



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 07/05/18

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.

06/05-07/02lc

Superior Court of Calif, County of San Bernardino

Page: 1 ADD ON

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

SEE ALSO 1A, 1B

HEARING:

Hearing Re: OSC RE SANCTIONS \$1,000.00 FOR FAILURE TO APPEAR

COUNSEL:

BRYAN STEWART

(PET)...PRO/PER

DAVID STEWART

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Sanctions \$1,000 for FTA/\$1,000 FTF.

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

1. OSC set on 06/07/18 when there was no appearance or proper accounting/status report filed. Court set sanctions of \$1,000 each for Failure to appear and for Failure to file. Administrator to appear.

RECOMMENDATION

Court's discretion re OSC.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 1A ADD ON

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

SEE ALSO 1, 1B

HEARING:

Hearing Re: OSC RE SANCTIONS \$1,000.00 FOR FAILURE TO FILE

COUNSEL:

BRYAN STEWART (PET)...PRO/PER
DAVID STEWART (DEC)...

See notes on matter 1.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 1B ADD ON

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1000611

CASE NAME: DAVID STEWART

SEE ALSO 1, 1A

HEARING:

Hearing Re: SUMMARY OF ACCOUNT

COUNSEL:

BRYAN STEWART (PET)...PRO/PER
DAVID STEWART (DEC)...

GENERAL INFORMATION

On 03/29/18, administrator ordered to filed supplement/amended accounting by 05/07/18.
05/01/18 hearing vacated re Summary of Account and reset for 06/07/18.

Continued from 06/07/18. No appearance.

THIS CASE SET FOR HEARING ON Summary of Account

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

1. Letters of Administration issued to Bryan Stewart on 04/06/11; full authority, no bond.
2. Previous status report approved on 09/17/14. **Need** order.
3. Summary of Account appears that a full report is missing. Petitioner must file a final report of administration per Cal Rules of Ct 7.550, Pr. C. §§ 1064, 10900. Deemed insufficient on 03/29/18. **Need** proper accounting and report.
4. Post move notice [incorrect form] indicates petitioner now resides in Maryland.

RECOMMENDATION

Inquire status of proper accounting with report and status report order.

(ww/lc)

Superior Court of Calif, County of San Bernardino

Page: 1C

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO DS1100003

CASE NAME: MATILDA ANABELLE HILLS

HEARING:

First and final rpt of adm w/will annexed on wvr Account and Report of LOMA LINDA UNIVERSITY and Petition for allowance of fees filed.

COUNSEL:

LOMA LINDA UNIVERSITY (PET)...CLAYSON, BAINER & SAUNDERS, AP
LOMA LINDA UNIVERSITY (PET)...CLAYSON, MANN, YAEGER & HANSEN
MATILDA ANABELLE HILLS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Loma Linda University, Trustee.

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

1. Assets on hand 257 Shares of Mills Livestock valued at \$479,369.
2. Executor waives accounting as Trustee of Trust.
3. Executor waives statutory compensation.
4. Counsel seeks statutory fees of \$12,587.38 each. Counsel has been paid per court order partial fees and is owed \$3,147.38. Ok.
5. No Proposed Order. Submit after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **07/18/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500803

CASE NAME: MTR OF SCOTT GEOFFREY KEY

HEARING:
Hearing re Final Discharge

COUNSEL:

LOIS A KEY (PET)... MARY M. BADER
SCOTT GEOFFREY KEY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Lois Key, mother, approved on 06/29/17.
2. **Need** receipt for Judi Norton.
3. **Need** proof of blocked accounts for minors Madison and Samuel Key [\$21,785.47 each].
4. **Need** informal accounting for \$5,000 reserve per local rule 20-911.
5. **Need** Ex Parte Petition for Final Discharge and Order.
6. **NOTE:** there appears to be a guardianship of person only for minors under **GARSS1500119**. Court to cross reference cases.

RECOMMENDATION

Inquire status of receipts and discharge order.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 2A ADD ON

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501093

Vacated

CASE NAME: MTR OF MILDRED B JACKSON

SEE ALSO 2B, 2C

HEARING:

Hearing re Final Discharge

COUNSEL:

JOHN JACKSON	(PET)...DUANE P BOOTH
MILDRED B JACKSON	(DEC)...
WELLS FARGO FINANCIAL NATIONAL	(TP)...

