



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 07/03/18

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.

nb0612/0627

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 07/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600493

CASE NAME: VANDORA V. HIGGINS

HEARING:

Hearing re Final Discharge

COUNSEL:

DEPARTMENTOF HEALTH CARE SERVI (TP)...

JUDY FROST

(PET)...JAMES A. BUSSE JR.

VANDORA V HIGGINS

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge of Judy Frost.

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

1. Order of Final Distribution entered 06/27/17.
2. Receipts filed.
3. Ex-Parte Petition/Order for Final Discharge received indicates no personal property is on hand for distribution or transfer; real property was disbursed when assets consisted of only cash; and name is not included at Order For Final Discharge Section. **Need** correction of same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600951

CASE NAME: YVONNE KAREN RAMOS-MOYA

HEARING:

Accounting Review by ***

COUNSEL:

CRYSTAL TORRES	(PET)...PRO/PER
EDWARD RAMOS JR	(PET)...PRO/PER
NOREENA RAMOS	(OBJ)...PRO/PER
YVONNE KAREN RAMOS-MOYA	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review of Edward Ramos, Jr.

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

1. Letters Testamentary issued to Edward Ramos, Jr. on 04/25/17, full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1601281

CASE NAME: Barbra Ammon

HEARING:

1st & Final Account and Report of PATRICIA A. SMITH and Petition
for allowance of fees filed.

COUNSEL:

BARBRA AMMON (DEC)...
PATRICIA A. SMITH (PET)...D M DAVIS

GENERAL INFORMATION:

Continued from 05/29/18 at request of counsel. Notice to be given by Ms. Davis.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Personal Representative, Patricia A. Smith ["Petitioner"].

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

1. Accounting period 03/08/17 to 04/12/18. **Incorrect.** Accounting period should begin on date of death (10/23/16), not on issuance of letters. **JTD.**
2. Assets on Hand \$294,307.32 of which \$24,730.85 in cash (received thru 06/05/18); remaining in real and personal property per **Supp. filed 06/18/18.**
3. Statutory fees of \$9,007.81 requested. Calculated.
4. Proposed Order 03/26/18 reflects incorrect account period; reflects incorrect cash on hand; and does not include all tax refunds as indicated in supplements.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for final discharge on **06/05/19.**
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700682

CASE NAME: MTR OF JOYCE HELEN KELSEY

HEARING:

First and Final Account and Report of JOSEPH D KELSEY
and Petition for allowance of fees filed.

COUNSEL:

JOSEPH D KELSEY (PET)...CHARLES S ALTHOUSE
JOYCE HELEN KELSEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Administrator, Joseph D. Kelsey ["Petitioner"-son].

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

1. Assets on Hand \$66,767.35 consisting of cash held in attorney's IOLTA account.
2. Statutory fees of \$6,137.50 requested. Calculated.
3. Attorney requests extraordinary fees of \$1,445.40 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 4.9 hours' attorney time. Itemized [LF, p. 13].
4. Petitioner requests reimbursement of costs advanced of \$2,971.80, of which, a portion has been paid, leaving a balance of \$1,201.80 that needs to be reimbursed. Partially itemized [LF, p. 14]. Does Court wish to require further itemization? **JTD.**
5. ~Proposed Form Order 05/21/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
07/02/19.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 07/03/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST, DATED
JUN

SEE ALSO 5A

HEARING:

Verified Account and Report of KENNETH W. BUCHANAN and Petition
for allowance of fees filed.

COUNSEL:

CHARLES BUCHANAN	(PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOC	(TRU)...
KENNETH W. BUCHANAN	(PET)...DORSEY & WHITNEY
KENNETH W. BUCHANAN, TRUSTEE O	(TP)...DORSEY & WHITNEY LLP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Verified Accounting and Petition for Fees by
Trustee, Kenneth W. Buchanan ["Petitioner"-son].

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

1. Petition is not verified. **Need** same.
2. Accounting period 03/23/16 to 04/30/18.
3. Asset on Hand \$276,429.09 consisting of cash and securities.
4. Trust waives bond.
5. Petitioner requests lessor fees of \$20,000. Billed at \$75/hour for more than 450 hours' time (exceeds \$33,750). Not itemized. Does Court wish to require itemization via verified supplement? **JTD.**
6. Attorney requests outstanding fees of \$4,546.00 through 04/30/18. Does Court wish to require hourly rate(s), hours; and itemization via verified supplement? **JTD.**
7. **Need** mandatory form, Summary of Account and supporting schedules, to include Assets on Hand at Beginning of Account Period and Ending Assets on Hand at End of Account Period, via verified supplement.
8. Disbursements **require** further clarification via verified supplement as to the following:

