



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 12/14/17

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

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000472

CASE NAME: HOWARD WAYNE LIVINGSTON

SEE ALSO 2

HEARING:

Hearing re Final Discharge

COUNSEL:

HOWARD WAYNE LIVINGSTON (DEC)...

MICHAEL WAYNE LIVINGSTON (PET)...DAVID M LIVINGSTON

GENERAL INFORMATION

Continued from 12/15/16 at request of counsel to clear notes and file a further accounting.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution approved on 01/15/15. **Need order that specifies taxes are paid, Creditors are noticed, property on hand and actual distribution and residual distribution.** No order shall refer to another document; must be complete in itself local rule 20-614(b).
2. **Need** receipt for Laurel Ann Livingston.
3. **Need** Ex Parte Petition for Final Discharge and Order. Must clear note 1 first.

RECOMMENDATION

Need to clear notes 1-3.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000472

CASE NAME: HOWARD WAYNE LIVINGSTON

HEARING:
Hearing Re: FURTHER ACCOUNTING

COUNSEL:
HOWARD WAYNE LIVINGSTON (DEC)...
MICHAEL WAYNE LIVINGSTON (PET)...DAVID M LIVINGSTON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Further Accounting.

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

1. On 12/15/16, Counsel Cheryl Houde indicated a further accounting will be filed.
2. No accounting filed at time of review.

RECOMMENDATION

Inquire status of accounting, if any.
(lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500493

CASE NAME: David Lee Williams

SEE ALSO 4

HEARING:

Hearing re Final Discharge

COUNSEL:

DAVID L. MOSELEY	(PET)...PAMELA LEGGETT COOKE
DAVID LEE WILLIAMS	(DEC)...
KIM Y. MOSELEY	(PET)...PAMELA LEGGETT COOKE

See notes on matter 4.

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500493

CASE NAME: David Lee Williams

SEE ALSO 3

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE

COUNSEL:

DAVID L. MOSELEY	(PET)...PAMELA LEGGETT COOKE
DAVID LEE WILLIAMS	(DEC)...
KIM Y. MOSELEY	(PET)...PAMELA LEGGETT COOKE

GENERAL INFORMATION

OSC set on 10/26/17 when there was no appearance.

THIS CASE SET FOR HEARING ON **OSC re Sanctions/Surchage**/Final Discharge.

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

1. Final account/distribution of David and Kim Moseley, children, approved on 10/20/16.
2. No receipt required as personal representatives are sole heirs.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Court's discretion re OSC. Inquire status of discharge order.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500633
CASE NAME: LAUREL SCHMIDT TRUSTEE
HEARING: Hearing Re: Petition for REMOVAL OF TRUSTEE LAURELL SCHMIDT

COUNSEL:

DAVID SCHMIDT (PET)...ROBIN MCCONNELL
LAUREL SCHMIDT (OBJ)...MCINTIRE & MCINTIRE
RICHARD SCHMIDT (PET)...ROBIN MCCONNELL

XREF: UDBS1600534 (*Schmidt v Schmidt*)

GENERAL INFORMATION:

Continued from **08/18/15 and 09/22/15**. Motion to dismiss denied as it is untimely.
Continued from 11/02/15 and 12/17/15. Court orders Laurel Schmidt to file the
accounting by **01/15/16**. Court notes that the trust specifies that it will be administered in
San Bernardino County.

**Continued from 02/16/16, 05/23/16, 06/13/16, 08/22/16, 11/10/16, 04/20/17, 07/20/17
and 10/19/17. Matter set for trial.**

THIS CASE IS SET FOR HEARING ON Petition to Remove Trustee Laurel Schmidt and
Appoint Richard Schmidt as Successor Trustee; Petition for Interim Suspension and Order
Staying Notice of Intent to Terminate Trust and to Evict David Schmidt from Trust Property
[Pr. C. §§ 15642, 16000 *et seq.*, 17200, 17200(b)].

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

1. Petitioners allege venue is proper as the real property owned by the trust is located
in San Bernardino County, California. Question where the principal place of
administration of the trust is located? **Supp 09/17/15: current place of
Administration is Orange County as Laurel Schmidt lives in Orange County.**
2. Petitioners, Richard Schmidt and David Schmidt, beneficiaries under the Dorothy M.
Schmidt Trust, dated November 29, 1999, and as restated on June 16, 2005, allege
Trustee, Laurel Schmidt, has engaged in and undertaken numerous actions that
have exceeded her proper authority under the Trust; failed to protect the interest
and life estate of David Schmidt in certain real property; breached the Trust's lease
with David Schmidt; acted in bad faith and with a conflict of interest, placing her
desire to "cash out" her portion of the Property to the detriment of David Schmidt's
right to reside at the Property; and failed to protect the wishes and interest of all
beneficiaries.

3. Petitioners further allege Trustee has failed to communicate with them; failed to provide an accounting despite repeated requests; has failed to provide Trust banking information and changed Trust bank accounts to prevent Petitioners' from making deposits to justify her efforts to terminate the trust and David's life estate, lease and right to reside at the property; and has allowed her own personal interest to interfere with her duties as Trustee under the Trust.
- a. The court has the power to compel the trustee to report information about the trust or to account if the trustee fails to submit the report within 60 days after written demand and no report or account has been made within six months preceding the request. Pr.C. § 17200(b)(7). Question whether written demand has been made and whether more than 60 days have passed? **Supp 09/17/15: written requests made on 02/12/15 and 03/20/15.**
4. Petitioners request the removal of Trustee, Laurel Schmidt; for an interim order suspending Trustee's powers to prevent actions that will unreasonably jeopardize the Petitioners' interests; and for the Appointment of Successor Trustee, Richard Schmidt. Petitioners also request that Laurel Schmidt's Notice of Intent to Terminate the Trust and 60 Day Notice to Vacate served on David Schmidt be voided by this Court.
5. Alternatively, Petitioner's request that the Court issue an order authorizing Richard Schmidt to act as Successor Trustee with full rights under the Trust and Pr. C. § 16220 *et seq.*, with an agreement that the status quo will be maintained until such time as a full hearing is held.
6. Declarations in support of petition filed 07/08/15.
7. **Objections filed 08/06/15 by Trustee, Laura Schmidt; Trustee's Stipulation to Withhold Eviction proceeding Pendente Lite; and Request for Mediation Prior to Trial with p's and a's.**
8. **Amended Answer and objection filed by Laurel Schmidt, Trustee on 02/10/16.**
9. **Motion to Dismiss Petition with prejudice filed 09/15/15 by Laurel Schmidt, Trustee.**
10. **Objection to Motion to Consolidate Cases.**
11. **Declaration filed by Richard and David Schmidt in support of Petition and Court's consideration of replacing trustee – report of Trustee's improper entry onto property and confrontation/threats to David Schmidt.**
12. ~Proposed Order 07/08/15.

RECOMMENDATION:

Matter is contested.

(/lc)

Future Hearing: 03/08/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500633

CASE NAME: LAUREL SCHMIDT TRUSTEE

HEARING:

Hearing Re: PRETRIAL CONFERENCE/STATUS OF SETTLEMENT

COUNSEL:

DAVID SCHMIDT	(PET)...ROBIN MCCONNELL
LAUREL SCHMIDT	(OBJ)...MCINTIRE & MCINTIRE
RICHARD SCHMIDT	(PET)...ROBIN MCCONNELL

XREF: UDBS1600534 (*Schmidt v Schmidt*)

No notes- Settlement Status/Setting of Mediation- JTD.

Future Hearing: 03/08/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500981

CASE NAME: EILEEN T. ALLEN

SEE ALSO 8

HEARING:

Hearing Re: OSC RE SUSPENSION OF POWERS OF ADMINISTRATOR

COUNSEL:

EILEEN T ALLEN (DEC)...
VALERIE MINSTER (PET)...PRO/PER

GENERAL INFORMATION

OSC set on 10/19/17 when there was no appearance or documents filed.

THIS CASE SET FOR HEARING ON **OSC re Suspension**/Accounting review/Status.

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

1. Letters of Administration issued to Valerie Minster, daughter, on 07/07/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-3. No bonding company to notice.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500981

CASE NAME: EILEEN T. ALLEN

SEE ALSO 7

HEARING:

Accounting Review

COUNSEL:

EILEEN T ALLEN

(DEC)...

VALERIE MINSTER

(PET)...PRO/PER

See notes on matter 7.

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501015

CASE NAME: WILLIAM BERNARD OFNER

SEE ALSO 10

HEARING:

Hearing Re: OSC RE: DISMISSAL

COUNSEL:

DANIEL CAUSEY	(TP)...KENNETH L MORRIS
LINDA ATKINSON	(PET)...JEFFREY S. COHEN
WILLIAM BERNARD OFNER	(DEC)...

XREF: CONPS1500051 (*William Ofner*)

GENERAL INFORMATION

Vacated and reset on 10/05/17.

THIS CASE SET FOR HEARING ON OSC re Dismissal.