Final discharge approved and sent to clerk's office on 06/25/18.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501093

Vacated

CASE NAME: MTR OF MILDRED B JACKSON

SEE ALSO 2A, 2C

HEARING:

Hearing Re: OSC RE SANCTIONS \$500.00 FOR FAILURE TO APPEAR

COUNSEL:

JOHN JACKSON	(PET)...DUANE P BOOTH
MILDRED B JACKSON	(DEC)...
WELLS FARGO FINANCIAL NATIONAL	(TP)...

Final discharge approved and sent to clerk's office on 06/25/18.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 2C ADD ON

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501093

Vacated

CASE NAME: MTR OF MILDRED B JACKSON

SEE ALSO 2A, 2B

HEARING:

Hearing Re: OSC RE SANCTIONS \$500.00 FOR FAILURE TO FILE

COUNSEL:

JOHN JACKSON	(PET)...DUANE P BOOTH
MILDRED B JACKSON	(DEC)...
WELLS FARGO FINANCIAL NATIONAL	(TP)...

Final discharge approved and sent to clerk's office on 06/25/18.

(lc)

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600801

CASE NAME: MTR OF HERSEL RAY PIERCE, SR

HEARING:

Accounting Review by ***

COUNSEL:

CALIFORNIA VICTIM COMPENSATION	(PRO/PER
DESIREE D SMITH	(PET)...CHARLENE L USHER
DESIREE SMITH	(PET)...CHRISTINA FERRANTE
HERSEL RAY PIERCE JR	(PET)...USHER LAW GROUP, PC
HERSEL RAY PIERCE JR.	(PET)...CHRISTINA FERRANTE
HERSEL RAY PIERCE SR	(DEC)...
MICHAEL MCCASLAND	(PRO/PER
SEBREN A PIERCE	(OBJ)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Desiree Smith and Hersel Pierce, Jr., children, on 04/28/17; **limited** authority, \$20,000 bond and blocked account of \$167,851.49.
2. Partial and Reappraisal for sale Inventory and Appraisals filed. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700523

CASE NAME: MTR OF CAROLYN JANET DeVAUGHNS

HEARING:

first and final Account and Report of LLOYD LIONELL DEVAUGHNS
and Petition for allowance of fees filed.

COUNSEL:

CAROLYN JANET DEVAUGHNS (DEC)...
DEPARTMENT OF HEALTH CARE SERV (TP)...PRO/PER
LLOYD LIONELL DEVAUGHNS (PET)...PAUL HORN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for
Allowance of Fees by Lloyd DeVaughns, brother.

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

1. Assets on hand \$153,527.87 cash.
2. Administrator and counsel seek statutory fees of \$5,983.96.
3. Counsel seeks extraordinary fees of \$1,625 for 6.5 hours at \$250 per hour re sale of real property. [LFpg40-41].
4. Real property was sold at a \$64,500 loss. Court to inquire why loss was over 1/3 of its value.
5. Counsel seeks reimbursement of costs totaling \$2,334 [LFpg9]. **JTD**
6. No proposed order. Submit after hearing.

RECOMMENDATION

RFA subject to note 4. If approved, set hearing on the filing of receipts and final discharge for **07/18/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800310

CASE NAME: MTR OF WILLIAM LISLE MOORE

HEARING:

Hearing Re: STATUS OF BOND/VACATE HRG IF BOND POSTED

COUNSEL:

RONALD W MOORE (PET)...PRISCILLA C SOLARIO ESQ
WILLIAM LISLE MOORE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Bond.

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

1. Ronald Moore, son, appointed executor on 05/24/18; full authority, \$400,000 bond.
2. **Need** bond in order for letters to issue.

RECOMMENDATION

Inquire status of bond.

