



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 07/10/18**

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.

nb0619/0703

Superior Court of Calif, County of San Bernardino

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0900792

CASE NAME: CHARLES L & ARLENE B REYNOLDS TRUST

HEARING:

Fifth Account and Report of REBECCA REYNOLDS LYTLE and Petition  
for allowance of fees filed.

COUNSEL:

ASHLEY REYNOLDS	(MIN)...SHERRI L KASTILAHN
CHARLES L REYNOLDS AND ARLENE	(TRU)...
CHRISTOPHER POND	(PET)...HARTNELL,
JAMES MAYS	(PET)...THOMAS W DOMINICK
REBECCA REYNOLDS LYTLE	(ATTORNEYS & COUNSELORS AT
REBECCA REYNOLDS LYTLE	(PET)...LAWRANCE A WIDDIS
REBECCA REYNOLDS LYTLE	(STE)...LAURA WIDDIS
SHANA REILLY-POND	(PET)...HARTNELL,
SHERRI L KASTILAHN	(PET)...SHERRI L KASTILAHN

**XREF: GARSS900374** (Ashley Reynolds)  
GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Fifth Account Current and Petition for Fees by  
Successor Trustee, Rebecca Reynolds Lytle ["Petitioner"].

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

1. Account period 04/01/17 to 03/31/18.
2. Assets on hand \$190,234.97 consisting of \$25,438.76 in cash and the balance  
in real and personal property.
3. The Trust cannot be distributed as a life estate was granted to James Mays who  
remains in the property and is current on his payments.
4. Petitioner requests fees of \$750 to be deducted from fees taken but disallowed  
during the first account period leaving a balance owing of \$91.52 in disallowed  
fees. **JTD.**
5. Petitioner requests reimbursement of costs advanced of \$716.00. Itemized.
6. Attorney requests fees of \$600 to be deducted from fees taken but disallowed  
during the first account period leaving a balance of \$1,039.48 in disallowed  
fees. **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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - no legal or procedural advice will be given.

7. No proposed order submitted with the pleadings. Submit order after hearing.

**RECOMMENDATION:**

Court's discretion. If approved, set hearing re next Accounting Review for **09/17/19**.  
Account to be filed 30 days in advance of hearing.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1501123

CASE NAME: JOYCE ANN VILLAFANA AKA JOYCE A. VILLAFANA

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CELIA S. NAJERA

(PET)...JOHN F WEBER

JOYCE ANN VILLAFANA

(DEC)...

GENERAL INFORMATION:

**Continued from 02/06/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued 11/29/17 to Celia S. Najera (aunt by marriage), full authority, no bond.
2. No accounting or status report of administration. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600332

CASE NAME: MTR OF VESTA L GUGGISBERG  
**SEE ALSO 2B, 2C**

HEARING:  
Hearing Re: FIRST AND FINAL Account and Report

COUNSEL:  
AMY LYNN PHILLIPS (CRAIG E WILSON  
AMY LYNN PHILLIPS (PET)...FULLERTON LEMANN SCHAEFER  
BRIAN R GUGGISBERG (PET)...BRUNICK, MCELHANEY &  
KERI LEIGH GUGGISBERG (PET)...FULLERTON LEMANN SCHAEFER  
KERI LEIGH GUGGISBERG (TP)...CRAIG E WILSON  
TED A GUGGISBERG (PET)...BRUNICK, MCELHANEY &  
VESTA L GUGGISBERG (DEC)...

**X-REF: PROPS 1600332**

**GENERAL INFORMATION**

Continued from 06/22/17. Petitioner's counsel to be personally present on 08/31/17. Response to objections to be filed by 07/20/17 and if objectors have a reply to response, then to be filed by 08/10/17.

**Continued from 08/31/17.** All future petitions must be filed under this case number. All parties to meet and work on resolution. Counsel Brunick stated there are depositions scheduled for 09/13/17. Court sets a deadline for 09/07/17 for counsel to communicate whether the depositions will go forward on 09/13/17 or if the parties will be able to hold their informal meeting. Matter set for trial.

**Continued from 12/07/17 at request of counsel.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees for Ted and Brian Guggisberg, Sons/Co-Trustees.

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

1. Petitioners and attorney request statutory fees of \$23,298.99 each; petitioners to divide their fees equally. Ok.
2. Attorney requests reimbursement of costs totaling \$2,507. Itemized [Acct. 04/12 LFpg6].

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

3. **Objections filed by Amy Philips and Keri Guggisberg, granddaughters, filed 06/21/17.**
4. **Response to objections by Ted and Brian Guggisberg filed 07/19/17.**
5. **Reply and Amended reply to response to objections by Amy Philips and Keri Guggisberg filed 08/10/17 and 08/23/17 respectively.**
6. ~Proposed Order: 04/12/17.

#### RECOMMENDATION

Matter is contested. If approved, set hearing on the filing of receipts and final discharge for **08/08/19**.

(lc/nb)

#### Future Hearing:

10/25/18 Readiness calendar

12/03/18 Court Trial

12/04/18 Court Trial

12/05/18 Court Trial

12/06/18 Court Trial

12/07/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600332

CASE NAME: MTR OF VESTA L GUGGISBERG

**SEE ALSO 2A, 2C**

HEARING:

Hearing Re: STATUS CONFERENCE

COUNSEL:

AMY LYNN PHILLIPS	(CRAIG E WILSON
AMY LYNN PHILLIPS	(PET)...FULLERTON LEMANN SCHAEFER
BRIAN R GUGGISBERG	(PET)...BRUNICK, MCELHANEY &
KERI LEIGH GUGGISBERG	(PET)...FULLERTON LEMANN SCHAEFER
KERI LEIGH GUGGISBERG	(TP )...CRAIG E WILSON
TED A GUGGISBERG	(PET)...BRUNICK, MCELHANEY &
VESTA L GUGGISBERG	(DEC)...

