



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 07/02/18**

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.

(06/12/18 & 06/27/18 ww) (06/14/18 cs)(06/26/18 cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 07/02/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1500591

CASE NAME: JANICE S. TOMECK

HEARING: First and final Account and Report of WILLIAM D. TOMECK, ALISSA M. GRIMES and Petition for allowance of fees filed.

COUNSEL:

WILLIAM D. TOMECK

(PET)...IGNAZIO FICARA

ALISSA M. GRIMES

(PET)...IGNAZIO FICARA

JANICE S. TOMECK

(DEC)...

DEPT. OF CHILD SUPPORT SVCS (TP )...STEVEN E. PESANTE

**X-REF GARSS1400166**

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by William D Tomeck and Alissa M. Grimes [Executor/Administrator/Petitioner]

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

1. Assets on Hand \$504,841.61 consisting of cash.
2. Bond of \$20,000.
3. Attorney requests statutory fees in the amount of \$13,127.32. Calculated.
4. Petitioners request statutory fees in the amount of \$13,127.32 to be divided equally. Calculated.
5. Petitioner indicates a settlement was reached regarding the Department of Child Support lien of \$392,412.30. Per Stipulation and Order of 04/02/18 the amount of \$212,000.00 is to be paid in a lump sum from William .D. Tomeck's share of the estate to California State Disbursement Unit. Funds are to be held in attorney trust account until final distribution is approved.
6. Petitioners indicates heir Ethan Bivins was adoption in 2006 and therefore has no inheritance rights under the laws of intestacy. **Need** further clarification via points and authorities.
7. Petitioners request that Court approve distribution of minor, Nathen Tomeck's share of the estate to Alissa Grimes as custodian for the minor under the California Uniform Transfer to Minors Act. Alissa Grimes was appointed guardian of the minor, person only, on 10/14/14 under case GARSS1400166 and indicates is currently seeking estate powers. **Need** status of guardianship of the estate.

8. Petitioners indicate Emilie Boozier has been appointed conservator of the estate of minor, Ian Tomeck in Idaho and requests Court approve distribution of Ian's share to Emilie Boozier under the California Uniform Transfer to Minors Act. Order appointing conservator attached [LFp29-30]. **Need** issued letters.
9. Notice given.
10. ~ Proposed Order: 05/18/18

#### RECOMMENDATION

Need to clear note 6-8, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **07/15/19**

(cs)

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600423

CASE NAME: MTR OF JOYCE LOUISE MOORE

**SEE ALSO 3**

HEARING: First and Final report of adm; pet for waiver of Account and Report of LIZA S MARTINEZ and Petition for allowance of fees filed.

COUNSEL:

LIZA S MARTINEZ (PET)...MICHAEL C MADDUX  
JOYCE LOUISE MOORE (DEC)...

Waiver of Court Fees and Costs filed by LIZA S MARTINEZ is GRANTED  
TOTAL FEES WAIVED TO DATE: \$930.00

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Report and Petition for Final Distribution upon Waiver of Account and for Fees by Liza Martinez, daughter/executor

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

1. Assets on Hand: \$225,000.00 in real property.
2. Petition is sole heir and waives the accounting.
3. Petitioner waives statutory compensation.
4. Attorney indicates that the statutory fees calculate to \$7,500.00; however, that only \$4,000 is to be paid to attorney per Judgment. [LF pg. 8]
5. Attorney requests that a Judgment be entered against the estate and the petitioner in the amount of \$4,000.00. [LF pg. 8] **JTD**
  - a. Petitioner's name is misspelled as Liza Maritnez instead of Martinez. **JTD**
6. Petitioner requests to pay \$255.00 to Patrick Wright, probate referee.
7. Proposed Order: 05/17/18 line 27 on page 1 of the title of the document reflects "extraordinary fees"; however, none were requested; need statement of notice per Pr.C. § 9202, sole/separate property, assets on hand including legal description and the name and address of the person receiving the property, statement re: creditors, Liza's last name is misspelled as Maritnez on line 23 pg. 2 of the order and does not match the petition as the Judgment was requested against the estate also.

RECOMMENDATION

Court's discretion. If approved, set hearing re receipts and final discharge for **07/15/19**.

(ww)

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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](mailto: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: 3

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600423

CASE NAME: MTR OF JOYCE LOUISE MOORE

**SEE ALSO 2**

HEARING:

Probate status report filed.

COUNSEL:

LIZA S MARTINEZ

JOYCE LOUISE MOORE

(PET)...MICHAEL C MADDUX

(DEC)...

Matter is moot as accounting is filed and set same date. See matter 2.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700520

CASE NAME: MTR OF FELIPE NAJERA SANCHEZ

HEARING:

First and final Account and Report of ERIKA ALVARADO TORRES and  
Petition for allowance of fees filed.

COUNSEL:

ERIKA ALVARADO TORRES (PET)...THE BOUTIQUE LAW GROUP APLC  
FELIPE NAJERA SANCHEZ (DEC)...

GENERAL INFORMATION:

**Continued from 05/07/18.**

THIS CASE IS SET FOR HEARING ON First and Final Account, Petition for Fees,  
Reimbursement of Costs and Petition for Final Distribution by Erika Alvarado Torres, step-  
daughter/administrator

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

- 1 Accounting Period: **05/15/17-02/28/18 per Supp. 06/22/18.**
- 2 Assets on hand: **\$162,115.61 in cash per Supp. 06/22/18**
- 3 Current bond is \$150,000.00.
- 4 Petitioner and Attorney request statutory fees of \$6,550.00 each. Calculated.
- 5 Attorney request extraordinary fees of \$4,392.50 of 12.6 hours at \$350.00/hour attorney time. Itemized. [LF pgs. 24-30]
  - a. Court to see itemization. [LF pg. 29 re: Court appearance on 05/30/17] **JTD**
- 6 **Need** findings re: sole and separate property via verified supplement.
- 7 Summary of Account has the following issues:
  - a. Indicates the Gain on sales is on Schedule B and that the amount is \$0; however, Schedule B is not attached and instead Schedule D- Gain on sales indicates \$205.23. **(Supp. 06/22/18 Escrow closing statement provided in indicates that Net Proceeds in the amount of \$161,800.09 was received) There is no corrected Schedule for Gain on Sales and Amended Summary of Account reflects \$0 as to Gain on Sales.) Need** corrected Summary of Account and affected schedules.
- 8 Schedule C- Disbursements indicates a payment of \$465.00 for an "Amended Petition for Letters"; however, the Court does not charge a fee for an amended

petition and no payment is found in ICMS. Need verified supplement. **(Supp. 06/22/18 includes a revised Schedule C, however, dates and explanations of the purpose of the Court filing fees is not given.) JTD**

- 9 Petitioner requests authority to withhold \$2,000.00 as a reserve for tax returns for 2017 and any taxes that may be owed. **JTD.**
- 10 Notice given.
- 11 No Proposed Order.

**RECOMMENDATION:**

Need to clear notes 6 & 7 then Court's discretion re: note 8. If approved, Court to set hearing on filing of receipts and final discharge for **07/15/19.**

(ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700730

CASE NAME: MARK S OBERLY

HEARING:

Petition for Determine entitlement to estate distribution

COUNSEL:

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

Currently under review by Legal Research.  
(LR)

(CS)

Future Hearings:

11/08/18 Readiness Calendar  
11/08/18 Petition for Letters of Administration  
12/10/18 Court Trial (Day 1)  
12/11/18 Court Trial (Day 2)  
12/12/18 Court Trial (Day 3)  
12/13/18 Court Trial (Day 4)  
12/14/18 Court Trial (Day 5)



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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800262

CASE NAME: Mtr of Joe A Gonzales  
HEARING: Spousal Property Petition hearing.

COUNSEL:

LINDA L GONZALES (PET)...PRO/PER  
JOE A GONZALES (DEC)...

GENERAL INFORMATION:

**Continued from 04/23/18 at request of Court to clear probate notes.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition, by Linda Gonzales, [spouse/Petitioner].

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

1. Petitioner, Linda Gonzales, seeks court to determine and confirm her half of community property and determine that decedent's half transfers to petitioner without administration. Specifically, real property located in Fontana, CA.
2. Petitioner and decedent were married on 12/02/78. Decedent received property on 04/15/76 prior to marriage.
3. Petitioner indicates decedent and petitioner were self-employed as truck drivers from 1978 to 1999 and employed with Union Carbide. They finished their carriers working for separate companies. Petitioner alleges community funds were used to pay the mortgage from the date of marriage until the property was paid off in 2002.
4. Petitioner indicates decedent received about \$18,000 by way of a personal injury case. **Need** clarification as what monies were used for, when received, and what claim petitioner seeks regarding these monies. **Supp. filed 04/23/18 indicates monies received in 1980. \$10,000 were given to decedent's mother, and the remaining \$8,000 were used to purchase a trailer. Question as to how title of trailer is held. Need verified supplement.**
5. Decedent died intestate with one issue who would also share a one-half distribution in the estate per Pr.C. §6401 if the real property is the separate property of decedent.
6. Notice given.
7. ~Proposed Form Order: 03/16/18

RECOMMENDATION:

Need to clear note 4, then Court's discretion.

(cs)

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701001

CASE NAME: SOCORRO RODRIGUEZ

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

COUNSEL:

IRMA ROMERO-RODRIGUEZ (PET)...PRO/PER  
SOCORRO RODRIGUEZ (DEC)...

GENERAL INFORMATION

Continued from **01/22/18**.

