMENDATION:

Require notice then Court's discretion
(nb)

Future Hearing: 01/09/18 Probate status report

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0900560

CASE NAME: RYAN ALLEN REYNOLDS

HEARING:

Accounting Review

COUNSEL:

CHRISTIE DAVIDSON

(PET)...HORSPPOOL & HORSPPOOL

CHRISTIE DAVIDSON

(STE)...HORSPPOOL & HORSPPOOL

INLAND COUNTIES REGIONAL CENTE

(PET)...BRUNICK MCELHANEY &

INLAND COUNTIES REGIONAL CENTE

(PET)...LAYNE A BARTHOLOMEW

MITCHELL I ROTH

(PET)...

SPECIAL NEEDS TRUST OF RYAN AL

(TRU)...

GENERAL INFORMATION:

Continued from 10/31/17.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling Fifth Account entered 01/17/17; sixth account now due beginning 09/01/16.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400340

Vacated

CASE NAME: STEPHEN R MONACO SNT

HEARING:

Hearing re Final Discharge

COUNSEL:

GEOFFREY CONNER	(PET)...	JOSEPHINE A RICH
STEPHEN R MONACO SPECIAL NEEDS	(TRU)...	MITCHELL I ROTH
SURETEC INSURANCE COMPANY	(TP)...	

Final Discharge filed on 11/08/17.

(lc)

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400386

CASE NAME: William Arthur Lee

SEE ALSO 5B

HEARING:

Motion Re: To strike or tax costs Filed by Petitioner ENID
ALLEN, JOYCE LEE WEEKS

COUNSEL:

CHRISTIAN DYMALLY-LEE	(PET)...VARNER & BRANDT
ENID ALLEN	(PET)...LINDA ROSE FESSLER
JOYCE LEE WEEKS	(OBJ)...LINDA ROSE FESSLER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
WILLIAM ARTHUR LEE	(DEC)...

No notes – JTD

(LR)

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400386

CASE NAME: William Arthur Lee

SEE ALSO 5A

HEARING:
Accounting Review

COUNSEL:

CHRISTIAN DYMALLY-LEE	(PET)...VARNER & BRANDT
ENID ALLEN	(PET)...LINDA ROSE FESSLER
JOYCE LEE WEEKS	(OBJ)...LINDA ROSE FESSLER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
WILLIAM ARTHUR LEE	(DEC)...

GENERAL INFORMATION
Continued from 11/30/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Special Administration to Christian Dymally-Lee, son, on 08/06/14, letters of General Administration issued 05/08/17; full authority, \$100,000 bond.
2. Final Inventory and Appraisal filed.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.
(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

SEE ALSO 7

HEARING:

Hearing Re: Take Matter Under Submission

COUNSEL:

ELAINE TAPIA	(PET)...	SALLY ANNE COX
PETRA AMADOR RAMIREZ	(DEC)...	
RICHARD RAMIREZ	(OBJ)...	PRO/PER

Request for Waiver of Court Fees and Costs filed by RICHARD RAMIREZ is GRANTED

XREF: CIVDS1600795 (Tapia vs Ramirez)

CIVDS1610559 (Richard Ramirez vs Elaine Tapia et al)

No notes – Judge to decide.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

SEE ALSO 6

HEARING:

Probate status report filed.

COUNSEL:

ELAINE TAPIA	(PET)...	SALLY ANNE COX
PETRA AMADOR RAMIREZ	(DEC)...	
RICHARD RAMIREZ	(OBJ)...	PRO/PER

XREF: CIVDS1600795 (Tapia vs Ramirez)
CIVDS1610559 (Richard Ramirez vs Elaine Tapia et al)

GENERAL INFORMATION:

Continued from **11/21/16**. Matter set to trail CIVDS1610559 and CIVDS1600795.
Continued from **02/27/17**. Richard Ramirez advises court a motion for summary judgment was filed on related case CIVDS1610559 and is set for 05/16/17. This matter will be continued to be heard on that date. Notice waived.
Continued from **05/16/17 and 09/28/17**. Matter set for trial
Continued from 10/12/17.

THIS CASE IS SET FOR HEARING ON Status Report (filed 09/07/16) by Administrator, Elaine Tapia ["Petitioner"].

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

1. Letters of administration issued to Elaine Tapia, daughter, on 05/22/15, full authority \$140,000 bond.
2. Petitioner alleges the estate is not in a condition to be closed as there are numerous civil complaints being litigated that are preventing this administration from closing.
3. Petitioner does not specify the additional time in which to close the estate. Suggest 12 months.
4. Need notice per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

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.**

Need notice. If approved, set next Accounting Review for **09/27/18**. Note requirements of Local Rules.
(nb/cs/lc/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600524

CASE NAME: MTR OF JUAN-EDGAR RAPACON GAPUZAN

HEARING:

Accounting Review

COUNSEL:

JUAN-EDGAR RAPACON GAPUZAN (DEC)...