No notes – Status Conference.  
(nb)

Future Hearing:

10/25/18 Readiness calendar  
12/03/18 Court Trial  
12/04/18 Court Trial  
12/05/18 Court Trial  
12/06/18 Court Trial  
12/07/18 Court Trial

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Superior Court of Calif, County of San Bernardino

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600332

CASE NAME: MTR OF VESTA L GUGGISBERG

**SEE ALSO 2A, 2B**

HEARING:

Hearing Re: PTN TO COMPEL ACCOUNTING REMOVE TRUSTEES, ETC

COUNSEL:

AMY LYNN PHILLIPS	(CRAIG E WILSON
AMY LYNN PHILLIPS	(PET)...FULLERTON LEMANN SCHAEFER
BRIAN R GUGGISBERG	(PET)...BRUNICK, MCELHANEY &
KERI LEIGH GUGGISBERG	(PET)...FULLERTON LEMANN SCHAEFER
KERI LEIGH GUGGISBERG	(TP )...CRAIG E WILSON
TED A GUGGISBERG	(PET)...BRUNICK, MCELHANEY &
VESTA L GUGGISBERG	(DEC)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

Future Hearing:  
10/25/18 Readiness calendar  
12/03/18 Court Trial  
12/04/18 Court Trial  
12/05/18 Court Trial  
12/06/18 Court Trial  
12/07/18 Court Trial

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



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601193

CASE NAME: MTR OF HORACE BENTON

**SEE ALSO 2E**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 (ADMNSTRTR & COUNSEL)

COUNSEL:

HORACE BENTON (DEC)...  
MICHAEL BENTON (PET)...RICHARD F NEVINS

GENERAL INFORMATION:

**Continued from 06/05/18 due to non-appearances. The Court sets and OSC re Sanctions of \$500 on Administrator and Counsel. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions of \$500** on Accounting Review by Administrator w/Limited Authority, Michael Benton.

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

1. Letters of Administration issued 03/28/17, limited authority, no bond.
2. 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

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601193

CASE NAME: MTR OF HORACE BENTON

**SEE ALSO 2D**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

HORACE BENTON  
MICHAEL BENTON

(DEC)...  
(PET)...RICHARD F NEVINS

See prior matter #2D.  
(nb)

Superior Court of Calif, County of San Bernardino

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700311

CASE NAME: RONALD GENE SMEDLEY

HEARING:

First and Final Account and Report of BENJAMIN CHARLES SMEDLEY  
and Petition for allowance of fees filed.

COUNSEL:

BENJAMIN CHARLES SMEDLEY (PET)...ALBREKTSON & SHUMATE, LLP  
RONALD GENE SMEDLEY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Executor, Benjamin C. Smedley ["Petitioner"-son].

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

1. Sole beneficiary waives accounting.
2. Accounting period 02/01/17 to 04/05/18.
3. Assets on Hand \$39,171.34 consisting of cash.
4. Petitioner waives statutory compensation.
5. Attorney requests reduced statutory fees of \$8,325.00 (from \$9,250).  
Calculated. **JTD.**
6. Attorney requests extraordinary fees of \$713.90 for services rendered in  
connection with a personal injury claim and settlement of a claim against  
Subway initiated prior to Decedent's death and sales of real and personal  
properties. Billed at the reduced rates of \$328/hour for 1.3 hours' attorney time  
and \$125/hour for 2.3 hours' paralegal time. Itemized [LF, pgs. 42-43]. **JTD.**
7. Attorney requests reimbursement of costs of \$465.00. Itemized.
8. Petitioner requests authority to withhold \$1,000 as a reserve for closing costs.
9. Proposed Order 04/12/18 does not include findings re: character of assets, ie:  
sole and separate property.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for final discharge on **07/23/19**.

(nb)

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HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701102

CASE NAME: ESTATE OF STEPHEN LEE GUGGISBERG

HEARING:

Petition for transfer of property belonging to decedent etc

COUNSEL:

BRIAN R GUGGISBERG	(BRUNICK, MCELHANEY & KENNEDY
SCOTT SHOWLER	(PET)...FULLERTON LEMANN SCHAEFER
STEPHEN LEE GUGGISBERG	(DEC)...
TED A GUGGISBERG	(OBJ)...BRUNICK, MCELHANEY &

**X-REF: PROPS 1600332**

Currently under review by Legal Research.  
(LR)

Notice:

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)

Future Hearing:

05/02/19 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800032

CASE NAME: Carol Jean Brinks

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION TO DETERMINE, ETC

COUNSEL:

CAROL JEAN BRINKS (DEC)...  
DWAYNE BRINKS (PET)...LINDA ROBERTS ROSS

GENERAL INFORMATION:

Continued from **02/27/18**. Counsel states she will file an amended petition.  
Continued from **04/17/18**. No appearances. Court notes that if counsel fails to appear at next hearing date, the petition will be dismissed. Notice by Judicial Assistant.  
**Continued from 05/29/18. The court continues the OSC re dismissal. Court sets a deadline of June 26, 2018 by 4pm to file the amended petition. If the amended petition is not filed by this date, the court will dismiss the petition.**

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Amended (03/15/18) Petition to Determine Succession to Real Property (Estates \$150,000 or less) by brother, Dwayne Brinks ["Petitioner"].

