



Second Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 12/19/17

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.

nb1204/1213

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300856

CASE NAME: Ralph L Church

SEE ALSO 2, 3

HEARING:

Motion Re: TO COMPEL RESPONSES TO SPECIAL INTERROGATORIES SET
ONE Filed by Petitioner PAMELA HARRIS

COUNSEL:

HAROLD ULRICH

(PET)...FUERZA LEGAL

HAROLD ULRICH

(PET)...PRO/PER

PAMELA HARRIS

(PET)...ROBERT J SPITZ

RALPH L CHURCH

(DEC)...

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

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.

(LR)

Future Hearing:

01/03/18 Readiness calendar

01/29/18 Petition for order under probate code 850

01/29/18 Court Trial

01/30/18 Court Trial

01/31/17 Court Trial

02/01/18 Court Trial

02/02/18 Court Trial

03/06/18 Court Trial

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

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

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1300856

CASE NAME: Ralph L Church

SEE ALSO 1, 3

HEARING:

Motion Re: COMPEL RESPONSES TO REQUEST FOR PRODUCTION OF
DOCUMENTS SET ONE Filed by Petitioner PAMELA HARRIS

COUNSEL:

HAROLD ULRICH	(PET)...FUERZA LEGAL
HAROLD ULRICH	(PET)...PRO/PER
PAMELA HARRIS	(PET)...ROBERT J SPITZ
RALPH L CHURCH	(DEC)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.
(LR)

Future Hearing:

01/03/18 Readiness calendar
01/29/18 Petition for order under probate code 850
01/29/18 Court Trial
01/30/18 Court Trial
01/31/17 Court Trial
02/01/18 Court Trial
02/02/18 Court Trial
03/06/18 Court Trial

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Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO S1300856

CASE NAME: Ralph L Church

SEE ALSO 1, 2

HEARING:

Motion Re: COMPEL RESPONSES TO FORM INTERROGATORIES SET ONE
Filed by Petitioner PAMELA HARRIS

COUNSEL:

HAROLD ULRICH	(PET)...FUERZA LEGAL
HAROLD ULRICH	(PET)...PRO/PER
PAMELA HARRIS	(PET)...ROBERT J SPITZ
RALPH L CHURCH	(DEC)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN

Currently under review by Legal Research.
(LR)

Future Hearing:

01/03/18 Readiness calendar
01/29/18 Petition for order under probate code 850
01/29/18 Court Trial
01/30/18 Court Trial
01/31/17 Court Trial
02/01/18 Court Trial
02/02/18 Court Trial
03/06/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

Page: 4

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1401042

CASE NAME: Robert Charles Fitzpatrick

SEE ALSO 5

HEARING:

Hearing re Final Discharge

COUNSEL:

JEFFREY FITZPATRICK (PET)...MARIELLEN ROSS

ROBERT CHARLES FITZPATRICK (DEC)...

See next matter #5

(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1401042

CASE NAME: Robert Charles Fitzpatrick

SEE ALSO 4

HEARING:

Hearing Re: OSC RE SANCTIONS/SURCHARGE FOR FAILURE TO FILE

COUNSEL:

JEFFREY FITZPATRICK (PET)...MARIELLEN ROSS
ROBERT CHARLES FITZPATRICK (DEC)...

GENERAL INFORMATION:

Matter set at 11/14/17 hearing due to no appearances. Court orders administrator and counsel to be personally present at hearing. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving Waiver of Account entered 11/08/17.
2. Need receipts by Jeffrey and Zachary Fitzpatrick; Inheritance Funding Company, Inc. as to Zachary; and Release and Satisfaction by same as to Zachary.
3. Need Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600731

CASE NAME: MTR OF ROGER E BERG

HEARING:

Accounting Review

COUNSEL:

PATRICIA M HOPKINS (PET)...STEPHEN P JANIS

ROGER E BERG (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 10/24/16, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600843

CASE NAME: MTR OF BRENDA K TALLEY

HEARING:

FIRST AND FINAL Account and Report of ERICA ROWLAND and Petition for allowance of fees filed.

COUNSEL:

BRENDA K TALLEY (DEC)...
ERICA ROWLAND (PET)...MICHAEL C MADDUX

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

Fee waiver amount due \$1153.00

\$465.00 for petition for letters on 08/24/16

\$52.00 for cert copy of the letters and order on 05/22/17

\$51.00 for cert copy of the letters and order on 05/22/17

\$120.00 for appointment of special admin on 06/07/17

\$465.00 for first and final account on 08/08/17

GENERAL INFORMATION:

Continued from 11/07/17 at request of counsel. Court notes that if counsel is unable to obtain additional information from escrow company other than the seller's closing statement, court will accept the submitted closing statement.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Administer, Erica Rowland ["Petitioner"- daughter].

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

1. Accounting period 06/20/15 to 07/31/17.
2. Assets on Hand \$33,098.19 consisting of cash.
3. Statutory fees in the amount of \$7,973.11 requested. Calculated.
4. Attorney requests extraordinary fees of \$8,450 for services rendered in connection with the sale of real property. Billed at \$325/hour for a total of 26 hours' attorney time. Itemized [LF, p. 6]. JTD.
5. Attorney requests reimbursement of costs advanced of \$480.00. Itemized.
6. Proposed Order 08/09/17 does not include sibling in distribution; does not include findings re sole and separate property; and does not have 3 lines of content before signature line.

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RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **11/13/18.**

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600873

CASE NAME: MTR OF WILLIAM LESTER COX

HEARING:

Accounting Review

COUNSEL:

MELODY AMBER COVERDELL (PET)...GAUDY LAW, INC

WILLIAM LESTER COX (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 10/11/17, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600883

CASE NAME: ESTATE OF GUADALUPE PACHECO BUENO

VACATED

HEARING:

Accounting Review

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP)...

GUADALUPE PACHECO BUENO (DEC)...

SOCORRO PANTOJA (PET)...RONALD W ASK

SURETEC INSURANCE COMPANY (PET)...PRO/PER

FUTURE HEARING DATES:

03/08/18 First & Final Account

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

Superior Court of Calif, County of San Bernardino

Page: 10

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

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700363

CASE NAME: MTR OF RAYMOND G MACIAS

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL AUTHORIZATION
TO ADMINISTER UNDER IAEA

COUNSEL:

ELAINE MACIAS (PET)...PRO/PER
RAYMOND G MACIAS (DEC)...

GENERAL INFORMATION:

Continued from 06/27/17, 09/26/17 and 10/24/17 at request of petitioner to clear notes.

THIS CASE IS SET FOR HEARING ON **AMENDED** (11/21/17) Petition for Letters of Administration with full authority under IAEA by Elaine Macias (daughter)

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

1. Petitioner seeks to waive bond. Waivers of bond filed. Estimated net value of estate is \$250,000 in real property. Court also has discretion to require bond per Pr. C. § 8481(b). JTD
2. Proof of publication filed.
3. **Sections 2d and 3e as to bond are blank. However, bond waivers filed on 08/21/17. JTD.**
4. **Section 8 to petition does not include relationships of those listed. Need verifies supplement.**
5. Court to verify that Sam Macias is same person as Samuel D. Macias. JTD
6. **Notice filed on 09/22/17 does not include Veterans Administration. Need proper service.**
7. ~Proposed form Order: 04/17/17

RECOMMENDATION:

Need to clear notes 4 & 6 then Court's discretion re bond. If approved, set future hearing for Accounting/Status Review on **12/04/18**. Any accounting to be filed 30 days in advance. Note requirements of Local Rules.

(lh/cs/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700652

CASE NAME: MTR OF GARY J WAGNER

SEE ALSO 12

HEARING:

Hearing Re: Bond Review

COUNSEL:

GARY J WAGNER

(DEC)...

MATTHEW S WAGNER

(PET)...DAVID T EGLI

X-REF: GARPS1700290

See next matter #12

(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700652

CASE NAME: MTR OF GARY J WAGNER

SEE ALSO 11

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$500.00

COUNSEL:

GARY J WAGNER

(DEC)...

MATTHEW S WAGNER

(PET)...DAVID T EGLI

XREF: GARPS1700290 (Cooper Taite Costello-Wagner)

GENERAL INFORMATION:

Continued from 10/24/17 due to non-appearances. Court orders David Egli and Matthew Wagner to be personally present in court on December 19, 2017. Court sets OSC re surcharge of \$500.00 for failure to file as court ordered- OSC is set.

THIS CASE IS SET FOR HEARING ON **OSC re Surcharge of \$500** on Bond Review

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

1. Order appointing Mathhew S. Wagner entered 09/26/17, limited authority, \$20,000 bond.
2. **Bond filed 11/28/17.**

RECOMMENDATION:

Need letters.

(nb)

Future Hearing:

12/04/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700892

CASE NAME: MTR OF THOMAS ALVIN ATKINSON

HEARING:

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

COUNSEL:

LYNETTE ATKINSON RAMIREZ (PET)...PRO/PER

THOMAS ALVIN ATKINSON (DEC)...

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

VACATE – Amended petition filed and set for 01/11/18.

(nb)

Future Hearing:

01/11/18 Hearing re: Amended petition for probate of will etc.

