



Guardianship Calendar

Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/07/17

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.

08/31 ww

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **GUARDIANSHIPS**

DATE: 09/07/17 TIME: 11:00 DEPT: S35G

CASE#: GAR PS1600242

CASE NAME: CHRISTOPHER XU

HEARING:

Accounting Review

COUNSEL:

CHRISTOPHER XU

(MIN)...

WENSHENG XU

(PET)...FEI PANG

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review.

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

1. Wensheng Xu, father, appointed guardian of the estate only on 09/01/16, \$169,887.00 bond.
2. Need final Inventory and Appraisal.
3. Need First account beginning with 09/01/16.

RECOMMENDATION:

Inquire status.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/07/17 TIME: 11:00 DEPT: S35G

CASE#: GAR PS1600530

CASE NAME: MTR OF JASON JAMES L BUCHANAN

HEARING:

Hearing Re: PETITION FOR GUARDIANSHIP OF THE PERSON ONLY

COUNSEL:

DEBORAH FAULKENBERRY (GP)...PRO/PER

JAMES FAULKENBERRY (GP)...PRO/PER

JASON JAMES L BUCHANAN (MIN)...

GENERAL INFORMATION

Continued from **11/30/16**. Court informed that there is a related family law action pending in Kern County. Father was given physical custody. Notice dispensed with to mother Kimberly Buchanan. Court provided her with a copy of the petition and the UCCJEA in open court. Referred to CI.

Temporary hearing on 02/23/17: Petition for temporary provided it to mother. She objects to temporary and general petition.. Sherri Kastilahn appointed as GAL for minor, Jason Buchanan. Deborah Faulkenberry, James Faulkenberry are appointed temporary guardians of the person. Written objections by mother are to be filed by 03/30/17 by 4pm. Hearing date of 04/19/17 for general petition moved to 06/15/17. By 4pm on 09/14/17 parties are to exchange list of witnesses, list of exhibits, copies of exhibits. Referred to FCS.

Continued from **06/15/17**. Court makes orders per FCS report. Written objections by mother to be filed/served by 4pm on 07/13/17. If not filed then objections will be waived. Trial based on written objections only. Minor only to be driven by person with valid license. Mother must notify in writing of change or address of phone number. Proof of service as to maternal grandmother accepted and notice to maternal grandmother Edward Franklin Plato is dispensed. Court needs notice to siblings Ciara and Chelsea Buchanan. Notice to father and paternal grandfather cleared. Pretrial orders given.

On 08/10/17 Visitation matter taken off as mother didn't comply with appointment. Mother's objections are deemed waived for failure to meet deadline to serve/file. Court is considering taking the trial off at next hearing.

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardianship of the person only, by James and Deborah Faulkenberry (paternal grandparents), minor Jason, age 7.

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

1. James and Deborah Faulkenberry (paternal grandparents) appointed temporary guardians of person only, of minor, on 02/23/17
2. Father Jason F. Buchanan signed Consent, Nomination and Waiver.
3. Biological paternal grandfather George Buchanan signed Consent and Waiver.
4. **Need** Notice of Hearing and Proof of Service by Mail or file Request to Excuse Notice with Due Diligence Declaration (local form) as to Ciara and Chelsea Buchanan (siblings).
5. Court to review Guardianship Questionnaire.
6. CI report filed on 06/09/17.
7. Report of GAL Sherri Kastilahn filed 06/15/17.
8. FCS report filed 03/16/17
9. **Objections filed by mother Kimberly Buchanan on 07/17/17. Objections deemed waived on 08/10/17.**
10. . ~Proposed Letters/Order: 10/21/16.

RECOMMENDATION

Need to clear note 4 then Court's discretion.

(cs/lh/ww)

Future Hearing:

12/14/17 Readiness calendar

12/14/17 Hearing re: Petition for guardianship

01/19/18 *Court Trial*

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

DATE: 09/07/17 TIME: 11:00 DEPT: S35G

CASE#: GAR PS1700391

CASE NAME: MTR OF SHAYE ELIZABETH ROTH

HEARING:

Hearing re: Petition for Appointment of Guardian

COUNSEL:

SHAYE ELIZABETH ROTH (MIN)...
TIMOTHY SCOTT ROTH (GE)...BANKS GARCIA & JANIS

GENERAL INFORMATION

Timothy Roth appointed temporary guardian on 08/03/17; estate only.