(lc)

Future Hearing: 8/01/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800313

CASE NAME: MTR OF JUSTICE BARAMEY THACH ET AL

HEARING:

Hearing Re: PROOF OF DEPOSIT

COUNSEL:

RI KIM THACH	(PET)...	FULLERTON LEMANN SCHAEFER
JUSTICE BARAMEY THACH	(MIN)...	
VICTORIA REACHNY THACH	(MIN)...	

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Proof of Blocked Account.

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

1. Petition to deposit funds into blocked account by Mother, Ri Kim, approved on 05/24/18.
2. **Need** proof of blocked account for Victoria and Justice for \$65,000 each [form MC-356].

RECOMMENDATION

Inquire status of blocked accounts.

(lc)

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: 07/05/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1600510

Vacated

CASE NAME: EMELY GARCIA SPECIAL NEEDS TRUST

HEARING:

Accounting Review by ***

COUNSEL:

EMELY GARCIA SPECIAL NEEDS TRU (TRU)...

WESTAMERICA BANK

(PET)...RANDOLPH M SHARON ESQ

XREF: CIVRS1401779 (EMELY GARCIA -V- THOMAS T LEE)

(lc)

Future hearing dates: 08/6/18 2nd Account by WestAmerica Bank

Superior Court of Calif, County of San Bernardino

Page: 7A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/05/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800102

CASE NAME: IN THE MATTER OF THE MARY A. ALLESSIO REVOCABLE TR

HEARING:

Hearing Re: PETITION TO REMOVE TRUSTEE, ETC

COUNSEL:

JOHN ANTHONY ALLESSIO (PET)...PATRICK J MALLEN

MARY A ALLESSIO (DEC)...

Currently under review by legal research.

30 days' notice filed 05/17/18; image only available in Open Access.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 07/05/18 TIME: 9:30 DEPT: S35P

CASE#: CON DS1000013

CASE NAME: WILLIAM HARNISHFEGER

HEARING:

Hearing Re: CONSERVATOR TO FILE FINAL ACCOUNTING

COUNSEL:

BARBARA ANN SIMMONS (CPE)...PRO/PER

WILLIAM HARNISHFEGER (CTP)...

SOUTHERN CA BONDING SRVC (TP)...

GENERAL INFORMATION

Continued from 05/24/18. Referred to Legal Aid.

THIS CASE SET FOR HEARING ON Conservator to File Accounting/Accounting review.

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

1. Barbara Ann Simmons, friend, appointed temporary Conservator on 10/03/85 and general on 12/24/85 of person and estate 12/24/85; \$30,000 bond.
2. Matter set on 04/05/18 after review of Court Investigator report filed 03/12/18.
3. It appears no accounting or Pr.C. § 2628 waiver had been filed since 2014 [\$0 assets in 2014]. **Conservatee allegedly passed away on 03/03/18**; however, notice of death does not appear to be filed Pr.C. § 2361.
4. Exparte Petition to Dispense accounting beginning with 12/04/14 submitted; however, local rule 20-1406 states Pr.C. § 2628 waivers shall be set for a noticed hearing. The estate indicates a \$0 balance. Does court wish to deem as a final or set for noticed hearing? As there are zero assets, Conservator may be also discharged per Pr.C. § 2626. **JTD**
5. ~Proposed Form Order: 05/24/18.

RECOMMENDATION

Court's discretion. If hearing re account to be set, set for **08/30/18**.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1300297

CASE NAME: ELLIS ALFORD WESTMORELAND

HEARING:

Accounting Review by ***

COUNSEL:

DIANA JANE WESTMORELAND ABSOLO (OBJ)...PRO/PER

ELISA JILL WESTMORELAND COGBUR (B. PALMER RIEDE)...

ELLIS ALFORD WESTMORELAND (DEC)...

KEVIN JUDE WESTMORELAND (PRO/PER

PEGGY JOAN WESTMORELAND (PET)...GREGORY T ANNIGIAN

GENERAL INFORMATION

Continued from 01/17/18 for resolution/accounting to be filed. Accounting to be filed 30 days in advance.

Continued from 04/19/18. Accounting to be filed or court will suspend letters and appoint Public Administrator.