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

1. Petitioner requests a determination that decedent's one-half interest in real property located at San Bernardino County pass to petitioner without administration. Petitioner states he is decedent's sibling; tenant-in-common with Decedent; and only heir at law.
2. Response to OSC filed 05/24/18.
3. ~Proposed Form Order 01/22/18.

RECOMMENDATION:

Court's Discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800032

CASE NAME: Carol Jean Brinks

HEARING:

Petition to determine succession to Real Property

COUNSEL:

CAROL JEAN BRINKS

(DEC)...

DWAYNE BRINKS

(PET)...LINDA ROBERTS ROSS

See prior matter #3.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800520

CASE NAME: RUDOLPH MUSGROVE

**MOVED TO S37P TO BE HEARD WITH PROPS1800519**

HEARING:

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

COUNSEL:

ANGELA MUSGROVE

(PET)...BRIAN C MILES

RUDOLPH MUSGROVE

(DEC)...

**X-REF: PROPS 1800519**

GENERAL INFORMATION:

Ex Parte orders granted on 06/06/18. Angela Musgrove appointed Special  
Administrator, \$20,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with  
limited authority under IAEA by daughter, Angela Musgrove ["Petitioner"].

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

1. Petitioner seeks limited powers, thus reducing requirement for bond. Petitioner requests bond of \$20,000 based on estimated estate value of \$53,000. Does court wish to require maximum bond of \$53,000 or minimum bond of \$20,000?  
**JTD.**
2. **Need** proof of publication.
3. Section 5 to notice requests full authority to administer the estate under IAEA. However, caption to petition requests limited powers. Court to confirm.
4. ~Proposed Form Orders/Letters 05/29/18

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800523

CASE NAME: MARTIN BLANCARTE CANTU

HEARING:

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

COUNSEL:

GABRIELA P. CANTU

(PET)...MARIVEL M ZIALCITA

MARTIN BLANCARTE CANTU

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Gabriela P. Cantu ["Petitioner"].

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

1. Petitioner requests bond be fixed at \$390,000. Appears sufficient. **JTD.**
2. **Need** proof of publication.
3. ~Proposed Form Order/Letters 05/30/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)



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

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800531

CASE NAME: MARY GRACE MEDINA

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MARY GRACE MEDINA (DEC)...  
RICHARD MEDINA (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petition indicates all heirs waive bond. **Need** signed, Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by petitioner and sibling, Faustino Medina.
2. Estimated estate valued at \$240,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 06/01/18.

RECOMMENDATION:

Need to clear notes 1, 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. 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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HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800108

CASE NAME: RONALD DAVE WEBER

HEARING:

Petition for Letters of **Special** Administration w/limited IAEA

COUNSEL:

BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
NANCY L MARTIN	(REC)...GREENBERG 7 BASS, LLP
RONALD DAVE WEBER	(DEC)...
SHERRI L KASTILAHN	(PET)...ROSE C ROSADO

No notes – Judge to decide.  
(nb)

Future Hearing:

08/22/18 Hearing re: Petition for letters of adm. w/full etc.

08/22/18 Hearing re: Petition for letters od admin. etc.

08/22/18 Hearing re: Petition for letters of admin w/ full etc.

Superior Court of Calif, County of San Bernardino

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HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800411

CASE NAME: JACQUELYN B. KIRCHER

HEARING:

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

COUNSEL:

JACQUELYN B. KIRCHER	(DEC)...
JOEL B. BLACK	(PET)...JEREMY A. BURNS
LINCOLN KIRCHER	(OBJ)...LOUIS PACELLA
LINCOLN KIRCHER	(PET)...LOUIS PACELLA

GENERAL INFORMATION:

**Continued from 06/12/18. Attorney Louis Pacella indicates that he filed a competing petition by fax yesterday and has not yet received a hearing date on that petition.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by named executor, Joel B. Black ["Petitioner"].

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

1. Petitioner requests bond be fixed at \$1,700,000. Appears sufficient. **JTD.**
2. **Need** Proof of Holographic Instrument.
3. ~Proposed Form Order/Letters 04/23/18

RECOMMENDATION:

Need to clear note 2, \$1,700,000.00 bond. If approved, set future hearing for Accounting/Status Review on **10/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Future Hearing:

07/31/18 Petition for lost will and letters etc.

07/31/18 Petition for contest and grounds etc.

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Superior Court of Calif, County of San Bernardino  
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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

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DATE: 07/10/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800091

CASE NAME: Jose Rossab Individual Beneficiary Account Created

HEARING:

Petition for order establishing an individual beneficiary account for the sole benefit of Jose Rossab

COUNSEL:

RUBEN ROSSAB (PET)...RODNUSKY & ASSOCIATES  
JOSE ROSSAB INDIVIDUAL BENEFIC(TRU)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(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: 07/10/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800120

CASE NAME: The Shirley I Olson Living Trust as Amended

HEARING:

Petition for invalidate trust second and third amendments

COUNSEL:

ELIZABETH TONA (PET)...LAW FIRM OF SHAEFER &  
GREGORY VAN PROYEN (PET)...LAW FIRM OF SHAEFER &  
THE SHIRLEY I OLSON LIVING TRU(TRU)...