Superior Court of Calif, County of San Bernardino

Page: 13A ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/20/17 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700893

CASE NAME: MANUEL SANDOVAL ESQUER

HEARING:

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

COUNSEL:

JULIE A ESQUER

(PET)...JOSEPH D BORJAS

MANUEL SANDOVAL ESQUER

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate, Letters Testamentary
with Full Authority under IAEA by Julie Esquer (executor)

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

1. Petitioner alleges all heirs waive bond; however, no bond waivers were filed.
Estimated net value of estate is \$75,000. The court may for good cause require
that a bond be given, either before or after issuance of letters. (Prob. Code, §
8481(c)). JTD
2. ~Proposed form Order: 09/07/17

RECOMMENDATION:

RFA, Court's discretion re bond. If approved, set future hearing for Accounting/Status
Review on **02/27/18**. Any accounting to be filed 30 days in advance. Note
requirements of Local Rules.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 12/19/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700271

CASE NAME: THE NINA WOOD IRREVOCABLE TRUST, DATED FEB 23,2011

HEARING:

Hearing Re: Petition for TRUST CLAIM TO REAL PROPERTY

COUNSEL:

GARY WOOD

(OBJ)...SHARON M ANDERSON

NORMA RUDAMETKIN

(PET)...CHRISTOPHER B JOHNSON

THE NINA WOOD IRREVOCABLE TRUS (TRU)...

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Future Hearing:

08/29/18 Readiness calendar

10/01/18 Court Trial

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1701130

CASE NAME: MTR OF THE PETIT FAMILY LIVING TRUST

HEARING:

Petition for TO DETERMINE VALIDITY OF PURPORTED TRUST FOR UNDUE
INFLUENCE ETC

COUNSEL:

AUDREY GEBHART-PETIT	(PET)...MICHAEL P. NEWMAN
DENISE BABCOCK	(PET)...MICHAEL P. NEWMAN
FRANK A PETIT	(PET)...MICHAEL P. NEWMAN
JULIE CARUSO	(PET)...MICHAEL P. NEWMAN
LORI PETIT	(PET)...MICHAEL P. NEWMAN
LYNN PETIT	(PET)...MICHAEL P. NEWMAN
THE PETIT FAMILY LIVING TRUST	(TRU)...
YVETTE PETIT	(PET)...MICHAEL P. NEWMAN

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500100

CASE NAME: MTR OF JOSHUA EDWARD ANDREWS SR

HEARING:

Accounting Review

COUNSEL:

JOSHUA EDWARD ANDREWS SR (CEP)...J. DAVID HORSPOOL

MARLENE ANDREWS-SCOTT (CPE)...LENITA A SKORETZ

MARLENE ANDREWS-SCOTT (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MARLENE ANDREWS-SCOTT is GRANTED

VACATE – Ex Parte Petition to Dispense with Accounting and Order entered
10/06/17.

(nb)

FUTURE HEARING DATES:

01/18/19 Accounting Review

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Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600310

CASE NAME: IVORY KING

SEE ALSO 18

HEARING:

Hearing Re: OSC Re: Dismissal

COUNSEL:

IVORY KING

(CTP)...

KAYSHA KING

(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by IVORY KING is GRANTED

GENERAL INFORMATION

Continued from 11/29/16. Court clears probate notes 1 (venue) and 2 (undated signature on capacity declaration). Matter continued for remaining notes to be cleared.

Continued from 03/21/17. Court clears probate note 4 re Proof of Certificate of Completion of Conservatorship Class. Matter continued for petitioner to clear remaining probate notes.

Continued from **06/27/17** to clear probate notes.

Matter set at 09/26/17 hearing due to non-appearance. Court orders petitioner, Kaysha King, to be personally present at hearing. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON **OSC re Dismissal** on Petition for Appointment of Conservator person only by Kaysha King (daughter)

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

1. Petitioner seeks medical powers. Capacity Declaration filed 10/25/16.
2. Return of Citation filed 12/07/16.
3. Court Investigator Report filed on 11/23/17.
4. Certificate of Completion of Conservatorship Class filed 03/15/17.
5. Need Notice of Hearing and Proof of Service on siblings: Sharon Lincoln, Carla King, Gwendolyn King, Vernessa Boults, and children: Ivory King, Jr., Delon King, on mandatory California Judicial Council Form GC-020.
6. ~Proposed Form Order: 10/21/16

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RECOMMENDATION

Need to clear note 5. If approved, set hearing for Compliance Review for **07/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 18

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600310

CASE NAME: IVORY KING

SEE ALSO 17

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IVORY KING

(CTP)...

KAYSHA KING

(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by IVORY KING is GRANTED

See prior matter #16.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700011

CASE NAME: JOHN MORALES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SILVIA GUEVARA SALAZAR

COUNSEL:

JOHN MORALES (CPE)...
SILVIA GUEVARA SALAZAR (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by JOHN MORALES is GRANTED

GENERAL INFORMATION

Silvia Guevarra Salazar Appointing Limited Conservator of the Person on 05/16/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700312

CASE NAME: JORGE ISAAC ALVARADO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LILIANA ALVARADO (PET)...PRO/PER
JORGE ISAAC ALVARADO (CEE)...CANDICE A GARCIA-RODRIGO

Request for Waiver of Court Fees and Costs filed by JORGE ISAAC ALVARADO is GRANTED

XREF: CONPS1700313 (Rolando, Yesenia, Aubrey, Joshua, Julian Corral)

GENERAL INFORMATION

Continued from 10/03/17. Court dispenses with notice to paternal grandparents and notes proposed conservatee has already reached the age of 18 years old. Attorney Candice A Garcia-Rodrigo appointed. Court notes it has reviewed the IRC and CI Reports. Notice by Judicial Assistant.

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make and consent to all medical decisions.
2. Petitioner seeks medical powers. Capacity Declaration filed 09/14/17.
3. Petitioner seeks civil rights not be limited without court order. JTD
4. Proposed conservatee is developmentally disabled. IRC report filed.
5. Court Investigator report filed.
6. Proposed conservatee is developmentally disabled. **Need report by court-appointed counsel, Attorney Candice A Garcia-Rodrigo.**
7. List of Required Contact Information filed 08/17/17 is missing father, maternal grandparents, and brothers. Need completed form.
8. Need Certificate of Completion of the Conservatorship Training Class.

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

9. Return of Citation with proof of personal service filed 09/14/17.
10. ~Proposed Form Order: 08/17/17

RECOMMENDATION

Need to clear notes 6-8. If approved, set hearing for Compliance Review for **07/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.
(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700403

CASE NAME: MTR OF MICHELLE AIKEN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JOHNNIE AIKEN	(CP)...FULLERTON LEMANN SCHAEFER & DO
MICHAEL AIKEN	(CP)...FULLERTON LEMANN SCHAEFER & DO
MICHELLE AIKEN	(CEP)...

GENERAL INFORMATION

Ex Parte orders granted 11/09/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by father, Michael Aiken and mother Johnnie Aiken ["Petitioners"].

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

- 1 Petitioners request bond in the amount of \$20,000 be fixed. However, as Sections 3(2-5) are incomplete, it cannot be determined if a \$20,000 bond is sufficient. Need estimated value of personal and real property via verified supplement.
- 2 Petitioner seeks Pr. C. § 2590 powers but do not specify orders, powers and reasons. Need Attachment 1d via verified supplement
- 3 Petitioners seek medical powers. Medical Capacity Declaration incomplete at Sections 4a & 4b. Need verified supplement.
- 4 **Court Investigator's Report filed.**
- 5 Need return of Citation.
- 6 Need Notification to Court of Address on Conservatorship form.
- 7 Need Certificates of Completion re Conservatorship Class.
- 8 ~Proposed Form Orders/Letters 11/02/17.

RECOMMENDATION:

Need to clear notes 1-3 & 5-7 then Court's discretion. If approved, set hearing for Compliance Review for **07/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); a Determination of

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

Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 22
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700411

CASE NAME: MTR OF ARTHUR GENE FELDMAN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
ARTHUR GENE FELDMAN (CEP)...
CORRY FELDMAN (CPE)...PRO/PER
JESSICA ROUNDTREE (PET)...PRO/PER

X-REF: CIFMS 1700007 (RO re: son, Mark Bruner)
GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by son, Corry Feldman as petitioned by Jessica Roundtree.

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

1. Outdated petition used that does not include Indian Ancestry questions. JTD.
2. Petitioner requests bond be fixed in the amount of \$10,000. However, estimated estate valued at \$85,000. Suggest bond of \$93,500 (includes recovery). JTD.
3. Section 1 to petition [LF, p. 2] does not specify the type of orders sought. Need verified supplement.
4. Petitioner seeks medical powers. Need Medical Capacity Declaration with dementia attachment GC-335A.
5. Petitioner requests dementia powers; need appointment of counsel and report be same.
6. List of Required Contact form does not include Corry Feldman.
7. Need Court Investigator's Report.
8. Need return of Citation
9. Need Notice of Hearing with proof of service
- 10. Certificate of Completion re: Conservatorship Class filed.**
11. ~Proposed Form Order/Letters 11/09/17.

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

RECOMMENDATION:

Court to appoint counsel then need to clear notes 3-9. Courts discretion re notes 1 & 2. If approved, set hearing for Compliance Review for **07/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino
Page: 23
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: VC VS00302

CASE NAME: MATTER OF NEIL H HASKIN

HEARING: Final Account and Report of FRED A HASKIN, ANNE HASKIN and
Petition for allowance of fees filed.