THIS CASE IS SET FOR HEARING ON Accounting Review re Peggy Westmoreland, administrator

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

1. Letters of Administration issued to Peggy Westmoreland, daughter, on 02/18/14; full authority; no bond.
2. Status Report approved on 01/25/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(lh/lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 3, 4

HEARING:

Petition for /TO COMPEL REMOVAL OF TRUSTEE;FOR APPOINTMENT OF
SUCCESSOR TRUSTEE ETC

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

Currently under review by legal research.

Continued matter. Notice not re-reviewed.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 2, 4

HEARING:

Petition for to Recover Trust Assets, to Impose Constructive Trust, to Impress
Equitable Lien etc

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

Currently under review by legal research.

Continued matter. Notice not re-reviewed.

(lc)

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500897

CASE NAME: the Mitchell Family Trust

SEE ALSO 2, 3

HEARING:

Second Account and Report of KEITH MITCHELL and Petition for allowance of fees filed.

COUNSEL:

CHERIE KEITH	(OBJ)...RICHARD L BARRETT
CHERIE KEITH	(PET)...RICHARD L BARRETT
KEITH MITCHELL	(PET)...DIANE E ROBBINS
MITCHELL FAMILY TRUST	(TRU)...

GENERAL INFORMATION

Continued from 04/05/18. Working on settlement. Diane Robbins to give notice.

THIS CASE SET FOR HEARING ON 2nd Account Current and Report of Trustee, Keith Mitchell.

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

1. Accounting period 01/01/16 – 12/08/17.
2. Assets on hand \$607,613.37: cash of \$54,612.37 and remainder in real property.
3. Receipts indicate a \$50,000 loan from Trustee to the Trust. [1/26LFpg35]. However, there does not appear to be any schedule for liabilities. **Need** same.
4. **Need** statements to support cash balance per local rule 20-908.
5. Fees of \$22,311.87 were paid to counsel on 04/14/17. Allowed per Section G(17) of Trust.
6. Partial distribution was made to Carol, surviving spouse, totaling \$75,000.
7. ~Proposed Order: 01/16/18.

RECOMMENDATION

Need to clear notes 3-4. *If court retains jurisdiction of trust*, set Accounting/Status Review for **02/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500918

Vacated

CASE NAME: GERALD E FERRIS

HEARING:
Hearing re Final Discharge

COUNSEL:
GERALD E FERRIS (DEC)...
JONATHAN J MARSHALL (PET)...PRO/PER

Final discharge approved/filed 06/14/18.

(lc)

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600129

CASE NAME: DAVID W LAFLIN

HEARING: Pet for settlement of First & Final on wvr of Account and Report of RICHARD LAFLIN and Petition for allowance of fees filed.

COUNSEL:

DAVID W LAFLIN (DEC)...
RICHARD LAFLIN (PET)...MONICA A MIHELL
STEVEN ANTHONY LAFLIN (TP)...ROSE C ROSADO

XREF: PROPS1600129 (David W Laflin)

GENERAL INFORMATION

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

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

1. Assets on hand \$238,210.02 in cash.
2. All heirs waive accounting; however, waivers not attached. Rather a supplement attached with actual accounting. Court may wish to deem as an accounting absent waivers filed. **JTD**
3. Petitioner and counsel seek statutory fees of \$14,810.64; however, calculation is incorrect. Statutory fees appear to be \$9,910.64. **Need** corrected calculation as \$5,000 gain is not in statutory fees, but rather 2% of \$5,000.
4. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear note 3. If approved, set hearing on the filing of receipts and final discharge for **07/18/19**.

(lc)

Future hearing dates: 07/25/18 Petition for Attorney's Fees by GAL Melvin Friedland

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600177

CASE NAME: MTR OF RICHARD JACOBUS HUTZEZON

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

RICHARD JACOBUS HUTZEZON (DEC)...
RICHARD JAKE HUTZEZON (MIN)...
SANDRA MARQUEZ (PET)...CANDICE A GARCIA-RODRIGO

(lc)

Future hearing dates: 07/09/18 Status Report

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600879
CASE NAME: MTR OF SHIRLEY ANN BIANCO
HEARING: First and Final Account and Report of LISA D CARMONA and
Petition for allowance of fees filed.