Currently under review by Legal Research.  
(LR)

Notice:

Need Notice of Hearing with proof of service on Lisa Van Proyen Douieri (niece); and  
Judy Staub (neighbor).

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18      TIME: 8:35      DEPT: S35P  
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CASE#: TRU PS1800122

CASE NAME: ALBERT L GODDARD TRUST

HEARING:

Petition for To Confirm Trust Assets

COUNSEL:

ALBERT L GODDARD TRUST DATED M (TRU)...PRO/PER  
VIRGINIA CORNWELL (PET)...CHANDLER LAW FIRM

Currently under review by Legal Research.  
(LR)

Notice given.  
(nb)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 8:35 DEPT: S35P  
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CASE#: TRU PS1800123

CASE NAME: THE APRIL ELIZABETH EDWARDS INVESTMENT TRUST ETC

HEARING:

Petition for Order modifying irrevocable trust

COUNSEL:

JON RICHARD (TEE)...THE URBATSCH LAW FIRM,  
THE APRIL ELIZABETH EDWARDS IN (TRU)...

Currently under review by Legal Research.  
(LR)

Notice given.  
(nb)

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: 07/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600222

CASE NAME: MTR OF MARCO ANTONIO FLORES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ROSA M FLORES

COUNSEL:

MARCO ANTONIO FLORES	(CTP)...LENITA A SKORETZ
ROSA M FLORES	(CP )...PRO/PER
SAUL FLORES JUAREZ	(CP )...PRO/PER

GENERAL INFORMATION

Rosa and Saul Flores appointed Limited Conservators of the person on 10/24/17.  
**Continued from 05/29/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700383

CASE NAME: MTR OF TONY BRANDON KWON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MIRELIA VELAZQUEZ

COUNSEL:

MIRELIA VELAZQUEZ

(CP )...PRO/PER

TONY BRANDON KWON

(CTP)...CRAIG M PARKER

GENERAL INFORMATION

Mother, Mirelia Velazquez, appointed Limited Conservator of the person on 12/05/17.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

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

RECOMMENDATION:

Inquire status.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1700443

CASE NAME: CONCEPCION R RODARTE

**SEE ALSO 14**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

CANDELARIA MCFARLAND	(PET)...LAMB MORRIS & LOBELLO
CONCEPCION MCFARLAND	(CEE)...CRAIG M PARKER
MIGUEL RODARTE	(PRO/PER
SERAFIN RODARTE	( )...
VICTOR J RODARTE	(CAL-LAWYER PLC

No notes – TSC.

(nb)

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

-----  
DATE: 07/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700443

CASE NAME: CONCEPCION R RODARTE

**SEE ALSO 13**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CANDELARIA MCFARLAND	(PET)...LAMB MORRIS & LOBELLO
CONCEPCION MCFARLAND	(CEE)...CRAIG M PARKER
MIGUEL RODARTE	(PRO/PER
SERAFIN RODARTE	( )...
VICTOR J RODARTE	(CAL-LAWYER PLC

**X-REF: UDFS 1801234**

GENERAL INFORMATION

Ex parte orders granted on 10/12/17, no bond. Candelaria McFarland appointed temporary conservator of the person and estate.

Continued from **01/10/18**. Court notes that citation is not required as Concepcion R Rodarte is present today in court. Court notes that notice of hearing and proof of service is not required as there are no relatives to notice and proposed conservatee is present. Attorney Craig M Parker is appointed. Notice by Judicial Assistant.

Continued from **03/13/18**. Written report received from Craig Parker. Court orders that until further order of the Court, Victor Rodarte is not permitted to take the conservatee out of the country. Court sets deadline for filing of written objections.

**Continued from 05/22/18. All temporary orders to remain in full force and effect.**

**Visitation order made. Court finds that notice of the objections, are timely.**

**Court sets deadline for the filing of competing petition of 4pm June 5, 2018; court notes that if the competing petition is not filed by deadline, the competing petition will be deemed waived permanently.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Candelaria McFarland, daughter

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

1. Suggested bond \$22,894.30, based on personal property. JTD

2. Petitioner seeks medical powers. Capacity Declaration filed.
3. Petitioner seeks dementia powers. Report by court appointed counsel, Craig M. Parker, filed.
4. Certificate of Completion of the Conservatorship Training Class filed
5. CI Report filed 01/03/18.
6. **Need** Notice of Hearing with proof of service.
7. **Objections filed by grandson, Miguel Rodarte.**
8. **Objections filed by grandson, Serafin Rodarte.**
9. **Objections filed by son, Victor J. Rodarte.**
10. ~Proposed Form Order: 12/05/17

#### RECOMMENDATION

Require notice then set for contested hearing. If approved, set hearing for Compliance Review for **02/13/19** for the filing of the required documents and hearing re Accounting Review for **09/18/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(lh/nb)

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HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800041

CASE NAME: MTR OF FRANK PLASENCIA

HEARING:

Petition for Appointment of Conservator

COUNSEL:

FRANK PLASENCIA	(CEP)...MARK J. FLORY
JIM PLASENCIA	(CPE)...PRO/PER
KRISTIN VILLANUEVA	(CPE)...PRO/PER

#### GENERAL INFORMATION

Ex Parte Orders granted 02/26/18, person and estate, no bond.

Continued from **03/27/18**. Case referred to Legal Aid for legal assistance. Attorney Mark J. Flory appointed. Notice by Judicial Assistant.