**Continued from 04/02/18. Supplement to be filed.**

**Continued from 06/04/18 to clear probate notes. Notice to be given by petitioner**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Irma Romero-Rodriguez, daughter

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

1. All heirs waive bond. Net estate value consists of \$537,400.00 with \$37,400.00 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code §8481(b)).
2. Section 8 of petition does not include Rosalba Barragan who signed a Waiver of Bond. (Supp. 04/24/18 indicates that Rosalba Barragan is issue of the decedent; however, does not provide age or address as required in section 8.) **Supp. filed 06/14/18 provides Rosalba Barragan's age; however no address as required in section 8 of petition. Need** verified supplement to include Rosalba's address.
3. Notice to Petition to Administer Estate and proof of service filed 04/24/18; however, it is indicated that addresses are continued in an attachment and no attached is provided. **Notice to Petition to Administer Estate and proof of service filed 06/14/18; however, dept. number is incomplete. JTD**
4. ~Proposed Form Order: 10/05/17

RECOMMENDATION:

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/ww/cs)

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800343

CASE NAME: MTR OF BRONSON WILLIAM BRADLEY JR

**SEE ALSO 8**

HEARING:

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

COUNSEL:

KAREN BRADLEY	(PET)...NETT & NETT, P.C.
BRONSON WILLIAM BRADLEY JR	(DEC)...
CARLA A. THOMAS-MCMORRIS	(PET/OBJ)...JEFF GROTKE

GENERAL INFORMATION

**Continued from 05/24/18. Mr. Grotke reports that his client filed an objection and a competing petition on 05/23/18. The hearing on the competing petition is set for 07/02/18. The court continues this matter to the same date for both matters to be heard together. Mr. Grotke is ordered to notice by 4pm on 05/30/18.**

THIS CASE SET FOR HEARING ON:

**Petition #1:** Petition for Probate, Letters of Administration with Will Annexed with Full Authority under IAEA **by Karen Bradley, sister.**

**Petition #2:** Hearing re: Petition for Probate of **Lost** will, Letters of Testamentary With Full Authority Under IAEA **by Carla Thomas-McMorris, friend**

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

**Petitioner 1- Karen Bradley, sister**

1. 1<sup>st</sup> named executor declined to act; however, declaration filed as to 2<sup>nd</sup> nominated executor indicating due diligence [Pet. 04/12 LF pgs. 12-14]. **JTD** if due diligence is sufficient per Cal Rules of Ct 7.52.
2. Petitioner filed notice of refusal to probate rejected will per local rule 20-205. Petitioner is rejecting 02/19/16 will and seeking to probate 07/18/00 will. Proof of service of notice of refusal attached per local rule.
3. Petitioner seeks bond of \$216,000. Ok.
4. **Objections filed by Carla Thomas-McMorris on 05/23/18.**
5. ~Proposed Form Order: 04/12/18.

**Petitioner 2- Carla Thomas-McMorris, friend**

6. Will waives bond. Net value of the estate consists of \$212,600.00 of which \$92,600.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
7. Petition title does not have the box for "Lost" will marked. Does Court wish for an amended petition to be filed? **JTD**
8. The original will is apparently lost. When a will is lost, and was last in the testator's possession, it is presumed that the testator destroyed the will with the intent to revoke it Pr.C. § 6124. This presumption affects the burden of producing evidence and unless petitioner can overcome the presumption, no valid will exists. **Need** Declaration re attempts to locate missing will.
9. It appears that there is a presumption of duress, menace, fraud, or undue influence per Pr.C. § 6112(c) as the will was not witnessed by at least 2 disinterested subscribing witnesses. This presumption affects the burden of proof.
  - a. Will is witnessed only by 2 witnesses. Traci Hoggan, a disinterested person, and petitioner Carla, who is also a beneficiary of the will.
10. Petitioner is not listed in section 8 of the petition and it is clear that petitioner is the friend and named executor per the will. Does Court wish for a verified supplement to include petitioner's name, relationship, age and address? **JTD**
11. Section 8 of the petition fails to list all persons mentioned in the will. **Need** verified supplement as to Annette Kelley.
12. Proof of Subscribing witness by Carla Thomas-McMorris filed 05/23/18; however, sections 1 is incomplete as to items a, b, and c. **Need** completed form.
13. **Need** Duties and Liabilities Form.
14. **Need** Confidential Supplement to Duties and Liabilities Form.
15. **Need** Notice to Petition to Administer Estate and proof of service.
16. **Need** proof of publication.
17. No proposed order.

**RECOMMENDATION**

Matter is contested. Need to clear notes 8 and 13-16, Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 8

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800343

CASE NAME: MTR OF BRONSON WILLIAM BRADLEY JR

**SEE ALSO 7**

HEARING:

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

COUNSEL:

KAREN BRADLEY	(PET)...NETT & NETT, P.C.
BRONSON WILLIAM BRADLEY JR	(DEC)...
CARLA A. THOMAS-MCMORRIS	(PET/OBJ)...JEFF GROTKE

See notes on matter 7.

(ww)

Superior Court of Calif, County of San Bernardino  
Page: 8A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500993

CASE NAME: ETHELMARY VAN DYK

**SEE ALSO 8B**

HEARING:

Hearing re Final Discharge

COUNSEL:

JON KRIS VAN DYK (PET)...CHRISTOPHER L CARPENTER  
ETHELMARY VAN DYK (DEC)...

GENERAL INFORMATION

**Continued 07/02/18 there is no appearance or contact by petitioner or counsel. The Court continues this matter to 07/02/18 at 8:30 am in Dept. S35. The Court also sets an OSC re sanctions for John Kris Van Dyk and counsel Christopher Carpenter for \$500.00 each for failure to appear, hearing set 07/02/18 at 8:30 am in Dept. S35. Counsel and petitioner are ordered to be personally present at this hearing.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Jon Kris Van Dyk, son/trustee, approved on 05/22/17.
2. Receipts filed.
3. **Signed Ex Parte Petition for Final Discharge and Order forwarded to Clerk's office for processing on 06/25/18.**

RECOMMENDATION

Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino  
Page: 8B add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500993

CASE NAME: ETHELMARY VAN DYK

**SEE ALSO 8A**

HEARING:

Hearing Re: OSC RE \$500 SANCTIONS ON PETNR AND \$500 ON COUNSEL

COUNSEL:

JON KRIS VAN DYK

(PET)...CHRISTOPHER L CARPENTER

ETHELMARY VAN DYK

(DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC RE \$500 Sanction on Petitioner and \$500 on Counsel

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

1. Matter set on 06/04/18 during final discharge hearing, wherein, petitioner and counsel failed to appear or contact the court. Court continued matter and set OSC for failure to appear.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/02/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800502

CASE NAME: Mary La Verne Miller

HEARING:

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

COUNSEL:

CLAY MILLER

(PET)...DIANA J CARLONI

MARY LA VERNE MILLER

(DEC)...

#### GENERAL INFORMATION

**Clay Miller is appointed Special Administrator, no bond on 05/30/18**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son, Clay Miller , [Administrator/Petitioner].

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

1. All heirs waive bond; however, **need** waiver of bond by Harry Miller. Net estate value \$285,000 consisting of real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. ~Proposed Form Order: 05/24/18

#### RECOMMENDATION

Need to clear notes 1. Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)



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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400931

CASE NAME: Larry Davis

HEARING:  
Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:	
BRENDA C DAVIS	(PET)...PRO/PER
LARRY DAVIS	(DEC)...
LAWRENCE DAVIS	(AARON F GARCIA
STATE OF CALIFORNIA FRANCHISE	(TP)...

Trial Setting Conference- No notes- JTD

(ww)

Future Hearings:  
08/13/18 Petition to Confirm Property Belongs to Estate

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800512

CASE NAME: Mtr of Myllicent I Combs

HEARING:

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

COUNSEL:

TAMERA TOWER  
MYLLICENT I COMBS

(PET)...D M DAVIS  
(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Tamera Tower, friend/executor

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

1. Will waives bond. The estate consists of \$108,000.00 of which \$3,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Section 8 of the petition fails to list all persons mentioned in the will. **Need** verified supplement as to Alexis Hrabley
3. Notice to Petition to Administer Estate and proof of service filed 06/08/18; however, section 4 is incomplete as to probating a will and Alex Hrabley, beneficiary of will needs to be noticed. **Need** corrected notice.
4. **Need** proof of publication.
5. ~Proposed Form Order: 06/06/18

#### RECOMMENDATION

Need to clear notes 2-4. Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0900753

CASE NAME: JASMINE DIAZ

HEARING:

Fifth Account and Report of VIDA F NEGRETE and Petition for allowance of fees filed.