ROCHELLE EVANGELISTA DEL ROSAR (PET)...JOSEPH FLOHR

VACATE – first and final account filed and set for 01/30/17.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600640

CASE NAME: MTR OF FRED AUSTIN YATES

HEARING:

Accounting Review

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP)...
FRED AUSTIN YATES (DEC)...
JAMIE WALDIE (PET)...BRYAN NADDAFI

GENERAL INFORMATION:

Continued from 10/24/17. No appearances. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/16/16, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600785

Vacated

CASE NAME: MTR OF JOSE HUMBERTO SANDOVAL IRIBE

HEARING:

Accounting Review

COUNSEL:

JESUS B SANDOVAL	(PET)...BRIGGS LAW
JOSE HUMBERTO SANDOVAL IRIBE	(DEC)...
JOSE JULIAN SANDOVAL	(BEN)...
PAOLA DANIELA SANDOVAL	(BEN)...

(lc)

Future hearing dates: 02/06/18 Status report.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601104

CASE NAME: MTR OF ROBERT C HUNTLEY

HEARING:

FIRST & FINAL Account and Report of JARED HUNTLEY and Petition
for allowance of fees filed.

COUNSEL:

JARED HUNTLEY

(PET)... RICHARD SAMUEL

ROBERT C HUNTLEY

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by son and sole beneficiary, Jared Huntley.

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

1. Administrator is sole beneficiary, waives accounting and statutory compensation.
2. Assets on Hand \$177,736.66 consisting of \$174,736.66 in cash and vacant real property.
3. Attorney requests statutory fees of \$8,621.15. Calculated.
4. Attorney requests extraordinary fees of \$1,005.00 for services rendered in connection with the sale of real property. Itemized in supplement.
5. Proposed Order 09/07/17 does not include extraordinary fees.

RECOMMENDATION

RFA subject to extraordinary fees. If approved, set next hearing for receipts and final discharge for **12/11/18**.

(nb/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/05/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700895

CASE NAME: MTR OF SONNY LONG THACH

HEARING:

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

COUNSEL:

RI KIM THACH

(PET)...PRO/PER

SONNY LONG THACH

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by wife, Ri Kim Thach ["Petitioner"].

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

1. Petitioner waives bond on an estate with \$0.00 value. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr.C. § 8481(c).
2. Decedent was survived by minor issue. Court may wish to appoint GAL or Guardian of the estate. JTD.
3. Section 5a indicates decedent was survived by spouse and registered domestic partner. Need further clarification via verified supplement.
4. Section 5b to petition as to whether decedent was survived by a stepchild or foster child who would have been adopted but for a legal barrier is blank. Need verified supplement.
5. Proof of publication is filed. However, Publication does not comply with Pr. C. §10451(c). The publication shall contain specific statutory wording re: IAEA. Court could require amended publication or alternatively, grant petition with no IAEA powers. JTD.
6. Need Notice of Petition to Administer Estate with proof of service to GAL or guardian of the estate, if appointed.
7. ~Proposed Form Order/Letters 09/11/17.

RECOMMENDATION:

Need to clear notes 3-4 & 6 then Court's discretion re: notes 2 & 5. If approved, set future hearing for Accounting/Status Review on **02/19/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200325

CASE NAME: Catherine Connor

HEARING:

Hearing re Final Discharge

COUNSEL:

CATHERINE CONNOR	(CEP)...MITCHELL I ROTH
CATHERINE CONNOR	(CTE)...PRO/PER
JULIET CONNOR	(CE)...GREGORY T ANNIGIAN
JULIET CONNOR	(CPE)...GREGORY T ANNIGIAN
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
ROXANNE RHOADES	(PET)...GREGORY T ANNIGIAN

X-REF: PROPS 1600694

GENERAL INFORMATION:

Continued from 10/31/17. No appearances. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Second and Final Account entered 11/01/16.
2. Need receipt from Personal Representative.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300175

CASE NAME: Margaret Mary Dyer

SEE ALSO 15

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

DIANE HUSSEY	(PRO/PER
KARL F SCHMIDT	(CPE)...PRO/PER
MARGARET MARY DYER	(CEP)...
MICHAEL A DYER	(CPE)...PRO/PER
SHIRLEY R. EARL	(OBJ)...FULLERTON LEMANN SCHAEFER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Inventory and Appraisal

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

1. Matter set at 10/24/17, wherein, an Inventory and Appraisal was to be filed.
Need same.
2. **Objections to Inventory and Appraisal of Conservator filed by Karl F. Schmidt and Diane Hussey.**

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300175

CASE NAME: Margaret Mary Dyer

SEE ALSO 14

HEARING: SECOND AND FINAL Account and Report of SHIRLEY R. EARL and
Petition for allowance of fees filed.

COUNSEL:

DIANE HUSSEY	(PRO/PER
KARL F SCHMIDT	(CPE)...PRO/PER
MARGARET MARY DYER	(CEP)...
MICHAEL A DYER	(CPE)...PRO/PER
SHIRLEY R. EARL	(OBJ)...FULLERTON LEMANN SCHAEFER

GENERAL INFORMATION:

Conservatee passed away on 11/10/16.

**Continued from 09/12/17 and 10/24/17. Matter is contested/I & A to be filed.
Objections to be filed by 11/14/17. Notice given by Attorney David Colella.**

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for
Fees by Temporary Conservator, Shirley R. Earl ["Petitioner"].