THIS CASE SET FOR HEARING ON Petition for Guardianship Estate only by Timothy Roth, father, minor 8.

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

1. Petitioner seeks funds be placed into a blocked account. Assets stated are \$0; however, minor is receiving inheritance from paternal grandfather. Need verified supplement indicating amount to be received.
2. Parents, Timothy and Erin Roth signed consent and waiver.
3. Notice complete.
4. No proposed order. Submit order after hearing.

RECOMMENDATION

Court's discretion. If approved, set hearing re proof of blocked account on **10/26/17** Inventory and Appraisal for **04/12/18** and Accounting/Status Review for **11/15/18**. Any accounting to be filed 30 days in advanced per local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 09/07/17 TIME: 11:00 DEPT: S35G

CASE#: GAR PS1700392

CASE NAME: MTR OF GABRIELA KING-BAUTISTA

HEARING:

Hearing re: Petition for Appointment of Guardian

COUNSEL:

GABRIELA KING-BAUTISTA (MIN)...
TONIA BALLOU (GP)...PRO/PER

XREF: FAMVS1702377 (Ivette Bautista –N- Tonia Ballou- Hearing on 08/25/17 Dept. V14)

GENERAL INFORMATION

Temporary orders denied on 08/03/17. Court informs Ivette Bautista, mother, and David King Jr, father, that further written objections must be served and filed by 09/07/17.

THIS CASE SET FOR HEARING ON Petition for Guardianship person only by Toni Ballou, paternal grandmother for minor Gabriela King-Bautista (age 2)

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

1. **Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on David King Sr. (paternal grandfather).
2. **Need** notice of hearing and proof of personal service [GC-020/020P] on David King (father) and Ivette Bautista (mother).
 - a. As mother has filed an objection. Court may wish to deem that she has been served. JTD
3. The child attachment to the petition is incomplete in section 1e as to the type of month benefit received in the amount of \$329.00 and section 1f as to the person who has legal custody. **Need** verified supplement.
4. Maternal grandparents are deceased.
5. Court to see Guardianship Questionnaire [LF pg 9]
6. Court to see Guardian Screening form [LF pg 5 & 6]
7. Petitioner seeks broad medical/dental powers. Recommend order to reflect that requested medical/dental powers are subject to Pr.C. § 2353(b).

8. Petitioner seeks power to apply for and receive any public benefits, social security & SSI benefits the minor child may be entitled to receive. Recommend order reflect that if accumulated principal exceeds \$15,000 on account, Petitioner to file for estate powers as Pr.C. § 2628(a)(1) will require an accounting.
9. If referred to Court Investigator, a CI report would be required.
- 10. Objection by mother Ivette Bautista filed on 08/03/17; however, the proof of service is incomplete and must be served by a non-party to the action. Need proper proof of service.**
11. ~Proposed Form Order: 07/27/17

RECOMMENDATION

Need to clear notes 1-3 & 10. Matter is contested. Court's discretion

(ww)

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

DATE: 09/07/17 TIME: 11:00 DEPT: S35G

CASE#: GAR SS1400133
CASE NAME: Gabriela M. Garcia
HEARING: Hearing re: Petition for Termination of Guardianship

COUNSEL:

ANSELMO GARCIA	(OBJ)...PRO/PER
ANSELMO GARCIA	(PG)...PRO/PER
CARMEN GARCIA	(PET)...PRO/PER
GABRIELA M GARCIA	(MIN)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON **New [07/27/17]** Petition for Termination of Guardianship by Carmen Garcia (mother), minor Gabriela age 5 (DOB: 03/30/11).