COUNSEL:

SAUL DIAZ	(PET)...PRO/PER
JASMINE DIAZ	(MIN)...
THE JASMINE DIAZ SPECIAL NEEDS TRUST (TRU)...	
VIDA F NEGRETE	(PET)...FARMER & RIDLEY
VIDA F NEGRETE	(PET)...WILLIAM L WINSLOW
VIDA F. NEGRETE	(PET)...GIFFORD, DEARING & ABERNATHY,
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR & ASSOCIATES

GENERAL INFORMATION

**Continued from 06/04/18 to clear notes for Court to review supplement. Notice to be given by Mr. Holzman.**

THIS CASE SET FOR HEARING ON 5<sup>th</sup> Account Current, Petition to Amend Trust Termination Provision, For Deceased in Bond, and Petition for Allowance of Fees by Vida Negrete, trustee/PPF

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

1. Accounting period: **01/01/15**-12/31/17 however, accounting period in report appears to be inaccurate as the Summary of Account indicates **01/01/16. JTD**
2. Assets on hand \$141,930.41 of which \$20,888.29 is cash.
3. Petitioner requests fees of \$5,261.50 for 55.85 hours at a rate not exceeding \$120 average 94.20 per hour. Itemized [LF pgs. 72-77].
4. Attorney requests fees of \$1,832.00 plus \$420.45 in advanced costs for "House Refinance" for assisting in the refinancing of the Beneficiary's residence of 8.4 hours at varying rates of \$350/240/100 per hour for attorney and paralegal time respectively. Itemized. [LF pg. 96-117] **JTD**
5. Attorney requests fees of **\$6,812.00** plus \$403.00 in advanced costs for "general trust administration" of 21.60 hours at varying rates of \$350/240/100 per hour for attorney and paralegal time respectively. [LF pg. 96-110]

- a. Calculation in declaration is indicated as **\$6,022.00** in total amount for “trust administration.”
  - i. Attorney Winslow indicates that anticipated time of 4 hours will be required in connection with this hearing: 1 hour of time by himself, 1 hour of time by Attorney Holzman and 2 hours of time by Paralegal Jackie Cahill for an additional amount of **\$790.00**. [LF pg. 100] **JTD**
6. Petitioner requests to amend the language of the Trust to provide that, in the event of early termination, the remaining funds (after reimbursement to any state’s Medicaid agency for medical services rendered to the Beneficiary) be distributed only to the Beneficiary, thus bringing the trust into compliance with POM SI 01120.199. [LF pg. 7] The new language to be added is outlined on [LF pg. 8] **JTD**
7. Petitioner requests a reduction in the current bond of \$224,000.00 to \$119,000.00, a reduction of \$105,000. Appears adequate. [LF pg. 8] **JTD**
8. Bank statement in support of end date of accounting period per Local Rule 20-908 for Community Bank statements for acct #s 0559 and 0579 provided; however the statements have an end date of 12/29/17 which prior to the end of the accounting period of **12/31/17**. **JTD**
9. **Need** all bank/investment statements for the accounting period per Pr.C. § 2620(c)(3) as petitioner is a Private Professional. **Financial documents filed 06/20/18; however, not in Laserfiche at time of review.**
10. Notice given.
11. No proposed order.

#### RECOMMENDATION

Need to clear notes 4, 5, 9 then Court’s discretion. If approved, set hearing on the next accounting review for **04/22/19** (if one year) or **04/20/20** (if two years). Accounting to be filed 30 days in advance.

(ww/cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 07/02/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1800161

CASE NAME: KATRINA LEE DA SILVA

HEARING: Petition for Appointment of Conservator

COUNSEL:

JOSE LUIS DA SILVA	(PET)...PRO/PER
LORA LEE DA SILVA	(PET)...PRO/PER
ALEXANDRA LEE DA SILVA	(PET)...PRO/PER
ADAM LEE DA SILVA	(PET)...PRO/PER
KATRINA LEE DA SILVA	(CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, person only, by Petitioners/parents Jose and Lora Da Silva, appointing Jose, Lora, Alexandra, and Adam Da Silva as Conservators

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

1. No Bond- Person only.
2. Proposed conservatee is developmentally disabled. It appears a petition for limited is appropriate.
  - a. An IRC report is optional per Pr.C. §1827.5(b). Does Court wish to require? **JTD**
  - b. As this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C.§1470. **JTD**
3. Petitioner seeks medical powers. Section 5 of Capacity Declaration re whether proposed conservatee is able to attend the hearing is incomplete. Does court wish to require new Capacity Declaration. **JTD**
4. Section 3b(2) of Petition is incomplete re whether proposed petitioners are debtors or an agent of a debtor. Court to clarify.
5. Citation with proof of service filed 06/11/18.
6. **Certificate of Completion of the Conservatorship Training Class filed 0617/18 for Jose, Lora, and Adam Da Silva.**
7. **Need Certificate of Completion of the Conservatorship Training Class for Alexandra Da Silva.**
8. Notice of Hearing and proof of service filed 06/25/18 as to Alexandra Da Silva, Adam Da Silva, and Dorothy Nolan; however, item 5 re whether copy of petition was served is incomplete. **Need** corrected notice.

- a. **Need** notice of hearing and proof of service to all those listed in section 11 of petition.
9. **Need** Court Investigator report.
10. ~Proposed Form Order: 05/31/18.

#### RECOMMENDATION

Need CI Report and to clear notes 7-8. If approved, set hearing for Compliance Review for **02/04/19** 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.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

-----  
DATE: 07/02/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300107

CASE NAME: RAMON ERNESTO POL

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

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

RAMON ERNESTO POL

(CEP)...

GENERAL INFORMATION:

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

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

1. Accounting period: 05/10/14-09/30/16
2. Assets on Hand \$1,941.44 of which \$341.44 is cash and the remainder in a burial fund.
3. Public Guardian requests fees totaling \$5,836.00. Approving and confirming \$5,036.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$800.00 which was previously collected by petitioner. Generally itemized.
4. County Counsel request fees in the amount of \$3,136.00. Approving and confirming and \$2,736.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$400.00 was previously collected by petitioner. Generally itemized.
5. Conservator and Counsel failed to date their signatures. [LF pg. 6] **JTD**
6. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
7. ~Proposed Order: 10/12/17

RECOMMENDATION:

Need to clear note 6 then Court's discretion. If approved, set for next Accounting Review in 60 days as third account current is overdue.

(ww)

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500352

CASE NAME: MTR OF JENNIFER WILMS

HEARING:

first Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JENNIFER WILMS (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees

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

1. Accounting period 12/18/15-03/31/17
2. Assets on hand \$839.85 in cash.
3. Public Guardian requests fees totaling \$3,000.00 pursuant to a new Court-approved fee schedule effective 07/01/14. For the period of 12/18/15 to 03/31/17, approving and allowing the sum of \$3,000.00, deferred until such time the estate has sufficient funds. Generally itemized. JTD.
4. County Counsel request fees totaling \$1,500.00 pursuant to a new Court-approved fee schedule effective 07/01/14. For the period of 12/18/15 to 03/31/17, approving and allowing the sum of \$1,500.00, deferred until such time the estate has sufficient funds. Generally itemized. JTD.
5. Notice given.
6. Proposed Order 02/20/18

RECOMMENDATION:

Court's discretion If approved, set next hearing re Accounting Review for **08/27/18**, or a biennial Accounting Review for **08/26/19**. Accounting to be filed 30 days' in advance.  
(cs)



Superior Court of Calif, County of San Bernardino

Page: 14

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S35P  
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CASE#: SC SS5535

CASE NAME: IN THE MTTR OF DENNIS RENISH

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
DENNIS RENISH (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 27<sup>th</sup> Account for PG approved on 06/27/16.
2. **Need** 28<sup>th</sup> Account beginning with 04/01/15.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 15

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS5512

CASE NAME: IN THE MATTER OF CLAUDIA SANDERS

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
CLAUDIA SANDERS (CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

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

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

1. Twenty-Ninth and Final Account was approved on 08/28/17. **Need** Order Settling Twenty-Ninth and Final account.
2. **Need** receipt for Department of Health Services.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

Future Hearing: 2/25/19 Amended 29<sup>th</sup> & Final Account & Report

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1500357

CASE NAME: MTR OF MADELINE PRATKO

HEARING:  
Hearing Re: STATUS OF SALE OF PROPERTY

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MADELINE M. PRATKO TRUST (TRU)...  
MADELINE MARY PRATKO (CEE)...SANDY L. TURNER

GENERAL INFORMATION:  
**Continued from 06/18/18. For counsel to file copy of the MLS listing.**

THIS CASE SET FOR HEARING ON Status Of Sale of Property

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

1. Matter set on 03/08/18 during Receipt of Report from Connie Stringfellow, Court ordered that counsel to file proof that the property is listed on MLS.
2. Declaration filed by Connie Stringfellow re PG currently working on the statutorily required publication of the Notice of Sale.
3. **Need** Copy of MLS listing filed per minutes on 06/18/18.

RECOMMENDATION:  
Court's discretion.

(cs/ww)

Future Hearing: 11/05/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 16

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

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DATE: 07/02/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1700083

**VACATED**

CASE NAME: PATRICIA ANNETTE REDFERN

HEARING:

Hearing Re: COURT TRIAL

COUNSEL:

SUZETTE A WHITE

(PET/TP)...PRO/PER

PATRICIA ANNETTE REDFERN

(DEC)...

STEVEN REDFERN

(PET)...PRO/PER

Stipulation of Agreement reached on 06/07/18.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 07/02/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1600466

CASE NAME: BEATRICE DORETTA CHISUM

HEARING:

Hearing Re: amended petition for waiver of final accounting

COUNSEL:

JEANNETTA LORETTA LOVE      (PET)...MATTHEW SHEASBY  
BEATRICE LORETTA CHISUM      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON **[Amended 05/21/18]** Petition for Waiver of Final Account and Report, Petition for Fees and for Final Distribution by Jeannetta Love, sole beneficiary

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

1. Previous Petition for Waiver of Final Account approved on 05/23/18.
2. Assets on hand: \$325,464.75, consisting of stock and real property.
  - a. Initial petition included cash but it was discovered that the account was a payable on death and was distributed to petitioner as she was the listed beneficiary.
  - b. Corrected Final Inventory and Appraisal filed 05/21/18 reflecting the amount above.
3. Petitioner is sole beneficiary and waives the account.
4. Petitioner requests statutory fees of \$10,763.94.
5. Attorney requests statutory fees of \$10,763.94, less \$435.00 retainer fee previously received for total of **\$10,328.94**. Calculated.
6. Attorney requests reimbursement for advanced costs in the amount of \$926.44. Itemized. [LF pg. 6].
7. Petitioner requests reimbursement of \$1,038 for costs.
8. Petitioner requests reimbursement of \$435 to third party, Jacqueline Love, for advanced filing fee.
9. **Need** Notice of Hearing and proof of service.
10. Proposed order: 05/31/18 appears to reflect the previously granted Petition for Waiver of Final Account. **Need** proposed order on Amended Petition for Waiver of Final Account and Report to include description of real and personal property

assets on hand, proposed distribution to person (including their address), statement re: notice per Pr.C. § 9202, no creditor's claims, sole/separate property, debts/costs paid.