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

1. Accounting period 11/01/14 to 12/31/16.
2. Assets on Hand \$275,409.58 consisting of \$271,409.58 in cash and \$4,000 in personal property.
3. Conservator seeks compensation of \$27,615.00 for the period 05/17/13 to 12/26/16. Billed at \$35/hour for 789 hours. Itemized [LF, pgs. 27- 33 & **supp. filed 10/03/17**]. JTD.
4. Attorney requests fees and costs of \$85,778.51 for period 10/02/13 to 07/26/17. Billed at \$200-\$350/hour for 330.55 hours' attorney time and \$95-\$110/hour for 171.65 hours' paralegal time. Itemized [LF, pgs. 34- 79 & **supp. filed 10/03/17**]. JTD.
5. Disbursements – Schedule C [LF, p. 25] includes miscellaneous expense reimbursement to Petitioner in the amount of \$2,300. **Supp. (10/03/17) indicates expense was for extraordinary travel expenses from Iowa to California for purposes of overseeing and managing the sale of Conservatee's residence in Highland, CA. Itemized [see supp. filed 10/03/17, LF, p. 20 & 22]. JTD.**

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

6. Disbursements – Schedule C [LF, p. 25] includes reimbursement to Petitioner for travel expenses that are not itemized, in the amount of \$276.80, that are normally not allowed when fees are being requested. **Supp. (10/03/17) indicates expense was for extraordinary travel expenses from Iowa to California for purposes of overseeing and managing the sale of Conservatee’s residence in Highland, CA. Itemized [see supp. filed 10/03/17, LF, p. 20 & 22]. JTD.**
7. Petitioner requests exoneration of bond and discharge upon filing of receipts. However, bond will not be exonerated until entry of final discharge order.
8. Petitioner seeks to distribute assets to Trustee of Trust; however, question under what authority as there does not appear to be a substituted judgment and the assets exceed \$150,000; therefore, cannot distribute per Pr.C. § 13100? **Need** verified supplement with corrected distribution and/or points and authorities.
9. Proposed Order: 10/24/17; however, not reviewed.

RECOMMENDATION:

Need to clear note 8. If approved, set next hearing for receipts and final discharge for **12/11/18.**

(nb/lc)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500305
CASE NAME: MTR OF BUDDY LEE SAILOR
HEARING: FIRST Account and Report of THERESA L PRINCE and Petition for allowance of fees filed.

COUNSEL:
BUDDY LEE SAILOR (CEP)...WALTER T. MOORE
THERESA L PRINCE (CPE)...DAVID M GROSSMAN

XREF: FAMSS1509076 (*Janice Sailor –v-Buddy Lee Sailor*)

GENERAL INFORMATION:

Continued from 06/20/17 for notes to be cleared. The Court notes that this case will not be transferred to Orange County until the related family law matter is resolved completely.

Continued from 11/07/17.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Theresa L. Prince (daughter).

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

1. Accounting period 12/16/15 TO 12/15/16. However, account period should begin on 11/10/15.
2. Petitioner has not used mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use mandatory form(s) on future accountings.
3. Assets on Hand \$590,853.45 consisting of \$226,735.76 in cash and remaining in real and personal property.
4. Current bond of \$562,000. Insufficient. Suggest bond of \$650,000 (includes recovery). JTD.
5. Partial Inventories 1 & 2 indicates estate is includes community property interests that are unknown until the outcome of the related Family Law Case. Need complete, final inventory and appraisal. **Supp. 08/14/17 indicates a final inventory and appraisal cannot be filed until settlement from the Family Court in the related matter.**
6. Petitioner does not request compensation.
7. Attorney requests fees of \$11,146.00 for 22.3 hours' attorney time billed at \$350/hour and 25.7 hours' paralegal time billed at \$130/hour. **Itemized [see supp. 08/14/17, LF, pgs. 7-8]. JTD.**
8. Attorney requests reimbursement of costs advanced of \$465.00.

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.

9. Value is not given; purportedly unknown or not valued by Probate Referee for a business known as Integrity Design Group or Orange County Container Group LLC Profit Sharing. Question the status of these assets? **Supplement 08/14/17 indicates these assets are currently being valued as part of the community assets by the Family Court and will be inventoried upon valuation and division of the community property.**
10. **Need bank/investment statements verifying date of death and ending balances per Local Rule 20-908 for US Bank Acct. XXX4068 and Boeing Investment Plan. Also, Assets on Hand at End of Account Period US Bank Acct. XXX4068.**
11. **Schedule E- Assets on Hand at End of Account Period [acctg. 04/20/17-LF, p25] does not include Chase Checking Acct. XXX2508 or Savings Acct. XXX6083 affixed to supp. filed 08/14/17 [LF, p73]. Need amended Schedule E and affected schedules via verified supplement.**
12. Need proof of service to Notice of Proposed Action re sale of real property.
13. During the accounting period, petitioner paid Julia Chavez and Francesca Kelium for caregiving expenses of \$3,532.55. **Supp. (08/14/17) affixes weekly time cards. Need verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).**
14. Conservatee resides in Fountain Valley, CA which is located in Orange County. Suggest transfer. If so, Court to set control date. JTD.
15. ~Proposed Order does not comply with Local Rule 20-614.

RECOMMENDATION:

Need to clear notes, \$650,000 bond. If approved, set next hearing for Accounting Review on **02/13/18**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600084

CASE NAME: MTR OF SEAN E SITTLER

HEARING:

FIRST Account and Report of SHANNON M DEBENEDICTIS and Petition for allowance of fees filed.