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

1. Anselmo Garcia (maternal uncle) appointed guardian of the person only on 07/30/14.
2. Carmen Garcia (Mother) is petitioning for termination of guardianship. Petitioner states that she and the guardian came to an agreement and that the child is ready to return to live with her. She requests that the 10/06/17 hearing for her initial petition for termination be taken off calendar. [LF pg 5] Does Court wish for a signed written agreement to be filed?. JTD
3. Need Notice of Hearing and Proof of Service by Mail as to Dennis Washington (father), Anselmo Garcia (maternal uncle/guardian), Jose and Maria Garcia (maternal grandparents), Daniel Ortega (sibling), Jose Arzarte (sibling), and unknown paternal grandparents, or file Due Diligence Declaration(s).
4. If referred to Court Investigator, a CI report would be required.
5. No objections to subsequent petition have been filed.
6. ~Proposed Form Order: 07/27/17

RECOMMENDATION:

Need to clear note 3. Court may wish to vacate 10/06/17 matter. Court's discretion.

(ww)

Future Hearing: 10/06/17 Hearing re: Petition for termination of guardianship by Carmen Garcia (file date of 07/14/16)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1600495

CASE NAME: STEVEN PELLETIER

HEARING:

Hearing Re: Petition for Appointment of Guardian

COUNSEL:

MICHELLE HERNANDEZ (PET)...PRO/PER
STEVEN PELLETIER (MIN).

GENERAL INFORMATION:

Ex Parte orders denied on 10/11/16.

Continued from **11/17/16** Petitioner needs to clear probate notes.

Continued from **02/16/17** Due to non-appearance, OSC set re Dismissal.

Continued **04/13/17**. Court vacates OSC re dismissal. Matter continued to clear probate notes.

Continued from 07/06/17. Notice to father, maternal grandmother and paternal grandparents excused. Court notes that Michelle is an aunt though marriage (non-relative). Referred to DCFS for investigation and report.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Guardian, person only, by Michelle Hernandez (non-relative), minor Steven (12)

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

1. Consent and Waiver signed by mother.
2. Court to review questionnaire (LF, p. 4).
3. Notice is complete.
4. Need DCFS report.
5. ~Proposed form Order/Letters: 10/03/16

RECOMMENDATION:

Need DCFS report and then Court's discretion.

(lh/cs/lh/ww)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700024

CASE NAME: SHELBY NOELLE SCHAFFER

SEE ALSO 4

HEARING: Re: Proof of Blocked Account

COUNSEL:
MARINA SUZETTE MONTGOMERY (PET)...SCOTT D FISHER
SHELBY NOELLE SCHAFFER (MIN)...

GENERAL INFORMATION

Continued from **04/05/17 and 05/04/17** If the bond is not posted by the next hearing, Marina Montgomery is ordered to personally be present.

Continued from 05/18/17. Counsel represents minor has reached age 18. Marina Montgomery to appear.

Continued from 06/22/17. In lieu of bond, funds shall go directly from insurance company to blocked account. Counsel to submit amended Order.

Continued from 0727/17.

THIS CASE SET FOR HEARING ON: Proof of Blocked Account/ Inventory and Appraisal

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

1. Marina Montgomery (mother) was appointed Guardian of the Estate of Shelby Noelle Schaffer, age 17 (DOB 01/26/00) on 03/07/17, \$185,000 bond.
 - a. Amended order appointing guardian filed on 08/08/17. Bond is no longer required as \$167,800.00 is to be placed in a blocked account.
2. Need proof of blocked account.
3. Need issued Letters.
4. Need Inventory and Appraisal with supporting statements.

RECOMMENDATION:

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

(lh/cs/lh/ww)

Future Hearing:
04/03/18 *Accounting Review.*

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700024

CASE NAME: SHELBY NOELLE SCHAFFER

SEE ALSO 3

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

MARINA SUZETTE MONTGOMERY

(PET)...SCOTT D FISHER

SHELBY NOELLE SCHAFFER

(MIN)...

See notes on matter 3.