**RECOMMENDATION:**

Need to clear note 9 then Court's discretion. Final discharge is already set for hearing on 07/31/19.

(ww)

**Future Hearing: 7/31/19 Hearing Re Final Discharge**

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600624

**VACATED**

CASE NAME: MTR OF MICHAEL JOHN FOLEY

HEARING:  
Hearing re Final Discharge

COUNSEL:

MISTIA V FALLON (PET)...HAROLD S NELSON  
MICHAEL JOHN FOLEY (DEC)...

Final discharge filed on 05/30/18.

(ww)

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600625

CASE NAME: MTR OF SELMA L ROBERTSON

HEARING:

Probate status report filed.

COUNSEL:

ROSEMARY R MARTIN (PET)...PRO/PER  
SELMA L ROBERTSON (DEC)...

GENERAL INFORMATION

**Continued from 04/04/18. Petitioner needs to file a petition for final distribution.**

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Testamentary issued to Rosemary Martin, daughter/executor, on 12/02/16; full authority, \$20,000.00 bond.
2. Petitioner requests an additional 6 months to close the estate.
3. Estate is not in a condition to close due to the need for preparing the Petition for Final Distribution on Waiver of Accounting.
4. Final Inventory and Appraisal filed 03/06/18.
5. Notice of Hearing and proof of service filed 03/23/18; however, only 12 days' notice given. **JTD**
6. No proposed order.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **10/08/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)



Superior Court of Calif, County of San Bernardino

Page: 4

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600640

CASE NAME: MTR OF FRED AUSTIN YATES

HEARING: Accounting Review by \*\*\*

COUNSEL:

JAMIE WALDIE	(PET)...BRYAN NADDAFI
FRED AUSTIN YATES	(DEC)...
BRYAN NADDAFI	(PET)...OLYMPIA LAW, P.C.
DEPARTMENT OF HEALTH CARE SERVICES (TP )...	

GENERAL INFORMATION

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

Matter set on **12/05/17** due to non-appearances and failure to file accounting.

Continued from **01/30/18**. Administrator to file the accounting..

Continued from **03/19/18** at request of counsel to file motion to withdraw.

**Continued from 05/07/18. Jamie Waldie is not present in court today. The court issues citation as to Jamie Waldie for failure to appear and failure to file accounting. Citation issued to: Jamie Waldie who is cited and required to appear on 07/02/18 at 8:30 in department S36P and show cause why fta/failure to file accounting.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions** on Accounting Review

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

1. Letters of Administration issued to Jamie Waldie, step-daughter, on 08/16/16, full authority, no bond.
2. Final Inventory and Appraisal filed 01/05/17.
3. **Notice of non-payment of statutory fees and expenses by Probate Referee Burdette Garvin filed 02/09/18.**
4. **Need** accounting or status report.
5. **Need** proof of service of Citation as to Jamie Waldie, step-daughter.

RECOMMENDATION:

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

(nb/ww/cs/ww)

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1601266

CASE NAME: MTR OF H JAMES LOGAN

HEARING:

Waiver of Account and Report of AARON JAMES LOGAN and Petition  
for allowance of fees filed.

COUNSEL:

AARON JAMES LOGAN (PET)...CLARK & TREVITHICK  
H JAMES LOGAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Aaron Logan, son/ administration with will annexed

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

1. Accounting period: 09/06/16-05/31/18
2. Assets on Hand: \$104,151.14 in cash.
3. All beneficiaries waive the accounting.
4. Petitioner and Attorney request statutory fees of \$6,955.00 each. Calculated.
5. Attorney requests extraordinary fees of \$2,326.00 for services rendered in  
connection with sale of real property and the domiciliary probate estate. Billed at  
\$225/320 hour for a total of 8.10 of paralegal and attorney time respectively.  
Itemized. [LF pgs. 19-27]. **JTD**
  - a. Paralegals' rates of \$225.00 for a Maureen Salman and Mary Gray are  
above the community standard rate of \$150.00. Does Court wish to reduce  
their rates? **JTD**
6. Attorney requests reimbursement of costs of \$890.52; however, there is a total of  
\$426.52 in "filing fees" in which there are not filing fees charged by the Court for the  
listed documents. Court may wish to inquire. Itemized. [LF pgs. 6-7] (**Supp.**  
**06/25/18 indicates that there are fees that were not listed on the initial report  
bringing the reimbursement request to \$2,195.02. Itemized. [LF pg. 7])
  - a. Supplement includes an amount of \$13.50 for "Photocopy Fees". Court may  
wish to disallow as copies are considered overhead per Local Rule 20-909  
and should be absorbed in fees or commissions. **JTD****

7. Petitioner requests that the estate be distributed to Kenneth Logan as personal representative of the domiciliary probate estate in the state of Washington as there are delinquent excise tax bills and penalties to settle. [LF pg. 9] **JTD**
8. Partial Inventory and Appraisal filed 07/14/17 indicates that it is for all of the estate. Does Court wish to require a Final Inventory and Appraisal? (**Supp. 06/25/18 includes the Final Inventory and Appraisal**) **Need** Final Inventory and Appraisal filed separately.
9. Petitioner requests authority to withhold \$2,000.00 as a reserve for closing costs. **JTD**
10. Notice is complete.
11. Proposed Order is attached to the Supp. 06/25/18; however, **need** it "received" separately. Hearing date in proposed order is incorrect, assets on hand is missing, need statement re: notice per Pr.C. § 9202 statement re: creditor paid. Submit order after hearing.

#### RECOMMENDATION

Need to clear note 8 then Court's discretion re: remaining notes. If approved, set hearing re receipts and final discharge for **07/15/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 6

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

-----  
DATE: 07/02/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: TRU PS1800066

CASE NAME: MTR OF DONALD A EDWARDS REVOCABLE LIVING TRUST

HEARING:

Petition for AN ORDER TO CONFIRM VALIDITY OF TRUST CONFIRM  
TRUSTEE AND CONFIRM ASSETS TO REVOCABLE

COUNSEL:

MICHELLE LYNN WILLIAMSON      (PET)...PRO/PER  
DONALD A EDWARDS REVOCABLE LIVING TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice:

Notice of hearing filed 06/05/18 as to Donald Edwards Jr. **Need** notice to Shelia Rister,  
daughter

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: VPR VS002864

CASE NAME: ESTATE OF ERNEST MAYFIELD

**SEE ALSO 8**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

YVETTE MAYFIELD	(PET)...RANDALL & ASSOCIATES
ERNEST ANTHONY MAYFIELD	(DEC)...
DERRICK MAYFIELD	(PET)...RANDALL & ASSOCIATES
NINA KAYE MAYFIELD	(PET)...LAW OFFICES OF C L FARRELL PC
DERRICK MAYFIELD	(PET)...JOHN GUY
BOND SERVICES OF CA	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
CAROL L KUNDERT	(PET)...GARY E. MUNGER
RICHARD A CHERRY	(TP )...PRO/PER
AMERICAN CONTRACTORS INDEMNITY (LANAK & HANNA)	

GENERAL INFORMATION

**Continued from 11/30/17, 02/08/18, 04/05/18 and 05/14/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of **Successor** Administration issued to Nina Kaye Mayfield, spouse, on 09/22/16; full authority, funds in blocked account.
2. **Need** accounting or status report.

RECOMMENDATION

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

(lc/ww)

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: VPR VS002864

CASE NAME: ESTATE OF ERNEST MAYFIELD

**SEE ALSO 7**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

YVETTE MAYFIELD	(PET)...RANDALL & ASSOCIATES
ERNEST ANTHONY MAYFIELD	(DEC)...
DERRICK MAYFIELD	(PET)...RANDALL & ASSOCIATES
NINA KAYE MAYFIELD	(PET)...LAW OFFICES OF C L FARRELL PC
DERRICK MAYFIELD	(PET)...JOHN GUY
BOND SERVICES OF CA	(PET)...PRO/PER
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER
CAROL L KUNDERT	(PET)...GARY E. MUNGER
RICHARD A CHERRY	(TP )...PRO/PER
AMERICAN CONTRACTORS INDEMNITY (LANAK & HANNA)	

GENERAL INFORMATION

**Continued from 05/14/18. Counsel to file P & A's. Court notes that no further research is necessary from the probate examiners.**

THIS CASE SET FOR HEARING ON Spousal Property Petition by Nina Mayfield, spouse.