COUNSEL:

SEAN E SITTLER (CEP)...PRO/PER
SHANNON M DEBENEDICTIS (CPE)...HARTNELL LAW GROUP
SHANNON M DEBENEDICTIS (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SEAN E SITTLER is GRANTED
Fee waiver amount due \$633.00
\$555.00 for temp and general petitions on 04/21/16
\$78.00 for 3 certified copies of the letters on 05/12/16

Request for Waiver of Court Fees and Costs filed by SHANNON M DEBENEDICTIS is GRANTED
Fee waiver amount due 538.00
\$73.00 for 3 certified copies of the letters on 07/14/16
\$465.00 for first account current on 09/19/17

GENERAL INFORMATION:

Continued from 10/24/17 at request of counsel. Mr. Hartnell's Office has been sub'd back in.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate by Shannon DeBenedictis ["Petitioner"-sister].

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

1. Accounting period 07/27/16 to 08/15/17. However, accounting should begin as of day of appointment on 07/12/16. Does Court wish to require amended accounting? JTD.
2. Assets on Hand \$66,384.13 consisting of \$17,884.13 in cash and \$48,500 in personal property.
3. Current bond of \$18,000. Suggest bond increase by \$108,000 for a total bond of \$126,000 (includes recovery). JTD.

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

4. Initial and Amended Inventory and Appraisals do not include any bank account(s) as reflected in accounting. Need amended inventory.
5. Petition indicates Conservator is receiving \$2,200 per month for conservatee's care and services. It does not appear this has been authorized by Court. Does court wish to ratify monthly payments and make a formal order authorizing same? JTD.
6. Question whether any receipts were received during the period 07/12/16 to 03/01/17? Need verified supplement.
7. Need Schedule E, Non-Cash Assets on Hand at End of Account period via verified supplement.
8. Need Notice of Hearing with proof of service.
9. Proposed Order 09/19/17 reflects wrong judge and does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance (Local Rule 20-614c).

RECOMMENDATION:

Need to clear notes then Court's discretion re bond and fees. If approved, set hearing on the next accounting review for **10/23/18** (if one year) or **10/22/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

DATE: 12/05/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600185

CASE NAME: MTR OF JOSEPH JAMES STRUCK

HEARING:

THIRD Account and Report of LINDA CALLAWAY and Petition for allowance of fees filed.

COUNSEL:

DAVID STRUCK	(CTP)...MICHELE L ABERNATHY
DAVID STRUCK	(PET)...GIFFORD, DEARING &
DENISE WEINSTOCK	(CEP)...PATRICIA A LOBELLO
DENISE WEINSTOCK	(PET)...LAMB MORRIS & LOBELLO
JOSEPH JAMES STRUCK	(CEP)...SHAWN M HAGGERTY
LARRY E HOOVER	(CE)...
LINDA CALLAWAY	(CE)...M DANIEL SAYLOR
MIRIAM STRUCK	(CTE)...MICHELE L ABERNATHY
MIRIAM STRUCK	(PET)...GIFFORD, DEARING &
RUSSELL POTTHARST	(CPE)...GLORIA SCHARRE PITZER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third and Final Account and Petition for Fees by Prior Conservator of the Estate, Linda Callaway ["Petitioner"-PPF].

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

1. Accounting period 08/01/16 to 08/10/17.
2. Assets on Hand \$0.00. All assets have been transferred to Successor Conservator, Larry E. Hoover.
3. Current bond in the amount of \$247,000. Petitioner requests bond be exonerated. However, bond is not exonerated until entry of final discharge order.
4. Petitioner requests ratification of fees already paid in the amount of \$3,678.40. Billed at \$35-\$50/hour for 75.29 hours. Itemized [LF, pgs. 20-23]. JTD.
5. Petition indicates prior Conservator fees ordered in the first account in the amount of \$15,032.90 have not been paid. Additional prior ordered fees in the second account in the amount of \$3,280.35 have been partially paid in

payments totaling \$1,961.41, leaving a balance of \$1,318.94 that have not been paid.

6. Attorney requests fees of \$6,443.75. Billed at \$375/hour for 13.35 hours' attorney time and \$125/hour for 11.50 hours' paralegal time. Itemized [LF, pgs. 26-28]. JTD.
7. ~Proposed Order 10/18/17.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **12/11/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400199

CASE NAME: Kenneth Wayne Horne

HEARING:

Accounting Review

COUNSEL:

KENNETH WAYNE HORNE (DEC)...

MARCUS RAY JONES (PET)...E. LAWRENCE BROCK

GENERAL INFORMATION

Continued from 10/03/17 at request of counsel.

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 Marcus Ray Jones, step-grandson, on 04/29/14; full authority, no bond.
2. Order on First Report of Status entered on 11/12/15.
3. Final Inventory and Appraisal filed 08/31/15.
4. Need accounting or status report.

RECOMMENDATION

Inquire status

(cs/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600078

CASE NAME: JOHN HANF

HEARING:
Accounting Review

COUNSEL:

JOHN HANF	(DEC)...
PAT PERLEY	(PET)...MITCHELL I ROTH
SCOTT A HANCOCK	(SNYDER & HANCOCK
STATE OF CALIFORNIA FRANCHISE	(TP)...