Future Hearing:

04/03/18 *Accounting Review.*

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700025

CASE NAME: NATHANIEL TYREE GAINES

HEARING:

Hearing Re: GUARDIANSHIP PETITION OF THE PERSON ONLY

COUNSEL:

JACQUIE ANNE WASHINGTON (PET)...BRIAN J HOLOHAN
NATHANIEL TYREE GAINES (MIN)...
ROBERT HART III (OBJ)...PRO/PER

XREF FAMSS17004232 (Robert Hart III –N- Tiffany Gaines)

GENERAL INFORMATION:

Temporary Orders denied on 01/31/17 and continued to 03/30/17. At 03/30/17 hearing the father objection and directed to file written objections. Temporary hearing was not continued.

Continued from 03/16/17 Non-appearance. OSC set re dismissal of guardianship petition for 05/11/17. OSC re dismissal continued on 05/11/17 Father's objection to be filed by 05/26/17 or deemed as waived. **OSC re dismissal continued to 06/29/17 and vacated. Counsel states there is a pending family law case FAMSS1704232 on for 07/19/17. Hearing continued for outcome of that case.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian, of the person only, by Jacquie Washington (maternal great-grandmother), minor: Nathaniel, 1

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

1. **On 07/19/17 the Court awarded father Robert Hart III with sole physical and legal custody in case FAMSS17004232.**
2. Maternal grandfather is deceased.
3. Notice of Hearing and Proof of Personal Service [GC-020 & GC-020(P)] on Tiffany Gaines (mother) filed on 03/10/17; however the proof in section 6 is incomplete as to the sender's name, address and telephone number. Need corrected proof.
4. Need Notice of Hearing and Proof of Service by Mail [form GC-020] on Jacquie Washington (maternal grandmother); Robert T Hart Jr and Venton Hart,

- (paternal grandparents); Gregory and Terrance Washington (siblings if over 12).
or file Due Diligence Declarations
5. Need complete Child Information Attachment. Attachment filed 01/24/17 is incomplete as to item 8 re ICWA inquiry.
 6. Need supplement of Confidential Guardian Screening form to include missing attachment 14.
 7. Court to review Guardianship Questionnaire [LF p. 4]
 8. Per UCCJEA, minor resides with Robert Hart, Jr.
 9. Petitioner has intention to adopt minor.
 10. Petitioner seeks broad medical/dental powers. Recommend order to reflect that requested medical/dental powers are subject to PC 2353(b).
 11. Petitioner request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed ward;, authority to make and consent to all medical decisions for the proposed limited ward, including authority to consent to surgery. JTD.
 12. Upon referral to CI by the Court, requires CI report.
 13. **Objections by Robert Hart III (father) with proof of service filed on 05/17/17. Does Court wish to dispense with notice on father? JTD**
 14. ~Proposed form Order: 01/24/17

RECOMMENDATION:

Court may wish to deem matter as moot as family law matter has settled.

(cs/ww)

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

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700056

CASE NAME: MTR OF TYESSIA RILEY JR ET AL

HEARING:

Hearing Re: Status of I&A/Proof of Deposit of Blocked Accts

COUNSEL:

ERIC RILEY JR	(MIN)...
TYESSIA RILEY	(PET)...L'TANYA M BUTLER
TYESSIA RILEY JR	(MIN)...

GENERAL INFORMATION

Continued from 06/22/17.

THIS CASE IS SET FOR HEARING ON Status of I&A/Proof of Deposit of Blocked Accts

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

1. Tyessia Riley (mother,) appointed as guardian of the estate only on 03/23/17, funds to be placed in blocked account with Bank of America in lieu of bond.
2. Need Inventory and Appraisal with supporting statements.
3. Need proof of blocked account.

RECOMMENDATION

Inquire status.

(lh/ww)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700394

CASE NAME: KEVIN MARQUEZ AND KIMBERLY MARQUEZ

SEE ALSO 8, 9

HEARING:

Hearing re: Petition for Appointment of Guardian

COUNSEL:

KEVIN MARQUEZ (MIN)...
KIMBERLY MARQUEZ (MIN)...
MARIA YOLANDA SAGAL (PET)...HARTNELL LAW GROUP

XREF: PROPS1400344 (*Ruben Marquez, father*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian, of the estate only, by Maria Sagal, mother for Kevin (age 17, 02/16/2000) and Kimberly (age 4).