COUNSEL:

ANNE HASKIN	(CPE)...EDWARD G. OPERINI
FRED A HASKIN	(CPE)...EDWARD G. OPERINI
NEIL H. HASKIN	(CEP)...
ROBETA L TAYLOR	(PET)...ROBERTA L. TAYLOR & ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 11th and Final Account; Petition to Terminate
Conservatorship; Exonerate Bond; and Distribution; Petition for Attorney Fees

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

1. Account period 01/01/16 to 07/31/17. Conservatee died 05/29/17. Need accounting for the period that ended on the date of death and separate accounting for the period subsequent to the date of death. Pr.C. §2620(b).
2. Assets on hand \$1,714,241.13 (market value of \$1,788,688.59) consisting of \$176,410.21 in cash and remaining \$1,537,830.92 in securities/2 vehicles.
3. Schedule C, [LF p. 47] indicates caregiver monthly payments to Marie Haskin on 04/29/16 and 04/01/16. Also indicates payments on 06/15/17 to Rescare Homecare (caregiver); payments to Anne Haskin (caregiver) on 06/05/17, 07/07/17, and 07/26/17. Conservatee passed away 05/29/17, need verified supplement clarifying payments.
4. Attorney requests fees of \$1,155.00 and costs of \$465; billed at \$150/hour for 7.7 hours, total \$1,620. Itemized [Accounting LF p.86].JTD
5. Need attorney, Edward Operini's signature on petition, per Local Rule 20-903.
6. A Substituted Judgment to create and fund Conservatee's Revocable Living Trust and Pour-Over will was approved on 02/27/09. On 12/24/16 Court confirmed Trust under court supervision.
7. Current Trustees, Fred and Anne Haskin of said Trust request to terminate conservatorship and distribute the remainder of the estate after expenses paid

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

to the beneficiaries, Fred and Anne Haskin. Accordingly, petitioners request that the court unblock account with Edward Jones and transfer to themselves as the beneficiaries. JTD

8. Summary of Account total charges and credits do not match. Need corrected Summary of Account.
9. Bond is currently set at \$275,000. Appears adequate. Petitioner requests to exonerate bond in the amount of \$275,000.00 after this accounting. JTD
10. Proposed order submitted 10/31/17 contains verbiage that bond be exonerated and discharge to occur upon filing of receipts; however, bond cannot be exonerated and Discharge will not occur until entry of a final discharge order.

RECOMMENDATION:

Court's discretion 1, 3, 5 & 8 If approved, set next hearing for final discharge for **01/18/19.**

(cs)

Superior Court of Calif, County of San Bernardino
Page: 23A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS03123

CASE NAME: MTR OF MIRIAM Y. GIRON

SEE ALSO 23B

HEARING:

Hearing Re: STATUS OF MOVE

COUNSEL:

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

GENERAL INFORMATION:

Continued from 12/12/17. Court inquired of petitioners as to whereabouts of Miriam Yessica Giron. Petitioners represent Miriam Giron is in a facility in Adelanto; however, petitioners advise the court Miriam has been moved out of the court ordered facility in the past. The Court orders petitioners to move Miriam back to Serenity Adult Day Care in Adelanto by Friday, December 8, 2017 by 4:00pm. Referred to Court Investigator for investigation and report. Court orders the Court Investigator to check on Miriam Yessica Giron and to report to the court if Miriam is back at Serenity Adult Day Care in Adelanto. The Court investigator may appear at the next hearing for an oral report regarding confirmation of visit to Miriam Yessica Giron and confirmation she is residing at Serenity Adult Day Care in Adelanto Court further orders Rose Rosado to confirm if Miriam Yessica Giron is in Serenity Adult Day Care in Adelanto at the next hearing on 12/19/17.

THIS CASE IS SET FOR HEARING ON Status of Move

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

1. Need CI Report.

RECOMMENDATION:

Court's discretion

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 23B ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 9:30 DEPT: S35P

CASE#: SC SS03123

CASE NAME: MTR OF MIRIAM Y. GIRON

SEE ALSO 23A

HEARING:

Hearing Re: OSC RE REMOVAL OF CO-CONSERVATORS

COUNSEL:

JAZMIN K. GIRON

(CP)...PRO/PER

MARIA G GIRON

(CP)...

MIRIAM Y. GIRON

(CTP)...SHERRI L KASTILAHN

MIRIAM YESSICA GIRON

(CEE)...

GENERAL INFORMATION:

Jazmin K, Giron and Maria G. Giron appointed Limited Conservators on 10/28/10. Matter set at **11/28/17** hearing, wherein, the court suspended the powers of co-conservators and ordered that the Social Security Representative Payee be re-designated to IRC, forthwith. Court also ordered that Miriam Yessica Giron is to be moved to the Adelanto Facility on 12/01/17 and ordered Miriam Yessica Giron to attend tender hearts day program. Co-Conservators to be personally present for hearing and they fail to appear, Court will remove them as co-conservators.

Notice by Judicial Assistant.

Continued from 12/12/17.

THIS CASE IS SET FOR HEARING ON **OSC re Removal of Co-Conservators** and Appointment of Successor Conservator.

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

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

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

RECOMMENDATION:

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

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS0900497

CASE NAME: MANUEL RAMIREZ

HEARING:

FIRST AND FINAL Account and Report of SAN BERNARDINO COUNTY
PUBLIC ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

CATALINA MONTEZ	(PET)...JOSEPHINE A. RICH
MANUEL RAMIREZ	(DEC)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

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

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

1. Accounting period 04/27/07 to 08/08/17.
2. Assets on Hand \$24,858.13 consisting of cash.
3. Petitioner and Attorney request statutory compensation of \$2,518.88. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 8 hours' time. Generally described [LF, p. 26]. JTD.
5. Attorney requests extraordinary fees of \$980 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 2.8 hours' attorney time. Itemized [LF, p. 27]. JTD.
6. Petitioner alleges the sum of \$5,915.90 should be paid to the former Administrator, Catalina Montez, and Petitioner should be authorized to pay such sum. JTD.
7. Petitioner requests authorization to withhold the sum of \$4,000 as a reserve. JTD.
8. Proposed Form Order 09/05/17 does not include findings re: sole and separate property; or findings re: known creditors.

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

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 25

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1300422

CASE NAME: DEBRA MARY SAVAGE-EVANS

HEARING:

FIRST AND FINAL Account and Report of DIANE M SCHUMANN and
Petition for allowance of fees filed.

COUNSEL:

DEBRA MARY SAVAGE-EVANS	(DEC)...
DIANE M SCHUMANN	(PET)...MARIA G NICIFOROS
MARIA G NICIFOROS ESQ	(TP)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

Petitioner's powers of administration were suspended on 02/01/16.

Letters of Special Administration issued to PA on 04/06/16.

Continued from **05/10/16 and 07/26/16**. Court notes that the notice of proposed action was filed on 09/30/13.

Continued from **10/11/16** at request of counsel. Oral report by Craig Parker.

Continued from **11/29/16, 01/17/17 and 03/28/17**. Oral report given by Craig Parker.

Continued from 06/13/17 and 09/19/17 at request of Maria G Niciforos. Counsel indicates that Kent Savage has also passed away.

THIS CASE IS SET FOR HEARING ON **Amended (05/04/16)** First and Final Account and Petition for Fees.

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

1. Accounting period 01/30/13 to 03/28/16.
2. Assets on Hand \$46,711.76 in cash.
3. Petitioner requests statutory fees of \$11,551.52. Calculated.
 - a. Petitioner requests this Court allow statutory compensation less \$12,590.01, the amount Petitioner previously inadvertently erroneously reimbursed and paid herself, leaving a balance due to the Estate by Petitioner of \$1,038.49 to be paid by Petitioner and collected by PA. **Supp. (11/29/16) represents the balance due was mailed to PA on 10/807/16.**
4. Attorney requests reimbursement of the outstanding balance for costs advanced of \$765.00. Itemized [LF, p.79].

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

5. Attorney requests statutory fees of \$11,551.52 less the amount of \$1,000.00 due to Craig Parker. JTD.
6. Petitioner indicates she used the services of Michelle Boyes who assisted with preparation for sale of the house and requests the court approve the sum of \$5,382.50 as compensation. Billed at \$15/hour. Itemized [LF, pgs. 60-64]. Petitioner requests Craig M. Parker to pay Ms. Boyes for such services.
7. George Ross was inadvertently overpaid by the Petitioner for his mileage (\$707) and for fees (\$313) totaling \$1,020.00 and has agreed to reimburse the Estate forthwith.
8. Amended Account (05/04/16) indicates partial distribution was made to petitioner, consisting of the 2004 Saturn, with the approval of PA, Craig Parker. The value of the vehicle (\$2,500) will be deducted from Petitioner's ultimate share of the estate. Petitioner requests transfer of vehicle to her as a devisee by Craig. M. Parker. **Receipt by Diane M. Shuman for pink slip to vehicle filed 11/29/16.**
9. Petitioner requests authority for Craig M. Parker to pay four Creditor's Claims that were presented and approved in the amounts of \$3,847.26; \$2,086.27; \$778.81; and \$666.01.
10. Under the terms of the Will admitted on 06/27/13, Decedent specifically left all personal assets to Petitioner. However, there is no mention of to whom the real property was to be distributed and there is no residual clause. Petitioner believes it was the intent of Decedent to leave the entire Estate to Petitioner, but submits the matter to the Court and presumes that the Court will find that the net sale proceeds of the house should be distributed to Decedent's father. John Savage.
 - a. On 02/02/15, John Savage, father of Decedent and heir at law, passed away. Petition requests PA, Attorney Parker, be authorized and directed to distribute to the heirs of John D. Savage, father of Decedent. If approved, Court to require Pr. C. § 13100 petitions. **Pr. C. § 13100 petition filed 01/17/17 is not signed by Kent Savage. Counsel indicates that Kent Savage has also passed away. Question whether Kent was survived by issue(s)? Need verified supplement.**
11. Petitioner requests her powers to be reinstated and that she performs all acts necessary to close out the Estate.
12. Notice given.
13. Notice of non-payment of bond filed.
14. Proposed Order 05/04/16 distributes directly to John D. Savage's heirs.