**Continued from 05/29/18 at request of petitioners to clear notes. Mr. Flory is permitted to file an OSC re why bank manager at Bank of America will not accept temporary letters.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Kristin Villanueva and son, Jim Villanueva ["Petitioners"].

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

- 1 Petitioners request bond to be determined. Suggest bond of \$381,000 (includes recovery). Court determined bond to be set at \$380,000 on 05/29/18.
- 2 Petitioner seeks medical powers. Capacity Declaration has the following issues:
  - a. Section 2 does not include physician's phone number;
  - b. Section 4 does not include proposed conservatee's name or the last time physician saw him;
  - c. Number 8 does not include number of pages attached;
  - d. Number 10 to Dementia Attachment does not include number of pages attached.

**Need** completed Capacity Declaration.

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

- 3 Petitioner requests dementia powers; report by court-appointed attorney, Mark J. Flory, filed.
- 4 Court Investigator's Report filed.
- 5 **Need** return of Citation.
- 6 Certificates of Completion re Conservatorship Class filed.
- 7 ~Proposed Form Order/Letters 02/09/18.

**RECOMMENDATION:**

Need to clear notes 2 & 5. If approved, set hearing for Compliance Review for **02/12/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **09/17/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/10/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1800162

CASE NAME: MTR OF GENOVERA MARIE BARRAGAN

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GENOVERA MARIE BARRAGAN (CTP)...  
ROCIO BARRAGAN (CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Rocio Barragan ["Petitioner"].

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

1. Proposed Conservatee's name is misspelled. Clerk to **correct** first and middle names.
2. No bond – person only.
3. Proposed conservatee is developmentally disabled. **Need** report by court-appointed counsel, Sandy Turner.
4. Section 7b to capacity declaration is not initialed and signature is not dated. **Need** complete Medical Capacity Declaration.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
6. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
7. Citation returned SERVED.
8. Sections 2a & 2b to Screening form are incomplete. **Need** verified supplement.
9. Court Investigator Report filed.
10. **Need** Inland Regional Center Report. **Request for 30 day continuance filed.**

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

11. **Need** Certificate of Completion re Conservatorship Class.
12. ~Proposed Form Order/Letters 05/31/18.

RECOMMENDATION: Continue 30 days.

Need to clear notes. If approved, set hearing for Compliance Review for **02/12/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)



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

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DATE: 07/10/18 TIME: 9:35 DEPT: S35P  
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CASE#: SC SS01241

CASE NAME: IN THE MATTER OF NATALIE ANN MORRIS

HEARING:

Eighth Account and Report of INLAND COUNTIES REGIONAL CENTER,  
INC and Petition for allowance of fees filed.

COUNSEL:

EMMA J. SAMUEL	(MOT)...PRO/PER
INLAND COUNTIES REGIONAL CENTE	(PET)...BRUNICK MCELHANEY &
INLAND COUNTIES REGIONAL CENTE	(PET)...STEVEN K BECKETT
MURIEL TUCKER	(CP )...RUDY AGUIRRE
NATALIE ANN MORRIS	(BEN)...
NATALIE ANN MORRIS	(CTP)...C L FARRELL
NATALIE ANN MORRIS SPECIAL NEE	(TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Eighth Account Current; Report of IRC;  
Petition for Approval of Fees; and Request to Amend the Trust.

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

1. Accounting covers 02/01/16 to 04/30/18.
2. Assets on hand: \$93,321.24 consisting of \$88,321.24 cash held in a pooled investment fund.
3. Current bond of \$95,370.00. Petitioner requests bond be increased to \$97,150.00. Insufficient. Suggest bond of \$103,000. **JTD.**
4. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$3,529.73. Billed at \$1,000 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000 pursuant to court order dated 06/02/16.
5. Petitioner requests authority to allow Master Trust to continue taking its annual fee according to its 2017 fee schedule [LF, p. 56], in quarterly payments. **JTD**
6. Attorney requests fees of \$1,435.00. Billed at \$250/hour for 2.30 hours' attorney time and \$100/hour for 8.60 hours' paralegal time. Itemized in separate declaration filed 05/24/18. **JTD.**

7. Petitioner requests the Court approve the revisions to the proposed revised Master Trust of California Agreement [LF, pgs. 31-54]. **JTD.**
8. Petitioner requests the next accounting review to be set in two years.
9. Proposed Form Order 05/24/18 reflects incorrect bond amount.

#### RECOMMENDATION

Court's discretion. If approved, set hearing on the next accounting review for **07/23/19** (if one year) or **07/14/20** (if two years). 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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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

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

CASE#: PRO PS0800976

CASE NAME: KATE KATHLEEN BIRGERS

**SEE ALSO 19**

HEARING:

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

COUNSEL:

BRaille INSTITUTE OF AMERICA,

(PRO/PER

KARIN E HORSPOOL

(TP )...KARIN E HORSPOOL

KATE KATHLEEN BIRGERS

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

SANDRA LINDER-MUNOZ

(PET)...

**CCP170.6 filed as to CYNTHIA LUDVIGSEN**

GENERAL INFORMATION:

Continued from **09/05/17**. Court enters order surcharging the bond of the former administrator in the amount of \$20,000.

Continued from **11/14/17 and 03/06/18** at request of counsel. Court notes that the note re court entering surcharge the bond of the former administrator is already taken care of.

**Continued from 05/08/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON **Amended** (05/16/18) First and Final Account; Petition for Fees; and for Surcharge of Bond of prior Administrator by Successor Administrator, Public Guardian ["Petitioner"].