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

1. OSC set on 05/25/17 Readiness.
2. It appears the dismissal is in regards to Pr.C. § 850 re real property. Court to clarify.

RECOMMENDATION

Court's discretion re OSC.

(lc)

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501015

CASE NAME: WILLIAM BERNARD OFNER

SEE ALSO 9

HEARING:
Accounting Review

COUNSEL:

DANIEL CAUSEY	(TP)...KENNETH L MORRIS
LINDA ATKINSON	(PET)...JEFFREY S. COHEN
WILLIAM BERNARD OFNER	(DEC)...

XREF: CONPS1500051 (*William Ofner*)

GENERAL INFORMATION

Continued from 05/03/17 and 05/25/17; final account to be filed by 9/01/17.

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 Linda Atkinson, PPF, on 08/09/16; full authority, \$25,000 bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

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

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600202

CASE NAME: TERESA D SACCONO

HEARING:

FIRST & FINAL OF EXECUTRIX & PETITION Account and Report of
KATHLEEN G SACCONO and Petition for allowance of fees filed.

COUNSEL:

KATHLEEN G SACCONO (PET)...JAMES BANKS JR
TERESA D SACCONO (DEC)...

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Kathleen Saccone, Executrix/Trustee/sister-in-law.

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

1. Assets on hand \$595,052.08 cash.
2. Executrix waives statutory compensation.
3. Executrix seeks reimbursement of costs advanced of \$13,199.35. [Acct.09/01LFpg17-18].
4. Attorney advanced \$1,302.06 for costs of which \$567 has been paid out of reserve.
5. Attorney seeks statutory fees of \$14,941.23. Ok.
6. Executrix seeks several reserve amounts totaling \$9,600. JTD
7. ~Proposed Order: 09/01/17

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.
(lc)

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600252

CASE NAME: HELEN F RAZO

HEARING:
Accounting Review

COUNSEL:
HELEN F RAZO (DEC)...
MARIA MONIQUE QUIROZ (PET)...BROWN WHITE & OSBORN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Maria Quiroz, granddaughter, appointed administrator WWA on 10/06/16; \$67,200 bond. However, on 09/13/17 court granted approved to place funds in blocked account.
2. **Need** proof of blocked account in order for letters to issue.
3. **Need** final Inventory and Appraisal.
4. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-4. Court may wish to continue Accounting review as letters have not yet issues.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601110

CASE NAME: IN RE: THE HENRY R ZAHNER 1992 TRUST

SEE ALSO 20

HEARING:

Hearing Re: CONFIRMATION ACCOUNTINGS HAVE BEEN FILED

COUNSEL:

CYRUS CLARKE VAN DEVENTER (RES)...STEVE ALDACO
MARY DE AVILAN (PET)...WRIGHT KIM DOUGLAS, ALC
THE HENRY R ZAHNER 1992 TRUST (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Confirmation Accountings Have Been Filed.

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

1. Matter set on 06/15/17 when an accounting was ordered to be filed for the period of 04/07/09 – 12/31/15.
2. Accounting filed to be heard 03/06/18.

RECOMMENDATION

None.

(lc)

Future Hearing:

01/24/18 Mediation settlement conference

01/24/18 Hearing re: Status of mediation- special setting

03/06/18 First Account Trustee Mary de Avilan

07/12/18 Readiness calendar

08/06/18 *Court Trial*

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700032

CASE NAME: JOANNE V REYNOLDS

HEARING:

Final Account and Report of RICHARD E WHITE and Petition for allowance of fees filed.

COUNSEL:

JOANNE V REYNOLDS (DEC)...
RICHARD E. WHITE (PET)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Richard White, son/executor.

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

1. Assets on hand \$204,650.23 in cash/mobile home/vehicle.
2. Executor and attorney seek statutory fees of \$7,093 each. Ok.
3. Executor requests a reserve of \$1,500.
4. ~Proposed Order: 09/05/17

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700491

CASE NAME: RICK HIEBERT

HEARING:

Hearing Re: PETITION FOR WITHDRAWAL OF FUNDS, ETC

COUNSEL:

KIMBERLY CATHERINE ANDREWS TOY (PET)...MICHAEL C MADDUX
RICK HIEBERT (DEC)...
SURETEC INSURANCE COMPANY (TP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Withdrawal of Funds Etc.

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

1. Matter set on 10/30/17 when there was no reason stated for disbursement of funds indicated in petition. Petition is not available for review in Laserfiche on 11/29/17. Clerk's office notified.
2. Inventory and Appraisal filed 10/25/17 only indicates \$280,000 in real property, no cash.
3. **Need** notice of hearing and proof of service as matter was set for actual hearing.
4. ~Proposed Form Order: 10/27/17.

RECOMMENDATION

Need notice then Court's discretion.

(lc)

Future Hearing: 12/13/18 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 15A ADD ON

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700823

CASE NAME: JAMES STOKES TANKARD TRUST

HEARING:

Petition for ORDER CONFIRMING PROPERTY TO BE A TRUST ASSET AND
DIRECTING ITS TRANSFER TO THE TRUSTEE

COUNSEL:

JAMES STOKES TANKARD TRUST DEC (TRU)...PRO/PER
JANA BRINDZIK (PET)...MICHAEL G YORK

Currently under review by legal research.

NOTICE: Petitioner appears to be sole beneficiary of trust; Wells Fargo also noticed;
however, only 15 days.

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700873

CASE NAME: SHEILA GAIL SEYMOUR

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

COUNSEL:

SHEILA GAIL SEYMOUR (DEC)...
YVETTE DAVIS (PET)...CKB VIENNA, LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Yvette Davis, daughter.

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

1. **Need** Notice to Petition to Administer Estate and proof of service.
2. All heirs waive bond. Net estate value is \$460,436.18 of which \$30,742 is personal
property. Court for good cause could require bond per Pr.C. § 8481(b). JTD
3. ~Proposed Form Order: 09/01/17.

RECOMMENDATION

RFA subject to note 1, Court's discretion re bond. If approved, set Accounting/Status
Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901.
Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700891

CASE NAME: MTR OF JEAN MAVA GREENSTREET

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

COUNSEL:

JEAN MAVA GREENSTREET (DEC)...
MARTA CANADAY (PET)...RICHARD S PRICE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Marta Canaday, daughter.

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

1. Petitioner is sole heir and waives bond. Net estate value is \$179,300 of which
\$4,300 is cash. Court for good cause could require bond per Pr.C. § 8481(b).
2. ~Proposed Form Order: 09/07/17

RECOMMENDATION

RFA. If approved, set Accounting/Status Review for **02/21/19**. Any accounting to be filed
30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701122

CASE NAME: ESTATE OF FERNE ROSENBALM

HEARING:

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

COUNSEL:

FERNE L ROSENBALM (DEC)...
VIRGINIA WECKBACK (PET)...MOYNIHAN LYONS PC

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Virginia Weckback, niece.

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

1. Will waives bond. Estate value \$97,000 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Copy of trust filed 11/08/17.
3. Petitioner alleges that Cici Huchins, niece, is presumed deceased. Cici is not a current trust beneficiary; however, is an heir. Does court wish to require due diligence? JTD
4. ~Proposed Form Order: 11/08/17.

RECOMMENDATION

RFA subject to Court's discretion re note 3. If approved, set Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 12/14/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701123

CASE NAME: EMILIO PEREZ PEREZ

HEARING:

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

COUNSEL:

EMILIO PEREZ PEREZ (DEC)...
MARIA I GUZMAN PEREZ (PET)...GAUDY LAW, INC

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full
authority under IAEA by Maria Perez, spouse.

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

1. All heirs waive bond. Net estate value is \$126,000 in real property. Court for good
cause could require bond per Pr.C. § 8481(b).
2. ~Proposed Form Order: 11/28/17.

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **02/21/19**.
Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of
local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

DATE: 12/14/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1601110

CASE NAME: IN RE: THE HENRY R ZAHNER 1992 TRUST

SEE ALSO 13

HEARING:

Hearing Re: PTN FILED JULY 12, 2016/ RESP FILED 1/9/17

COUNSEL:

CYRUS CLARKE VAN DEVENTER (RES)...STEVE ALDACO
MARY DE AVILAN (PET)...WRIGHT KIM DOUGLAS, ALC
THE HENRY R ZAHNER 1992 TRUST (TRU)...

Currently under review by legal research

(LR)

Continued matter. Notice not re-reviewed.

Future Hearing:

01/24/18 Mediation settlement conference

01/24/18 Hearing re: Status of mediation- special setting

07/12/18 Readiness calendar

08/06/18 *Court Trial*

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 12/14/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700462

CASE NAME: THE STENERSON TRUST

HEARING:

Petition for APPOINTMENT OF SUCCESSOR TRUSTEE QUIET TITLE TO
REAL PROPERTY CANCELLATION OF DEEDS ETC

COUNSEL:

JAMES STENERSON (PET)...JAMES L HEYWOOD AND ASSOCIATES
THE STENERSON TRUST (TRU)...PRO/PER

Currently under review by legal research

(LR)

NOTICE:

1. Petition does not provide caption/code per Local rule 20-601
2. Need list of persons entitled to notice in accord with Pr.C. § 17201.
3. Need 30 days' notice once notes 1 & 2 are cleared.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 12/14/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600031

CASE NAME: BEVERLEY DAWN HEBERT

HEARING: FIRST CURRENT Account and Report of NICOLE MARIE HEBERT and
Petition for allowance of fees filed.