RECOMMENDATION:

Need to clear note 10a then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 26

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

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1400175

CASE NAME: JAMES LEONARD HILL

HEARING:

Hearing Re: STATUS OF ACCOUNTING OF MARILYN HILL

COUNSEL:

JAMES LEONARD HILL	(DEC)..
JENNIFER L FIELD	(TP)...PRO/PER
MARILYN HILL	(PET)...

GENERAL INFORMATION:

Continued from **06/06/17**. Court issues citation on Jennifer Field as Craig Parker for Public Administrator indicates that Jennifer Field took attorney fees without court approval. Citation issued to: Jennifer Field who is cited and required to appear. Court orders that Marilyn Hill be personally present in court.

Continued from 09/26/17. The Court orders attorney Jennifer Field to file an accounting on or before 12/19/17. The Public Administrator is to reimburse Ms. Field for the filing fee. Citation issued to: Marilyn Hill who is cited and required to appear on 12/19/17.

THIS CASE IS SET FOR HEARING ON OSC re Status of Accounting of Marilyn Hill.

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

1. Matter set at 03/14/17 hearing, wherein, the Court appointed Public Administer as general administrator.
2. Citation issued as to Marilyn Hill. Need return of citation.
3. **Citation issued as to Jennifer Field. Need return of citation.**
4. **First and Final Account filed and set for 03/13/18.**

RECOMMENDATION:

Need return of citations then Court's discretion.

(nb)

FUTURE HEARING DATES:

03/13/18 First and Final Account

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

Superior Court of Calif, County of San Bernardino

Page: 27

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1400970

CASE NAME: Marcia Beller

HEARING:

Accounting Review

COUNSEL:

MARCIA BELLER

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

Order Authorizing the PA to Collect and Sell the Property of Decedent per Pr.C. § 7660(a)(1) entered 12/01/14.

Continued from **01/12/16** at request of counsel. Waiting on the life insurance monies to fund.

Continued from 06/28/16, 09/20/16 and 09/19/17 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Need final inventory and appraisal
2. No accounting. Need same.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 28

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500661

CASE NAME: HOWARD PTTTMAN

SEE ALSO 29

HEARING:

Hearing Re: OSC RE SUCHARGE ON MICHAEL JONES OF \$10,000.00

COUNSEL:

HOWARD PITTMAN

(DEC)...

MICHAEL JONES

(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MICHAEL JONES is GRANTED

GENERAL INFORMATION

Continued from **11/17/16, 02/09/16 and 04/06/17**. No appearance. Citation issued to Michael Jones.

OSC set **on 04/06/17** and further OSC on **05/25/17** when there was no appearance or documents filed.

Continued from 10/26/17. No appearance. Court suspends the powers of the administrator and refers this case to the public administrator.

THIS CASE SET FOR HEARING ON **OSC re Surcharge of \$10,000/Accounting Review/Status.**

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

1. Letters Testamentary issued to Michael Jones, son/sole beneficiary, on 09/10/15; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. **Service of citation on Michael Jones was unsuccessful.** For sale sign on property. Does court wish to inquire if server contacted real estate company?

RECOMMENDATION

Court's discretion re OSC. Inquire status of Inventory and Appraisal and accounting/status report.

(lc/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 29

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500661

CASE NAME: HOWARD PTTTMAN

SEE ALSO 28

HEARING:

Hearing Re: STATUS RE I&A/ACCOUNTING REVIEW

COUNSEL:

HOWARD PITTMAN (DEC)...

MICHAEL JONES (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by MICHAEL JONES is GRANTED

See prior matter #28.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 30

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500825

CASE NAME: MYRL MARLENE STALLINGS

SEE ALSO 31

HEARING:

Hearing Re: Accounting Review by PA

COUNSEL:

ALICIA MAE STALLINGS	(PET)...PRO/PER
DARRELL L. STALLINGS	(PET)...PRO/PER
DEPARTMENT OF HEALTH CARE SERV	(TP)...
MYRL MARLENE STALLINGS	(DEC)...
PUBLIC ADMINISTRATOR	(CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Public Administrator appointed Successor Administrator on 07/11/17.
2. Declaration Lack of Assets filed by PA on 10/03/17 alleges there are no other known assets.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

Page: 31

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500825

CASE NAME: MYRL MARLENE STALLINGS

SEE ALSO 30

HEARING:

- Account and Report of DARRELL L. STALLINGS, ALICIA MAE STALLINGS and Petition for allowance of fees filed.

COUNSEL:

ALICIA MAE STALLINGS	(PET)...PRO/PER
DARRELL L. STALLINGS	(PET)...PRO/PER
DEPARTMENT OF HEALTH CARE SERV	(TP)...
MYRL MARLENE STALLINGS	(DEC)...
PUBLIC ADMINISTRATOR	(CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Attorney Christopher Murtagh for former Co-Executors, Darrell L. Stallings and Alicia M. Stallings.

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

1. Attorney requests statutory fees of \$6,394.00. Calculated.
2. Counsel indicates he rendered services on behalf of the former co-executors totaling \$3,625.00. Billed at \$250/hour for 14.5 hours attorney time. Itemized [LF, p. 15]. JTD.
 - a. Court may wish to have attorney establish that all ordinary compensation has been earned prior to granting extraordinary compensation (In re Walker Estate (1963) 221 Cal.App.2d 792.). JTD.
3. Attorney alleges former Co-Executors have failed to perform the duties necessary of them. As such, no statutory compensation is due. JTD.
4. Need Summary of Account and supporting schedules
5. Need balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c).
6. Need findings re: sole and separate property.
7. Need legal description of the real property, including common address, if any, and assessor's parcel number.

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

8. Real property was sold during this account period. Need copy of closing statement per Local Rule 20-910.
9. Need verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C. §1064(a)(5).
10. Account indicates creditor's claims consisting of a Property Tax Bill and a DHS bill have not been paid; however, there are no allowances or rejection notices in the file regarding these claims. Need verified supplement confirming status of these claims.
11. Attorney requests to be relieved as counsel for Darrell L. Stallings and Alicia M. Stallings under CCP §284(2). JTD.
12. Need Notice of Hearing with proof of service to include prior co-executors and outstanding creditors.
13. No Summary of Account. It cannot be determined whether or not this accounting balances. Need to file proper accounting that complies with Pr. C. §1060 et seq.

RECOMMENDATION:

Need amended accounting to be set on first check calendar not sooner than **01/30/19 or thereafter**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 32

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 12/19/17 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700876

CASE NAME: HERBERT C COCHRAN

HEARING:

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

COUNSEL:

HERBERT C COCHRAN (DEC)...

PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

GENERAL INFORMATION:

Letters of Special Administration issued 09/12/17, no bond.

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

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

1. No bond – public administrator.
2. Need proof of publication.
3. Decedent had a predeceased spouse [Virginia L. Cochran] who died not more than 15 years before decedent and who owned an interest in real property that passed to decedent. Section 7(2) is not completed. Need same.
4. Petitioner requests that, in accordance with Pr. C. §1212 and CCP §415.50, the Publication of the Notice of Petition to Administer Estate be deemed sufficient notice to any possible heirs of the decedent in order to proceed with the administration of this estate and that no further personal notice need be given.
5. ~Proposed Form Order/Letters 09/05/17

RECOMMENDATION:

Need to clear note 2-3, no bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 33

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

MISC.

DATE: 12/19/17 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1500520

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

VACATED

HEARING:

Hearing Re: Court Trial (Day #2)

COUNSEL:

LYLE LEROY MALLORY

(DEC)...

RAYMOND SCOTT MALLORY

(PET)...PRO/PER

RICHEY LYLE MALLORY

(RES)...H FORD SHERIDAN

THE CHAPPY TRUST

(TRU)...

Future Hearing:

12/20/17 Court Trial

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300794

CASE NAME: Lawrence Alf

HEARING:

Hearing re Final Discharge

COUNSEL:

PATRICK O'HAIR

(PET)...JOHN F WEBER

LAWRENCE ALF

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Approving First and Final Accounting entered 02/02/17.
2. No receipts. Need same.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500475

CASE NAME: MIGUEL GALVAN

HEARING:
Accounting Review

COUNSEL:
CHRISTINA GALVAN (PET)...CRAIG M PARKER
MIGUEL GALVAN (DEC)...
WELLS FARGO BANK, N.A. (TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order on Status Report entered 12/20/16.
3. No accounting or updated status report. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500476

CASE NAME: RENE ROBERT HELESIC

HEARING:

Accounting Review

COUNSEL:

JACKIE DENISE HUBER(HELESIC)	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(SA)...CRAIG M PARKER
RENE ROBERT HELESIC	(DEC)...
STATE OF CA FRANCHISE TAX BOAR	(TP)...

GENERAL INFORMATION

Continued from **09/19/16**. No appearance. Jackie Huber to be present at next hearing.

Matter set on **11/10/16**. No appearance. Court refers the matter to the Public Administrator for possible successor appointment. Notice by Judicial Assistant. Continued from **01/31/17**. Jackie Huber failed to appear. Petitioner failed to file final inventory and appraisal and accounting or status report. Citation issued to: Jackie Denise Huber(Helesic) who is cited and required to appear on 4/11/17. Court suspends the powers of the administrator Jackie Denise Huber (Helesic).