COUNSEL:

LISA D CARMONA	(PET)...PRO/PER
RHONDA A ANDERSON	(PET)...PRO/PER
SHIRLEY ANN BIANCO	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Lisa Carmona, daughter.

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

1. Assets on hand \$90,355.64 in cash.
2. Administrator seeks extraordinary fees of \$7,282.54; however, it appears to be a request for reimbursement [Acct. 05/22/18LFpg72]. Court to inquire why cell phone for beneficiary Steve is administrative expense. **JTD**
3. Administrator seeks statutory compensation of \$7,638.04. Calculation does not appear to be correct as gains/losses are not included per Pr.C. § 1021; however, attached fee request is. Does court wish to require separate verification or verify on record? **JTD**
4. Report states Creditor's Claim by Ascension for Synchrony Bank of \$366.04 is allowed; however, disbursements do not indicate claim has been paid. **Need** verified supplement.
5. **Need** closing escrow statement per local rule 20-910.
6. **Need** statements to support Inventory and Appraisal and ending account cash balance per local rule 20-908.
7. Report itself does not appear to be verified per Pr.C. § 1021; however, attached fee request is. Does court wish to require separate verification or verify on record? **JTD**
8. No proposed order. Submit after hearing.

RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing on the filing of receipts and final discharge for **07/18/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601107

CASE NAME: JACK E BIRKINSHAW TRUST OF 2009,DATED MARCH 12,200

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT/DISMISSAL

COUNSEL:

ERLINDA CAMERON	(PET)...ROBERT F SCHAUER
ISRAEL GARCIA	(OBJ)...SERGIO A WHITE
JACK E BIRKINSHAW TRUST OF 200	(TRU)...

XREF: CIVDS1413193 (*Cameron-v-Garcia et al*)

GENERAL INFORMATION

Continued from 04/19/18. No dismissal or settlement filed.

THIS CASE SET FOR HEARING ON Receipt of Settlement/Dismissal.

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

1. Matter set on 01/25/18 T.S.C. when notice of settlement was filed 01/22/18. A dismissal should be filed.

RECOMMENDATION

Inquire status.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700988

Vacated

CASE NAME: CARL LEE MCDONALD

HEARING:
Hearing Re: RECEIPT OF BOND

COUNSEL:
CARL LEE MCDONALD (DEC)...
KRISTINE PARADA (PET)...JAMES MERCER

Bond filed/letters issued

(lc)

Future Hearing: 6/27/19 Accounting Review

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800228

CASE NAME: MARIE T. HERNANDEZ AKA MARIE HERNANDEZ ETC

HEARING:

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

COUNSEL:

MARIE T. HERNANDEZ (DEC)...
VERONICA VALADEZ-ARREZOLA (PET)...ELISABETH KEMPE-

GENERAL INFORMATION

Continued from 04/19/18. For corrected publication.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Veronica Valadez-Arrezola, niece.

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

1. Will waives bond. Net estate value is \$256,500 of which \$6,500 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. ~Proposed Form Order: 03/08/18.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **09/12/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800498

CASE NAME: RUSSELL J MCKEE

HEARING:

Hearing re: Petition for Probate of Will and Letters with limited authority IAEA.

COUNSEL:

ANDREW P WILSON, JR (PET)...EMMETT A TOMPKINS, JR
RUSSELL J MCKEE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with **Limited** Authority under IAEA Andrew Wilson Jr, stepson/Trustee.

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

1. Petitioner seeks bond of \$620,000. Ok. Petitioner is a resident of Pennsylvania.
2. **Need** Duties and Liabilities form.
3. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C.§18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? JTD
4. Petitioner attaches declaration admitting that he underlined sections of the will.
5. Court to clarify decedent did not have registered domestic partner as section is incomplete.
6. No Proposed Form Order submitted.

RECOMMENDATION

Need to clear notes 2-3, \$620,000 bond. If approved, set Accounting/Status Review for **09/12/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800528

CASE NAME: JOHN S WHITBY

HEARING:

Hearing re: Petition for Probate of Will and Letters with limited authority IAEA.