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

1. Accounting period 04/26/08 to 04/24/17.
2. Assets on Hand **\$22,816.28** in cash.
3. Statutory fees of **\$1,527.49** requested. Calculated.
  - a. Attorney Parker has agreed to split statutory fees with attorney for the prior administrator, Karin E. Horspool in the amount of \$763.74, each.

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

4. Petitioner requests extraordinary fees of \$480 for services rendered in connection with the sale of real property. Billed at \$60/hour for a total of 8 hours' time. Generally described [LF, p. 25]. **JTD.**
5. Attorney requests extraordinary fees of \$630 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 1.8 hours' attorney time. Itemized [LF, p. 27].
6. Petitioner requests authority to withhold the sum of **\$1,000** as a reserve. **JTD.**
7. Proposed Order 05/16/18 indicates estate is insolvent.

**RECOMMENDATION:**

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

**07/23/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS0800976

CASE NAME: KATE KATHLEEN BIRGERS

**SEE ALSO 18**

HEARING:

(AMENDED) FIRST AND FINAL Account and Report of PUBLIC ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

BRaille INSTITUTE OF AMERICA,

(PRO/PER

KARIN E HORSPOOL

(TP)...KARIN E HORSPOOL

KATE KATHLEEN BIRGERS

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

SANDRA LINDER-MUNOZ

(PET)...

**CCP170.6 filed as to CYNTHIA LUDVIGSEN**

See prior matter #18.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1401122

CASE NAME: Irene Helen McEllistrim

**SEE ALSO 21, 22**

HEARING:

Hearing Re: OSC RE SUSPENSION OF ADMIN & REFERRAL TO P.A.

COUNSEL:

AMY TORGERSEN                      (PET)...PRO/PER

IRENE HELEN MCELLISTRIM      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Suspension of Administrator & Referral to Public Administrator.

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

1. Matter set at 05/31/18 hearing. No appearance.
2. Administrator is ordered to appear this date.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: PRO PS1401122

CASE NAME: Irene Helen McEllistrim

**SEE ALSO 20, 22**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$1,000.00 ON ADMIN

COUNSEL:

AMY TORGERSEN                      (PET)...PRO/PER  
IRENE HELEN MCELLISTRIM      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$1,000 on Administrator.

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

1. Matter set at 05/31/18 hearing. No appearance.
2. Administrator is ordered to appear this date.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1401122

CASE NAME: Irene Helen McEllistrim

**SEE ALSO 20, 21**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

AMY TORGERSEN

(PET)...PRO/PER

IRENE HELEN MCELLISTRIM

(DEC)...

#### GENERAL INFORMATION

Continued from **11/10/16, 02/02/17, 03/30/17, 06/29/17, and 10/26/17**. Accounting to be filed by 04/30/18. Nothing new filed.

**Continued from 05/31/18.**

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 Amy Torgersen, niece, on 02/05/15; full authority, no bond.
2. Previous status report approved on 04/07/16.
3. Partial Inventory and Appraisal filed 02/09/16. **Need** final Inventory and Appraisal.
4. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting/Inventory and Appraisal. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. NO bonding company to notice.

(lc/nb)



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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1600194

CASE NAME: WILLIAM J VANCAMP

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC ADMINISTRATOR	(ADM)...CRAIG M PARKER
RICHARD H ANDERSON	(PET)...PRO/PER
ROSE CHUNCHICK	(PET)...
WILLIAM J VANCAMP	(DEC)...

GENERAL INFORMATION:

Court suspended the powers of Rose Churchick on 05/02/17 and appointed the Public Administrator as Successor Special Administrator with general powers, no bond.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued on 08/26/16 to Rose Churchick, limited authority, no bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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-----  
DATE: 07/10/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1800284

CASE NAME: Jack Mallory

HEARING:

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

COUNSEL:

JACK MALLORY	(DEC)...
S.B. COUNTY PUBLIC ADMINISTRAT	(PET)...CRAIG M PARKER
SKY HARBOR CARE CENTER	(TP)...SANDERS REHASTE

GENERAL INFORMATION:

**Continued from 05/01/18. The Court is advised Mr. Mallory intends to file a Petition to Administer Estate. Mr. John Mallory is directed to file said petition by 07/09/18. If said petition is not filed, the right to do so will be ordered waived.**

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

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

1. Declinations and Nomination of this petitioner affixed to petition [LF, pgs. 7-8].
2. No bond - PA
3. Order/Letters entered on 05/01/18 as to Public Administrator.

RECOMMENDATION: Matter appears moot.

RFA. No bond. If approved, set future hearing for Accounting Review on **09/17/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT **MISC**

-----  
DATE: 07/10/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1600251

CASE NAME: MARY M ORTIZ LIVING TRUST

HEARING:  
Hearing Re: Court Trial (Day 1)

COUNSEL:  
BARBARA RUBIO RESENDEZ (PET)...PRO/PER  
DEPT OF CHILD SUPPORT SVCS LOM (PRO/PER  
JOE MARTIN ORTIZ (OBJ)...THOMAS V PRATT  
LOUISE SULLIVAN (PET)...BANKS GARCIA & JANIS  
MARY M ORTIZLIVING TRUST (TRU)...  
THOMAS W DOMINICK ( )...