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

- a. Found stuff;
 - b. Credit card accounts and refund;
 - c. Travel expenses;
 - d. Reclaimed payments by US Bank;
 - e. Attorney fees to Dorsey & Whitney;
 - f. Attorney fees to Hillsboro Law Group;
 - g. Two Bros. Painting;
9. Real property was sold during this account period. **Need** copy of Escrow Closing Statement.
 10. **Need** proof of service to Notice of Proposed Action re: sale of real property.
 11. **Need** statement regarding notice to Director of Health Care Services. Alternatively, notice per Pr. C. § 9202(a).
 12. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board. Alternatively, notice per Pr. C. § 9202(b).
 13. **Need** statement regarding notice to Franchise Tax Board. Alternatively, notice per Pr. C. § 9202(c)(1).
 14. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§1064(a)(5).
 15. **Need** findings re: sole and separate property.
 16. **Need** findings re: known creditors;
 17. **Need** bank/financial statements to support opening and closing balances.
 18. Notice does not give 30 days; notice per Pr. C. §17203. **Need** proper service.
 19. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. **JTD.**
 20. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended account that complies with Pr. C. §1064 et seq., to be set on first check calendar no sooner than **08/14/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

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

DATE: 07/03/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST, DATED
JUN

SEE ALSO 5

HEARING:

Petition for TO COMPEL ACCOUNTING AND PRODUCTION OF TRUST RELATED DOCUMENTS; REMOVE TRUSTEE; APPOINT of SUCCESSOR

COUNSEL:

CHARLES BUCHANAN	(PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOC	(TRU)...
KENNETH W. BUCHANAN	(PET)...DORSEY & WHITNEY
KENNETH W. BUCHANAN, TRUSTEE O	(TP)...DORSEY & WHITNEY LLP

Currently under review by Legal Research.
(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 07/03/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500221

CASE NAME: Gerald Brown

HEARING:

Accounting Review by ***

COUNSEL:

GERALD BROWN	(CEP)...WALTER T. MOORE
HAROLD FLETCHER	(PET)...PRO/PER
HORACE WALLACE	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from 03/20/18 and 05/29/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review by Temporary Conservator of the Person and Estate, Harold Fletcher.

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

1. **Need** First and Final Account beginning 09/24/15 (date of appointment) to 06/02/16 (date oral motion to withdraw estate powers).
2. **Need** final inventory and appraisal.
3. No accounting. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/03/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600362

CASE NAME: ASHLEIGH FAYE MIRANDA

HEARING:

First Account and Report of SHELLY MARIE BURLESON and Petition for allowance of fees filed.

COUNSEL:

ASHLEIGH FAYE MIRANDA (CEE)...

SHELLY MARIE BURLESON (CPE)...PRO/PER

Request for Waiver of Court Fees and Costs filed by SHELLY MARIE BURLESON is GRANTED
Request for Waiver of Court Fees and Costs filed by ASHLEIGH FAYE MIRANDA is GRANTED

GENERAL INFORMATION:

Conservatee is the beneficiary of a SNT [see 04/11/18 filing for SNT] dated 06/28/17 established in LA County.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Trustee of SNT, Shelly M. Burleson ["Petitioner"-mother]

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

1. Accounting period 06/28/17 to 05/16/18.
2. Assets on Hand \$64,180.24 consisting of cash held in a blocked account.
3. Purported accounting consists of a conformed copy of the Order Approving Disposition of Proceeds of Judgment from LA County and bank statement ending on 05/16/18. **Need** accounting that conforms to Pr. C. §1064 et seq. and Local Rule 1406.
4. **Need** Notice of Hearing to include beneficiary, State Director of Health Care Services, Department of State Hospitals and Director of Developmental Services.
5. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need amended account that complies with Pr. C. §1064 et seq., to be set on first check calendar no sooner than **08/21/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/03/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700292

CASE NAME: ALYSSA CISNEROS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIE CISNEROS

COUNSEL:

ALYSSA CISNEROS	(CTP)...E. JOAN NELMS
MARIE CISNEROS	(CP)...PRO/PER

GENERAL INFORMATION

Marie Cisneros appointed Limited Conservator of the person on 01/30/18.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights; Care Plan; and a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

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

DATE: 07/03/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700463

CASE NAME: LORENA QUIROZ

HEARING:

Hearing Re: CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

CRISTINA QUIROZ	(CP)...
LORENA QUIROZ	(CTP)...WALTER T. MOORE
LORETO QUIROZ	(CP)...
MARIA QUIROZ	(CP)...PRO/PER

GENERAL INFORMATION:

Parents, Maria and Loreto Quiroz and sister, Cristina Quiroz appointed Limited Co-Conservators of the person on 10/01/09.