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

1. Maria Sagal, mother, requests that bond not be required as there are no assets at this time. Court may wish to revisit bond once guardianship receives assets. See next note.
2. The minors are entitled to receive distribution from their father's estate- PROPS1400344. Need notice of related case.
3. Father Ruben Marquez is deceased.
4. Maternal grandparents are deceased.
5. Minor Kevin signed Consent and Waiver of Notice.
6. **Need** Notice of Hearing and Proof of Service by Mail as to Salvadore Marquez (paternal grandfather); Valentina Huerta (paternal grandmother); Ruben and Aaron Marquez (siblings) or file Request to Excuse Notice with Due Diligence Declaration (local form).
7. UCCJEA Declaration filed 07/27/17; however the 5 year residence history is incomplete as to Kevin. **Need** same.
8. ~Proposed Form Order: 07/27/17

RECOMMENDATION

Need to clear notes 6 & 7. Court's discretion re bond. If approved, set Inventory and Appraisal for **04/12/18** and Accounting/Status Review for **11/15/18**. Any accounting to be filed 30 days in advanced per local rule 20-901. Note requirements of local rule 20-908.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700394

CASE NAME: KEVIN MARQUEZ AND KIMBERLY MARQUEZ

SEE ALSO 7, 9

HEARING:

Petition for Compromise of Disputed Claim of Minor

COUNSEL:

KEVIN MARQUEZ (MIN)...

KIMBERLY MARQUEZ (MIN)...

MARIA YOLANDA SAGAL (PET)...HARTNELL LAW GROUP

XREF: PROPS1400344 (*Ruben Marquez, father*)

Currently under review by Legal Research

LR

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700394

CASE NAME: KEVIN MARQUEZ AND KIMBERLY MARQUEZ

SEE ALSO 7, 8

HEARING:

Petition for Compromise of Disputed Claim of Minor

COUNSEL:

KEVIN MARQUEZ (MIN)...

KIMBERLY MARQUEZ (MIN)...

MARIA YOLANDA SAGAL (PET)...HARTNELL LAW GROUP

XREF: PROPS1400344 (*Ruben Marquez, father*)

Currently under review by Legal Research

LR

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR PS1700396

CASE NAME: ZAMIR JACKSON

HEARING:

Hearing re: Petition for Appointment of Guardian

COUNSEL:

AURORA JOHNSTON (PET)...PRO/PER
ZAMIR JACKSON (MIN)...

GENERAL INFORMATION

Temporary Guardianship orders denied on 08/07/17. Petitioner to make effort to identify and locate father, maternal and paternal grandparents.

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian of the person only by Aurora Johnston (non-relative) for minor Zamir Jackson

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

1. Petitioner is considered a non-relative per Pr.C. § 1513(g). Refer to DCFS for investigation and report.
2. **Need** Notice of Hearing and Proof of Personal Service [GC-020 & GC-020(P)] on unknown father and Tiffany Lawrence (mother), or file Request to Excuse Notice with Due Diligence Declaration (local form).
 - a. Father is reportedly unknown; **need** copy of birth certificate per Local Rule 20-1302.
 - b. Tiffany (mother) signed a notarized letter in which she relinquished her parental rights to Aurora. [LF pg 11]. Does Court wish to waive notice to mother? JTD
3. **Need** Notice of Hearing and Proof of Service by Mail as to unknown maternal and unknown paternal grandparents or file Request to Excuse Notice with Due Diligence Declaration (local form).
4. The petition is incomplete in sections 3, 4, 11, 12 and 14. **Need** completed form.
5. The screening form is missing attachment 3. **Need** corrected form.
6. Court to see Guardianship Questionnaire. [LF pg 4]
7. Petitioner seeks broad medical/dental powers. Recommend order to reflect that requested medical/dental powers are subject to PC 2353(b).