GENERAL INFORMATION

Continued from 05/23/17 and 08/01/17 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. Court appointed Pat Perley as administrator with full authority, \$220,000 bond. Letters issued 01/27/16.
2. Partial Inventory and Appraisal filed 05/31/16. Need Final Inventory and Appraisal.
3. Need accounting or status report.

RECOMMENDATION

Inquire status.
(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600388

CASE NAME: FAMILY TURST OF JAMES AND OLGA JOHNSON

SEE ALSO 4

HEARING:

Hearing Re: TSC/STATUS OF MEDIATION

COUNSEL:

CYNTHIA J JOHNSON

(OBJ)...AMANDA A STEWART

FAMILY TRUST OF JAMES JOHNSON A

(TRU)...

MARK S JOHNSON

(PET)...THOMAS W DOMINICK

No notes – TSC/Status
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600388

CASE NAME: FAMILY TRUST OF JAMES AND OLGA JOHNSON

SEE ALSO 3

HEARING:

FIRST Account and Report of CYNTHIA J JOHNSON and Petition for allowance of fees filed.

COUNSEL:

CYNTHIA J JOHNSON

(OBJ)...AMANDA A STEWART

FAMILY TRUST OF JAMES JOHNSON A

(TRU)...

MARK S JOHNSON

(PET)...THOMAS W DOMINICK

GENERAL INFORMATION:

Continued from **11/01/16 and 03/14/17**. Request for statutory compensation is denied. Reasonable compensation may be awarded if appropriate request is filed.

The Court also denies request for funds paid to a legal document assistant service and fee to Nicholas Schouten. If attorney bill from Nicholas Schouten is submitted, the Court will reconsider the request. Counsel reports discovery is underway and issues may settle when discovery is complete.

Continued from **07/11/17** by stipulation of counsel through email prior to hearing.

Notice waived.

Continued from 09/19/17. Parties request court mediation to be set.

THIS CASE IS SET FOR HEARING ON First Account Current by Co-Trustee, Cynthia J. Johnson.

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

- 1 Account period 06/18/14 to 07/31/16.
- 2 Assets on Hand \$82,000 consisting of \$2,000 in cash and remaining in real property located in Nevada.
- 3 Petitioner requests statutory compensation of \$25,916.92. However, Part 3 - Comprehensive Provisions, Compensation-Reasonable [LF, p. 52-53 of trust filed 04/21/16] states the trustee may pay itself reasonable compensation from the trust estate during each calendar year for all ordinary services.
Supp. (01/06/17) indicates Petitioner is seeking a determination by this Court as to a preliminary statutory compensation determination.

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.

Petitioner would like to retain the property and alleges a determination now will allow the Petitioner to make an equalization payment to allow this Co-Trustee to retain the Laughlin property. JTD.

- 4 Petitioner requests reimbursement of costs advanced of \$11,133.44. Itemized [LF, p.3 to supp. filed 08/22].
- a. Petitioner requests legal compensation of \$837.00 for funds paid to a legal document assistant service. Itemized [LF, p. 29-30 to supp. filed 08/22/16]. JTD.
- b. Request includes attorney's fees of \$750 to Nicholas Schouten. [See supp. filed 08/22/16, LF, p. 31]. JTD.
- 5 Need copies of bank/financial statements to trust account per Local Rule 20-908. **Supp. (01/06/17) does not include bank statements for beginning or end of account period. Need same.**
- 6 Notice given.
- 7 **Objections filed 01/09/17 by Mark S. Johnson alleges Ms. Johnson has failed to include a number of bank accounts; has failed to account for all Trust income received for the period of the account; and objects to allowance of reimbursements for expenses; trustee and attorney fees.**
- 8 No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 5 then set for contested hearing. If approved set next hearing for Accounting Review on **02/06/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600547

CASE NAME: LINDA S EDMONDSON

SEE ALSO 6

HEARING:

Petition for suspension of powers & removal of personal representative

COUNSEL:

BRENDA S GARCIA	(PET)...J. TERRENCE MOYNIHAN
LINDA S. EDMONDSON	(DEC)...
TERRI A. TURNER	(PET)...DAVID LIVINGSTONE TAUB, ESQ

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Suspension of Powers and Removal of Personal Representative by Terri A. Turner ["Petitioner"].

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

- 1 Petitioner is a beneficiary to the estate and the sister of the Executrix, Brenda S. Garcia ["Brenda"]. Petitioner alleges the personal representative has committed acts of waste on the Bloomington residence; has committed acts of mismanagement on the estate; and is incapable of properly executing the duties of the office or is otherwise not qualified for appointment as personal representative. Additionally, petitioner claims Brenda owes the IRS about \$10,000 to \$30,000 in taxes for the inheritance she withdrew.
- 2 Petitioner claims removal of Brenda is necessary for the protection of the estate; beneficiaries; and because Brenda is abusing her status as Executrix by allowing herself and others to live on the residence without paying the estate fair rental value and rent-free for the last 14 months. Petitioner alleges this activity suggests self-dealing and a conflict of interest in the executor's duty to close the estate.
- 3 Petitioner request the Court to issue a citation directed to Brenda S. Garcia requiring her to appear and show cause why she should not be removed and her letters revoked; for Court to remove and revoke the Testamentary Letters; and for the Court to suspend the powers of Brenda S. Garcia, forthwith, pending investigation of the charges made against her.
- 4 Declaration of Terri A. Turner in support of petition filed, separately.