Continued from **03/27/18**. The case is referred to legal aid for legal assistance.

Court reads into the record the names on green certified mail receipts that were presented by Loreto Quiroz- receipts are returned back to Loreto Quiroz in court today.

Continued from 05/08/18. Attorney Walter T. Moore appointed. Court notes that report is required from Inland Regional Center. Notice by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON CMC re Transfer in from Los Angeles County

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

1. **Need** amended letters.
2. Conservatee is developmentally disabled. **Need** report by court-appointed attorney, Walter T. Moore..
3. **Need** IRC Report.
4. Last CI Report filed 10/05/17 in LA County. **Need** CI Report.
5. ~Proposed Form Letter 02/06/18

RECOMMENDATION:

Need to clear notes.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800001

CASE NAME: MTR OF HENRY W. DAVIS

HEARING:
Petition for ATTORNEY FEES

COUNSEL:
HENRY W DAVIS (CEP)...
TRACY DAVIS (CPE)...ZUMBRUNN LAW CORPORATION

GENERAL INFORMATION:
Temporary Letters issued on 02/21/18.

THIS CASE IS SET FOR HEARING ON Petition for fees and compensation by Walter T. Moore ["Petitioner"].

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

- 1 Petitioner was appointed on 02/14/18. Petitioner indicates that services have been rendered for which counsel has not been compensated.
- 2 Attorney requests fees of \$2,970.00. Billed at \$450/hour for 6.60 hours' attorney time. Itemized [LF, p. 3]. JTD.
- 3 Petitioner requests that Conservator of the Estate, Tracy Davis, pay requested sum, forthwith. **However**, an Inventory and Appraisal has not been filed per Pr. C. §2640.
- 4 ~Proposed Order 05/21/18.

RECOMMENDATION:
Court's discretion.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 07/03/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1401128

CASE NAME: Jewell nadine McAdams

HEARING:

FIRST & FINAL Account and Report of TRACY FREDRICKSON and
Petition for allowance of fees filed.

COUNSEL:

D M DAVIS	(TP)...
JEWELL NADINE MCADAMS	(DEC)...
PUBLIC GUARDIAN	(COUNTY COUNSEL
TRACY FREDRICKSON	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by TRACY FREDRICKSON is GRANTED

TOTAL WAIVED \$465.00

GENERAL INFORMATION:

Continued from **10/03/16**. The Court suspends administrator's powers and refers matter to the Public Administrator.

Continued from **11/14/16**. Court orders Tracy Fredrickson to appear on 01/10/17.

Continued from **01/10/17**. Citation issued as to: Tracy Fredrickson.

Continued from **03/28/17**. Court re-issues citation for the service to be completed on Tracy Fredrickson of the citation.

Continued from **06/13/17 and 12/12/17**. Citation issued as to Tracy Frederickson.

Continued from 01/23/18. Court orders Tracy Fredrickson to be personally present in court at 10:00 am in Department S35 on July 3, 2018. Court orders Tracy Fredrickson to file and serve account (on issues of accounting of funds received from sale of property on Monte Vista Road, Cathedral City, CA and issue of creditor's claim from Diane K Neugebauer) by 4pm, April 24, 2018. Court notes it is not going to be addressing issue of Navajo property, Mecury Sable Automobile.

THIS CASE IS SET FOR HEARING ON First and Final Account and for Assignment of Case to Public Guardian(s/b Administrator) and Release of Petitioner as Administrator by Tracy Fredrickson ["Petitioner"].