No notes – Court Trial.  
(nb)

Future Hearing:  
07/11/18 Court Trial  
07/12/18 Court Trial

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

-----  
DATE: 07/10/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1600251

CASE NAME: MARY M ORTIZ LIVING TRUST

**SEE ALSO 27**

HEARING:

Hearing Re: OSC RE DISMISSAL OF OBJECTIONS OF B. RESENDEZ

COUNSEL:

BARBARA RUBIO RESENDEZ	(PET)...PRO/PER
DEPT OF CHILD SUPPORT SVCS LOM	(PRO/PER
JOE MARTIN ORTIZ	(OBJ)...THOMAS V PRATT
LOUISE SULLIVAN	(PET)...BANKS GARCIA & JANIS
MARY M ORTIZ LIVING TRUST	(TRU)...
THOMAS W DOMINICK	( )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Dismissal of Objections of B. Resendez.

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

1. Matter set at 06/29/18 hearing. Prior to hearing JA receives a telephonic message that Barbara Rubio Resendez is unable to appear due to being ill. Court does not accept the excuse of Barbara Rubio Resendez of her non-appearance for hearing and sets OSC re Dismissal of Objections of Barbara Rubio Resendez for the first date of trial set this day.
2. Counsel makes oral request to reset trial dates and informs the court that counsel are working on settlement of issues. Court finds that there is no legal basis to reset the trial dates and orders that the trial will proceed on July 10, 2018 and that existing pre-trial orders remain in full force & effect.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 27 ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 07/10/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1600251

CASE NAME: MARY M ORTIZ LIVING TRUST

**SEE ALSO 26**

HEARING:

Petition for /to DETERMINE VALIDITY OF PURPORTED TRUST, RECOVER  
PROPERTY HELD BY TRUSTEE, UNDUE INFLUENCE, ETC

COUNSEL:

BARBARA RUBIO RESENDEZ	(PET)...PRO/PER
DEPT OF CHILD SUPPORT SVCS LOM	(PRO/PER
JOE MARTIN ORTIZ	(OBJ)...THOMAS V PRATT
LOUISE SULLIVAN	(PET)...BANKS GARCIA & JANIS
MARY M ORTIZLIVING TRUST	(TRU)...
THOMAS W DOMINICK	( )...

Currently under review by legal research.  
(LR)

Continued matter. Notice not re-reviewed.  
(lh/nb)

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S36P  
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CASE#: CIV RS1400249

CASE NAME: MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON

HEARING:  
Hearing Re: OSC RE: DISMISSAL

COUNSEL:  
ARROWHEAD CREDIT UNION (CC )...KNAPP, PETERSEN &  
ARROWHEAD CREDIT UNION (KNAPP, PETERSEN & CLARKE  
DAVINA MICHELLE PATTERSON (DEF)...PRO/PER  
MERCEDES MURRAY AND MONICA MUR(PLA)...OSBORN/LAW

**XREF: PROPS1300718** (David Lee Patterson)

GENERAL INFORMATION

**Continued from 10/19/17** for dismissal to be filed.

**Continued from 01/04/18** at request of Court to verify settlement. Oral report given by Mitchell Roth and Barbara Colino.

**Continued from 02/21/18.** Court and counsel confer on the record. Matter is continued as parties are awaiting signatures on settlement agreement. Richard Osborn and Blair Berkley are order to appear at next hearing.

**Continued from 04/03/18.** Court notes Attorneys Richard Osborn and Blair Berkley has failed to appear at today's hearing and did not contact the Court as to non-appearance. On February 21, 2018, Court ordered Attorneys Richard Osborn and Blair Berkley to appear at today's hearing. There being no appearance by either counsel, Court will ordered Bench warrant to be issued as to both, Attorneys Richard Osborn and Blair Berkley-- BAIL: \$5,000.00. Court will hold issuance of Bench Warrant and Bail until May 1st, 2018. Attorney Mitchell Roth to give notice. Pursuant to stipulation Court orders the April 18, 2018 hearing on related case PROPS1300718, VACATED.

**Continued from 05/01/18. Bench warrant quashed before issuance. Court and counsel confer on the record.**

THIS CASE SET FOR HEARING ON OSC re Dismissal

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

1. Matter set at settlement OSC on 08/24/17.

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

2. Counsel Roth to submit application for good faith. Order determining settlement of Plaintiffs to be in good faith filed 09/07/17.
3. Declaration by Mark Skapik filed 04/18/18 and for review in open access.
4. Declaration by Richard Osborn filed 04/18/18 and for review in open access.
5. Notice of Entry of Dismissal and proof of service filed on 05/08/18 as to Arrowhead Credit Union and for review in open access.

#### RECOMMENDATION

Court's discretion re OSC.

(lc/lh/nb/ww/nb)

Superior Court of Calif, County of San Bernardino

Page: 2

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 07/10/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1400006

CASE NAME: Velma Preciado

HEARING:

Hearing re Final Discharge

COUNSEL:

DENIS DICKINSON	(CPE)...CRAIG M PARKER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
ROD PACHECO	(OBJ)...PRO/PER
RODRIC ANTHONY PACHECO	(PCR)...PRO/PER
RODRIC ANTHONY PACHECO	(PET)...RONALD W ASK
VELMA PRECIADO	(CEP)...PRO/PER
VELMA PRECIADO	(PCE)...BRYAN C HARTNELL

GENERAL INFORMATION

**Continued from 04/30/18 at request of counsel to clear notes.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. First and Final Account by Rodric Pacheco, son/former conservator of the person and estate, approved on 08/14/17.
  - a. **Need** Order on First and Final account submitted for signature.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(ww/nb)

Future Hearing:

01/29/19 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: CON PS0800137

CASE NAME: JOE M. TOLLEY SR.