8. Petitioner seeks power to apply for and receive any public benefits, social security & SSI benefits the minor child may be entitled to receive. Recommend order reflect that if accumulated principal exceeds \$15,000 on account, Petitioner to file for estate powers as PC 2628(a)(1) will require an accounting.
9. ~Proposed Form Order: 07/31/17

RECOMMENDATION

Need to clear notes 2-5. Court's discretion.

(ww)

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

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: GAR SS1300415
CASE NAME: MTR OF KATHERYN BROOKE RIESCHER
HEARING: Re: AMENDED FIRST ACCOUNT CURRENT

COUNSEL:

CORRENE MARYE RIESCHER (GE)...PRO/PER
KATHERYN BROOKE RIESCHER (MIN)...

Request for Waiver of Court Fees and Costs filed by CORRENE MARYE RIESCHER is GRANTED
Fee waiver amount due \$930.00 \$465.00 for filing fees on 10/09/13 \$465.00 for 1st accounting on 03/15/16

GENERAL INFORMATION

Continued from **05/05/16** and **07/14/16**.

Per minute order of **12/14/16**, Ms. Riescher informs the court that she and the minor are moving to Oroville, California in Butte County and requests the hearing be continued for the probate notes to be cleared. The court continued hearing currently set for 01/10/17 to 03/15/17 and provided Ms. Riescher with court call information. Continued from **03/15/17**. No appearance. Citation issued to Correne Riescher.

Continued from 06/28/17. No appearance. Clerk's office never issued citation. New Citation issued to Correne Riescher.

THIS CASE SET FOR HEARING ON (**Amended 12/05/16**) "Revised" Amended First Account Current, minor now 18 (DOB 08/10/99).

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

1. Correne Riescher (mother), appointed guardian of estate on 03/27/14 with funds placed in blocked account in lieu of bond.
2. Accounting period 03/27/14 through 10/31/16.
3. Assets on hand \$34,039.55.
4. Need separate schedules for assets on hand at beginning of period, disbursements, receipts and assets on hand at end of accounting.
5. Need report per Pr.C. §1064 allegations: (1) whether payments were made to the guardian without court order, (2) whether the guardian hired family members during the accounting period, and (3) whether cash was held in an interest-bearing account.
6. Need notice of hearing and proof of service for minor.

7. \$9,187 burial expense payment from ward's funds approved in minute order of 01/23/14.
8. Court to inquire whether minor is or has been a patient in, or on leave from, a state hospital under the jurisdiction of the State Department of State Hospitals or the State Department of Developmental Services. If so, need notice to same.
9. **Minor reached the age of majority on 08/10/17.**
10. No proposed order submitted.
11. **Proof of unsuccessful service of citation for Correne Riescher filed on 08/29/17.**

RECOMMENDATION

Need to clear notes 4-6. If approved, set Accounting Review for a final account for **11/22/17**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/jm/lc/ww)

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

DATE: 09/07/17 TIME: 11:00 DEPT: S36G

CASE#: VG VS02295

VACATED AND RE-SET ON 09/06/17 PER NOTICE OF COURT ROOM

CASE NAME: MTR OF DEJANAE & DEDRIANA JACKSON

HEARING: Hearing Re: ACCOUNTING/WITHDRAWAL OF FUNDS PETITION

COUNSEL:

DEDRIANA YOLANDA JACKSON	(MIN)...
DEJANAE TAMIRA JACKSON	(MIN)...
TAMMY MONROE	(PET)...PRO/PER

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

DATE: 09/07/17 TIME: 11:00 DEPT: S37G

CASE#: GAR PS1700318

VACATED AND RESET ON 12/14/17.

CASE NAME: ALONA CRANER & JASMIN CRANER
SEE ALSO 2

HEARING:
Hearing re: Petition for Appointment of Guardian

COUNSEL:
ALONA CRANER (MIN)...
JASMIN CRANER (MIN)...
JOLENE NELSON (OBJ)...HOLSTROM BLOCK & PARKE
LAMAR WARE (PET)...HOLSTROM BLOCK & PARKE
MELANIE MEYER (PET)...PRO/PER

GENERAL INFORMATION

Continued from 08/03/17 Court makes no ruling at present as to where minors should attend school. Current orders remain in effect. Referred to DCFS. E. Joan Nelms appointed as GAL for the minors.