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

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

1. Notice filed 09/02/16 does not include Public Administrator. **Need** proper service.
2. Accounting period 11/04/13 to 04/23/16.
3. Assets on Hand \$118,000 consisting of real and personal property.
4. Petitioner does not request compensation.
5. Prior Attorney, D.M. Davis does not request compensation.
6. Petitioner alleges delinquent taxes on the Cathedral City real property are due in the amount of \$11,000 which the estate cannot pay. Those taxes will be satisfied if the real property is sold at the tax foreclosure sale on May 19, 2016. Question whether there is surplus on subject property? **Declaration filed 06/13/17 indicates was sold by prior Administrator, Tracy A. Fredrickson. Grand Deed affixed [LF, p. 4]**
7. Petition indicates the real property located in Yucca Valley was bequeathed to Dustin Silus Owens who lived in the property at the time of Decedent's death and continued to reside in the property until the property was no longer habitable. The subject property was in the final stages of foreclosure before petitioner's appointment but the estate had no money with which to bid or reclaim the Navajo Property. Mr. Owens received notice of the Probate and was aware of the foreclosure proceedings and made no effort to assist in saving the property. A Trustee's Deed was recorded on 07/14/15. Question whether there was a surplus on subject property? **Declaration filed 06/13/17 indicates property was sold at Trustee Sale and there were no excess proceeds. Trustee Deed Upon Sale affixed [LF, p.3].**
8. There is a creditor's claim for \$1,638.00 from Diane K. Neugebauer filed on 01/28/15. However, there is no allowance or rejection notice regarding this claim. **Need** verified supplement confirming status of this claim.
9. Petitioner requests the right of redemption subject to County and State regulations, and surplus monies, if any from the foreclosure of the real property located at 56161 Navajo Trail, Yucca Valley, CA, to decedent's grandson, Dustin Owens.
10. Petitioner requests the right of redemption subject to County and State regulations, and surplus monies, if any from the foreclosure of the real property located at 32570 Monte Vista Road, Cathedral City, CA, to decedent's daughter, Diane Owens, and granddaughter, Tracy Fredrickson, each as to an undivided ½ interest, therein.
11. To Diane Owens, the 2004 Mercury Sable Automobile and all the rest and remainder of decedent's estate.
12. Petitioner indicates she has no funds with which to correct the problems inherent in this estate or to hire an attorney to help her. She cannot post the bond. Petitioner request the Court to relieve her of the responsibility of Administrator and Order the Estate be turned over to the Public Guardian, sic should be Public Administrator, for resolution. **JTD.**
13. Notice of Non-Payment of Bond filed 07/26/16.
14. **Need** return of Citation.
15. Notice of Non-Payment of Bond filed 03/14/17.

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

16. Declaration Lack of Assets filed by PA on 06/13/17 alleges there are no other known assets and unable to locate prior Administrator, Tracy A. Fredrickson.

RECOMMENDATION:

Need to clear notes 1, 9 & 14 then Court's discretion. If approved, set next hearing for receipts and final discharge for **07/02/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 07/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800514

CASE NAME: MTR OF JOHN W LAING

HEARING:

Spousal Property Petition hearing.

COUNSEL:

JOHN W LAING

(DEC)...

PATRICIA A LAING

(PET)... LESLIE BARNETT

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Patricia A. Laing ["Petitioner"].

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

1. Decedent was a nonresident of California and left an estate in this county.
2. Petitioner requests a determination and confirmation of property passing to the surviving spouse as community property. Specifically, real property in San Bernardino County.
3. Petitioner proffers Decedent's Will [LF, p. 5] and Probate documentation from Pennsylvania [LF, pgs. 10-21] reflecting petitioner as beneficiary.
4. ~Proposed Form Order 05/18/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 07/03/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800516

CASE NAME: Rosa Siqueiros

HEARING:

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

COUNSEL:

JOSE SIQUEIROS

(PET)...MARK W REGUS

ROSA SIQUEIROS

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by spouse, Jose Siqueiros ["Petitioner"].

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

1. Petition alleges all heirs waive bond. Need Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by issues Guadalupe Siqueiros and Jose A. Siqueiros. Alternatively, suggest bond of \$315,000. **JTD.**
2. Section 8 to petition [LF, p. 5] does not include relationship of individuals listed. **Need** verified supplement.
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/03/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 07/03/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800085

CASE NAME: GASSAWAY FAMILY TRUST COMPLETELY ETC

HEARING:

Petition for Order determining trust's title to real property
(Heggstad Petition)

COUNSEL:

GASSAWAY FAMILY TRUST COMPLETE (TRU)...

RAYMOND GASSAWAY

(STE)...DIANA J CARLONI

Currently under review by Legal Research.
(LR)

Notice:

Proof of mailed service filed: however, need proof of personal service per Pr. C. §851.
Need proper service.

(nb)

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

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

DATE: 07/03/18 TIME: 10:00 DEPT: S36P

CASE#: EAP PS1800084

CASE NAME: NEAL V NEAL

HEARING:
Hearing Re: Elder Abuse Restraining Order

COUNSEL:
KOOSJE M NEAL (PP)...PRO/PER
ODESSA K SANTIAGO NEAL (RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need proof of personal service as to Respondent, Odessa K. Santiago Neal.
(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500390

CASE NAME: JEREMY LEE OLSON

HEARING:

Accounting Review by ***

COUNSEL:

JEREMY LEE OLSON (DEC)...