COUNSEL:

BEVERLEY DAWN HEBERT (CEP)...JENNIFER DANIEL
NICOLE MARIE HEBERT (CPE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st Account Current, Petition for Allowance of Fees
and Increase in bond by Nicole Hebert, granddaughter.

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

1. Accounting period 05/16/16 – 05/31/17.
2. Assets on hand \$767,534.73 of which \$27,195.51 is cash and remaining shares/investments.
3. Conservator does not seek fees.
4. Attorney seeks fees of \$8,369 for 56.9 hours at \$120/350 per hour for paralegal and attorney services. [Acct.10/26LFpg140-143]. JTD
5. Conservator seeks court approve costs of \$465.
6. Conservator seeks current bond of \$131,000 be increased to \$183,000 for additional bond of \$52,000. As shares are bought and sold and considered personal property, question why they are not included in the bond calculation per Pr.C. § 2320(c)(1)? **Need** verified supplement.
7. ~Proposed Order: 10/26/17.

RECOMMENDATION

Need to clear note 6. If approved, set hearing on the next accounting review for **09/13/18**
(if one year) or **09/12/19** (if two years). Accounting to be filed 30 days in advance.
(lc)

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

DATE: 12/14/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700212
CASE NAME: JAKE KURTEN
HEARING: Petition for Appointment of Conservator

COUNSEL:

JAKE KURTEN (CTP)...
LINDA KURTEN (CP)...ROSSANA MITCHELL
TODD KURTEN (CP)...ROSSANA MITCHELL

GENERAL INFORMATION

Todd and Linda Kurten appointed temporary co-conservators of the person on 06/14/17.
Continued from 07/20/17.

**OSC set on 09/21/17 for no appearance and/or notes cleared.
Continued from 10/26/17. Dismissal off.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only
by Todd and Linda Kurten (parents).

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

1. It appears a limited conservatorship is appropriate. Does Court wish to deem this petition for limited conservatorship?
2. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. JTD
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. 1827.5(b). Does court wish to require? JTD
4. Petition does not request medical powers; however, section 9 indicates medical treatment. **Need** verified supplement as to whether medical powers are sought. If so, need Capacity Declaration.
5. Section 11 of Petition does not list petitioners/parents. **Need** verified supplement.
6. List of required contacts does not list petitioners/parents. **Need** completed form.
7. **Need** Certificates of Completion of the Conservatorship Training Class.
8. **Need** return of Citation.
9. **Need** Notice of Hearing and proof of service, including 30 days' notice to Inland Regional Center.
10. Court Investigator report filed 07/19/17.
11. No proposed order for general petition.

RECOMMENDATION

Need to clear notes 4-9. If approved, set hearing for Compliance Review for **07/19/18** 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/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 24

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

DATE: 12/14/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700221

CASE NAME: MTR OF ARTHUR PABLO GRIJALVA

HEARING: Petition for Appointment of Conservator

COUNSEL:

ARTHUR PABLO GRIJALVA (CEP)...
CECELIA BARBA (CPE)...PRO/PER

GENERAL INFORMATION

Continued from 08/03/17 and 10/26/17.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Cecelia Barba; daughter.

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

1. Petitioner requests no bond due to limited income. Suggested bond \$105,570; alternatively deposit funds in blocked account. JTD
2. Petitioner seeks medical powers. Capacity Declaration filed 07/21/17.
3. Certificate of Completion of the Conservatorship Training Class filed 10/05/17.
4. **Need** Confidential Screening form.
5. **Need** return of Citation.
6. **Need** Notice of Hearing and Proof of Service.
7. Court Investigator report filed 07/26/17.
8. ~Proposed Form Order: 06/07/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **07/19/18** for the filing of the required documents and hearing re Accounting Review for **02/21/19**. Any accounting to be filed 30 days in advance.

(lh/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 12/14/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700393

CASE NAME: ANTHONY SEBASTIAN RAZO ARGONANIZ

HEARING:
Petition for Appointment of Conservator

COUNSEL:
ANTHONY SEBASTIAN RAZO ARGONAN (CTP)...MITCHELL I ROTH
MARIA L ARGOMANIZ (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maria Argomaniz, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. Proposed conservatee is developmentally disabled. **Need** report of Counsel Roth.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Court Investigator report filed 11/30/17.
7. Citation returned served.
8. Certificate of Completion of the Conservatorship Training Class filed 11/01/17.
9. ~Proposed Form Order: 10/25/17.

RECOMMENDATION

Need to clear notes 3-5. If approved, set hearing for Compliance Review for **07/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

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

DATE: 12/14/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700402

CASE NAME: MTR OF ADRIANA E GOMEZ

HEARING: Petition for Appointment of Conservator

COUNSEL:

ADRIANA E GOMEZ (CTP)...
CECILIA E GOMEZ (CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Cecilia Gomez, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 11/02/17.
4. Proposed conservatee is developmentally disabled. **Need** report of Counsel Mark Flory.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** Court Investigator report.
7. Certificate of Completion of the Conservatorship Training Class filed 11/02/17.
8. Citation returned served.
9. ~Proposed Form Order: 11/02/17.

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **07/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 12/14/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100392

CASE NAME: patricia ann howerton

HEARING:

Accounting Review

COUNSEL:

BRASWELL'S MEDICAL CONSULTANTS (TP)...SANDERS, COLLINS &	
PATRICIA ANN HOWERTON	(DEC)...
RAUL GARCIA	(PET)...BETTY AUTON-BECK
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER
STEVEN EUGENE HOWERTON	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Successor** Administration issued to Public Administrator, on 02/11/15; full authority, on bond.
2. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300206

CASE NAME: MTR OF KENNETH P BURRES

SEE ALSO 14

HEARING:

Accounting Review

COUNSEL:

JEFFREY BURRES

(PET)...PHILIP K FIFE

KENNETH P BURRES

(DEC)...

PHILLIP K. FIFE

(PET)...PHILLIP K FIFE

STEVEN BURRES

(PET)...JERRY T MORGAN

GENERAL INFORMATION

Continued from 05/17/17, 08/02/17 and 09/27/17.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Successor** Administration issued to Steven Burres, brother, on 04/05/16; limited authority, bond issue deferred.
2. Final Inventory and Appraisal indicating \$0 assets.
3. **Need** accounting/status report or Pr.C. § 12251 petition.

RECOMMENDATION

Inquire status of accounting.

(lc/ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300354

Vacated

CASE NAME: TIMOTHY F NOLAND

HEARING:

Hearing Re: Accounting/Status Report

COUNSEL:

AMBER DAWN NOLAND	(PET)...LOEB & LOEB LLP
CAROL NOLAND	(PET)...BEST BEST & KRIEGER
TIMOTHY F NOLAND	(DEC)...

(lc)

Future hearing dates: 02/13/18 Status Report

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400495

CASE NAME: THE SAVAGE TRUST

HEARING:

Probate status report filed.

COUNSEL:

DIANE D HARKISON	(PET)...MARIELLEN ROSS
DIANE D. HARKISON	(STE)...MARIELLEN ROSS
GEORGE DEKTEROV	(BARRY & BARRY
THE SAVAGE TRUST	(TRU)...
VICTOR DEKTEROV	(PRO/PER

XREF CONPS1300065 (*Lidia Dekterov, matters 16-18*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. **George Dekterov** appointed successor Trustee on 01/06/16; \$200,000 bond.
2. Trustee seeks additional time to prepare accounting. However, it appears first account was filed under conservatorship matter. Clerk's office notified and accounting to be put under probate case number.
3. **Need** notice of hearing and proof of service.
4. No proposed order.

RECOMMENDATION

Need notice. Appears accounting has been filed.

(lc)

Future Hearing: 1/17/18 1st **Trust** Account by **George Dekterov** 06/28/18 Final Discharge for **Diane Harkison former Trustee**.

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400674

CASE NAME: BOBBY LEE KIRCHNER

HEARING:
Accounting Review

COUNSEL:

BOBBY LEE KIRCHNER	(DEC)...
MATTHEW GLENN KIRCHNER	(PET)...IGNAZIO FICARA
SUSAN M HEDGECOCK-KIRCHNER	(TP)...

GENERAL INFORMATION

Continued from 10/26/16, 03/01/17, 06/14/17, 09/20/17 and 11/02/17.