Jolene Nelson and Lamar Ware, non-relatives, appointed as temporary co-guardians of the minors on 08/23/17.

On 08/23/17 at temporary hearing Court made visitation orders for Melanie Meyer. Alternate weekends from 5pm on Friday to 5pm on Sunday commencing 09/01/17.

Party receiving physical custody is responsible for the child/children's transportation on exchanges. Minors to be in individual therapy. Therapist information to be given to Ms. Meyer. Ms. Meyer and guardians may participate in therapy upon therapist's recommendation. Therapist to be given a copy of GAL and CI report when filed.

Neither party shall make, nor allow any other persons to use or make, any disparaging or derogatory remarks about the absent parent in the presence of said child/children.

Neither party shall discuss the facts of this case with the minor child/children. Daily telephone calls may occur with the party minors are not with. For Thanksgiving 2017 minors to be with Ms. Meyer from Wednesday at 5pm to Sunday at 5pm. All petitioners may attend all minors' school and extracurricular activities. All petitioners to cooperate in attempting to parent minors in a consistent manner. Temporary guardians to place minors in the schools they have been in prior years. Minors to be exchanged tonight at 5pm. **09/07/17 hearings are vacated and reset onto 12/14/17.**

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.

THIS CASE IS SET FOR HEARING ON

- Petition 1 - for Appointment of Guardian, person only, by **Melanie Meyer maternal grandmother**, minors: Alona 13 and Jasmin 10.
- Petition 2 - for Guardianship person only by **Jolene Nelson & Lamar Ware, non-relatives**, minors Alona 13 and Jasmin 10.

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

Petitioner 1 – Melanie Meyer, maternal grandmother

1. Nomination, Consent and Waiver filed by Desiree Craner (mother).
2. Proof of Service by mail of Notice of Hearing as to Durrell Ruffin (father/Alona) and Johnnie Hyatt (father/Jasmin) filed 06/21/17 & 08/18/17. **Need** proper Notice of hearing by **personal service** Pr. C. §1511 and with the correct court address.
3. **Need** Notice of Hearing and proof of mailed service or file Due Diligence Declarations as to unknown paternal grandparents of each minor.
4. Declaration in reply to objection filed by Melanie Meyer filed on 08/18/17; however the proof of service is not signed. **Need** corrected proof.
5. **Objection by Jolene Nelson filed 07/27/17 with proof of service.**
6. Upon Court referral, need CI report.
7. Order appointing GAL E. Joan Nelms filed 08/17/17.
8. Report of GAL E. Joan Nelms filed 08/23/17.
9. ~Proposed form Order: 06/21/17

Petitioner 2 - Jolene Nelson & Lamar Ware, non-relatives,

10. Jolene Nelson and Lamar Ware, non-relatives, appointed as temporary co-guardians of the minors on 08/23/17.
11. UCCJEA indicates minor lives with petitioners in Banning. Court to determine proper jurisdiction of minors. **Supplement filed stating that minors have lived with petitioners Jolene and Lamar for most of their lives. JTD**
12. **Need** notice of hearing and proof of personal service [GC-020/020P] or file Due Diligence Declarations as to Desiree Craner (mother); Durrell Ruffin (father/Alona); Johnnie Hyatt (father/Jasmin), and Alona (minor)
13. **Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on unknown paternal grandparents of each minor; Mark Craner and Melanie Meyer (maternal grandparents).
14. Guardianship Questionnaires by Jolene and Lamar are incomplete as to references and other information on pages 6&7. **Need** completed forms.
15. **Need** DCFS report.
16. Confidential Screening form by Lamar is incomplete as to section 12. Court may wish to clarify on the record. JTD
17. Petitioners indicate the willingness to adopt Jasmin.
18. Order appointing GAL E. Joan Nelms filed 08/17/17.
19. Report of GAL E. Joan Nelms filed 08/23/17.
20. ~Proposed Form Order: 07/27/17.