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.

- 5 Petition includes a request for the Court to consider the pending Petition of Administration of the Will, filed by Petitioner; however, review of this file does not indicate a Petition for Appointment of a Successor Personal Representative has been filed.
- 6 Petition is not verified. Need same.
- 7 Need Notice of Hearing with proof of service.
- 8 No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 6-7 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600547

CASE NAME: LINDA S EDMONDSON

SEE ALSO 5

HEARING:

Accounting Review

COUNSEL:

BRENDA S GARCIA

(PET)...J. TERRENCE MOYNIHAN

LINDA S EDMONDSON

(DEC)...

TERRI A. TURNER

(PET)...DAVID LIVINGSTONE TAUB, ESQ

GENERAL INFORMATION

Continued from 10/16/17 to be heard with petition set same date. Notice given by Mr. Taub.

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 Brenda Garcia, daughter, on 09/08/16; full authority, no bond.
2. Final Inventory and Appraisal filed.
3. Need accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(ww/nb)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600699

CASE NAME: WILLIAM V TYNE

HEARING:

Accounting Review

COUNSEL:

SHEILA TYNE

(PET)...D M DAVIS

WILLIAM V TYNE

(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 03/24/17, limited authority, no bond.
- 2 Need final inventory and appraisal.
- 3 No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 9, 10, 11

HEARING:

Hearing Re: PETITION FOR LETTERS OF SPECIAL ADMIN W/LIMITED

COUNSEL:

ERNEST ALLEN BECKSTROM	(DEC)...
JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
KURT BECKSTROM	(PET)...ROBERT J SPITZ

No notes – JTD.

(nb)

Future Hearing:

02/13/18 Motion re: Strike entire petition for letters etc.

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 8, 10, 11

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM	(DEC)...
JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
KURT BECKSTROM	(PET)...ROBERT J SPITZ

X-REF: MWV 17007117; FWV 1402081

GENERAL INFORMATION:

Continued from **03/20/17 and 05/24/17**. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

Continued from **07/26/17** Court recommends hiring a property manager. Counsel stipulate to property manager Samson Debebe, to be manager of the properties subject to James Baker residing in the home. Discovery to be conducted.

Continued from **09/21/17**. By agreement the Court will appoint Samson Debebe as special administrator to handle the properties. Matter continued for Mr. Debebe to be contacted and asked if he wants to accept the appointment. If he does not want to act as Special Administrator, Court requests Counsel attempt to find another person who would be willing to act in that capacity. The Court orders Mr. Baker provide mortgage statements and proof of payments made to counsel.

Continued from 10/03/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with full authority under IAEA by named executor, **James F. Baker, friend**.
- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker**.

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

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

Petitioner 1 – James Baker, friend.

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Need proof of publication.
- 3 Need Proof of Subscribing Witness.
- 4 Proof of Publication filed 01/23/17 does not include full IAEA language per Pr. C. § 8100. Need proper publication.
- 5 **Objections by Kurt Beckstrom filed 03/03/17.**
- 6 **Reply to Opposition filed by Kurt Beckstrom on 09/18/17.**
- 7 **Will Contest and Grounds of Opposition of Purported Will filed by Kurt Beckstrom on 09/21/17. Need return of served Summons.**
- 8 ~Proposed Form Order 01/10/17.

Petitioner 2 – Kurt Beckstrom, brother/caretaker.

1. Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
2. **Objections by James F. Baker filed 09/08/17. Need proof of service.**
3. **Declaration by Attorney Spitz filed 09/18/17.**
4. **Declaration of Real Estate Broker, Samson Debebe, filed 09/18/17. Supplemental filed 09/21/17.**
5. ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Need to clear notes 2-4 & 7 for petition 1; note 2 for petition 2; then set for contested hearing. If approved, set future hearing for Accounting/Status Review on **02/19/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc/lh/lc/cs/nb)

Future Hearing:

02/13/18 Motion re: Strike entire petition for letters etc.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 08:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 8, 9, 11

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

ERNEST ALLEN BECKSTROM (DEC)...

JAMES F BAKER (PET)...BANKS GARCIA & JANIS

KURT BECKSTROM (PET)...ROBERT J SPITZ

See notes on matter #9.

(nb)

Future Hearing:

02/13/18 Motion re: Strike entire petition for letters etc.

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

SEE ALSO 8, 9, 10

HEARING:
Trial Setting Conference

COUNSEL:
ERNEST ALLEN BECKSTROM (DEC)...
JAMES F BAKER (PET)...BANKS GARCIA & JANIS
KURT BECKSTROM (PET)...ROBERT J SPITZ

No notes – TSC.
(nb)

Future Hearing:
02/13/18 Motion re: Strike entire petition for letters etc.