Continued from **04/11/17**. Attorney Parker states the Public Administrator has not been able to locate Jackie Huber (Helesic). Counsel states the real property was sold 07/22/16 according to the deed. Attorney Parker to contact the Public Administrator to make sure that the investigation for prior administrator included both Huber and Helesic.

Continued from 06/27/17.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Letters Testamentary issued to Jackie Huber, spouse, on 08/08/15; full authority, no bond.
2. Need final Inventory and Appraisal
3. Need accounting or status report.
4. Need return of Citation. **Affidavits of Unsuccessful Service filed 03/24/17.**

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

RECOMMENDATION
Court's discretion
(lc/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600656

CASE NAME: MTR OF CYNTHIA MARIE THOMAS-WILLIAMSON

HEARING:
Accounting Review

COUNSEL:
CYNTHIA MARIE THOMAS-WILLIAMSON (DEC)...
DELMAR THOMAS (PET)...HOLSTROM BLOCK & PARKE

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

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 08/23/17, full authority, no bond.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600784

CASE NAME: RUTH ESTER JAMES

HEARING:

FIRST AND FINAL Account and Report of JANET M PENNMORRIS and
Petition for allowance of fees filed.

COUNSEL:

JANET M PENNMORRIS (PET)...QUINTON
RUTH ESTER JAMES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Janet Penn-Morris ["Petitioner"].

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

1. Accounting period 10/30/15 to present.
2. Assets on Hand \$128,649.08 consisting of \$125,649.08 cash held in blocked account and vehicle valued at \$3,000.
3. Petitioner waives statutory compensation and instead, pursuant to Decedent's Will in the third paragraph, takes 15% of net proceeds in the sum of \$18,847.36.
4. Attorney requests statutory fees of \$7,660.00. Calculated.
5. Need proof of service to Notice of Proposed Action re sale of real property.
6. Petitioner requests an order releasing funds from blocked account to pay Creditor's Claim by Arrowhead Credit Union in the amount of \$14,142.51 plus 10% interest from the date of the order. JTD.
7. Proposed Form Order affixed to creditor claim filed 09/27/17 does not include findings re: sole and separate property; findings re taxes have been paid, or reserve made for taxes.

RECOMMENDATION:

Need to clear note 5 then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600840

CASE NAME: MTR OF WILLIAM ROGER WHETSTONE

HEARING:
Accounting Review

COUNSEL:
JUNE SCOGGINS HERNANDEZ (PET)...CRAIG M PARKER
WILLIAM ROGER WHETSTONE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order of Appointment entered 10/11/16, full authority, \$332,000 bond. Need Letters.
2. No accounting or status report of administration. Need same.

RECOMMENDATION:
Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600865

CASE NAME: MTR OF DAVID ALLEN DUNCAN

HEARING:

Accounting Review

COUNSEL:

DAVID ALLEN DUNCAN

(DEC)...

PAUL DUNCAN

(PET)...KYLE A PATRICK

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued 10/11/16, full authority, no bond.
2. Need final inventory and appraisal.
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700784

CASE NAME: MTR OF MI YANG

HEARING:

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

COUNSEL:

CHOONG GEOL YANG (PET)...ANDREW KIM
MI YANG (DEC)...

GENERAL INFORMATION:

Continued from 11/07/17. No assets at this time – wrongful death litigation pending. Note 3 cleared, the brother (petitioner) is the sole heir.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother, Choong Geol Yang [“Petitioner”]

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

1. Petition alleges all heirs waive bond. However, the only bond waiver is signed by Attorney Kim. Need Mandatory Waivers of Bond by Heir or Beneficiary. Estimated value of estate is not given. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Section 5(7) or (8) to petition regarding issue of a predeceased child is blank. Need verified supplement.
3. Need proof of publication.
4. Petitioner alleges that petitioner is the sole beneficiary and waives bond.
5. ~Proposed Form Order/Letters 08/04/17.

RECOMMENDATION:

Need to clear notes 1-3 then Court’s discretion re: bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days’ in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700785

CASE NAME: DOROTHY JANE GODDARD

HEARING:

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

COUNSEL:

DEAN DILLON BROWN (PET)...HORSPOOL & HORSPOOL
DOROTHY JANE GODDARD (DEC)...

GENERAL INFORMATION:

Continued from 11/07/17. Travis Goddard objects to the petition, written objections to be filed prior to next hearing or the objections will be deemed waived.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by grandson, Dean Dillon Brown ["Petitioner"].

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

1. Petition is not signed or dated by Attorney Martin. Need same.
2. Petitioner requests bond be fixed in the amount of \$20,000 and anything in excess of \$20,000 be placed in a blocked account at Pacific Premier Bank in Redlands, CA. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
3. Proof of publication filed.
4. No written objections as of the review of this matter.
5. ~Proposed Form Order/Letters 08/04/17.

RECOMMENDATION:

Need to clear note 1 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days' in advance. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700950

CASE NAME: VICTORIA NELLIE MENEFEE

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARJORIE LIMBRICK (PET)...PRO/PER

PATRICIA JOHNSON (PET)...PRO/PER

VICTORIA NELLIE MENEFEE (DEC)...

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by daughters Patricia Johnson and Marjorie Limbrick ["Petitioners"].

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

1. Exhibit "A" [LF, p. 7] reflects a property in Clark County, Nevada. Need further clarification via verified supplement.
2. Petitioners request a determination that decedent's real property located at Rialto, CA in San Bernardino County pass to petitioners without administration. Petitioners are decedent's issue and purported sole heirs per intestate succession.
3. ~Proposed Form Order 09/26/17.

RECOMMENDATION:

Need to clear note 1 then Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700956

CASE NAME: WILLIAM R CHRISTIAN LIVING TRUST

HEARING:

Petition for ORDER CONFIRMING TITLE TO CERTAIN REAL PROPERTY
IN NAME OF TRUST

COUNSEL:

WILLIAM R CHRISTIAN II (TEE)...RODI POLLOCK PETTKER
WILLIAM R CHRISTIAN LIVING TRU(TRU)...

X-REF: CIVDS 1714898

Currently under review by Legal Research.
(LR)

Notice given
(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701124

CASE NAME: MTR OF WILLIE BELL BONNER

HEARING:

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

COUNSEL:

DALE E BONNER

(PET)...PRO/PER

WILLIE BELL BONNER

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by second named executor, Dale E. Bonner ["Petitioner"-son].

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

1. Will waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Proof of publication filed.
3. ~Proposed Form Order/Letters 11/09/17.

RECOMMENDATION:

RFA, no bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 14

HEARING:

Petition for LETTERS OF SUCCESSOR ADMINISTRATION

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION

Continued from 04/26/17, 07/25/17 and 09/19/17 to clear notes.

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administration with full authority under IAEA by Sandra Thomas Stell, great niece.

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

1. Letters of Administration with Will Annexed issued to Verna Grasso, paternal grandniece on 8/23/02, with funds held in blocked account in lieu of bond. Verna passed away on **12/29/16**.
2. As the will has already been admitted to probate, it appears to be a petition for successor administrator.
3. Petitioner requests bond of \$20,000; however, cash and real property appear to be valued at \$42,020. Court to require bond of \$42,020.
4. Notice to Petition to Administer Estate and proof of service filed 04/05/17. However, need Due Diligence Declarations as to heirs with unknown whereabouts.
5. Notice of Death of Administrator filed 04/05/17; need proof of service.
6. Proof of Publication filed 04/17/17 is not verified. Need amended Proof of Publication.
7. ~Proposed Form Order: 03/07/17.

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

RECOMMENDATION

Need to clear notes 4-6 then Court's discretion re bond. If approved, set Accounting/Status Review for **02/28/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 13

HEARING:

SIXTH Account and Report of VERNA GRASSO and Petition for allowance of fees filed.

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION:

Administrator Verna Grasso died on 12/29/16.

Continued from 07/25/17 and 09/19/17 to clear notes.

THIS CASE IS SET FOR HEARING ON Sixth and Final Account and Petition for Fees by Attorneys for Petitioner C.L. Farrell and as former Attorneys for the late Verna Grasso, Deceased Administrator.

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

1. Accounting period 10/12/15 to 02/28/17.
2. Assets on Hand \$45,260.36 consisting of \$40,255.40 in cash and remaining in a ½ interest in unimproved real property.
3. Compensation is not requested.
4. Reimbursement for costs is not requested.
5. Petitioner requests an Order Authorizing the Estate to Abandon its Undivided one-half tenancy in common interest in the unimproved, vacant lot located in Newberry Springs, CA, having a 01/26/16 reappraised value of \$2,000 due to its demonstrated unmarketability, to conserve the Estate cash assets and enable the Estate assets to be distributed to its heirs at law and for the Estate to be brought to a close. Consents are not affixed as alleged. **Need same by all Nolen Estate Heirs.**
6. Need Notice of Hearing with proof of service.