RECOMMENDATION

Need DCFS report and to clear notes 2-4 & 12-15. Court's discretion re note 16. Matter is contested.

(lh/lc/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 09/07/17 TIME: 11:00 DEPT: S37G

CASE#: GAR PS1700318

VACATED AND RESET ON 12/14/17.

CASE NAME: ALONA CRANER & JASMIN CRANER

SEE ALSO 1

HEARING:

Hearing re: Petition for Appointment of Guardian

COUNSEL:

ALONA CRANER

(MIN)...

JASMIN CRANER

(MIN)...

JOLENE NELSON

(OBJ)...HOLSTROM BLOCK & PARKE

LAMAR WARE

(PET)...HOLSTROM BLOCK & PARKE

MELANIE MEYER

(PET)...PRO/PER

See notes on matter 1.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/07/17 TIME: 11:00 DEPT: S37G

CASE#: GAR PS1700389

CASE NAME: JANICE J ANDERSON

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

FELICIA PORTER (PET)...PRO/PER
JANICE JASMINE ANDERSON (MIN)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Guardianship Management Conference

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

1. Felicia Porter, non-relative, was appointed guardian of the person only, on 02/26/13 of minor Janice (now age 13) in Riverside County.
2. Matter was transferred from Riverside County as the guardian and minor reside and intend to continue to reside in San Bernardino County.
3. Need amended Letters to reflect this county.

RECOMMENDATION:

Inquire status of amended letters.

(ww)

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

DATE: 09/07/17 TIME: 11:00 DEPT: S37G

CASE#: GAR SS1400089

CASE NAME: Chase Postema

HEARING:

FIRST AND FINAL Account and Report of RACHEL OLIVA GARCIA,
HOWARD ALEX GARCIA and Petition for allowance of fees filed.

COUNSEL:

CHASE POSTEMA (MIN)...
HOWARD ALEX GARCIA (GP)...WILLIAM M NASSAR & ASSOCIATES
RACHEL OLIVA GARCIA (GP)...WILLIAM M NASSAR & ASSOCIATES

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1st and Final Account by Rachel and Howard Garcia, maternal aunt/uncle, minor 18.

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

1. Assets on hand \$78,645.78; cash.
2. Accounting period 09/17/15 – 04/28/17.
3. Petitioners seek authority to distribute cash balance to Chase as they have reached the age of majority.
4. ~Proposed Order: 07/27/17.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/13/18**.

(lc)

Future hearing dates: 10/03/17 Hearing re: Petition for Termination of Guardianship by Rachel and Howard Garcia.

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

DATE: 09/07/17 TIME: 11:00 DEPT: S37G

CASE#: GAR SS1500029

CASE NAME: URIAH ROCHA AND CARLOS ROCHA

HEARING:

Hearing re: Petition for Termination of Guardianship

COUNSEL:

CARLOS ROCHA	(MIN)...
KARINA I VALDEZ	(PG)...PRO/PER
SHAUANA MARTIN	(MOT)...PRO/PER
URIAH ROCHA	(MIN)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Termination of Guardianship as to minors Uriah (12) and Carlos (age 11), by Shauana Martin, mother.

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

1. Karina Valdez, paternal aunt, appointed guardian of person only on 04/23/15.
2. Petitioner Shauana Martin, mother, is seeking termination of guardianship but reasons were not given in section 5. Need verified supplement.
3. Need Notice of Hearing and Proof of Service by Mail as to Uriah, minor; Karina Valadez, guardian; Carlos Rocha, father; Rene Sulsona, maternal grandmother; and Rosa Rocha aka Rosa Walton, paternal grandmother or file Request to Excuse Notice with Due Diligence Declaration (local form).
4. See Parent Questionnaire form filed 07/31/17, LF pg 5.
5. If referred to Court Investigator, a CI report would be required.
6. ~Proposed Form Order: 07/31/17

RECOMMENDATION

Need to clear notes 2 & 3, then Court's discretion.

(ww)