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700668

CASE NAME: CORNELIUS D DIXON JR

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH LIMITED IAEA

COUNSEL:

CORNELIUS D DIXON JR (DEC)...
ROBERT DIXON (PET)...JOHN M CARMACK

GENERAL INFORMATION

Continued from 10/03/17. Counsel ordered to republish as petition and publication do not match.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with *limited* authority under IAEA by Robert Dixon, son

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

1. All heirs waive bond. Estate value consists of \$113,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, §8481(c).
2. Declination/Nomination of this petitioner by surviving spouse filed 06/30/17 [Petition, LF p. 7].
3. Proof of publication indicates requests for limited powers but includes full IAEA powers language. **Counsel ordered to republish as petition and publication do not match.**
4. ~Proposed Form Order: 06/30/17

RECOMMENDATION

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

(cs/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700687

CASE NAME: ALI HALABIAN

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

ALI HALABIAN

(DEC)...

BEHROUZ HALABIAN

(ADM)...

FATEMEH ZAMANI

(PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Bond

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

1. Fatemeh Zamani appointed administrator with full powers, \$850,000 bond, on 10/03/17.
2. Need \$850,000 bond.

RECOMMENDATION:

Need bond.

(nb)

Future Hearing:

12/11/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701018

CASE NAME: MANYA BERTRAM

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

CAREL BERTRAM	(PET)...JOHN P BRECKENRIDGE
MANYA BERTRAM	(DEC)...
NEAL BERTRAM	(PET)...JOHN P BRECKENRIDGE

X-REF: PROPS 1701019

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by issues, Neal Bertram and Carel Bertram [“Petitioners”].

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

1. Inventory & Appraisal attached to petition [LF, p. 4] does not include signature of verification by Carel Bertram. **Need** corrected inventory.
2. Petitioners request a determination that Decedent’s undivided one-fourth interest in unimproved land and unimproved land (2 properties), located at San Bernardino, CA, pass to petitioners without administration as tenants-in-common. Petitioners are decedent’s children and heirs per intestate succession.
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 1 then Court’s discretion

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701019

CASE NAME: MTR OF BARRY BERTRAM

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BARRY BERTRAM	(DEC)...
CAREL BERTRAM	(PET)...JOHN P BRECKENRIDGE
NEAL BERTRAM	(PET)...JOHN P BRECKENRIDGE

X-REF: PROPS 1701018

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by issues, Neal Bertram and Carel Bertram ["Petitioners"].

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

1. Inventory & Appraisal attached to petition [LF, p. 4] does not include signature of verification by Carel Bertram. Need corrected inventory.
2. APN # is the same as a property listed in related case; however, appraised values differ. Need further clarification via verified supplement.
3. Decedent passed away on 05/03/11; Manya Bertram in related case passed away on 11/21/15. Question why Decedent's interest is not passing to the estate of Manya Bertram? Need verified supplement.
4. Petitioners request a determination that Decedent's interest in unimproved land, located at San Bernardino, CA, pass to petitioners without administration as tenants-in-common. Petitioners are decedent's children and heirs per intestate succession.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1-3 then Court's discretion
(nb)

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

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS02287

CASE NAME: IN THE ESTATE OF DEAN M DEVOE
SEE ALSO 17

HEARING:

Petition for INSTRUCTIONS TO ABANDON PROPERTY AND TERMINATION
OF ADMINISTRATION OF ESTATE

COUNSEL:

DEAN M DEVOE	(DEC)...
KENT BERGSTROM	(A LEE ADAIR
MELODIE Z SCOTT	(PET)...RYAN J GALLANT
MELODIE Z SCOTT	(SA)...BRYAN C. HARTNELL
PACIFIC WESTERN BANK	(HEMAR, ROUSSO & HEALD, LLP
R WARREN JONES	(TP)...ROBERT K BOLT

GENERAL INFORMATION:

Continued from **08/15/17** at request of counsel to give notice. The Court requests further information on the "designated super fund site." What efforts have been made to sell the property? Have other owners been contacted for possible buy out? Counsel may file petition to deem property abandoned/no asset estate. The Court orders any fees due to Melodie Scott to be paid to Pacific Western Bank. Ms. Russo reports list of Melodie Scott's cases is incomplete.

Continued from 10/03/17 on courts motion.

THIS CASE IS SET FOR HEARING ON Petition for Instructions to Abandon Property and Termination of Administration of Estate by Administrator, Melodie Z. Scott [Petitioner] Pr. C. §§9611,9780.

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

1. Petition indicates the real property remaining in the estate is located in Barstow, CA, and is an undivided 25% interest in a 6 acre parcel. Petitioner is unable to sell properties due to the toxic conditions on the site, made especially unattractive by its fractional interest. Petitioner alleges as the estate continues to hold this property, liability to the estate may result if any damages are caused by the "super fund" conditions on said property. **Need declaration in response to court's questions via verified supplement.**

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

2. Petitioner requests the Court approve and confirm the abandonment of the decedent's interest in real property, an undivided 25% interest in a 6 acre parcel in Barstow, CA; and terminating the administration of the estate.
3. ~Proposed Order 09/06/17.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 8:30 DEPT: S37P

CASE#: SPR SS02287

CASE NAME: IN TEH ESTATE OF DEAN M DEVOE

SEE ALSO 16

HEARING:

Accounting Review

COUNSEL:

DEAN M DEVOE	(DEC)...
KENT BERGSTROM	(A LEE ADAIR
MELODIE Z SCOTT	(PET)...RYAN J GALLANT
MELODIE Z SCOTT	(SA)...BRYAN C. HARTNELL
PACIFIC WESTERN BANK	(HEMAR, ROUSSO & HEALD, LLP
R WARREN JONES	(TP)...ROBERT K BOLT

GENERAL INFORMATION:

Continued from **06/26/17**. Counsel to file a list of all cases, names and case numbers on which Melodie Scott is involved by 07/14/17. Third party creditor is to be given notice on all cases involving Ms. Scott.