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

7. Petitioner requests Attorney Farrell be authorized and directed to issue Final Distribution checks to the Nolen Heirs from the unblocked Community Bank Nolen Heirs Checking Account.
8. Petitioner requests an order authorizing and directing her to retain the sum of \$5,000 in the Community Bank Nolen Heirs Checking Account for closing costs.
9. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 5-6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA
SEE ALSO 16, 17, 18

HEARING:
Hearing re Final Discharge

COUNSEL:

CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
PHILIP FELIX GARCIA	(DEC)...
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL

Request for Waiver of Court Fees and Costs filed by CHRISTINE GARCIA IRISH is GRANTED

XREF: PROPS1100842 (Miquela Macias Garcia)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order After Bench Trial Settling First and Final Account of Successor Trustee Cindy Garcia-Eastlick et seq. entered 10/03/17.
2. No receipts. Need same.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 16

San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 15, 17, 18

HEARING:

Hearing Re: Proof of order

COUNSEL:

CHRISTINE GARCIA IRISH

(PET)...HUTTON, ADAMS &

PHILIP FELIX GARCIA

(DEC)...

CINDY GARCIA-EASTLICK

(BEN)...C. L. FARRELL

INTERNATIONAL FIDELITY INSURAN

(PET)...PRO/PER

CINDY GARCIA-EASTLICK

(TP)...C. L. FARRELL

XREF: PROPS1100842 (Miquela Macias Garcia)

VACATE – Order after Bench Trial et seq. signed and entered on 10/03/17.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 15, 16, 18

HEARING:

Hearing Re: PROOF OF BOND

COUNSEL:

CHRISTINE GARCIA IRISH	(PET)...HUTTON, ADAMS &
PHILIP FELIX GARCIA	(DEC)...
CINDY GARCIA-EASTLICK	(BEN)...C. L. FARRELL
INTERNATIONAL FIDELITY INSURAN	(PET)...PRO/PER
CINDY GARCIA-EASTLICK	(TP)...C. L. FARRELL

Request for Waiver of Court Fees and Costs filed by CHRISTINE GARCIA IRISH is GRANTED

XREF: PROPS1100842 (Miquela Macias Garcia)

GENERAL INFORMATION:

Continued from 10/03/17.

THIS CASE IS SET FOR HEARING ON Proof of Bond.

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

1. Per order entered 07/31/17, Court fixed bond of \$166,000 by Cindy Garcia-Eastlick, as Successor Trustee of Decedent's Trust.
2. Proof of \$166,000 bond filed. However, **case name is incorrect**. Need corrected bond.

RECOMMENDATION:

Need to clear note 2.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 18

San Bernardino Superior Court

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 8:30 DEPT: S36P

CASE#: SPR SS51035

CASE NAME: PHILIP FELIX GARCIA

SEE ALSO 15, 16, 17

HEARING:

Accounting Review

COUNSEL:

CHRISTINE GARCIA IRISH

(PET)...HUTTON, ADAMS &

PHILIP FELIX GARCIA

(DEC)...

CINDY GARCIA-EASTLICK

(BEN)...C. L. FARRELL

INTERNATIONAL FIDELITY INSURAN

(PET)...PRO/PER

CINDY GARCIA-EASTLICK

(TP)...C. L. FARRELL

XREF: PROPS1100842 (Miquela Macias Garcia)

GENERAL INFORMATION:

Continued from 10/03/17 at request of counsel to complete accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review (re Trust)

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

1. Cindy Garcia-Eastlick appointed Interim Successor Trustee per order entered 05/25/16.
2. Per Order entered 07/31/17, Court ordered Cindy Garcia-Eastlick, as Administrator of the Estate to file a First and Final Accounting.
3. No accounting or status report of administration. Need same.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 12/19/17 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700955

CASE NAME: THE JOHN AND MARGARET GARDNER LIVING TRUST

HEARING:

Petition for ORDER CONFIRMING VALIDITY OF TRUST

COUNSEL:

CHARLES HAIMAN

THE JOHN AND MARGARET GARDNER

(PET)...PACIFIC WEALTH LEGAL

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

Page: 20

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 12/19/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600134

CASE NAME: MTR OF EVELYN RUTH GEORGE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PATRICIA LYNN RAMSEY

COUNSEL:

EVELYN RUTH GEORGE	(CEE)...PRO/PER
EVELYN RUTH GEORGE	(PET)...PRO/PER
PATRICIA LYNN RAMSEY	(CE)...JACK B. OSBORN
PATRICIA LYNN RAMSEY	(CPE)...JACK B. OSBORN

XREF: PROPS1600544 (Evelyn R George revocable living trust)

GENERAL INFORMATION

Order Appointing Conservator of the Person and Estate, Patricia L. Ramsey, entered
04/07/17.

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

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

1. Proof of mailing to Notification of Conservatee's Rights, section 5 is not dated.
Question whether a conformed copy of the Order Appointing Probate
Conservator was served? Court to inquire.
2. Care Plan is not signed by counsel. Need same.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Need final Inventory & Appraisal per Pr.C.§2610.
5. Need proof of service of Inventory & Appraisal including Instructions for
Objection per Pr.C.§2610.
6. If the conservatorship estate holds interest in real property, need proof of
recording of letters in each county where the real property is located or where
conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 21

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700096

CASE NAME: Fausto Sanabia

HEARING:

Hearing Re: STATUS ON 850 PETITION

COUNSEL:

CASTULO SANABIA

(PET)...PRO/PER

FAUSTO SANABIA

(CEE)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by FAUSTO SANABIA is GRANTED

X-REF: FAMSS 1604659

Status – no notes.

(nb)

Future Hearing:

02/27/18 Compliance review hearing

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

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700414

CASE NAME: Michael J Jackson

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAVNESHIA JACKSON (CP)...
MICHAEL J JACKSON (CTP)...

GENERAL INFORMATION

Temporary Letters issued 11/14/17.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of the person by daughter, Davenshia Jackson ["Petitioner"].

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

1. No bond – person only.
2. Petitioner seeks medical powers. Need Medical Capacity Declaration.
3. Need Court Investigator's Report.
4. Need List of Required Contacts form.
5. Need return of Citation.
6. Need Certificate of Completion re Conservatorship Class.
7. Need Notice of Hearing with proof of service.
8. Petitioner requests exclusive authority to give consent for and to require the conservatee to receive medical treatment determined to be necessary even if conservatee objects.
9. ~Proposed Form Order/Letters 11/13/17.

RECOMMENDATION:

Need to clear notes 2-7 then Court's discretion. If approved, set hearing for Compliance Review for **07/24/18** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

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

DATE: 12/19/17 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700406

CASE NAME: PROFIRIO ELIAS CASTILLO

HEARING:
Petition for Appointment of Conservator

COUNSEL:
MARIA GRACIA ELIAS (CP)...PRO/PER
PROFIRIO ELIAS CASTILLO (CTP)...JENNIFER DANIEL

GENERAL INFORMATION
Continued from 12/11/17.

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

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

1. No bond- Person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. List of Required Contacts (Local form SB-12224) indicates that father of proposed conservatee is unknown, but is listed as Providio Castillo in petition. Court to clarify.
4. Duties of Conservator and acknowledgement of receipt of handbook form filed; however, signature is not dated. **JTD**
5. Jennifer Daniel appointed as counsel. **Report filed.**
6. **Citation returned SERVED.**
7. **Need** Certificate of Completion of the Conservatorship Training Class
8. **Need** Notice of Hearing and proof of service.
 - a. **Requests to Excuse Notice filed as to father and paternal grandparents. JTD.**
9. **CI report filed.**
- 10.~Proposed Form Order: 11/02/17

RECOMMENDATION

Need to clear notes 2 & 7-8 then Court's discretion. If approved, set hearing for

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

Compliance Review for **07/23/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(ww/nb)

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

Superior Court of Calif, County of San Bernardino

Page: 24

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 12/19/17 TIME: 9:30 DEPT: S36P

CASE#: SC SS02140

CASE NAME: MTRR OF KEVIN RICHARD BARR

HEARING:

Accounting Review

COUNSEL:

CAROL L BARR

(CP)...JAMES B CHURCH

KEVIN RICHARD BARR

(CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 01/13/17.
2. Proposed Ex Parte Petition to Dispense with Accounting and Order returned for corrections. Need same.

RECOMMENDATION:

Need to clear note 2.

(nb)

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: CIF DS1700057

CASE NAME: PRAMSCHUFER VS ULLAH

SEE ALSO 2

HEARING:

Hearing Re: TO QUASH OR MODIFY DEPOSITION SUBPEONA ETC.

COUNSEL:

ANDREW PRAMSCHUFER (PET)...ROSA M MARQUEZ, ESQ
BARBARA A PRAMSCHUFER (PP)...PRO/PER
HAMMED "TONY" ULLAH (RP)...LAW OFFICES OF GARY BARSEGIAN

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Currently under review by Legal Research.
(LR)

Future Hearing:
01/04/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: CIF DS1700057

CASE NAME: PRAMSCHUFER VS ULLAH

SEE ALSO 1

HEARING:

Motion Re: NOTICE OF MOTION AND MOTION TO QUASH OR MODIFY
DEPOSITION SUBPOENA FOR PRODUCTION Filed by Petitioner HAMMED
"TONY" ULLAH

COUNSEL:

ANDREW PRAMSCHUFER	(PET)...ROSA M MARQUEZ, ESQ
BARBARA A PRAMSCHUFER	(PP)...PRO/PER
HAMMED "TONY" ULLAH	(RP)... GARY BARSEGIAN

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Currently under review by Legal Research.
(LR)

Future Hearing:
01/04/18 Readiness calendar

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200077

CASE NAME: ESTATE OF SHIRLEY MAE DARLING

HEARING:

Probate status report filed.