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 Matthew Kirchner, son, on 09/23/14; full authority, \$20,000 bond, additional bond of \$120,800 filed on 11/29/16.
2. Previous status report approved on 10/27/15.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.
(lc/ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600534

CASE NAME: MTR OF DALE LITTLE

HEARING:
Accounting Review

COUNSEL:

CAROL RISENER	(PET)...WILLIAM M NASSAR
CRIAG M PARKER	(TP)...CRAIG M PARKER
DALE LITTLE	(DEC)...
DAVID C LITTLE	(PET)...TREVOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to David Little, son, on 08/15/16; **limited** authority, \$20,000 bond.
2. Partial/Final Inventory and Appraisal filed 03/21/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.
(cs/lc)

Future Hearing: 12/21/17 Petition for removal of personal representative etc. by Carol Risener, daughter

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600576

CASE NAME: MTR OF ALFRED TAINATONGO ANDERSON

HEARING:

Probate status report filed.

COUNSEL:

ALFRED TAINATONGO ANDERSON	(DEC)...
ANDREW ANDERSON	(PET)...CHRISTOPHER B JOHNSON
SHAUN ANDERSON	(PET)...CHRISTOPHER B JOHNSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Andrew and Shaun Anderson, sons, on 08/08/16, full authority, no bond.
2. Administrators seek an additional 9 months to close the estate in order to close proceeding in Guam [PR0054-17] regarding 4 real properties.
3. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **07/19/18**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600826

CASE NAME: MTR OF LUCY M ESTRADA

HEARING:
Accounting Review

COUNSEL:
LUCY M ESTRADA (DEC)...
PAUL ESTRADA (PET)...LAW OFFICE OF DAVID T EGLI

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Paul Estrada, son, on 10/06/16; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.
(lc)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600846

CASE NAME: MTR OF RONALD LEE NELSON

HEARING:
Accounting Review

COUNSEL:
JEFFREY A NELSON (PET)...D M DAVIS
RONALD LEE NELSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Jeffrey Nelson, son, on 12/05/16; **limited** authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.
(lc)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600955

CASE NAME: GERALD MAURICE WRIGHT JR

HEARING:

FIRST AND FINAL Account and Report of D DENNIS JOINER and
Petition for allowance of fees filed.

COUNSEL:

D DENNIS JOINER (PET)...DUANE P BOOTH
GERALD MAURICE WRIGHT JR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Donald Joinder, stepson.

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

1. Assets \$210,000 in real property.
2. Administrator waives statutory compensation.
3. Attorney seeks statutory fees of \$7,200. Ok.
4. Administrator seeks a reserve of \$1,500.
5. ~Proposed Order: 09/21/17.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601006

CASE NAME: ANGELINA SANCHEZ

HEARING:

FIRST AND FINAL Account and Report of LARRY PINA and Petition
for allowance of fees filed.

COUNSEL:

ANGELINA SANCHEZ (DEC)...
LARRY PINA (PET)... RICHARD SAMUEL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Larry Pena, son.

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

1. Assets on hand \$72,692.19 cash.
2. Administrator and attorney seek statutory fees of \$3,121.20 each. Ok
3. Attorney seeks extraordinary fees of \$3,040 for 11 hours at \$150/300 per hour for paralegal and attorney services in relation to sale of real property. [09/21 LFpg24-27].
4. Administrator seeks a reserve of \$2,000.
5. Administrator seeks reimbursement of costs totaling \$1,500. Itemization in declaration filed 12/05/17 appears to be \$2,356.94; however, postage [\$69.94] is considered overhead per local rule 20-909. Court to clarify actual fees sought as order reflects \$1,500.
6. ~Proposed Order: 09/21/17.

RECOMMENDATION

RFA subject to note 5. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700716

CASE NAME: ROBERT BARKMAN
HEARING: OSC re: DISMISSAL OF PTN FOR LETTERS filed by JODIE PENN

COUNSEL:

JODIE PENN (PET)...PRO/PER
ROBERT BARKMAN (DEC)...

GENERAL INFORMATION

Continued from 09/26/17. Decedent died intestate leaving surviving spouse/domestic partner.

OSC set on 11/02/17 when there was no appearance.

THIS CASE SET FOR HEARING ON **OSC re Dismissal on Amended** Petition for Letters of Administration with full authority under IAEA by Jodie Penn, daughter.

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

1. Petitioner seeks \$600,000 bond. Estate value is \$850,000 of which \$250,000 is real property. Suggests bond of \$850,000.
2. Amended petition does not include all heirs in section 8; however, original petition does. **Need** verified supplement.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication.
5. ~Proposed Form Order: 07/19/17.

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-4. Court's discretion re bond. If approved, set Accounting/Status Review for **02/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 12

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700764

CASE NAME: VALERIE DEN BESTEN

HEARING:

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

COUNSEL:

CRAIG MINTZ (PET)...VINCENT L JAMISON
VALERIE DEN BESTEN (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner is nominated by all heirs.
2. All heirs waive bond. Estate valued at \$175,000, of which \$5,000 is personal
property. JTD
3. Petition is 2008 form. Does court wish to require updated form? JTD
4. **Need** proof of publication.
5. ~Proposed Form Order: 07/28/17.

RECOMMENDATION

RFA subject to note 4 and Court's discretion re bond/form. If approved, set
Accounting/Status Review for **01/10/19**. Any accounting to be filed 30 days in advance
local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 12/14/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701125

CASE NAME: JOHNIE L JONES

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JOHNIE L JONES (DEC)...
TRACI L KINNEY (PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal property by Traci Kinney, daughter.

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

1. Petitioner, Traci Kinney, seeks 100% interest in decedent's 100% interest in real and personal property per intestate succession.
2. ~Proposed Form Order: 11/15/17.

RECOMMENDATION

RFA.
(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 12/14/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1300206

CASE NAME: MTR OF KENNETH P BURRES

SEE ALSO 1

HEARING:

Motion Re: TO BE RELIEVED AS COUNSEL Filed by Petitioner
KENNETH P BURRES

COUNSEL:

JEFFREY BURRES	(PET)...PHILIP K FIFE
KENNETH P BURRES	(DEC)...
PHILLIP K. FIFE	(PET)...PHILLIP K FIFE
STEVEN BURRES	(PET)...JERRY T MORGAN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Motion to be Relieved as Counsel by Jerry Morgan.

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

1. Counsel, Jerry Morgan, seeks to be removed as counsel for successor administrator Steven Burres.
2. Counsel states specific facts for this motion are confidential per Business and Professions Code § 6068(e). If specific facts are sought, Counsel request s an in camera hearing outside presence of other parties.
3. ~Proposed Form Order: 09/21/17.

RECOMMENDATION

Court's discretion.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300006

CASE NAME: SIERRA MARTIN

HEARING: FIRST Account and Report of MARY MARGARET MARTIN and Petition for allowance of fees filed.

COUNSEL:

MARY MARGARET MARTIN (CP)... JOSEPH P FOLEY
SIERRA MARTIN (CTP)...

XREF: CIVVS1105356 (Sierra Martin)

GENERAL INFORMATION

Continued from 03/30/17 and 05/25/17 for counsel to file supplement re concerns read into record regarding accounting.

Continued from 07/27/17. **Rose Rosado appointed GAL for conservatee.**

Continued from 09/21/17. Any Settlement funds to be held in attorney client trust account of Mr. Foley until further order.

Continued from 11/02/17. No appearance by counsel or his client. Citation issued to Joseph Foley and Mary Margaret Martin.

THIS CASE SET FOR HEARING ON 1st Account Current of Trust and Petition for discharge of bond by Mary Margaret Martin, paternal grandmother.

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

1. Mary Margaret Martin, paternal grandmother, was appointed limited Conservator of **person only** on 04/03/13. Mary is also Trustee of Special Needs Trust created on 04/15/14 due to an automobile accident.
2. Accounting period 04/15/14 – 03/26/16.
3. Assets on hand \$1,332.97.
4. Petitioner requests exoneration of \$20,000 bond. JTD
5. Disbursements indicate car loan of \$488 and \$2,000 for home equity loan payments [Acct.01/18 LFpg6-7]. Question who owns the vehicle and real property as there are none listed in the property on hand? **Supp 03/27/17: Petitioner states that she owns the vehicle. The SNT is not the lienholder. Court to inquire how these payments fit under “special needs” and why SNT is not the lienholder. Supp 07/25: Payments allegedly reimbursements for household expenses and repairs. Court to clarify situation with vehicle.**
6. **Need** proof of service of supplement.

7. **Need** report of GAL.
8. **Need** return of citations for Joseph Foley and Mary Martin.
9. No proposed order.

RECOMMENDATION

Need to clear notes 6-8, clarify note 5. If approved, set hearing on the next accounting review for **01/04/18** (if one year) or **06/28/18** (if two years). Accounting to be filed 30 days in advance.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 17, 18

HEARING: Hearing re Final Discharge

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BAR
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
VICTOR DEKTEROV	(PET/OBJ)...JOHN R SETLICH
VICTOR DEKTEROV	(APP)...AMY M COHEN
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
SURETEC INSURANCE CO	(PRO/PER)

XREF PROPS1400495 (*Savage Trust, matter 3*)

GENERAL INFORMATION

Continued from **03/03/16 and 10/06/16**. Mitchell Roth relieved as counsel.