COUNSEL:

DONNA WHITBY HARADON (PET)...ROBERT L COHEN
JOHN S WHITBY (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Donna Haradon, sister/Trustee.

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

1. Will waives bond. Net estate value is \$289,100 in personal property. Court for good cause could require bond per Pr.C. § 8481(b).
2. The will conditionally incorporates decedent's Trust. Copy of trust submitted.
3. No Proposed Form Order submitted.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **09/12/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

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

DATE: 07/05/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800539

CASE NAME: LEILANI PEARL ROGERS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

LEILANI PEARL ROGERS	(DEC)...
PATRICIA JEAN HOLGATE	(PET)...PRO/PER
RONALD JOHN PATRICK HIGGINS	(PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property by Patricia Holgate and Ronald Higgins, executor and son.

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

1. Petitioners seek that Ronald receive 100% interest in decedent's 100% interest in real and personal property. However, Ronald is only successor in interest and is to petition solely. No need for named executor to petition or consent as no other proceeding has commenced Pr.C. § 13152(a). **Need** amendment to petition indicating Ronald only as petitioner.
2. ~Proposed Form Order: 06/05/18.

RECOMMENDATION

Need to clear note 1.

(lc)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS AND MOTIONS

DATE: 07/05/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700929

CASE NAME: THE MARY JO SOHOVICH INTER VIVOS TRUST

SEE ALSO 13

HEARING:

Hearing Re: ACCOUNTING REVIEW (DENISE KIMBERLIN)

COUNSEL:

DENISE KIMBERLIN

(OBJ)...RICHARD A KENNEDY

DONNA SOHOVICH

(PET)...GAUDY LAW, INC

MICHELE SOHOVICH

(PET)...GAUDY LAW, INC

THE MARY JO SOHOVICH INTER VIV

(TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review

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

1. Matter set on 04/19/18 when Trustee Denise Kimberlin ordered to file an accounting no later than 06/05/18 and turn over records to temporary successor Trustee W.A. Hlavaty.
2. **Need** accounting.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1700929

CASE NAME: THE MARY JO SOHOVICH INTER VIVOS TRUST

SEE ALSO 12

HEARING:

Hearing Re: ORDR COMPELLING TEE TO ACCTG REMOVE TEE/APPT SUCC

COUNSEL:

DENISE KIMBERLIN	(OBJ)...RICHARD A KENNEDY
DONNA SOHOVICH	(PET)...GAUDY LAW, INC
MICHELE SOHOVICH	(PET)...GAUDY LAW, INC
THE MARY JO SOHOVICH INTER VIV	(TRU)...

Currently under review by legal research.

Notice sufficient.

(lc)

Superior Court of Calif, County of San Bernardino
Page: 13A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 07/05/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800102

CASE NAME: IN THE MATTER OF THE MARY A. ALLESSIO REVOCABLE TR
MOVED TO DEPT S35P PAGE 7A

HEARING:
Hearing Re: PETITION TO REMOVE TRUSTEE, ETC

COUNSEL:
JOHN ANTHONY ALLESSIO (PET)...PATRICK J MALLEN
MARY A ALLESSIO (DEC)...

Currently under review by legal research.

30 days' notice filed 05/17/18; image only available in Open Access.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000197

CASE NAME: CAMILLE A. DALISAY

HEARING:

Hearing Re: CONFIRMATION OF TRANSFER

COUNSEL:

ALFRED DALISAY

(PET)...JOSEPH P FOLEY

CAMILLE A. DALISAY

(CEE)...

LUCILLE DALISAY

(PET)...JOSEPH P FOLEY

GENERAL INFORMATION

Continued from 04/19/18.

THIS CASE SET FOR HEARING ON Confirmation of Transfer to Riverside.

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

1. Conservators, Alfred and Lucille Dalisay [parents] and Conservatee now live in Indio; Riverside County. Matter transferred on 02/08/18.
2. **Need** receipt and acknowledgement re transfer with Riverside case number.