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

1. Petitioner was appointed as **successor** administrator on 09/22/16 with full IAEA, money to be placed in blocked account.
2. Petitioner requests a determination of real property passing to the surviving spouse as community property and confirmation of community property to be determined as having belonged to surviving spouse. Specifically, \$59,782.71 in cash in a blocked savings acct# 0874 located in Redlands in San Bernardino County.
3. Petitioner indicates that marriage occurred on 01/31/1981 and that all assets of the estate are community property.[LF pg. 5]
4. Petitioner indicates that a petition to dissolve marriage was filed on 08/03/2001 on Los Angeles Superior Court case no. BD351979 but that no orders either terminating the marital status or dividing the assets were ever made. [LF pg. 5]

5. Petitioner requests additional order as follows:
  - a. Direct Bank of America to unblock all funds in blocked savings acct #0874 and distribute full amount to petitioner.
  - b. Terminate the administration as there will be no remaining assets on hand without further need of an accounting or waiver of accounting.
  - c. Dispense with the need for the filing of an Ex Parte Petition for Final Discharge and receipts. **JTD**
6. **Need** Points and Authorities per minutes on 05/14/18.
7. Notice given.
8. ~Proposed Form Order: 05/07/18

#### RECOMMENDATION

Need Points and Authorities then Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 9

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

-----  
DATE: 07/02/18 TIME: 8:35 DEPT: S36P  
-----

CASE#: TRU PS1800055

CASE NAME: MTR OF THE PHILLIPS 1998 FAMILY TRUST

HEARING:

Petition for Compel accounting and trust financial records

COUNSEL:

DONALD SCOTT PHILLIPS  
THE PHILLIPS 1998 FAMILY TRUST

(PET)...ROSS LAW GROUP APC  
(TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice is complete.

Petitioner indicates that Donald Scott Phillips and Scotty D. Phillips are the same person.

(ww)

Future Hearing: 7/11/18 Petition for Redress of Breach of Trust & Surcharge Removal of Trustee, etc



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

-----  
DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400276

CASE NAME: Rita Sue Pesch

HEARING: Hearing re Final Discharge

COUNSEL:

JOHN PESCH (CPE)...PRO/PER

RITA SUE PESCH (CEP)...

KARIN E HORSPOOL (PET)...

Waiver of Court Fees and Costs filed by JOHN PESCH is GRANTED

GENERAL INFORMATION

Continued from **06/01/17**. Petitioner reports he has filed an appeal of attorney fees and exhibits. Court set a hearing date on those issues. Petitioner advised he need to file a petition for final discharge and order.

Continued from **01/17/18**. Court orders John Pesch to be present at the next hearing. Court is in need of an order for the final account still.

Continued from **03/19/18**. Court is in need of final account order still then receipts and final discharge order.

**Continued from 05/14/18. No appearance. John Pesch called in stating he will not be able to appear due to car issues. Court continues matter and orders John Pesch to be present at the next hearing.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Requirement for final account waived for, John Pesch, on 10/28/16. The court found that the reasonable fee for court-appointed counsel's work is \$12,356; from the sums on deposit, court appointed counsel is to be paid \$8,500; remainder to be submitted via voucher. The balance of the funds on deposit, \$4,600.77, is to be paid to the conservator. **Need** order for submitted matter.
2. Receipt for Karin Horspool filed 05/31/17.
3. Ex Parte Petition for Final Discharge and Order returned by Court on 06/14/17. **Need** corrected Ex Parte Petition for Final Discharge and Order after Order waiving final account is signed and filed.

RECOMMENDATION

Inquire status.

(lc/lh/ww)

Superior Court of Calif, County of San Bernardino

Page: 11

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

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

HEARING:

First Account and Report of NATALIE BLICKENSTAFF and Petition  
for allowance of fees filed.

COUNSEL:

NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
DAVID LANDO	(CP)...ROBERTA L. TAYLOR & ASSOC
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
GLORIA THORNTON	(CEE)...JEANNE E KENNEDY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Current Account of **Conservator and Trustee** and Petition for Fees by Natalie Blickenstaff, PPF/conservator/trustee

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

1. **Note:** Petitioner indicates that the Court authorized the conservatorship and trust accounting to be filed in one document.
2. Accounting period: 07/27/16-12/15/17
3. Assets on hand: \$447,321.66 of which \$71,321.66 is cash and the balance in real property.
4. Petitioner requests fees in the amount of \$21,427.50 for 27.00 hours at \$95.00/hour and 150.90 hours at \$125.00/hour. Itemized. [LF, pgs. 30-69]. **JTD**
5. Attorney requests fees in the amount of \$68,207.50. Billed at 205.4 hours at \$325.00/hour attorney time and 10 hours at \$125.00/hour paralegal time; plus \$202.50 costs advanced. Itemized. [LF, pgs. 71-129]. **JTD**
  - a. Request for reimbursement includes the following items for postage that are generally disallowed per Local Rule 20-909. [LF pg. 129]. **JTD**
    - i. "Overnight costs to UD attorney-unusual postage costs" in the amount of \$22.95 on 08/15/16.
    - ii. "Overnight freight charge" in the amount of \$25.78 on 02/26/18.
6. Schedule C Disbursements indicates "reimbursement for USP mailing" on 04/03/17 in the amount of \$71.37 but does not indicate whom it was paid to. [LF pg. 22] Also, postage is included in overhead per Local Rule 20-909. **JTD**

7. Statement for Chase account #4315 beginning with date of 08/05/16 provided, however, accounting period begins with date of **07/27/16**. **Need** statement that includes the beginning accounting date.
8. **Need** to indicate conservatee's address per Local Rule 20-1406(a) via verified supplement.
9. Residential facility statements filed 05/29/18.
  - a. **Need** Post-Move Notice for Conservatee as her residence changed during the accounting period.
10. Notice given.
11. Proposed Order: 05/29/18 Court's discretion re: notes 5 & 6

**RECOMMENDATION:**

Need to clear notes 7-9 then Court's discretion. If approved, Court to set hearing next Accounting Review hearing on **07/15/19**.

(ww)

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

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700025

CASE NAME: BETTY J ALTHER

HEARING:

Petition for Attorney fees

COUNSEL:

JANET E SACKWAR	(CPE)...JOELLE LEE A. NICHOL
BETTY J ALTHER	(CEP)...PRO/PER
WALTER T. MOORE	(PET)...WALTER T. MOORE
LIBERTY MUTUAL INSURANCE	(TP )...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Walter Moore

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

1. Petitioner, Walter Moore, was appointed counsel on 02/01/17.
2. Petitioner requests fees of \$13,545.00 for 17.80 hours at \$450.00 per hour for attorney services. Itemized [LF p. 3]. **JTD**
3. Notice of hearing and proof of service filed 05/30/18; however, the Court address is incorrect. **Need** corrected notice.
4. ~Proposed Order: 05/29/18

#### RECOMMENDATION

Need corrected notice then Court's discretion .

(ww)

Future Hearing: 3/06/19 Accounting Review

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

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700045

CASE NAME: CHINA NIKEL ARKADIE

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of NICOLE L ARKADIE

COUNSEL:

NICOLE L ARKADIE	(PET)...PRO/PER
ORLANDO ARKADIE	(PET)...PRO/PER
CHINA NIKEL ARKADIE	(CTP)...E JOAN NELMS

GENERAL INFORMATION

**Continued from 04/30/18. To file required documents. Mr. Church indicates he can assist petitioner with documents.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Nicole and Orlando Arkadie, parents, appointed limited co-conservators of the person only on 09/25/17, no bond.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 02/26/18; however, section 5 is incomplete as to service of order. **Need** completed notice.
3. Care Plan filed 02/26/18 however, petitioners failed to date at signature. **JTD**
4. Level of Care form filed 02/26/18.

RECOMMENDATION

Need to clear notes 2 then Court's discretion re: note 3.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 14

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

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700084

CASE NAME: MTR OF ARTHUR MARTIN LUNA

HEARING:

Hearing Re: STATUS ON VISITATION/RESTRAINING ORDER

COUNSEL:

GILBERT SALINAS	(CPE)...PRO/PER
ARTHUR MARTIN LUNA	(CEP)...MITCHELL I ROTH
ALBERT A JIMENEZ	(CPE)...TOMOHIRO J KAGAMI
DORA L VILLASENOR	(CPE)...LAW OFFICE OF JOHN R RAMOS

**XREF: PROPS1700209** *ARTHUR LUNA*  
**CIFDS1700032** *LUNA V. LUNA*  
**CIFDS1700033** *LUNA V. VILLASENOR*

No notes- Status- JTD

(ww)

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

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800160

CASE NAME: ABHISHEK SEHGAL

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

SUMESH SEHGAL	(PET)...CHRISTOPHER B JOHNSON
RITU SEHGAL	(PET)...CHRISTOPHER B JOHNSON
ABHISHEK SEHGAL	(CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person and estate by Sumesh and Ritu Sehgal, parents

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

1. Petitioner requests to waive bond as estate is less than \$15,000.00 and is solely from public benefit payments.
  - a. It would appear that conservatorship of the estate may not be necessary as there is no estate to manage. Court to inquire. **JTD**
2. Petitioner seeks medical powers. Capacity Declaration filed 05/30/18.
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 decisions concerning education, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, to consent or withhold consent to marriage/domestic partnership, right to control social/sexual contacts and relationships, authority to make & consent to medical decisions for the conservatee.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. List of Required Contacts (Local form SB-12224) is missing Ria Sehgal, sister; however, she is listed in section 11 of the petition. **JTD**.

8. Confidential Screening Form by Sumesh and Ritu are incomplete as to section 3 re: nomination. **JTD**.
9. Citation and proof of service filed 06/22/18.
10. **Need** Certificates of Completion of the Conservatorship Training Class.
11. Notice of Hearing and proof of service filed 06/05/18; however, only 27 days' notice was given to the IRC. **Need** corrected notice to include 30 days' notice to the IRC.
12. CI report filed 06/18/18.
13. ~Proposed Form Order: 05/30/18

#### RECOMMENDATION

Need appointment of counsel, IRC report, and to clear notes 10 & 11. Court's discretion re bond. If approved, set hearing for Compliance Review for **02/04/19** 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; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

***If Estate is approved*** Set hearing re Accounting Review for **09/09/19**. Any accounting to be filed 30 days in advance.