THOMAS EDWIN SHINTON (PET)...PRO/PER

GENERAL INFORMATION

Continued from 04/27/17 and 06/29/17. No appearances, Thomas Shinton ordered to appear. Should he fail to appear the Court may suspend letters of administration.

Continued from **09/07/17**. Administrator will file a petition to terminate.

Continued from 11/09/17. No appearance. The Court will suspend letters of administration if Thomas Shinton is not present at next hearing and appoint the Public Administration should Thomas Shinton not appear/file accounting or petition to terminate. PA to be present at next hearing. Thomas Shinton is cited to appear at next hearing, should he fail to appear a bench warrant may be issued for his arrest.

Continued from **02/06/18**. Petition to terminate will be filed. This is a no asset estate. The Court does not appoint Public Administrator at this time.

Continued from 04/17/18 on Courts motion. No appearance. Thomas Edwin Shinton is ordered to appear at next hearing. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON Accounting review/Status

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

1. Letters of Administration issued to Thomas Shinton, brother, on 02/18/16; limited authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting/status report/petition to terminate.
4. Court may wish to notify Public Administrator.
5. Proof of service as to citation filed.

RECOMMENDATION

Need to clear notes 2 & 3. 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/lc/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501034

CASE NAME: MTR OF LARRY LUCIANO

HEARING:

First And Final Account and Report of ANGELA PHILLIPS and
Petition for allowance of fees filed.

COUNSEL:

ANGELA PHILLIPS

(PET)...PECCORINI & PECCORINI

CINDY HEAD

(PET)...STEPHEN E. COCKRIEL

GREGORY SILVER

(PET)...STEPHEN E. COCKRIEL

LARRY LUCIANO

(DEC)...

LARRY LUCIANO JR

(PET)...HORSPOOL & HORSPOOL

SHERI GULINO

(PET)...PRO/PER

Judge Ludvigsen recuses herself

X-REF: PROPS 1700808

GENERAL INFORMATION:

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

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

1. Sherri Gulino appointed Special Administrator with Limited Authority, \$20,000 bond on 10/11/16 until appointment of general administrator. Question whether assets were marshalled as to require an accounting? **Need** verified supplement.
2. Accounting period 09/30/15 to 05/10/18.
3. Assets on Hand \$1,571,528.38 consisting of \$1,311,528.38 in cash and remaining in real property.
4. Petitioner requests statutory compensation of \$30,939.73 less offsets of \$1,772.94 for a balance of \$29,166.79. Calculated.
5. Attorney requests statutory fees of \$30,939.73. Calculated.
6. Attorney requests reduced extraordinary fees of \$11,000 (in lieu of \$21,309) for services rendered in connection with the defense of the Will Contest; and

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

- obtaining appointment of a special administrator. Billed at \$375-\$400/hour for a total of 54.96 hours' time. Itemized [LF, pgs. 25-30]. JTD.
7. Petitioner requests ratification of reimbursement of costs advanced of \$835.00. Itemized [LF, p. 49]. **JTD.**
 8. Petitioner's husband used his separate property funds to bring the mortgage current on the Lake Arrowhead House. Question whether reimbursement will be requested? **Need** verified supplement.
 9. **Need** bank/financial statements to support closing balances.
 10. Receipts – Schedule 2A and Disbursements – Schedule 3A include several mobile deposits; a counter credit from an unknown source; unknown credit card activity; unknown paid checks; utility payments to unknown property; toll road costs; DMV fees; and unknown Intuit Payroll payments **before** petitioner's appointment.
 11. Petitioner proposed upon approval of this Account to close the Probate Checking Account and transfer the balance of that account into the Attorney Special Trust Account, wherein, petitioner's attorney would pay the authorized fees, commissions and reimbursement from the Attorney Special Trust Account. **JTD.**
 12. The Will Contest was resolved by beneficiaries agreeing to pay Contestant and his sister jointly, \$35,000 and \$15,000, from their distribution from this estate. Petitioner proffers Pr.C. §10520(a) as authority for allowing preliminary distribution without leave of court. Petitioner intends to make equal preliminary distributions of \$40,000 to each of herself and Denise (beneficiary). Petitioner requests ratification upon proof of such payments. **JTD.**
 13. Petitioner requests authorization to distribute the balance of the Attorney Special Trust Account remaining after preliminary distributions; payment of attorney's fees and commissions; reimbursement of costs; and the setting aside of the requested reserve. Such balance shall be distributed to Denise and Petitioner in equal shares. **JTD.**
 14. Petitioner requests to distribute the House to herself and to include in the final order of distribution a standard omnibus clause distributing any unknown assets to herself as the residual beneficiary. **JTD.**
 15. Petitioner requests authorization to retain the sum of \$25,000 in the Attorney Special Trust Account as a reserve. **JTD.**
 16. Petitioner request bond exoneration upon approval of this account. However, bond is not exonerated until entry of a final discharge order.
 17. **Request for continuance to 10/15/18 or later as attorney will be unavailable in September and early October. JTD.**
 - a. **~Proposed Order 06/25/18.**
 18. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 1 & 8-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **07/02/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600459