Continued from **12/20/16** – awaiting refund on amended tax return.

Continued from 03/21/17, 06/22/17, 08/10/17, 10/19/17 and 10/30/17. Counsel Roy Barry to give notice.

THIS CASE SET FOR HEARING ON Final Discharge re **Temporary Conservator** Diane Harkison.

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

1. Final Accounting of Diane Harkison approved on 02/26/15.
2. **Need** receipt from George Dekterov, successor Conservator.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipt and discharge.

(lc/nb/lc)

Future hearing dates: 1/17/18 1st **Trust** Account by **George Dekterov**

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065
CASE NAME: LIDIA DEKTEROV

SEE ALSO 16, 18

HEARING: Second and Final Account and Report of GEORGE DEKTEROV and
Petition for allowance of fees filed.

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BAR
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
VICTOR DEKTEROV	(PET/OBJ)...JOHN R SETLICH

XREF PROPS1400495 (*Savage Trust, matter 3*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd and Final Conservatorship Account and Petition
for Allowance of Fees by George Dekterov, son.

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

1. Conservatee died on 08/21/16.
2. Accounting period 04/01/16 - 10/31/16. Normally pre and post death accountings
are required per Pr. C. § 2620(b). However, all assets were transferred to trust post
death. JTD
3. Assets on hand \$0.
4. Conservator waives fees.
5. Attorney seeks fees of \$39,764.06 at \$350 per hour to be paid by Trust. Costs of
\$389.06 appear to be overhead per local rule 20-1406(d). [Acct. 10/30LFpg27-23].
JTD
6. Current bond \$20,000.
7. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for
12/20/18.

(lc)

Future hearing dates: 1/17/18 1st **Trust** Account by **George Dekterov**

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 16, 17

HEARING:

Probate status report filed.

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BAR
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
VICTOR DEKTEROV	(PET/OBJ)...JOHN R SETLICH
VICTOR DEKTEROV	(APP)...AMY M COHEN
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
SURETEC INSURANCE CO	(PRO/PER)

XREF PROPS1400495 (Savage Trust, matter 3)

THIS CASE IS SET FOR HEARING ON Status Report by Conservator of the Person and Estate, George Dekterov, son.

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

1. Conservator alleges the estate is not in a condition to be closed as the accountings for the conservatorship and the related trust matter are incomplete due to the extent of information necessary to compile the 2 accountings.
2. Petitioner requests until 11/01/17 or to such time as determined at the time of the hearing of this matter.
3. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion as accounting appears to be on matter 17.

(nb/lc)

Future hearing dates: 1/17/18 1st **Trust** Account by **George Dekterov**

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400096

Vacated

CASE NAME: ROBERT EUGENE MATTISON

HEARING:

Accounting Review

COUNSEL:

ALICIA M MATTISON (CP)...PRO/PER

ROBERT EUGENE MATTISON (CPE)...KARIN HORSPOOL

Future hearing dates: 12/13/18 Final Discharge

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600046

CASE NAME: MTR OF DORETHA RILEY

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ADAM RILEY

COUNSEL:

ADAM RILEY JR (CP)...PRO/PER
DORETHA RILEY (CTP)...MARK J. FLORY

GENERAL INFORMATION

Continued from 11/09/17.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Adam Riley Jr., son appointed conservator of the person only on 05/04/17.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

SEE ALSO 22

HEARING:

Accounting Review

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE
LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Arthur Ewing, son, appointed conservator of the person and estate on 10/06/16, \$20,000 bond.
2. Final Inventory and Appraisal filed 06/09/17.
3. **Need** accounting.

RECOMMENDATION

Inquire status of accounting.

(lc/lh/lc)

Future Hearing: 12/14/17 *Accounting Review – conservatorship*

12/14/17 *Accounting Review – trust*

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

SEE ALSO 21

HEARING:

Accounting Review

COUNSEL:

ARTHUR CHARLES EWING (CPE)...CHRISTINA FERRANTE

LETHA JOAN CANUP PHILLIPS (CEP)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 10/28/16 Court took jurisdiction over the trust. Arthur Ewing is Trustee. All proceeds placed into a blocked account.
2. **Need** trust accounting.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 23

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600146

CASE NAME: MTR OF PATRICK RICHARD CAVENAUGH

SEE ALSO 24

HEARING:

Hearing Re: Petition for Temporary Conservatorship

COUNSEL:

COLLEEN ANN CAVENAUGH	(CPE)...SHERRI L KASTILAHN
COLLEEN CAVENAUGH	(DINA I FARHAT
KARIN HORSPOOL	(PET)...PRO/PER
KATHY BREITENBACH	(PCR)...PRO/PER
PATRICK M CAVENAUGH	(OBJ)...PRO/PER
PATRICK M CAVENAUGH	(PET)...GUY A BOVEE
PATRICK RICHARD CAVENAUGH	(CEP)...

No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 24

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600146

CASE NAME: MTR OF PATRICK RICHARD CAVENAUGH

SEE ALSO 23

HEARING:

Hearing Re: VISITATION

COUNSEL:

COLLEEN ANN CAVENAUGH	(CPE)...SHERRI L KASTILAHN
COLLEEN CAVENAUGH	(DINA I FARHAT
KARIN HORSPOOL	(PET)...PRO/PER
KATHY BREITENBACH	(PCR)...PRO/PER
PATRICK M CAVENAUGH	(OBJ)...PRO/PER
PATRICK M CAVENAUGH	(PET)...GUY A BOVEE
PATRICK RICHARD CAVENAUGH	(CEP)...

XREF: CONPS1600145 (*Betty May Cavanaugh-spouse*)

Visitation – No notes – JTD

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600354

CASE NAME: MTR OF DARR MADDOX

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARK MADDOX

COUNSEL:

DARR MADDOX (CEP)...JENNIFER M DANIEL
MARK MADDOX (CPE)...ESTEFAN M ENCARNACION

GENERAL INFORMATION

Continued from 10/05/17. Notice to be given by Counsel Encarnacion.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Mark Maddox, spouse, appointed conservator of the person and estate on 03/02/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.
5. **Need** final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. **If** the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 2-7.

(lc)

Future Hearing: 05/10/18 *Accounting Review*.

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

DATE: 12/14/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700404

CASE NAME: KRYSTAL CHARMAE ANGOLUAN BONUS

HEARING: Petition for Appointment of Conservator

COUNSEL:

IMELDA ANGOLUAN (CP)...PRO/PER
KRYSTAL CHARMAE ANGOLUAN BONUS (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Imelda Angoluan, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Petitioner seeks medical powers. Capacity Declaration filed 11/02/17; however, section 4 re last date seen is incomplete and verification is not dated. **Need** same.
4. Proposed conservatee is developmentally disabled. **Need** report of Counsel Marivel Zialcita.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. **Need** notice of hearing and proof of service including 30 days' notice to IRC per Pr.C. § 1822(e).
7. **Need** Court Investigator report.
8. Citation returned served.
9. Certificate of Completion of the Conservatorship Training Class filed 12/07/17.
10. ~Proposed Form Order: 11/02/17.

RECOMMENDATION

Need to clear notes 3-7. If approved, set hearing for Compliance Review for **07/19/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. § 1830(c); Level of Care and Care Plan per Pr.C. § 2352.5.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

MISC.

DATE: 12/14/17 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500228

CASE NAME: CHARLOTTE K KNIGHT-UTTER

SEE ALSO 28

HEARING:

Mandatory Settlement Conference

COUNSEL:

CARY KNIGHT

CHARLOTTE K KNIGHT-UTTER

E JOAN NELMS

LINDA K GUYETTE

WRETHA KNIGHT

(FRANK O TETLEY

(CEE)...E JOAN NELMS

(PET)...E. JOAN NELMS

(PET)...MICHAEL C. MADDUX

(PET)...FRANK O TETLEY

M.S.C. – No notes – JTD

Future Hearing:

12/28/17 Readiness calendar

01/08/18 *Court Trial*

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

DATE: 12/14/17 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500228

CASE NAME: CHARLOTTE K KNIGHT-UTTER

SEE ALSO 27

HEARING: Petition for Appointment of Conservator

COUNSEL:

CARY KNIGHT	(FRANK O TETLEY
CHARLOTTE K KNIGHT-UTTER	(CEE)...E JOAN NELMS
E JOAN NELMS	(PET)...E. JOAN NELMS
LINDA K GUYETTE	(PET)...MICHAEL C. MADDUX
WRETHA KNIGHT	(PET)...FRANK O TETLEY

GENERAL INFORMATION:

Continued from **9/28/15** Court appoints Melvin Friedland as GAL. Clerk's counsel and GAL to look into issue of proposed conservatee's ability to make decisions on power of attorney, as well as issue of funds being withdrawn from her banking account(s).