RECOMMENDATION

Inquire status of receipt.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0600009

Vacated

CASE NAME: CONSERVATORSHIP OF CARMEN P PADILLA

HEARING:

Hearing re Final Discharge

COUNSEL:

ANTONIO DOMINGUEZ	(PET)...
CARMEN P PADILLA	(CEP)...DONNASUE ORTIZ
DIANE D HARKISON	(CPE)...M DANIEL SAYLOR
REBECCA T PEREZ	(CPE)...PRO/PER

Final discharge approved/filed.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400317

CASE NAME: MTR OF KNUD ANDERSEN

SEE ALSO 17

HEARING:

FIRST Account and Report of JENS ANDERSEN and Petition for allowance of fees filed.

COUNSEL:

JENS ANDERSEN

(CPE)...MATTHEW E SHEASBY

KNUD ANDERSEN

(CEP)...E JOAN NELMS

KNUD ANDERSEN

(PET)...JAMES B CHURCH

See notes on matter 17.

(lc)

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400317

CASE NAME: MTR OF KNUD ANDERSEN

SEE ALSO 16

HEARING: Amended Petition for approval of the Account and Report of JENS ANDERSEN and Petition for allowance of fees filed.

COUNSEL:

JENS ANDERSEN (CPE)...MATTHEW E SHEASBY
KNUD ANDERSEN (CEP)...E JOAN NELMS

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON **Amended [05/25/18]** 1st Account Current and Petition for Allowance of Fees by Jens Andersen, son.

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

1. **Conservatee passed away on 08/15/17.**
2. Accounting period 11/20/14 – 05/31/16.
3. Assets on hand \$753,483.63 of which \$146,829.54 is cash.
4. Attorney requests fees of \$16,101.85 or 37.17 hours at \$300 an hour, which includes \$4,154.45 for dissolution. Itemized [Sup.12/12 LFpg4-31]. JTD
5. **Need** bank statement that covers 05/31/16. Last statement appears to be 05/23/16 [Con.12/12 LFpg215]. **Supp 02/02/18:** There is allegedly a hold on the bank account.
6. Disbursements indicate \$315 in overdraft charges [Acct.05/25 LFpg19-20]. Previous **Supp02/02:** Conservator alleges he made deposits of his own money to cover overdraft fees.
7. Disbursements indicate several credit card payments, one of which is \$8,715.81 to Bank of America [Acct.12/12 LFpg16-17]. Previous **Supp 02/02:** Conservator states cards were paid off and now closed.
8. Conservator completed the Saticoy Property transaction whereby a 1st Deed of Trust was secured for \$450,000, which conservatee received monthly interest. Conservatee was also paid a lump sum of \$208,794.88.
9. Current bond is \$507,000.
10. ~Proposed Order: 05/25/18.

RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review **for final pre and post death accounting 08/30/18**. Accounting to be filed 30 days in advance.

(lc)

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700088

CASE NAME: FELIX MENDOZA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of GUADALUPE MOYA ZAMARRIPA

COUNSEL:

FELIX MENDOZA	(CTP)...WALTER T. MOORE
GUADALUPE MOYA ZAMARRIPA	(CP)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Guadalupe Zamarripa, granddaughter, appointed conservator of the person only on 09/14/17.
2. Notice of Conservatee's rights filed 06/26/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan filed 04/19/18. Care plan form appears to be altered with financial information deleted. Court to inquire.

RECOMMENDATION

None.

(lc)

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700208

CASE NAME: MTR OF ROSSEBELL SANCHEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSA SANCHEZ

COUNSEL:

ROSA SANCHEZ (CP)...PRO/PER
ROSSEBELL SANCHEZ (CTP)... SANDY TURNER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Rosa Sanchez, mother, appointed **limited** conservator of the person only on 09/21/17.
2. Notice of conservatee's rights filed 03/13/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord filed 04/26/18.

RECOMMENDATION

None.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700367

Vacated

CASE NAME: GARY M MAJINSKI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of CHICE A DAVISON

COUNSEL:

CHICE A DAVISON	(CE)...JOSEPHINE A RICH
GARY M MAJINSKI	(CEP)...PRO/PER
GARY M. MAJINSKI	(DEC)...

(lc)

Future Hearing: 06/13/19 Final Discharge.