CASE NAME: JOHN J SCHMELZER

HEARING:

Accounting Review by ***

COUNSEL:

CAROLYN M SCHAFER (PET)...PRO/PER
JOHN J SCHMELZER (DEC)...

GENERAL INFORMATION:

Continued from **02/06/18**. No appearance. Carolyn Schafer is ordered to be present at next hearing if accounting is not filed. Notice by Judicial Assistant.

Continued from 04/17/18 at request of petitioner. Notice to be given by Carolyn Shaefer.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 11/29/16 to daughter, Carolyn Schafer, full authority, no bond.
2. No accounting or status report of administration. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700169

CASE NAME: RICHARD DAVID BOYLE

HEARING:

Accounting Review by ***

COUNSEL:

GUAY P WILSON

(PET)...GUAY P WILSON

RICHARD DAVID BOYLE

(DEC)...

STATE OF CALIFORNIA FRANCHISE

(TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Guay P. Wilson on 05/09/17, full authority, \$450,000 bond.
2. Need final inventory and appraisal.
3. No accounting or status report. Need same.

RECOMMENDATION:

Inquire status. Clerk to notice bonding company.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

SEE ALSO 11

HEARING:

First and Final Account and Report of CANDACE GLAUM and Petition
for allowance of fees filed.

COUNSEL:

CANDACE GLAUM	(PET)...DARLING LAW OFFICES
NICOLE M ANDERSON	(PET)...PRO/PER
RICHARD MICHAEL GLAUM	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NICOLE M ANDERSON is GRANTED

Fee waiver amount due \$167.00

\$40.00 for special notice on 09/22/17

\$103.00 for fax and motion fee on 02/21/18

\$24.00 for fax fees on 04/20/18

GENERAL INFORMATION:

Continued from 04/10/18 at request of counsel to clear notes and trailing motion.

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

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

1. Accounting period 08/12/12 to 01/12/18.
2. Assets on Hand \$71,655.69 consisting of \$66,655.69 in cash held in attorney's IOLTA account and remaining in personal property.
3. Statutory fees of \$7,100 requested. Calculated. .
4. **Need** bank/financial statements to support closing balance per Local Rule 20-908. Statement affixed to supp. filed on 04/24/18 and 06/25/18, ends on 03/30/18. **Need** statement ending 01/12/18.
5. There appears to be a minor heir. Does Court wish to appoint GAL or guardian of the estate? Petition for Appointment of GAL filed 03/02/18. ~Proposed Form Order 03/02/18. **JTD.**
6. Petitioner requests to withhold the sum of \$465.00 as a reserve. **JTD.**

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

7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Need to clear note 4 then Court's discretion. If approved, set next hearing for receipts and final discharge for **09/03/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700908

CASE NAME: MARY BETH STOCKSTAD

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER Account and Report of
JULIA L STOCKSTAD and Petition for allowance of fees filed.

COUNSEL:

JULIA L STOCKSTAD

(PET)...DALE K BETHEL

MARY BETH STOCKSTAD

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of
Account and for Fees by Executrix, Julia L. Stockstad ["Petitioner"-daughter].

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

1. Sole beneficiary waives accounting.
2. Accounting period 07/06/17 to 03/31/18.
3. Assets on Hand \$423,444.37 consisting of \$55,519.34 in cash and remaining in
real and personal property.
4. Petitioner waives statutory compensation.
5. Attorney requests statutory fees of \$11,403.66. Calculated.
6. ~Proposed Order 05/18/18.