Continued from **11/10/15** COURT ORDERS CASE TRANSFERRED TO RIVERSIDE COUNTY. Written report received from Melvin Friedland. Court orders Cary Knight to turn over all records/possessions of Charlotte Knight-Utter to E. Joan Nelms or Melvin Friedland who are to make a first appearance at the Riverside Court upon the transfer of this case to Riverside County. Transfer of the case to Riverside County will be effective upon the signing of the order after hearing.

Continued from **12/16/15 and 1/13/16** at request of counsel. Court grants motion for reconsideration of court's ruling on 11/10/15. CASE REMAINS IN SAN BERNARDINO COUNTY PENDING FURTHER ORDER OF THE COURT.

Continued from **03/09/16**. Court was informed that there are 2 blocked accounts at US Bank; one in name of grandson and the other in name of conservatee.

Continued from **05/12/16 and 06/20/16** at request of counsel.

Continued from **8/30/16** as matter is trailed specially. Counsel directed to provide info re treating doctor and where conservatee is located to Appointed-counsel. Counsel to file declaration re conservatee's ability to travel back to CA by car.

On 8/30/16 Court granted authority to accept offer on sale of Iowa real property.

On 8/31 re Status of Conservatee, Court directs that the medical records re Charlotte Knight-Utter may be released to the attorneys and they are to be maintained confidentially (confidentially with the court)-not to be discussed/disseminated to third parties and no copies to be made. Counsel agree that Charlotte Knight-Utter is to be transported from Oregon to California, and the trip is to commence on Tuesday after the labor day weekend. Court continues this hearing to September 14, 2016. Court orders that Linda Guyette is to

make an appointment (coordinating with E Joan Nelms and Melvin Friedland, so that they attend the doctor's appointment for Charlotte Knight-Utter) for Charlotte Knight-Utter to be seen by her regular physician as soon as possible. E Joan Nelms to prepare order (re above order re doctor appointment).

On 9/14/16 re Status of Conservatee, Court orders that no monies be removed from any bank account of Charlotte Knight-Utter.

Continued from **09/22/16 and 10/19/16**. No settlement reached. Trial requested.

Continued from **01/26/17** at request of counsel. Matter set for trial readiness.

Continued from **06/08/17**. **A competing petition was filed and set for 07/03/17. Parties agree that petition will be continued to 10/12/17 to be heard with this petition.**

Parties state they are going to work on a settlement.

Continued from 10/12/17. Matter contested, trial requested.

THIS CASE IS SET FOR HEARING ON

- Petition - 1: Petition for Appointment of Conservator, person and estate, filed by Linda Guyette, daughter
- Petition - 2: Petition for Appointment of Conservator, person and estate, by daughter-in-law, Wretha Knight.

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

Petition 1 - Linda Guyette, daughter

1. Proposed Conservatee resides in Riverside County.
2. Petitioner requests bond be fixed at \$150,000. Appears adequate. JTD
3. Petitioner requests medical and dementia powers. Capacity Declaration filed 08/11/16. **Need dementia attachment GC-313.**
4. Citation returned with proof of mailed service given in care of Cary Knight on 8/21/15. However, personal service upon proposed conservatee is required. JTD sufficient.
5. Petitioner requests powers under Pr.C. 2590. Specifically, the power to sell real or personal property with or without notice, other than the personal residence of the conservatee. JTD
6. Petitioner seeks dementia powers. Report of Counsel Joan Nelms filed 10/07/15.
7. Report of GAL, Melvin Friedland, filed 10/07/15.
8. Court Investigator report filed 09/22/15.
9. Proof of completion of Conservatorship Education course filed 9/18/15.
10. **Objections filed 10/19/15 by Cary Knight.**
11. **Reply to Opposition filed 11/02/15 by Linda K. Guyette.**
12. ~Proposed form Order/Letters: 8/21/15.

Petitioner 2 -Wretha Knight daughter-in-law:

13. Proposed Conservator resides in Riverside County. If approved, suggest transfer to Riverside County and Court to set control date.
14. Petitioner seeks dementia powers. Report of Counsel Joan Nelms filed 10/07/15.
15. Petitioner requests bond be fixed in the amount of \$150,000. Appears sufficient.
16. Petitioner seeks Pr. C. § 2358 powers to provide for the care, treatment, education and welfare of the conservatee.

17. Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. JTD
18. Section 11 to petition [LF, p. 8] does not include all relatives to the second degree. **Need** verified supplement.
19. Petitioner seeks medical powers. **Need** Capacity Declaration with Dementia Attachment.
20. **Need** return of Citation.
21. Court Investigator report filed 10/11/17.
22. Certificate of Completion re Conservatorship Class filed.
23. ~Proposed Form Order/Letters 05/19/17.

RECOMMENDATION

Need to clear notes 3 & 18-20. Matter is contested.

If approved, set hearing for Compliance Review for **07/19/18** for the filing of the required documents and hearing re Accounting Review for **02/21/19**. Any accounting to be filed 30 days in advance.

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

Future Hearing:

12/28/17 Readiness calendar

01/08/18 *Court Trial*

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

DATE: 12/14/17 TIME: 8:29 DEPT: S37P

CASE#: GAR PS1600219

CASE NAME: ALYSSA EILEESE MIRANDA-SIMS

HEARING: Hearing re: Petition for Appointment of Guardian

COUNSEL:

ALYSSA EILEESE MIRANDA-SIMS	(MIN)...PRO/PER
BROWN WHITE AND OSBORN	(PET)...BROWN WHITE & OSBORN
HEATHER MIRANDA	(GE)...BROWN WHITE & OSBORN
HEATHER MIRANDA	(OBJ)...BROWN WHITE & OSBORN
LUCIA PADILLA	(GP)...CRAIG M PARKER

SEE HEARINGS ON S37G CALENDAR TODAY

XREF: PROPS1600688 (*Estate of Raul Miranda; father*)

GENERAL INFORMATION

Temporary orders denied on 06/02/16 and 07/07/16.

Continued from 06/21/16 and 07/07/16 and 10/25/16. Mitchell Roth appointed GAL.

Continued from 03/23/17. Counsel ready for trial, but do not have dates free on which to proceed. Matter continued for Counsel to be available. Notice given by Counsel Flory.

Continued from 08/10/17. Mitchell Roth appointed GAL for guardianship as well as civil issue. If mother is living in the home, she owes 50% of the mortgage and utility bills.

Supplement re the purchase of property, date of marriage, separation and character of property to be filed with copy of deed.

Continued from 10/05/17. *Interpreter*. Settlement reached; matter to be heard with PROPS1600688.

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Guardianship person and estate by Lucia Padilla paternal grandmother.
- Petition 2 - Petition for Guardianship estate only by Heather Miranda mother, minor 11.

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

Petitioner 1 – Lucia Padilla, paternal grandmother

1. Petitioner requests no bond on the basis there is currently no assets other than personal property. Court to inquire re life insurance as to the father's death.

2. Father is deceased.
3. Mother was served
4. Petitioner requests Pr.C. § 2590 powers to file law suit for wrongful death of father; Raul Miranda.
5. Attorney did not date petition at signature. **Need** same.
6. CI Report filed on 08/05/16. **Need** updated report per 08/30/17 order.
7. ~Proposed Form Order: 05/09/16.

Petitioner 2 – Heather Miranda, mother

8. Petitioner requests life insurance proceeds be placed into a blocked account.
9. Father is deceased.
10. Questionnaire filed on 07/08/16 is missing signature on front page, Section VI References (see LF, p.6), Section VII, 1(a) **is incomplete** (See LF, P.7).
11. GAL Report filed 01/31/17.
12. **Objections filed on 07/08/16 by mother.**
13. ~Proposed Form Order: 05/13/16.

RECOMMENDATION

Need to clear notes 5-6 and 10. If approved, set proof of blocked account in **30 days** and Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 1A ADD ON

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400470

CASE NAME: Forrest E Spitler, Jr Living Trust

SEE ALSO 1B

HEARING:
Trial Setting Conference

COUNSEL:	
FORREST E SPITLER, JR LIVING T	(TRU)...
KATHERINE WALDRON	(PET)...PRO/PER
MARK ST JOHN	(PET)...GEORGE S THEIOS
MARK ST. JOHN	(OBJ)...GEORGE S THEIOS

T.S.C. – No notes – JTD

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600688

CASE NAME: MTR OF RAUL MIRANDA

SEE ALSO 1A

HEARING:

Spousal Property Petition hearing.

COUNSEL:

FORREST E SPITLER, JR LIVING T	(TRU)...
KATHERINE WALDRON	(PET)...PRO/PER
MARK ST JOHN	(PET)...GEORGE S THEIOS
MARK ST. JOHN	(OBJ)...GEORGE S THEIOS

XREF: GARPS1600219 (*Alyssa Eileese Miranda-Sims, minor child*)

GENERAL INFORMATION:

Continued from 09/06/16, 11/17/16, 02/23/17, 03/23/17, 08/10/17 and 10/05/17 to trail GARPS1600219.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Heather Miranda.