COUNSEL:

APRIL RENE DARLING

(PET)...CRAIG M PARKER

APRIL RENE DARLING

(PET)...DIXIE J ALLISON

SHIRLEY MAE DARLING

(DEC)...

VACATE – Waiver of Account filed and set for 03/06/18.

(nb)

Future Hearing:

03/06/18 Petition for its settlement and waiver account

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1401029

CASE NAME: KAY EULENE LANDIN

HEARING:
Accounting Review

COUNSEL:
KAY EULENE LANDIN (DEC)...
LOREE SABATINO (PET)...BROWN & BROWN

XREF: CIVDS1612554 (Sabatino –v- Pomtario Enterprises)

GENERAL INFORMATION:

Continued from **2/17/16** at request of counsel to file a quiet title action.

Continued from **6/29/16** as Quiet Title action still needs to be filed. Nothing new filed.

Continued from 09/28/16. Judge McCarville has heard the request to find this case and CIVDS1612554 related actions. These matters to be heard in S30 until issue of quiet title is resolved.

Continued from 04/04/17 and 06/13/17 at request of Counsel due to pending civil litigation. Notice to be given by Mr. Morris.

THIS CASE IS SET FOR HEARING ON accounting/status review

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

1. Letters of Administration issued 1/8/15, no bond.
2. Need final inventory & appraisal filed.
3. Need an accounting or status report filed. Need same.

RECOMMENDATION:

Inquire status.
(sa/lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500178

CASE NAME: Gloria Simonds

HEARING:

Hearing re Final Discharge

COUNSEL:

BERNARD M BIDART

(TP)...

DAVID R. SENA

(PET)...DAVID M SENA

GLORIA SIMONDS

(DEC)...

VERONICA GRANVILLE

(PET)...THOMAS W DOMINICK

X-REF: GARPS 1600025

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Accounting entered 12/15/16.
2. No receipts. Need same.
3. Need Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500787

CASE NAME: MTR OF PAUL R HANLEY(MASTERFILE)

HEARING:

Hearing Re: FURTHER STATUS REPORT

COUNSEL:

ALEXANDRIA TOPPING

(OBJ)...PECCORINI & PECCORINI

PAUL R HANLEY

(DEC)...

TRACY LYN COX

(PET)...JANIS B MARTINDALE

TYLER TOPPING

(PECCORINI & PECCORINI)

GENERAL INFORMATION:'

THIS CASE IS SET FOR HEARING ON Further Status Report

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

1. Matter set at hearing held on 05/09/17, wherein, the Court approved the status report and signed an order.
2. Need final inventory and appraisal.

RECOMMENDATION:

Inquire status.

(nb)

Future Hearing:

05/15/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

Page: 6A

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501047

CASE NAME: MTR OF GUILLERMO BUSTAMANTE

HEARING:

Hearing Re: FIRST AND FINAL ACCOUNTING

COUNSEL:

FRANCISCO BUSTAMANTE	(PET)...JENNIFER M DANIEL
GUILLERMO BUSTAMANTE	(DEC)...
SOCORRO BUSTAMANTE	(PET)... LUIS E LOPEZ
STATE OF CA FRANCHISE TAX BOAR	(TP)...PRO/PER

XREF: FAMSS1305823 (disso-Guillermo Bustamante n Socorro Bustamante)

GENERAL INFORMATION:

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

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

1. Accounting period 09/18/15 to 03/31/17.
2. Assets on Hand \$132,751.45 consisting of \$127,951.45 cash in blocked account and \$4,800 in personal property.
3. Statutory fees of \$8,232.42 requested. Calculated.
4. Attorney requests extraordinary fees of \$6,597.50, to be paid solely by the distributive share attributable to Socorro Bustamante, for services rendered as the charges resulted from her refusal to obey court orders, to cooperate, to communicate, and from her efforts to benefit from disingenuous and surreptitious behavior. Billed at \$325/hour for a total of 20.3 hours' attorney time Itemized [LF, pgs.34-36]. JTD.
5. Petitioner requests reimbursement of costs advanced of \$3,100.00 consisting of filing fees and \$1,425.00 for the storage of estate vehicles for the period May 2016 to October 2017. Itemized.
6. Attorney requests reimbursement of costs advanced of \$20.65. Itemized.
7. The FTB filed a creditor's claim against the estate for 2013 which resulted during a year where Mr. Bustamante claimed "head of household" status with Mrs. Bustamante, while still married. The debt is accumulating interest and should be paid in full by the surviving spouse's distributive share. JTD.

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

8. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. JTD.
9. Proposed Form Order 09/14/17 does not include findings re: sole and separate property; does not include vehicles, license number(s) and description; findings re: known creditors; findings re: all taxes have been paid, or reserve made for taxes; does not include reimbursement for storage requested in supplement filed 11/22/17; or include payment to FTB by Socorro Bustamante.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600347

CASE NAME: MTR OF BEINSCHROTH FAMILY TRUST

HEARING:

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

COUNSEL:

ANDREW BEINSCHROTH	(PRO/PER
BEINSCROTH FAMILY TRUST	(TRU)...
JOAN BEINSCHROTH-PAUSTEL	(PET)...JAMES L HEYWOOD AND
MICHAEL BEINSCHROTH	(PET)...JASON L GAUDY
MICHAEL BEINSCHROTH	(RES)...PRO/PER

GENERAL INFORMATION:

Stipulation and Order re Removal of Trustees; Appointment of Successor Trustee entered 12/12/16.

Continued from **08/15/17**. Counsel reports they will meet and confer regarding settlement and/or file objections prior to next hearing.

Continued from 10/03/17 at request of court. Settlement forthcoming/scheduled mediation.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Successor Co-Trustee, Michael Beinschroth ["Petitioner"].

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

1. Accounting period 12/18/13 to 12/20/16.
2. Assets on Hand \$5,057,938.61 consisting of \$216,682.16 in cash and \$4,841,256.45 in real and personal property.
3. Assets were distributed to the Successor Trustee, Lawrence A. Dean II, pursuant to the stipulation dated 12/12/16.
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **01/18/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

SEE ALSO 9, 15

HEARING:

Hearing Re: APPROVAL OF PROPOSED ACTION RE CAL REAL PROPERTY

COUNSEL:

GLORIA YVONNE ELLIOTT	(DEC)...
JONOVA KNICKERBOCKER	(PET)...SHEASBY AND ASSOCIATES
LISA HOEFGEN	(PET)...ROBERT J SPITZ

GENERAL INFORMATION:

Ex parte orders denied 07/11/17. Mr. Sheasby reports 850 petition will be filed. The Court orders the tenant to maintain the property and pay home owners insurance. Continued from 08/21/17 on courts motion. Running Springs realtor to be hired.
Continued from 10/30/17 and 11/16/17 to trail demurrer hearing.

THIS CASE IS SET FOR HEARING ON Approval of Proposed Action re California Real Property by Administrator, Lisa Hoefgen ["Petitioner"].

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

- 1 Petitioner requests authority to issue all required notices and initiate and prosecute all required court proceedings to evict the current tenant(s) occupying the subject property; and list the subject property for sale for the price of \$159,000.
- 2 **Objections to Petition filed 08/18/17 by beneficiary, Jonova Knickerbocker.**
- 3 Supp. (09/13/17) provides the Court with additional information in support of Petitioner's Petition.
- 4 ~Proposed Order 10/26/17.

RECOMMENDATION:

Set for contested hearing.

(nb)

Future Hearing:

08/20/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

SEE ALSO 8, 15

HEARING:

Petition for RETURN OF REAL PROPERTY

COUNSEL:

GLORIA YVONNE ELLIOTT (DEC)...

JONOVA KNICKERBOCKER (PET)...SHEASBY AND ASSOCIATES

LISA HOEFGEN (PET)...ROBERT J SPITZ

Currently under review by legal research.

NOTICE: Need actual 30 days' notice to all parties listed in section 8 of probate petition.

(lc/nb)

Future Hearing:

08/20/18 Accounting Review.

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

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

SEE ALSO 11

HEARING:

Hearing Re: PTN FOR LETTERS OF ADMINS W/FULL IAEA BY S DAVIS

COUNSEL:

DIANE YOUNG DAVIS	(PET)...	LUELLA F HAIRST
JASMINE ELISE VERRETTE	()...	
JEANETTE DAVIS	(OBJ)...	PRO/PER
JEROME DAVIS	(DEC)...	
SHAUN JEROME DAVIS	(PET)...	PRO/PER

GENERAL INFORMATION

Continued from **08/21/17**. Objection and competing petition filed.

Continued from 10/30/17 at request of court for competing petitions to be heard together.

THIS CASE SET FOR HEARING ON

- Petition for Letters of Administration with Full Authority under IAEA by Diane Young Davis, spouse
- Petition for Letters of Administration with Full Authority under IAEA by Jerome Davis, son

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

Petition by Diana Young, spouse

1. Bond in the amount of \$350,473 is being requested. Ok.
2. **Objection by Shaun Davis, son, filed 08/16/17.**
3. **Response by Diane Young Davis filed 10/12/17. Need verification by same.**
4. **Objection by Jeanette Davis, daughter, filed 10/25/17.**
5. **Objection by Jasmine Verrette, daughter, filed 10/27/17.**
6. ~Proposed Form Order: 05/24/17

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

Petition by Jerome Davis, son

7. Petitioner requests bond to be determined by Court.
8. It appears Diana Young, spouse/competing petitioner, has priority of appointment per Pr. Code §8461. JTD
9. Need Duties and Liabilities.
10. Need Notice of Petition to Administer Estate
11. Need Proof of Publication.
12. **Objection by Diane Young, spouse, filed 10/12/17.**
13. No proposed Order submitted by Jerome Davis.