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge for **07/02/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700919

CASE NAME: THE AGUIRRE FAMILY REVOCABLE TRUST

HEARING:

Petition for Cancellation of trust; for accounting; for transfer
of property to Gonzalo Aguirre

COUNSEL:

GONZALO AGUIRRE (PET)...HEALY & ASSOCIATES
THE AGUIRRE FAMILY REVOCABLE T (TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Need notice of hearing with proof of service to all Successor Trustees including:
Guadalupe Ortega Diaz and Maria Carmen; and all beneficiaries including Alma
Amaya, Angela Cruz, Isabel Flores, Gilbert Ortega, and Aniceto Ortega.
(cs/nb)

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

Superior Court of Calif, County of San Bernardino
Page: 7A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700958

CASE NAME: MTR OF AARON BRODAHL
HEARING:
Spousal Property Petition hearing.

COUNSEL:

AARON BRODAHL	(DEC)...
CRESTIN AARA	(PET)...PRO/PER
MINOR CHILDREN	(MIN)...PRO/PER

GENERAL INFORMATION:

Continued from **01/22/18** on Court's motion. The Court orders supplement be filed correcting petitioner's name to be Crestin Brodahl. The Court appoints Sherri Kastilahn as guardian ad litem for the minor children. Notice by Judicial Assistant. Continued from **03/27/18** for verified declaration to detail the source of the down payment on the property, how the payments on the property were made, and if her name was on any of the loans. Oral report given by Sherri Kastilahn.

Continued from 06/19/18 on courts motion to review recently filed supplement. Notice to be given by Ms. Kastilahn.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Crestin Aara

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

1. Petitioner, Crestin Aara, seeks court to determine and confirm her half of community property and determine that decedent's half transfer to petitioner without administration. **Supp. (06/18/18) indicates the home was purchased during the marriage; with community funds and income; and the title was allegedly held in decedent's sole name due to qualifying purposes. JTD.**
2. Oral report by GAL, Sherri Kastilahn made at 03/27/18 hearing.
3. Notice of Hearing filed on 03/27/18 does not include Sherri Kastilahn and does not give 15 days' notice. **Need** proper service.
4. ~Proposed Form Order: 03/07/18

RECOMMENDATION:

Need to clear note 3, then Court's discretion.
(cs/nb)

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

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

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800369

CASE NAME: CARLOS VENEGAS MALDONADO

HEARING:
Spousal Property Petition hearing.

COUNSEL:
CARLOS VENEGAS MALDONADO (DEC)...
MARIA VENEGAS (PET)...PRO/PER

GENERAL INFORMATION

Continued from 05/31/18 on Courts motion to clear notes.

THIS CASE SET FOR HEARING ON Spousal Property Petition by Maria Venegas, spouse.

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

1. Petitioner, Maria Venegas, seeks court determine that property left by decedent is community and passes to decedent without administration.
2. Petitioner alleges she and decedent were married in 1995 and the real property was purchased during the marriage with community funds. The title was allegedly held in decedent's sole name due to qualifying purposes. **Need** verified supplement with actual date of acquisition of property.
3. **Need** notice of hearing and proof of service to the 3 children.
4. ~Proposed form order: 05/16/18.

RECOMMENDATION

Need to clear notes 2-3.
(lc/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800508

CASE NAME: ROBERT RAYMOND BRONSKI

HEARING:

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

COUNSEL:

EDWARD A KOBETICH (PET)...IGNAZIO FICARA
ROBERT RAYMOND BRONSKI (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of **Lost Will** and Letters Testamentary with full authority under IAEA by named executor, Edward A. Kobetich ["Petitioner"-friend].

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

1. Will waives bond. Estimated estate valued at \$225,000. 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. Declaration re: Lost Will [LF, p. 10] filed. Petitioner alleges has been unable to locate decedent's original Will dated 04/12/12. Petitioner represents that the original Will may have been accidentally destroyed in a fire at the Decedent's house which destroyed about 75% of the house and its contents on or about 03/18/17. Petitioner represents that this Will has never been revoked. Does Court wish to deem the presumption in Pr. C §6124 overcome? **JTD**.
3. The will conditionally incorporates decedent's Trust. A copy of decedent's Trust has been filed under separate cover.
4. Notice does not include Daryl Layne Rupp in his capacity as Trustee. Does Court wish to require same? **JTD**
5. ~Proposed Form Order/Letters 05/24/18.

RECOMMENDATION:

Court's discretion. If approved, set future hearing for Accounting Review on **09/03/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 07/03/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600497

CASE NAME: THE FRAIZER LIVING TRUST

HEARING:

FIRST Account and Report of JERRY FRAIZER and Petition for allowance of fees filed.