(ww)



Superior Court of Calif, County of San Bernardino  
Page: 15A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 07/02/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600104

CASE NAME: IN THE MATTER OF COREY CAPECE

HEARING:

First Acct & Report of Conservator Account and Report of FRANK CAPECE and  
Petition for allowance of fees filed.

COUNSEL:

COREY CAPECE	(CTE)...
FRANK CAPECE	(PET)...MELINDA S. BELL
TERRI CAPECE	(PET)...MELINDA S. BELL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First Account and Request for Order Dispensing  
with Accounting by Frank and Terri Capece, parents/limited co-conservators of the estate  
only

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

1. Accounting period: 07/19/16-12/31/17.
2. Assets on hand: \$4,905.05 in cash.
3. Petitioners waive the right to receive fees.
4. Attorney requests reimbursement of advanced fees in the amount of \$240.00. **Need**  
itemization. [LF, pgs. 18]. **JTD**
  - a. Court to note that a Substitution of Attorney was filed by Attorney Melinda  
Bell on 06/18/18. Petitioners are now pro per.
5. Attorney requests to defer her fee request at this time and reserve the right to  
request fees at a later time.
6. Petitioners request an order dispensing with the necessity of an account while the  
conservatorship estate falls within the parameters of Pr.C. § 2628 and will inform  
the Court when it on longer complies with Pr.C. § 2628. [LF pg. 6] **JTD**
  - a. Petitioners indicate that the conservatee was a party to litigation in case  
CIVDS1409654 and received a settlement. Structured annuity payments in  
the total amount of \$107,925.00 will begin on 12/18/2021 as follows:
    - i. \$15,000.00 lump sum on 12/18/2021
    - ii. \$22,500.00 lump sum on 12/18/2026
    - iii. \$70,425.00 lump sum on 12/18/2031.

- Does Court wish for a Notice of Related Cases be filed? **JTD**
7. Bank statements provided for Retail Banking checking account #6266; however, the funds are not in an interest bearing account as required per Pr.C. § 1064. [LF pgs. 20-34] **JTD**
  8. No bond is currently ordered.
    - a. Petitioners indicate that a bond of \$22,600.00 shall be filed upon payment of the 1<sup>st</sup> settlement installment on 12/18/2021. [LF pg. 6] **JTD**
  9. **Need** Notice of Hearing and proof of service.
  10. No proposed order. Submit order after hearing.

**RECOMMENDATION:**

Need to clear notes 4 & 9 then Court's discretion. If approved, Court to set next Accounting Review on **04/22/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 16

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S36P  
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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 17, 18**

HEARING:

Petition for Appointment of Conservator of the Person and Estate

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

**X-REF: EAPSS 1800048; EAPSS 1800035**

GENERAL INFORMATION

**Public Guardian appointed temporary conservator of the person and estate on 05/25/18, no bond. Walter Moore appointed Guardian ad Litem. Court suspends any power of attorneys held. Court orders Shantell Galvan, Davin Kelley, Al Jones, Catrina Dorsey, Ashley Dorsey, Parish Whalem and Victoria Gadzhiyeva to vacate the home of Casey Jones Jr by 07/13/18 5pm. Order to be submitted for signature. The parties agree to set all future petitions/hearings for 07/02/18. Casey Jones Jr is present in court - court will waive the return of citation for the general conservatorship.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Appointment of Conservatorship of person and estate by **sons, Al Jones and Corlies Jones** ["Petitioners"].

Petition #2: Petition for Appointment of Conservatorship of person and estate by GAL, Walter T. Moore ["Petitioner"] as to Appointment of **Public Guardian**.

Petition #3: Petition for Appointment of Conservatorship of person and estate by **daughter, Shanta Jones-Ruffins** ["Petitioner"].

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

**Petition #1 by Al & Corlies Jones, sons:**

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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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

1. Petitioner, Al Navarro Jones is purportedly a co-attorney-in-fact. Does Court wish to require copy of Financial Power of Attorney? **JTD**.
2. Petitioners request no bond be required as the estate of the Conservatee is minimal and petitioners are the sons of the proposed conservatee. Estate valued at \$404,288.00. Suggest bond of \$445,000 (includes recovery). **JTD**
3. Section 11 to petition does not include issues, Kobe Jones, Tony Jones, Zolton Jones, Elaine Jones or sister, Susie Jones. **Need** verified supplement.
4. Petitioners seek Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **JTD**
5. Petitioners seek medical powers. Medical Capacity Declaration does not include attachment GC-313. **Need** same.
6. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
7. Citation and proof of service filed 05/31/18.
8. **Need** Order Appointing Court Investigator.
9. **Need** Certificates of Completion re Conservatorship Class.
10. CI report filed 06/22/18.
11. ~Proposed Form Letters 05/15/18.

**Petition #2 by PG:**

1. No bond – PG
2. Section 11 to petition does not include issues, Corlies Jones, Quarry Jones, Arnesia Jones, Casey Jones, Jr., III, Kobe Jones, Tony Jones, Zolton Jones, Elaine Jones or sister, Susie Jones. **Need** verified supplement.
3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration and attachment GC-335A. **Need** same.
4. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
5. **Need** Duties of Conservator.
6. **Need** Court Investigators Referral Report.
7. **Need** List of Required Contacts form.
8. **Need** Notification of Court of Conservatorship Address.
9. **Need** Confidential Conservator Screening form.
10. **Need** Order Appointing Court Investigator.
11. **Need** Notice of Hearing and proof of service
12. **Need** report of GAL Walter Moore.
13. CI report filed 06/22/18.
14. No proposed order/letters. Submit Order after Hearing.

**Petition #3 by Shanta Jones-Ruffins, daughter:**

1. Petitioner is purportedly a co-attorney-in-fact. Does Court wish to require copy of Financial Power of Attorney? **JTD**.
2. Petitioner requests bond be fixed at \$6,000. Estimated estate valued at \$26,268.96. Suggest bond of \$29,000 (includes recovery). **JTD**.

3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration and attachment GC-335A. **Need** same.
4. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
5. Signature on Duties of Conservator differs from other documents. **Need** verified supplement.
6. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with attachment GC-335A. .
7. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
8. Certificate of Completion re Conservatorship Class filed 06/07/18.
9. Notice of Hearing and proof of service filed 06/20/18.
10. Citation and proof of service filed 06/25/18.
11. CI report filed 06/22/18.
12. ~Proposed Form Order 05/22/18

RECOMMENDATION:

Matter is contested. Need appointment of counsel, GAL report, and notes to be cleared, then Court's discretion re: bond. If approved, set hearing for Compliance Review for **02/04/19** 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 **09/09/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 17

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S36P  
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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 16, 18**

HEARING:

Petition for Appointment of Conservator of the Person and Estate

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

See notes on matter 16.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 18

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

-----  
DATE: 07/02/18 TIME: 10:00 DEPT: S36P  
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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 16, 17**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

See notes on matter 16.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**ELDER ABUSE**

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DATE: 07/02/18      TIME: 10:00      DEPT: S36P  
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CASE#: EAP PS1800035

CASE NAME: JONES VS JONES

**SEE ALSO 20, 21**

HEARING:

Hearing Re: Status

COUNSEL:

CASEY JONES JR

(PP )...PRO/PER

SHANTA JONES

(RP )...CRYSTAL HAYES HILL

**XREF: EAPPS1800048** JONES VS JONES

**EAPPS1800059** JONES V GALVAN

**CIFDS1700119** JONES -VS- RUFFINS

**CIFDS1700133** JONES VS JONES

No notes- Status- JTD.

(ww)



Superior Court of Calif, County of San Bernardino

Page: 20

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S36P  
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CASE#: EAP PS1800048

CASE NAME: JONES VS JONES

**SEE ALSO 19**

HEARING:

Hearing Re: Status

COUNSEL:

CASEY JONES (PP )...PRO/PER  
CORLIES JONES (RP )...  
AL NAVARRO JONES

**XREF: EAPPS1800035** JONES VS JONES  
**EAPPS1800059** JONES V GALVAN  
**CIFDS1700119** JONES -VS- RUFFINS  
**CIFDS1700133** JONES VS JONES

No notes- Status- JTD.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 21

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

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DATE: 07/02/18 TIME: 10:00 DEPT: S36P  
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CASE#: EAP PS1800059

CASE NAME: JONES V GALVAN

**SEE ALSO 19**

HEARING:

Hearing Re: Status

COUNSEL:

CASEY JONES	(PP )...PRO/PER
AL JONES	(PET)...PRO/PER
SHAUNTELL GALVAN	(RP )...

**XREF: EAPPS1800035** JONES VS JONES

No notes- Status- JTD.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 22

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 07/02/18      TIME: 10:00      DEPT: S36P  
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CASE#: EAP PS1800069

CASE NAME: Jones vs Gadzhiyeva

HEARING:

Hearing Re: Status

COUNSEL:

SHANTA JONES-RUFFINS

(PET)...CRYSTAL HAYES HILL

CASEY JONES Jr

(PP )...CRYSTAL HAYES HILL

VIKTORIA GADZHIYEVA

(RP )...