RECOMMENDATION

Matter is contested.

Need to clear notes 7-9 as to Petition by Jerome Davis. If approved, Court to set Accounting Review Hearing on **02/26/19**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb)

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

SEE ALSO 10

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANE YOUNG DAVIS	(PET)...	LUELLA F HAIRST
JASMINE ELISE VERRETTE	()...
JEANETTE DAVIS	(OBJ)...	PRO/PER
JEROME DAVIS	(DEC)...	
SHAUN JEROME DAVIS	(PET)...	PRO/PER

See prior matter #10.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700770

CASE NAME: JUAN MANUEL GARCIA-MAYORQUIN

HEARING:

Hearing Re: RECEIPT OF BOND

COUNSEL:

JOHNN EMMANUEL GARCIA

(PET)...RICHARD S PRICE

JUAN MANUEL GARCIA MAYORQUIN

(DEC)...

VACATE – bond of \$290,000 filed.

(nb)

Future Hearing:

01/02/19 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700878

CASE NAME: CAROLYN S NEMETH

HEARING:

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

COUNSEL:

CAROLYN S NEMETH (DEC)...
GARY HOWARD MARTELL JR (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by Gary H. Martell, Jr. ["Petitioner"-son].

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

1. Will waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c).
2. Need proof of publication.
3. ~Proposed Form Order/Letters 09/28/17 & 10/06/17

RECOMMENDATION:

Need to clear note 2, no bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700879

CASE NAME: CAROL SNYDER

HEARING:

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

COUNSEL:

CAROL SNYDER

(DEC)...

ELENA SNYDER

(PET)...MATTHEW E SHEASBY

GENERAL INFORMATION:

Ex Parte orders granted 09/13/17.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by daughter, Elena Snyder ["Petitioner"].

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

1. Will nominates Edward Starr then Sue Yoakum as Executors. Need Declination to Act by each.
2. Will does not waive bond as to this petitioner. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). Suggest bond of \$370,000. JTD.
3. Waiver of Bond is not dated. Need same.
4. Supplement filed 09/20/17 reflects attempts to locate decedent's step-son, Dale Morris Snyder, Jr. and niece, Lawdra Colley. Does Court wish to deem supplement a due diligence declaration? JTD.
5. Proof of publication filed.
6. Notice does not include Rhoda May Hall and Cathylyn Stowe, named in will and does not include address for Diane Emery. Need proper service.
7. ~Proposed Form Order/Letters 09/06 & 09/13/17

RECOMMENDATION:

Need to clear notes 1, 3 & 6 then Court's discretion re bond and supplement. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules. (nb)

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

Superior Court of Calif, County of San Bernardino

Page: 14A

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701168

CASE NAME: MTR OF PAUL FRANCIS AGLIO

HEARING:

Petition for letters of administration with full authorization
to administer under IAEA

COUNSEL:

FRANCIS A AGLIO JR (ADM)...PRO/PER
PAUL FRANCIS AGLIO (DEC)...

XREF: CONPS1700363 (Paul Francis Aglio)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by brother, Francis A. Aglio, Jr. ["Petitioner"].

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

1. Petitioner alleges that petitioner is the sole heir and waives bond. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(c). Estimated value of estate is \$409,000. JTD.
2. Need proof of publication.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review on **02/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 15

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

DATE: 12/19/17 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600938

CASE NAME: GLORIA YVONNE ELLIOTT

SEE ALSO 8, 9

HEARING:

Motion Re: NTC OF DEMURRER AND DEMURRER TO JONOVA
KNICKERBOCKER'S PC850 Filed by Petitioner LISA HOEFGEN

COUNSEL:

GLORIA YVONNE ELLIOTT	(DEC)...
JONOVA KNICKERBOCKER	(PET)...SHEASBY AND ASSOCIATES
LISA HOEFGEN	(PET)...ROBERT J SPITZ

Currently under review by Legal Research.
(LR)

Future Hearing:
08/20/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 12/19/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1300047

CASE NAME: ALAN S. GILHAM

VACATED

HEARING:

Accounting Review

COUNSEL:

ALAN S GILHAM

(CEP)...

INLAND COUNTIES REGIONAL CENTE (CE)...LAYNE A BARTHOLOMEW

Third Account filed and set for 01/16/18.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400327

CASE NAME: GREGORY SMITH

HEARING:

FIRST Account and Report of CASEY HAGOOD and Petition for allowance of fees filed.

COUNSEL:

CASEY HAGOOD	(CP)...PRO/PER
GREGORY SMITH	(CTE)...MATTHEW E. SHEASBY
HEATHER ROBINSON	(CPE)...RICHARD A. LEPORE
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

Request for Waiver of Court Fees and Costs filed by HEATHER ROBINSON is GRANTED
Fee waiver amount due \$465.00 for Petition for conservator etc on 11/13/14

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account Current.

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

1. Proposed account consists of one page with copy of transaction history of bank account.
2. No Summary of Account or schedules. It cannot be determined whether or not this accounting balances. Need to file proper accounting that complies with Pr. C. §1060 et seq.
3. Need Notice of Hearing with proof of service.

RECOMMENDATION:

Need amended accounting to be set on first check calendar not sooner than **01/30/19 or thereafter**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 12/19/17 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

HEARING:

FIRST AND FINAL Account and Report of NATALIE BLICKENSTAFF and
Petition for allowance of fees filed.

COUNSEL:

CHARLES NAJJAR	(PET)...MARC B HANKIN
ISABELLA PLACENTIA	(PRO/PER
JACOB NIXA	(PRO/PER
JOHN MOIO	(CPE)...MARC B HANKIN
JOHN MOIO	(PET)...MITCHELL I ROTH
JORDAN NIXA	(PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NAJLA FORD	(CEP)...PRO/PER
NAJLA FORD	(PET)...SANDY L. TURNER
NATALIE BLICKENSTAFF	(CE)...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
SANDY TURNER	(PET)...SANDY L. TURNER
TINA NIXA	(JEREMIAH RAXTER
TINAMARIA A NIXA	(CP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

GENERAL INFORMATION:

Conservatee passed away on 10/08/16.

Continued from 11/06/17. The Court approves petitioner's request for fees in the reduced amount of \$24,903.00. The Court approves attorney fees as requested and approves fees being paid immediately. Order to be filed. The Court approves a preliminary distribution in the amount of \$50,000.00. Order to be filed. The Court orders previously frozen accounts, unfrozen. Order signed this date. The Court will not address the issue of attorney fees as to Mr. Hankin until a petition for attorney fees is filed.

THIS CASE IS SET FOR HEARING ON **Amended** (11/06/17) First and Final Account and Petition for Fees by Natalie Blickenstaff, PPF/conservator

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

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

- 1 **Accounting period: 05/11/16-10/07/16 (pre-death) and 10/08/16 to 06/23/17 (post-death)**
- 2 Assets on hand: \$394,011.71 cash
- 3 Petitioner requests fees in the amount of \$29,153.00 for 241.4 hours at various rates between \$90-125, [LF, pgs. 21 – 52]. **Approved in the lessor amount of \$24,903.00.**
- 4 Attorney requests fees in the amount of \$61,803.00. Billed at 190/hours' at \$325.00/hour; plus \$53.00 costs advanced, [LF, pgs. 54 – 92]. **Approved.**
- 5 Petitioner requests the estate be distributed **directly to Charles Najjar, the surviving brother of the Conservatee, sole heir of the estate and named beneficiary of the account;** and the conservatorship to be terminated; however, a formal probate is necessary.
- 6 Bond is set at \$550,000. Petitioner requests bond be exonerate. However, bond is not exonerated until entry of final discharge order.
- 7 Proposed Order: 08/10/17 reflects incorrect fees for petitioner; distributes directly to beneficiary; discharges petitioner; and exonerates bond.

RECOMMENDATION:

Need to clear notes 5 then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **12/24/18.**

(cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 12/19/17 TIME: 9:30 DEPT: S37P

CASE#: VC VS00251

CASE NAME: MTR OF LORENA SARAI BENITEZ

HEARING:

Accounting Review

COUNSEL:

ANGEL L BENITEZ	(PET)...BEATRICE L LAWSON
BERTHA A BENITEZ	(PET)...BEATRICE L LAWSON
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
GWENDOLYN BENITEZ	(MIN)...CALDWELL, KENNEDY & PORTER, .
GWENDOLYN BENITEZ IRREVOCABLE (TRU)...PRO/PER	
JEANNE KENNEDY	(PET)...JEANNE E KENNEDY
LORENA SARAI BENITEZ	(CEP)...DONNASUE ORTIZ
LORENA SARAI BENITEZ	(CEP)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT BENITEZ IRREVOCABLE TRU(TRU)...PRO/PER	
ROBERT BENITEZ JR	(OBJ)...STANLEY W HODGE
ROBERT C. BENITEZ JR	(SC)...PRO/PER
ROBERTA L TAYLOR	(PET)...ROBERTA L TAYLOR
ROBERTO CARLOS BENITEZ	(CPE)...PRO/PER
VIOLETA TOPETE	(CPE)...PATRICIA A LOBELLO
VIOLETA TOPETE	(PET)...PRO/PER

X-REF: CIVDS 1607088

VACATE - Second account filed and set for 01/22/17.

(nb)

Future Hearing:

03/21/18 Hearing re: Status of civil litigation

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