COUNSEL:

BETTY JANES FRAIZER	(PRO/PER
DIXIE J FRAIZER	(OBJ)... DAVID A XAVIER
DIXIE J. FRAZIER	(PET)...DAVID A XAVIER
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JERRY FRAIZER	(PET)...FITZGERALD YAP CREDITOR
LISA GREEN	(DAVID A XAVIER)...
THE FRAIZER LIVING TRUST	(TRU)...

Image not available – Clerks' Office notified on 06/18/18.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700358

CASE NAME: MTR OF RICHARD MICHAEL GLAUM

SEE ALSO 5

HEARING:

Motion Re: Request for Reimbursement Filed by Petitioner NICOLE
M ANDERSON

COUNSEL:

CANDACE GLAUM	(PET)...DARLING LAW OFFICES
NICOLE M ANDERSON	(PET)...PRO/PER
RICHARD MICHAEL GLAUM	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(TP)...PRO/PER

GENERAL INFORMATION:

Continued from 04/10/17 for proper notice.

THIS CASE IS SET FOR HEARING ON Request for Reimbursement and Declaration in Support by Nicole M. Anderson ["Petitioner"].

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

1. Petitioner indicates she is the granddaughter of decedent and was not included as an heir at law by Administrator, Candace Glaum.
2. Petitioner states she contacted Administrator's Attorney, Ryan Michael Darling, on various occasions via e-mails, requesting petitioner be added as an heir at law; following up on the status of same; and requesting petition be amended to include Petitioner. E-mails affixed [LF, pgs. 7-18].
3. Petitioner alleges that after not having received a response by Attorney Darling to petitioner's e-mail dated 10/26/17, as well as numerous e-mails requesting petitioner be added as an heir at law, Petitioner filed a Petition for Determination of Entitlement to Estate Distribution. Petitioner claims that Attorney Darling sent her a request via e-mail to withdraw her Petition for Determination as Petitioner was included in the distribution to the First and Final Account filed by Administrator Glaum. Petitioner filed a Request for Dismissal concurrently with the filing of this petition.
4. Petitioner requests reimbursement from the estate in the amount of \$650 for unnecessary expenses incurred by Petitioner for the preparation and filing of the

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

Petition for Determination, Request for Dismissal and this petition, due to Administrator Glaums' failure to provide an affirmative response or objections with regard to Petitioner's request to be included as an heir at law.

5. Petitioner does not request sanctions to be imposed at this time.
6. ~Proposed Order 03/12/18

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/03/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800028

CASE NAME: MTR OF COSTELLO FAMILY TRUST

HEARING:

Petition for VERIFIED PETITION FOR ORDER DECLARING ASSETS OF
DECEDENT TO BE TRUST ASSETS

COUNSEL:

COSTELLO FAMILY TRUST	(TRU)...
GEORGE WAYNE FISHER	(PET)...BRIAN W. SMETHURST
LORI M HARDCASTLE	(PET)...BRIAN W. SMETHURST

Currently under review by Legal Research.
(LR)

Notice:

Personal Service is required per Pr. C. §851.

Notice is not proper.

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859 if applicable; and
- (3) a statement advising any interested person that he or she may file a response.

The Notice of Hearing filed does not comply with one of more of these mandatory requirements.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 9:30 DEPT: S37P

CASE#: CIF DS1700118

CASE NAME: BOBRINK -V- BARELA

HEARING:
Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

HOLLIE SUE BARELA (RES)... LAUREN LAUNDIS
TED BERNARD BOBRINK (PET)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

No notes – Judge to decide.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 07/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1500208

CASE NAME: Teresa M. Morris

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

LEMUEL MORRIS

(PCR)...PRO/PER

MARRIETTA MORRIS METOYER

(PET)...PRO/PER

MITCHELL I ROTH

(PET)...MITCHELL I ROTH

TERESA M. MORRIS

(CEP)...

Ex-Parte Petition to Dispense with accounting and order approving entered 05/22/18.
(nb)

FUTURE HEARING DATES:

03/06/19 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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

DATE: 07/03/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600278

CASE NAME: JOSEPH DIAB

HEARING:

Accounting Review by ***

COUNSEL:

JOSEPH DIAB	(CEE)...MELVIN L FRIEDLAND
MICHLINE DIAB	(PRO/PER
SAMER DIAB	(CPE)...E. JOAN NELMS

XREF: SG SS05306 (Joseph Diab)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Estate, .

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

1. Samer Diab appointed conservator of the person and estate on 04/25/17, \$255,000 bond; \$600,008.22 in blocked account. Accounts reflected on final inventory and appraisal exceeds FDIC limits.
2. No accounting. **Need** same.

RECOMMENDATION:

Inquire status. Clerk to notice bonding company.

(nb)