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

1. Petitioner, Heather Miranda, requests a determination of property passing to the surviving spouse as community property. Specifically, real property located in Barstow, CA, in San Bernardino County. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. When were petitioner and decedent married? How was the property interest acquired – with community funds, etc? **Need** verified supplement.
2. Decedent died intestate with one minor child Alyssa (11) who would also share a one-half distribution in the estate per Pr.C. §6401 if the real property is the separate property of decedent.
3. ~Proposed Form Order 07/08/16.

RECOMMENDATION:

Need to clear note 1 then Court's discretion.

(nb/lc)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601049

CASE NAME: MTR OF VICKIE IRENE ATIYEH

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

COUNSEL:

AWANA IRENE RING (PET)...PRO/PER
VICKIE IRENE ATIYEH (DEC)...

GENERAL INFORMATION

Continued from 01/05/17 and 03/16/17.

OSC set on **06/01/17** when Awana Ring was not present. Marybeth Fry advised she may file a competing petition.

Continued from 07/27/17 to clear probate notes. Bond required \$50,000. OSC off calendar due to appearance made in court.

Continued from 10/12/17. Petitioner to attempt to locate persons named in will.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Awana Ring, mother.

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

1. Petitioner states all beneficiaries waive bond. \$50,000 bond posted 10/12/17.
2. The following persons are named in the will, but not in petition: Joe Cihak, Mary Beth, Fry, Judy Nowlen, Lorene Loader, Rhonda Homes, Bonnie Peterson and Chuck Hershey. **Supp 07/21/17 petitioner alleges internet searches were conducted and no parties were located. Need** updated status on parties.
3. **Need** Notice to Petition to Administer Estate and proof of service to Advance Inheritance, LLC.
4. ~Proposed Form Order: 10/19/16.

RECOMMENDATION

Need to clear notes 2-3. If approved, set Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

SEE ALSO 4

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER

LEEERTHA ALISA ROGERS (DEC)...

See notes on matter 2.

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601279

CASE NAME: Leebertha Alisa Rogers

SEE ALSO 3

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

COUNSEL:

EVANS LOUIS ROGERS Jr (PET)...PRO/PER
LEEERTHA ALISA ROGERS (DEC)...

GENERAL INFORMATION:

Continued from **03/09/17, 05/25/17 and 07/27/17.**

OSC set on 07/27/17 when there was no appearance.

Continued from 10/12/17. OSC off calendar. \$75,000 bond required.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Letters of
Administration with full authority under IAEA by Evans Rogers, Jr, brother.

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

1. Quentin Rogers, son/sole heir, waives bond. Estimated net value of estate is
\$103,799 in real property. \$75,000 bond required.
2. **Need** Proof of Publication.
3. ~Proposed form Order: 12/27/16.

RECOMMENDATION:

Need to clear notes 1-2, \$75,000 bond. If approved, set Accounting/Status Review for
02/21/19. Any accounting to be filed 30 days in advance local rule 20-901. Note
requirements of local rule 20-908.

(lh/lc/cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 6, 7

HEARING:

Hearing Re: PTN TO INTERVENE AND FOR DEC RELIEF

COUNSEL:

HELLEN BUSH	(INT)...PRO/PER
HELLEN BUSH	(PET)...PRO/PER
JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE N	(TRU)...
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
NORA J MORALES	(PET)...SKAPIK LAW GROUP

No notes – JTD

Future Hearing: 02/15/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 5, 7

HEARING:

Hearing Re: APPLICATION FOR OSC RE: CONTEMPT

COUNSEL:

HELLEN BUSH	(INT)...PRO/PER
HELLEN BUSH	(PET)...PRO/PER
JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE N	(TRU)...
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
NORA J MORALES	(PET)...SKAPIK LAW GROUP

No notes – JTD

Future Hearing: 02/15/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700269

CASE NAME: LIVING TRUST OF EUGENE MONTE NACCARATO

SEE ALSO 5, 6

HEARING:

Trial Setting Conference

COUNSEL:

HELLEN BUSH	(INT)...PRO/PER
HELLEN BUSH	(PET)...PRO/PER
JOHN LAMBRECHT	(PET)...MICHAEL C MADDUX
LIVING TRUST OF EUGENE MONTE N	(TRU)...
MICHAEL C. MADDUX	(PET)...MICHAEL C MADDUX
NORA J MORALES	(PET)...SKAPIK LAW GROUP

T.S.C. – No notes – JTD

Future Hearing:

02/15/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700447

CASE NAME: LENA SMITH

SEE ALSO 9

HEARING:
Petition for LETTERS OF ADMINISTRATION

COUNSEL:

DYANNA L SMITH	(PET)...PRO/PER
JAMES SMITH JR	(PET)...PRO/PER
LENA SMITH	(DEC)...

GENERAL INFORMATION

Continued from 07/27/17 and 10/12/17.

THIS CASE SET FOR HEARING ON **Amended [07/27/17]** Petition for Letters of Administration with full authority under IAEA by James Jr and Dyanna Smith, children.

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

1. All heirs waive bond. Ok.
2. Notice filed; however, **need Notice of Petition to Administer Estate and proof of service [DE-121]** to Lakora Benford.
3. ~Proposed Form Order: 05/10/17.

RECOMMENDATION

RFA subject to note 2, no bond. If approved, set Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700447

CASE NAME: LENA SMITH

SEE ALSO 8

HEARING:

Petition for (AMENDED) Letters of administration with full
authority

COUNSEL:

DYANNA L SMITH	(PET)...PRO/PER
JAMES SMITH JR	(PET)...PRO/PER
LENA SMITH	(DEC)...

See notes on matter 8.

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700469

CASE NAME: MARIA E RAMIREZ REVOCABLE TRUST

HEARING:

FIRST AND FINAL Account and Report of MARY FRANCES LOPEZ-TIANA
and Petition for allowance of fees filed.

COUNSEL:

DOLORES RENTERIA	(PET)...NEIL J DE LEON
LORRAINE RENTERIA	(PET)...NEIL J DE LEON
MARIA E RAMIREZ REVOCABLE TRUS	(TRU)...
MARY FRANCES LOPEZ-TIANA	(STE)... JOHN R RAMOS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account of Trust Administration by Mary Lopez-Tiana, Successor Trustee.

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

1. Accounting period 07/05/16 – 10/15/17.
2. Assets on hand \$254,516.90 in cash.
3. Attorney Ramos was paid \$9,565.50 in fees and costs for 28 hours at \$450. A balance of \$2,730 due is also being requested. [Acct.10/18LFpg75-82]. Costs of \$170.50 appear to be overhead per local rule 20-909. JTD
4. Trustee seeks ratification of fees paid of \$2,000 for 23.25 hours. [Acct.10/18LFpg83-84]. Trust allows reasonable fees [Acct.10/18LFpg35]. .
5. Trustee reimbursed herself costs of \$33,114.40. [Acct.10/18LFpg12-14].
6. Trust does not require bond.
7. **Need** notice of hearing and proof of service to all 14 beneficiaries listed [LFpg5-6].
8. No proposed order. Submit after hearing.

RECOMMENDATION

Need notice. If approved and *if* trust is court supervised, set hearing on the filing of receipts for **12/20/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700689

CASE NAME: MTR OF YSB-61325 IRREVOCABLE TRUST

HEARING:

Petition for ORDER SETTING ASIDE REAL PROPERTY CONVEYANCE

COUNSEL:

DENISE KANTER	(OBJ)...DOUGLAS J PETTIBONE
MILDRED KANTER	(PET)...FRIDLEY LAW FIRM
YSB-61325 IRREVOCABLE TRUST DA	(TRU)...

Currently under review by legal research

(LR)

NOTICE: 30 days' notice filed, including personal service to Denise Kanter.

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700709

CASE NAME: ADAM JESSE BOSCH

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

ADAM JESSE BOSCH (DEC)...
MARIE GARCIA (PET)...MELINDA S. BELL

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Bond.

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

1. Marie Garcia, mother, appointed personal representative on 10/12/17; \$75,000 bond.
2. **Need** order.
3. **Need** bond.

RECOMMENDATION

Inquire status of order/bond.

(lc)

Future Hearing: 12/20/18 *Accounting Review*.

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700718

Vacated

CASE NAME: FERNANDE SONIA GERARD

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
FERNANDE SONIA GERARD (DEC)...
MATTHEW GERARD (PET)...CHRISTOPHER B JOHNSON
PETER E GERARD (PET)...CHRISTOPHER B JOHNSON

Bond posted, letters issued.

Future Hearing: 12/20/18 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700719

Vacated

CASE NAME: JULIENNE M COMASKEY

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
JULIENNE M COMASKEY (DEC)...
MICHAEL J HOGGARD (PET)...LAYNE A BARTHOLOMEW

Bond posted, letters issued.