Continued from 10/03/17 on courts motion.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Matter set at 12/06/16 status report hearing. Need Order after Hearing.
2. No accounting or status report of administration. Need same.
3. Need list of all cases, names, and case numbers.

RECOMMENDATION:

Inquire status.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

DATE: 12/05/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701007

CASE NAME: MTR OF THE SARAH A LUNDY 2011 REVOCABLE TRUST

HEARING:

Petition for INSTRUCTIONS RE OWNERSHIP OF TRUST ASSETS

COUNSEL:

JOHN W CADLWELL

(PET)...DIANE E ROBBINS

THE SARAH A LUNDY 2011 REVICAB

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

DATE: 12/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800069

CASE NAME: BRADY MONROE LOSER II

HEARING:

Petition for authority to refinance loan on real property

COUNSEL:

BRADY MONROE LOSER II (CEP)...SHERRI L KASTILAHN
KIMBERLY LOSER (CPE)...IGNAZIO FICARA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Authority to Refinance Loan on Real Property by Conservator of the Person and Estate, Kimberly Loser ["Petitioner"]. [Pr. C. §2570-2572].

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

- 1 Per Order entered on 06/15/17, Petitioner was authorized to arrange for the refinancing of that certain loan with a current balance of approximately \$39,000, which loan is secured by the real property located at 475 Cambria Ave., Yucca Valley, CA, 92284.
- 2 Petitioner claims that following the Court's Order and after an exhaustive search, Petitioner failed to find a lender willing to refinance the loan in question for the balance of \$39,000. Petitioner was informed that this was so due to the constraints of current lending rules and regulations. However, Petitioner was able to find a lender who would be willing to and able to fund a loan for a larger amount.
- 3 Petitioner received a proposal for a loan in the total amount of \$81,500 from American Family Funding that would be a 15-year loan, with a fixed interest rate of 3.5% per year, and would make available about \$76,723 to the Petitioner. Petitioner indicates the new loan of \$81,500 would allow the consolidation of the current mortgage loan; the minivan loan; and would also pay off an old outstanding medical bill.
- 4 Petitioner requests an order authorizing petitioner to obtain the loan described in this Petition for the amount of \$81,500.

- 5 Proof of Service to Notice filed on 10/31/17, Section 4b is blank and does not include Sherri Kastilahn. Need proper service.
- 6 ~Proposed Order 10/16/17.

RECOMMENDATION:

Need to clear note 5 then Court's discretion
(nb)

Future Hearing:

11/01/18 Accounting Review.

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400307

CASE NAME: DORIS KATHLEEN BARNES

HEARING:

Petition for ORDER FIXING COMPENSATION AND AUTHORIZING PAYMENT
OF ATTORNEY'S FEES

COUNSEL:

CRAIG M PARKER	(PET)...CRAIG M PARKER
DORIS KATHLEEN BARNES	(CEP)...
GARY LEE BARNES	(CPE)...CHRISTOPHER A SCHUMATE
MARK A BARNES	(CPE)...CHRISTOPHER A SCHUMATE

GENERAL INFORMATION:

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

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

- 1 Petitioner was appointed on 11/04/14. Petitioner alleges services have been rendered for which counsel has not been compensated. For the period 11/03/16 to 10/19/17.
- 2 Attorney requests fees of \$3,710.00. Billed at \$350/hour for 10.60 hours' attorney time. Itemized [LF, p. 7]. JTD
- 3 Petitioner requests that Conservator of the Estate, Mark A. Barnes, be authorized to pay requested sum from the estate.
- 4 ~Proposed Order 10/24/17.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

06/19/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600117

CASE NAME: MTR OF JEFFREY CRAIG ANDERSON

HEARING:

Accounting Review

COUNSEL:

DOUGLASS LEE GROVES (CPE)...RONALD W ASK

JEFFREY CRAIG ANDERSON (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

- 1 Order Appointing Limited Conservator of the person and estate entered 11/29/16, \$20,000 bond.
- 2 No accounting or waiver of account. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 12/05/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600369

CASE NAME: JENNIFER GOMEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA G MENDEZ DE GOMEZ

COUNSEL:

JENNIFER GOMEZ	(CTP)...CRAIG M PARKER
JOSE DE JESUS GOMEZ LOPEZ	(CP)...PRO/PER
MARIA G MENDEZ DE GOMEZ	(PET)...PRO/PER

GENERAL INFORMATION

Continued from 10/03/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Maria G. Mendez De Gomez and Jose De Jesus Gomez Lopez appointed Conservator of the person on 05/02/17. **Amended Order as modified, entered 10/12/17.**
2. **Section 5 to Proof of Mailing affixed to Notification of Conservatee's Rights is blank. However, a conformed copy of the Order Appointing Probate Conservator is affixed to Notification.**
3. Determination of Conservatee's Appropriate Level of Care and Care Plan filed.

RECOMMENDATION

None.

(lh/nb)