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700369

CASE NAME: MTR OF JOSEPH RONALD MARTINEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JOSE MARTINEZ RECIOS

COUNSEL:

JOSE MARTINEZ RECIOS (CP)...PRO/PER
JOSEPH RONALD MARTINEZ (CTP)...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Jose Recinos, father, appointed **limited** conservator of the person only on 11/30/17.
2. Notice of conservatee's rights filed on 02/16/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan in accord filed 01/18/18..

RECOMMENDATION

None.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700398

CASE NAME: MTR OF SEAN PATRICK CHUA NUNEZ

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

NIGEL KENNETH CHUA NUNEZ (CP)...PRO/PER
SEAN PATRICK CHUA NUNEZ (CTP)...JAMES B CHURCH

GENERAL INFORMATION

Continued from 01/25/18. No appearance. James Church appointed counsel. IRC to provide report.

THIS CASE SET FOR HEARING ON Case Management Conference.

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

1. Nigel Nunez and Christina Chua, brother and mother appointed **limited** conservator, person only, on 02/02/15 in Los Angeles County. Matter transferred to San Bernardino on 10/12/17.
2. Amended letters filed 04/19/18.
3. IRC report filed 04/17/18.
4. Report of Counsel James Church filed 04/30/18.
5. Court Investigator report filed 01/23/18.

RECOMMENDATION

None. No future dates needed.

(lc)

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

DATE: 07/05/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800088
CASE NAME: MTR OF VIVIAN WILLIAMS
HEARING: Petition for Appointment of Conservator

COUNSEL:

FITZGERALD WILLIAMS (CPE)...LAW OFFICE OF MILES & HATCHER,
VIVIAN WILLIAMS (CPE)... DONNASUE ORTIZ

GENERAL INFORMATION

Fitzgerald Williams, son, appointed temporary conservator of person and estate on 03/26/18; \$241,000 bond.

Continued from 04/26/18. Donnasue Smith Ortiz appointed counsel.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Fitzgerald Williams, son.

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

1. Petitioner seeks bond of \$183,000. Court requires bond of \$241,000.
2. Petitioner seeks medical powers. Capacity Declaration filed 04/25/18; however, date last seen is incomplete. **JTD**
3. Petitioner seeks Pr.C.§ 2590 powers. **Need** verified supplement specifying what powers under Pr.C.§ 2591 are being sought. **Filed 06/28/18, However, image not available in open access or LF on 07/02/18.**
4. Petitioner seeks dementia powers. **Need** report of Counsel Donnasue Smith Ortiz. **Filed 06/27/18, However, image not available in open access or LF on 07/02/18.**
5. **Need** return of citation. **Filed 06/28/18, However, image not available in open access or LF on 07/02/18.**
6. **Need** notice of hearing and proof of service to Annette Harris and Joyce Filer who are listed on required contacts. **Filed 06/28/18, However, image not available in open access or LF on 07/02/18.**
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. Court Investigator report filed 04/17/18.
9. ~Proposed Form Order: 03/19/18.

RECOMMENDATION

Need to clear notes 3-7; \$241,000 bond. If approved, set hearing for Compliance Review for **02/07/19** for the filing of the required documents and hearing re Accounting Review for **09/12/19**. Any accounting to be filed 30 days in advance.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

MISC

DATE: 07/05/18 TIME: 1:30 DEPT: S37P

CASE#: EAP PS1800037

CASE NAME: RODRIGUEZ V RENDON

SEE ALSO 25

HEARING:

Court Trial set for ELDER/DEPENDANT ADULT ABUSE of ESTHER A
RODRIGUEZ

COUNSEL:

ESTHER A RODRIGUEZ (PP)...PRO/PER

LATISHA RENDON (RP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Trial – No notes – JTD

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 07/05/18 TIME: 1:30 DEPT: S37P

CASE#: EAP PS1800037

CASE NAME: RODRIGUEZ V RENDON

SEE ALSO 24

HEARING:

Hearing Re: Request to Modify Elder or Dependent Adult etc

COUNSEL:

ESTHER A RODRIGUEZ (PP)...PRO/PER

LATISHA RENDON (RP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

All parties previously present and/or served.