Future Hearing: 12/20/18 *Accounting Review.*

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700728

CASE NAME: MTR OF DOROTHY MAE ROBINSON-HOWARD

SEE ALSO 16

HEARING: OSC re: Dismissal

COUNSEL:

DOROTHY MAE ROBINSON-HOWARD (DEC)...
JOHNNIE R GREEN (PET)...PRO/PER

GENERAL INFORMATION

OSC set on 10/12/17 when there was no appearance.

THIS CASE SET FOR HEARING ON **OSC re Dismissal on** Petition for Letters of Administration with full authority under IAEA by Johnnie Green, daughter

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

1. All heirs waive bond. Estate value consists of \$229,000 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. Section 8 does not indicate relationship of Cathy Thomas, Darnell Ross, and Karen Risper to the decedent. Petitioner is not listed in section 8. **Need** verified supplement.
3. Section 2b of petition indicates petitioner be appointed executor of estate; however, petitioner requests letters of administration. Court to clarify.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication.
6. ~Proposed Form Order: 07/21/17

RECOMMENDATION

Court's discretion re OSC. Need to clear notes 2-5. Court's discretion re bond. If approved, set Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lc)

Superior Court of Calif, County of San Bernardino

Page: 16

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700728

CASE NAME: MTR OF DOROTHY MAE ROBINSON-HOWARD

SEE ALSO 15

HEARING:

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

COUNSEL:

DOROTHY MAE ROBINSON-HOWARD (DEC)...
JOHNNIE R GREEN (PET)...PRO/PER

See notes on matter 15.

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700797

CASE NAME: GARRY ALLEN LINDT

HEARING:

Hearing Re: amended petition to determine succ to real property

COUNSEL:

GARRY ALLEN LINDT

(DEC)...

JUSTICE J. LINDT

(PET)...IGNAZIO FICARA

Matter Granted on 11/09/17.

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 12/14/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1701058

CASE NAME: MTR OF THE LYDIA R GARCIA TRUST

HEARING:

Petition for VERIFIED TRUST CONTEST AND POUR OVER WILL CONTEST
OF CARLOS GARCIA ETC

COUNSEL:

CARLOS GARCIA

THE LYDIA R GARCIA TRUST AND E

(PET)...EDWARD B FISCHER &

(TRU)...

Currently under review by legal research.

30 days' notice filed 10/25/17.

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700029

CASE NAME: CARLOS M MARTINEZ

HEARING: Petition for Appointment of Conservator

COUNSEL:

CARLOS M MARTINEZ (CTP)...MITCHELL I ROTH

MARLA A VARGAS (CP)...PRO/PER

GENERAL INFORMATION

Continued from 03/09/17. Mitchell Roth appointed Counsel. IRC to prepare report.
Continued from **05/25/17, 08/03/17 and 09/28/17. Marla Vargas to be present at next hearing.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Marla Vargas, mother.

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. § 2351. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Proposed conservatee is developmentally disabled. IRC report filed 03/21/17.
4. Petitioner seeks medical powers. Capacity Declaration filed 02/16/17. However, the document is not dated, name and address of physician is incomplete, section 5 re ability to attend is incomplete, and form not dated at signatures. **Need** same.
5. Confidential Screening Form filed 01/26/17 is incomplete at item 3 re nomination of proposed conservator. **Need** completed form.
6. List of Required Contact Information filed 01/26/17 is incomplete as to first and second degree relatives. **Need** completed form.
7. Proposed conservatee is developmentally disabled. Report of Counsel Roth filed 05/02/17.
8. Court Investigator report filed 03/01/17.
9. Certificate of Completion of the Conservatorship Training Class shown in court.
10. Citation returned served.
11. ~Proposed Form Order: 01/26/17

RECOMMENDATION

Need to clear notes 4-6. If approved, set hearing for Compliance Review for **07/19/18** 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/lc/lh/lc/lh/lc)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700298

Vacated

CASE NAME: MTR OF SKYE LIM

See matters 20A, 20B

HEARING:

Petition for Appointment of Conservator filed by ***Rueben C. Lim,***
Sr.

COUNSEL:

JULIE LIM

(CP)...GISSELLE M AMINI

RUEBEN C LIM

(OBJ)...ANGELIQUE G BONANNO

RUEBEN C LIM

(PET)...ANGELIQUE G BONANNO

SKYE LIM

(CTP)...

XREF: FAMSS1502471 (Julie A Lim-v-Rueben C Lim Jr Dissolution)

Superior Court of Calif, County of San Bernardino

Page: 20A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700298

See matters 20, 20B

CASE NAME: MTR OF SKYE LIM

HEARING:

Filing of Order

COUNSEL:

JULIE LIM

(CP)...GISSELLE M AMINI

RUEBEN C LIM

(OBJ)...ANGELIQUE G BONANNO

RUEBEN C LIM

(PET)...ANGELIQUE G BONANNO

SKYE LIM

(CTP)...

XREF: FAMSS1502471 (*Julie A Lim-v-Rueben C Lim Jr Dissolution*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON

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

1. Julie and Rueben Lim, parents, appointed **limited** conservator of the person only on 11/27/17.
2. **Need** order and letters.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 20B

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

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700298

See matters 20, 20A

CASE NAME: MTR OF SKYE LIM

HEARING:

Compliance Review.

COUNSEL:

JULIE LIM	(CP)...GISSELLE M AMINI
RUEBEN C LIM	(OBJ)...ANGELIQUE G BONANNO
RUEBEN C LIM	(PET)...ANGELIQUE G BONANNO
SKYE LIM	(CTP)...

XREF: FAMSS1502471 (*Julie A Lim-v-Rueben C Lim Jr Dissolution*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

3. Julie and Rueben Lim, parents, appointed **limited** conservator of the person only on 11/27/17.
4. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
5. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
6. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.

RECOMMENDATION

Court may wish to continue matter to **07/02/18** as Conservators were recently appointed.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 12/14/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701077

CASE NAME: Witherell Living Trust

HEARING:

Petition for to invalidate transfer of funds and designations of
death beneficiary due to undue influence etc

COUNSEL:

LINDA SCHAEFER (PET)...BEST BEST & KRIEGER
WITHERELL LIVING TRUST (TRU)...

Currently under review by legal research.

Continued matter. Notice not re-reviewed.

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

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600048

CASE NAME: DOUGLAS HAROLD EATON

HEARING:
Hearing Re: RETURN TO CALIFORNIA

COUNSEL:

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

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Return to California.

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

1. William Folkmar appointed temporary Conservator on 3/9/16.
2. Matter set on 11/22/17 when counsel reported that APS in Illinois has been contacted and reported conservatee is safe. Douglas Eaton ordered to be returned to California.
3. William Folkmar suspended as temporary guardian and cited. Bench warrant to be issued if William fails to appear.
4. **Need** return of citation.

RECOMMENDATION

Need return of citation.

(lc)

Future Hearing:01/09/18 Petition for appointment of conservator

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

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: SC SS02839
CASE NAME: MTR RE DANIEL P MADRID
HEARING: Eighth and Final Account and Report of CHRISTINA ERICKSON-TAUBE
and Petition for allowance of fees filed.

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(CPE)...ALEX R BORDEN
DANIEL P MADRID	(CEP)...EDWARD B FISCHER &
ESMERALDA MADRID	(CE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 8th and Final Account and Petition to Terminate by Christina Erickson Taube, PPF.

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

1. Accounting period 08/01/16 – 07/31/17.
2. Assets on hand \$1,057.41 cash.
3. Conservator seeks termination on that basis that conservatee was deemed as competent by Veteran's Administration on 10/13/16. [Acct.10/27LFpg37]. Conservatee receives benefits directly from Veteran's and Social Security Administration. No assets will remain after fees.
4. Petitioner seeks exoneration of bond. However, petitioner does not seek discharge per Pr.C. § 2626.
5. Attorney seeks fees of \$7,168 for 21.2 hours at \$135/390 per hour for paralegal and attorney services and reimbursement of costs totaling \$202. [Acct.10/27LFpg43-45].
6. Conservator seeks fees of \$10,421.50 at \$65-115 per hour. Itemized, hours not totaled. [Acct.10/27LFpg23-35].
 - a. Court to inquire why calls from conservatee are billed at \$115 per hour and account reconciliation is \$65 per hour.
 - b. Periodic fees of \$17,555.75 were paid; however, no calculation provided for fees paid as opposed to fees owed. **Need** verified supplement.
7. **Need** Receipt and acknowledgment of services for Lance Riley per local rule 20-1406(c).
8. ~Proposed Order: 10/27/17.

RECOMMENDATION

Need to clear notes 6-7. If approved, set hearing on the filing of receipts and final discharge for **12/20/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 24

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

DATE: 12/14/17 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700098

CASE NAME: JORDAN VS. VASQUEZ

HEARING:

Hearing Re: STATUS OF LIEN/ELDER ABUSE RESTRAINING ORDER

COUNSEL:

JOHNNY VASQUEZ (RP)...PRO/PER

SERVERIANA JORDAN (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Continued matter. All parties present on 11/13/17.