No notes- Status- JTD.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 07/02/18    TIME: 8:30    DEPT: S37P  
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CASE#: PRO PS1200518

CASE NAME: GEORGE H WILLIAMS

HEARING:

Petition for FRAUD; UNCLEAN HANDS; EQUITABLE ESTOPPEL ETC SEE LISTED

COUNSEL:

ALICE JOHNSON	(PET)...ASHWORTH & ASHWORTH
GEORGE H WILLIAMS	(DEC)...
DACREY NORTHRUP	(PET)...LAW OFFICE OF COTTLE & KEEN
PAMELA ANN WILLIAMS CHUNCHICK	(PET)...PAUL D VELASCO
DARINA WILLIAMS	(PET)...ROGERS & HARRIS
SKAIDRITE G WILLIAMS	(RES)...LAW OFFICES OF COTTLE & KEEN
MICHAEL HARRIS	(ROGERS & HARRIS)
MARGO RICHARDSON	(ERNEST L. HOWARD)

Currently under review by Legal Research.  
(LR)

(CS)

Superior Court of Calif, County of San Bernardino

Page: 2

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500938

CASE NAME: Adam a Rigoli Trust

HEARING:

Petition for Approval of Resignation of Trustee Appointment  
of Successor Trustee etc

COUNSEL:

CHERYL R. STEFANSSON	(PET)...JAY OBERHOLTZER
ADAM A. RIGOLI TRUST	(TRU)...
KURT REXIUS	(TP )...KAREN ZUBIATE-BEAUCHAMP

Currently under review by Legal Research.  
(LR)

Notice:

Notice given.  
(cs)

Superior Court of Calif, County of San Bernardino

Page: 3

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600107

CASE NAME: MTR OF KATHRYN LUCILLE KAME

HEARING:

Accounting Review by \*\*\*

COUNSEL:

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

GENERAL INFORMATION:

Continued from **06/26/17 and 09/18**

Continued from **12/04/17**. Hearing continued at request of Counsel. The Court orders inventory and appraisal be filed by 1/2/18 and accounting be filed by 3/2/18.

**Continued from 04/02/18 at request of Counsel due to awaiting receipt of verification. Counsel will be filing the final inventory and appraisal with the clerk's office today.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to California McKay, daughter/executor on 05/12/16, full authority, \$20,000 bond.
2. Final Inventory and Appraisal filed 04/02/18. However, item 4 is incomplete re probate referee; item 6 re bond is erroneously, item 7 is blank; and Attachment 2 does indicate whether community or separate property. **Need** corrected inventory and appraisal.
3. **Need** Accounting or status report.

RECOMMENDATION:

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

(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 4

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601029

CASE NAME: MTR OF KAREN LYNN HALL

**SEE ALSO 5**

HEARING:

Hearing Re: Petition for Will Contest filed by Daneille Hall

COUNSEL:

KEENAN MICHAEL HALL	(PET)...DUANE P BOOTH
KAREN LYNN HALL	(DEC)...
DANIELLE CHERISE HALL	(OBJ)...PRO/PER

Currently under review by Legal Research.  
(LR)

(cs)

Future Hearing: 1/29/19 Hearing Re Final Discharge

Superior Court of Calif, County of San Bernardino

Page: 5

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601029

CASE NAME: MTR OF KAREN LYNN HALL

**SEE ALSO 4**

HEARING:

OSC re: Dismissal

COUNSEL:

KEENAN MICHAEL HALL	(PET)...DUANE P BOOTH
KAREN LYNN HALL	(DEC)...
DANIELLE CHERISE HALL	(OBJ)...PRO/PER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC re: Dismissal

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

1. Matter set on 04/02/18 during First and Final accounting, wherein, Court approved accounting and reserved jurisdiction on the issue of extraordinary fees.
1. The Court ordered that the objection by Danielle Hall filed 01/22/18 be a petition for will contest, and set hearing for 07/02/18 on that petition.
2. Danielle Hall is ordered to be present at next hearing.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 1/29/19 Hearing Re Final Discharge



Superior Court of Calif, County of San Bernardino

Page: 6

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 7, 8, 9**

HEARING:

Hearing Re: PET FOR DECLARATORY RELIEF OR BREACH OF CONTRACT

COUNSEL:

ANGELA LANDIN	(PET)...DIANA J CARLONI
DEE SHCNEPF-EWING	(DEC)...
BO RAMOS	(MIN)...PRO/PER
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
SURETEC INSURANCE	(TP )...

Currently under review by Legal Research.

(LR)

(CS)

Superior Court of Calif, County of San Bernardino

Page: 7

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 6, 8, 9**

HEARING:

Hearing Re: PETITION FOR SPECIFIC PERFORMANCE OR CONTRACT

COUNSEL:

ANGELA LANDIN	(PET)...DIANA J CARLONI
DEE SHCNEPF-EWING	(DEC)...
BO RAMOS	(MIN)...PRO/PER
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
SURETEC INSURANCE	(TP )...

Currently under review by Legal Research.

(LR)

(CS)

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 6, 7, 9**

HEARING:

Petition for enforcement of creditor's claims and for attorneys  
fees and costs of suit

COUNSEL:

ANGELA LANDIN	(PET)...DIANA J CARLONI
DEE SHCNEPF-EWING	(DEC)...
BO RAMOS	(MIN)...PRO/PER
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
SURETEC INSURANCE	(TP )...

Currently under review by Legal Research.  
(LR)

GENERAL INFORMATION:

Letters issued 06/20/17 to Angela Landin, Administrator/Executrix

**Continued from 04/02/18 at request of counsel as parties are being referred to mediation. Mediation Settlement Conference set for 06/13/18. Notice waived.**

THIS CASE SET FOR HEARING ON Petition for Enforcement of Creditor's Claims and for Attorney's fees and costs of suit, by Abraham Tekin

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

1. Petition, Abraham Tekin authorized representative for Ozel Developer, Inc. seeks to enforce creditor's claims filed against the estate on 09/27/17 which were rejected on 10/19/17 by the estate administrator, Angela Landin.
2. Creditor's claim in the amount of \$41,202.40 is based on custom jewelry for decedent. Itemized. [LF,p.6-21].
3. Creditor's claim in the amount of \$2,096.98 is based on expenses paid as part of a real estate sales agreement. Petitioner is agreeable to having expenses deemed part of the deposit of the sale, if Respondent agrees to fulfill the contract. Itemized. [LF.pgs. 23-28].

4. Petitioner further seeks reimbursement of court costs and litigation expenses for the cost of suit per Pr.C. §9354.
5. Notice given.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 7/19/18 Accounting Review

Future Hearing: 7/19/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 9

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601249

CASE NAME: MTR OF DEE SHCNEPF-EWING

**SEE ALSO 6, 7, 8**

HEARING:

Petition for 1.Financial abuse of a dependent adult 2.Conversion 3.Common  
Counts 4.Constructive Trust

COUNSEL:

ANGELA LANDIN	(PET)...DIANA J CARLONI
DEE SHCNEPF-EWING	(DEC)...
BO RAMOS	(MIN)...PRO/PER
OZEL DEVELOPERS, INC	(PET)...THOMPSON & COLEGATE
ABRAHAM TEKIN	(CC )...THOMPSON & COLEGATE
SURETEC INSURANCE	(TP )...

Currently under review by Legal Research.  
(LR)

(cs)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/02/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700167

CASE NAME: THERESA MARIE HILTON

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ALICIA CASTILLO-TRUJILLO

(PET)...REX ALAN LOWE

THERESA MARIE HILTON

(DEC)...

VACATED- Waiver of Account and Report of Alicia Castillo-Trujillo filed.  
(cs)

Future hearing: 07/10/18 Wavier of Account and Report

Superior Court of Calif, County of San Bernardino

Page: 11

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**TRUST**

-----  
DATE: 07/02/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700490

CASE NAME: MTR OF 2010 MOSER FAMILY TRUST

**SEE ALSO 12, 13**

HEARING:

Hearing Re: status of mediation/settlement

COUNSEL:

ETHEN BOYD MOSER

2010 MOSER FAMILY TRUST

PATRICIA SIMPSON

(PET)...BETTY AUTON-BECK

(TRU)...

(OBJ)...FELIX M MARTIN

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Status of Mediation/Settlement

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

1. Matter set on 04/02/18 during Trial Setting Conference, wherein, counsel indicated parties are not ready for trial and are close to settlement. Counsel may call and request a mediation date from the Judicial assistant.
2. Notice to be given by Ms. Auton-Beck. **Need** notice.
3. **Need** status of settlement.

RECOMMENDATION:

Need to clear note 2, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 12

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700490

CASE NAME: MTR OF 2010 MOSER FAMILY TRUST

**SEE ALSO 11, 13**

HEARING:

Petition for (VERIFIED) TO INVALIDATE PUERPORTED FIRST AMENDMENT  
BASED ON UNDUE INFLUENCE ETC

COUNSEL:

ETHEN BOYD MOSER	(PET)...BETTY AUTON-BECK
2010 MOSER FAMILY TRUST	(TRU)...
PATRICIA SIMPSON	(OBJ)...FELIX M MARTIN

Currently under review by Legal Research.  
(LR)

Notice given.  
(cs)



Superior Court of Calif, County of San Bernardino

Page: 13

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700490

CASE NAME: MTR OF 2010 MOSER FAMILY TRUST

**SEE ALSO 11, 12**

HEARING:

Trial Setting Conference

COUNSEL:

ETHEN BOYD MOSER	(PET)...BETTY AUTON-BECK
2010 MOSER FAMILY TRUST	(TRU)...
PATRICIA SIMPSON	(OBJ)...FELIX M MARTIN

No notes – TSC. JTD

(cs)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 07/02/18    TIME: 8:30    DEPT: S37P  
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CASE#: PRO PS1800158

CASE NAME: MTR OF IMA JEAN DICKERSON

HEARING:

Petition for APPLICATION FOR PRELIMINAR INJUNCTION MEMORADUM OF POINTS AND AUTHORITIES IN SUPPORT

COUNSEL:

GLEN FREDRICK DAVIS                    (PET)...PRO/PER

IMA JEAN DICKERSON                    (DEC)...

Waiver of Court Fees and Costs filed by GLEN FREDRICK DAVIS is GRANTED

Currently under review by Legal Research.

(LR)

(CS)

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

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DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800517

CASE NAME: MTR OF BONNIE JO FREEMAN

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

COUNSEL:

ALLEN RAY FREEMAN (PET)...MARK W REGUS  
BONNIE JO FREEMAN (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by husband, Allen Ray Freeman, [Administrator/Petitioner].

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

1. All heirs waive bond; however, need Waiver of bond by Anna Winburn. Net estate value of \$40,000 with \$30,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters.Pr.C.§8481(b).
2. Section 3a indicates decedent was a resident of Lexington, KY; however, section 3c indicates decedent's residence at time of death was in Rancho Cucamonga, CA. It is not clear as to decedent's domiciliary residence. Court to clarify.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication.
5. No Proposed. Submitted after hearing.

RECOMMENDATION:

Need to clear notes 3-4. Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

-----  
DATE: 07/02/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800518

CASE NAME: CAROLYN MARSTON

HEARING: Petition for Probate, Letters of Testamentary W/full Authority Under IAEA

COUNSEL:

VINCENT SCOTT MARSTON (PET)...DEBRA S POPINEAU  
CAROLYN MARSTON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Will and for Letters of Administration under **W/WA**, and Full Authority under IAEA, by son, Vincent Scott Marston, [Administrator/Petitioner]

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

1. Will waives bond as to named executors only. Waivers of bond filed. Estate value of \$214,088.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Pr.C.§8481(b). **JTD**
2. Petition is marked as Letters Testamentary, but it appears that it should be Letters of Administration with Will Annexed. Does Court wish for an amended petition be filed? **JTD**
3. Nomination signed by Christopher Marston and Nicholas Marston affixed to petition [LF p. 16-18].
4. Declination to act as executor by Nicholas Marston and Linda Davidson affixed to petition [LF19/20].
5. The will conditionally incorporates decedent's Trust. **Need** Certification of Trust that meets the requirements in Pr. C. § 18100.5, to include a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? **JTD**
6. **Need** Notice to Petition to Administer Estate and proof of service.
7. **Need** proof of publication.
8. ~Proposed Form Order: 05/24/18

RECOMMENDATION

Need to clear notes 6-7, Court's discretion re bond. If approved, set Accounting/Status Review for **09/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)



Superior Court of Calif, County of San Bernardino

Page: 18

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

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DATE: 07/02/18 TIME: 8:35 DEPT: S37P  
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CASE#: TRU PS1800118

CASE NAME: THE FORSTER FAMILY TRUST DATED 2/20/87 ETC

HEARING:

Petition for an order directing distribution from Trust; for  
constructive Trust; Compelling etc

COUNSEL:

MERCEDES CELLI-BUCSA (PET)...KYLE A PATRICK  
THE FORSTER FAMILY TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice

**Need** Notice of Hearing with proof of service to Jenny Celli. **Notice of hearing filed 06/26/18; however, not in Laserfiche at time of review.**

(cs)

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

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DATE: 07/02/18 TIME: 8:35 DEPT: S37P  
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CASE#: TRU PS1800119

CASE NAME: REED FAMILY TRUST DATED 3/1/99 ROBERTA REED,ETC

HEARING:

Petition for Order compelling trust accounting and for order compelling Julia Ann Hage, Trustee to perform etc

COUNSEL:

ANDREA RAE ABERNATHA (PET)...GAYLE J. CARSON  
REED FAMILY TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice:

1. Proof of service filed 06/07/18 as to daughter/beneficiary/named trustee, Julia Ann Hage, in her individual capacity and Andrea Rae Abernatha. However, Proof does not indicate whether a copy of petition was served. **JTD**
2. **Need** Notice of Hearing with proof of service to include, Julia Ann Hage individually and in her capacity as Trustee, and granddaughter/contingent beneficiary/successor trustee Alexis Nicole Hage per Article VII/VIII of the First Amendment to Trust.

(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

-----  
DATE: 07/02/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1700158

CASE NAME: KEILA BOTHI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of AMERICA BOTHI

COUNSEL:

AMERICA BOTHI

(PET)...PRO/PER

KEILA BOTHI

(CEE)...SANDY L. TURNER

GENERAL INFORMATION

**Continued from 04/02/18 at request of Court to clear probate notes. All existing order shall remain in full force and effect.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. America Bothi, appointed limited conservator of the person only on 08/28/17.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/05/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 03/05/18; however, item 4(a)(b) is incomplete. **Need** completed form.
4. **Need** Care Plan in accord with Pr.C.§2352.5.
5. **Supplemental Report by Sandy Turner, Court appointed attorney and request for Instructions filed 05/21/18. JTD**

RECOMMENDATION

Need to clear notes 3-4. Inquire Status  
(cs)



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

-----  
DATE: 07/02/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800158

CASE NAME: GERALDINE DOUGLASS  
HEARING: Petition for Appointment of Conservator

COUNSEL:

CHRISTINE SMITH (CPE)...PRO/PER  
GERALDINE DOUGLASS (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by daughter, Christine Smith, Petitioner.

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

1. Petitioner seeks bond of \$15,000.00. Estimated value of personal property is \$9,337.00 and estimated annual income of \$21,365.76. Suggest bond of \$33,773.00 (includes 10% recovery). **JTD**
2. Petitioner indicates proposed conservatee has a Court appointed Texas guardian. Court to inquire.
3. Court to see Conservator Screening form.
4. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
5. Petitioner seeks medical powers. **Need** Capacity Declaration with attachment.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need** return of Citation.
8. Notice given.
9. Court Investigator report filed 06/26/18. **Need** CI Report (Medical Information).
10. ~Proposed Form Order: 05/25/18

RECOMMENDATION

Need to clear notes 5-7. Court's discretion re Bond. If approved, set hearing for Compliance Review for **02/04/19** 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 and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **09/09/19**. Any accounting to be filed 30 days in advance.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 22

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

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DATE: 07/02/18 TIME: 9:35 DEPT: S37P  
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CASE#: CON PS0900049

CASE NAME: TODD L KOERBER

HEARING: Eighth Account and Report of CHRISTIE DAVIDSON and Petition for allowance of fees filed.

COUNSEL:

CHRISTIE DAVIDSON	(CPE)...KARIN E HORSPPOOL
TODD L KOERBER	(CEP)...JAMES B CHURCH
TODD L. KOERBER SPECIAL NEEDS TRUST (TRU)..	
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JAMES B CHURCH	(PET)...JAMES B CHURCH
TODD KOERBER	(TP )...VANCE & BLAIR LLP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 8<sup>th</sup> Account Current of Trustee and 9<sup>th</sup> Account current of Conservator and Petition for Fees, by Christie Davidson, Trustee/PPF.

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

1. Accounting covers period: 03/01/17 – 02/28/18.
2. Assets on hand: SNT \$345,487.94; of which \$133,392.15 is cash  
Conservatorship \$295.22 in cash.
3. Petitioner requests fees of \$3,871.05 as Trustee; and \$19,434.25 as Conservator for 8.7 hours/269.1 hours at \$45/95 per hour. Itemized [Acct. 05/31/18 LFpg 37-60 & 61-164]. JTD
4. Attorney requests total fees of \$13,500.00 for 7.80 hours at \$375 per hour for services to Trust and 27.60 hours at \$375/\$425 per hour for services to Conservatorship. Itemized [Acct. 05/31/18 LFpg165-171]. JTD
5. Petitioner indicates the Court Investigator report filed 07/08/14 notes that Conservatee is incapable of completing an affidavit of voter registration and does not wish to petition for restoration of his right to vote. However, Conservatee was not disqualified from voting when the conservatorship was established and maintains his right to vote. Additionally it appears reports from Court Investigator, Court appointed counsel, or GAL have provided regular reports.
6. Care and board statements provided do not cover entire period of account. **Need** all statement covering 06/17 and 12/17.

7. Current bonds appear sufficient;
  - a. \$20,000 re Conservatorship
  - b. \$475,000 re Trust.
8. ~Proposed Order: 05/31/18

#### RECOMMENDATION

Need to clear note 6. Court's discretion re fees. If accountings approved, set next accounting review for **05/27/19** (if one year) or **05/25/20** (if two years). Accounting to be filed 30 days in advance of hearing.

(cs)

Future Hearing: 8/01/18 Hearing Re: Review

Superior Court of Calif, County of San Bernardino

Page: 23

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

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DATE: 07/02/18 TIME: 9:35 DEPT: S37P  
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CASE#: CON PS1800068

CASE NAME: Margaret Scott Smith (Master File).

HEARING:

Petition for Instructions re: Revocation of Second Amendment;  
Complete restatement etc

COUNSEL:

KIM MOORE	(CPE)...FULLERTON LEMANN SCHAEFER
MARGARET SCOTT SMITH	(CEP)...SHERRI L KASTILAHN
TIMOTHY J SMITH	(CP )...NANCY W. ANDRUS
SHERI KASTILAHN	(PET)...SHERRI L KASTILAHN
ROSE C ROSADO	(TP )...ROSE C ROSADO

Future Hearing: 7/24/18 Petition for Conservatorship of the Person

Currently under review by Legal Research.  
(LR)

Notice:

Notice given.

(cs)