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CHRISTOPHER SUTTON	(PRO/PER
DONNA J TOLLEY	(CPE)...BRIAN C MILES
DONNA TOLLEY	(PET)...MARIELLEN ROSS
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
JOE M. TOLLEY SR	(CEP)...DONNASUE ORTIZ
JOHN L GORDON esq	(PET)...DRISKELL & GORDON
MARIELLEN ROSS	(PET)...MARIELLEN ROSS
MICHAEL D TOLLEY	(PET)...PRO/PER
PATRICK	(PRO/PER
ROBERT L KERN	(ROBERT L KERN
RUTH M TOLLEY	(OBJ)...
RUTH M. TOLLEY	(PET)...STEVENSON LAW OFFICE
THOMAS V. TOLLEY	(PCR)...

**XREF: CONPS0900199** (Ruthie Mae Tolley)

**PROPS0900741**(Joe M Tolley, Sr and Ruth M Tolley)

Future Hearing:

07/17/18 OSC re: Sanctions

07/26/18 Second Account

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: CON PS1300029

CASE NAME: MTR OF MATTHEW SHEA UPTON

HEARING:

Hearing Re: OSC re: REMOVAL OF CONSERVATORS AND APPT OF PG

COUNSEL:

FAIRVIEW DEVELOPMENTAL CENTER	(PRO/PER
INLAND COUNTIES REGIONAL CEN	(TP )...STEVEN K BECKETT
JACK L UPTON	(CP )...PRO/PER
JULIA L UPTON	(CP )...PRO/PER
MATTHEW SHEA UPTON	(CTP)...JAMES B CHURCH

GENERAL INFORMATION:

**Continued from 01/29/18.** Ms. Ortiz gives an oral report to the Court. Guardian ad litem supports the removal of current guardians. The Court suspends conservator powers of Jack L Upton and Julie L Upton. Temporary conservator not appointed at this time. The Public Guardian nominated DDS as successor conservator. Matter continued to notice to be given. Notice given by Mr. Beckett.

**Continued from 04/10/18 at request of counsel for DDS to complete evaluation. Court notes conservator powers of Jack L. Upton and Julie L. Upton were suspended and no order has been signed. Mr. Church to file order of suspension.**

THIS CASE SET FOR HEARING ON OSC re: Removal of Conservators and Appointment of PG

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

1. Matter set on 10/23/17 wherein Court appointed Donnasue Ortiz as Guardian Ad Litem for minor.
2. Oral report of GAL given on 01/29/18.
3. Order Suspending Conservator of the Person and Estate entered 04/18/18.

RECOMMENDATION:

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

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DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1500939

CASE NAME: KENNETH DANIEL TURNEY

HEARING:

Accounting Review by \*\*\*

COUNSEL:

KENNETH DANIEL TURNEY      (DEC)...

KEVIN A TURNEY                      (PET)...PRO/PER

#### GENERAL INFORMATION

Continued from **04/06/17**. No appearance. Kevin Turney to appear at next hearing if accounting and Inventory and Appraisal not filed.

Continued from **06/15/17**.

OSC set on **09/14/17 and 11/09/17** when there was no appearance. The Court will suspend letters of administration as to Kevin A Turney at next hearing and appoint the Public Administrator if accounting not filed. The Court orders the Public Administrator to appear at the next hearing. The Court cites Kevin A Turney to appear at next hearing. Should he fail to appear, a bench warrant may be issued for his arrest. Citation issued to: KEVIN A TURNEY who is cited and required to appear on 02/06/18. Notice by Judicial Assistant.

**Continued from 02/06/18 on courts motion. Petitioner had a death in the family and was in an accident and was unable to have accounting timely complete. Petitioner is working on it. The Court does not appoint Public Administrator at this time.**

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 Kevin Turney, son, on 01/28/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.
4. Citation returned SERVED.

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

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1600079

CASE NAME: ESTATE OF WALTER L BUDD AMMONS

HEARING:

Hearing re Final Discharge

COUNSEL:

GARY AMMONS	(OBJ)...PRO/PER
KRISTA WAGNER	(PET)...ALAN D KHALFIN
LARRY AMMONS	(PET)...ALAN D KHALFIN
S.B. COUNTY PUBLIC	(PET)...CRAIG M PARKER
WALTER L. BUD AMMONS	(DEC)...

**VACATE** – final discharge order entered on 05/07/18.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1601248

CASE NAME: Larry Lavant Bonnie

HEARING:

Accounting Review by \*\*\*

COUNSEL:

LARRY LAVANT BONINE

(DEC)...

LAURIE A. WHELAN

(PET)...JENNIFER M DANIEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Laurie A. Whelan on 05/02/17, full authority, \$187,000 bond.
2. 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: TARA REILLY

-----  
DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1700167

CASE NAME: THERESA MARIE HILTON

HEARING:

WAIVER OF Account and Report of ALICIA CASTILLO-TRUJILLO and  
Petition for allowance of fees filed.

COUNSEL:

ALICIA CASTILLO-TRUJILLO      (PET)...REX ALAN LOWE

THERESA MARIE HILTON      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Administrator, Theresa M. Hilton ["Petitioner"-daughter].

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

1. Heirs waive accounting.
2. Assets on Hand \$131,027.80 in cash.
3. Petitioner waives statutory compensation and reimbursement for costs.
4. Attorney requests statutory fees of \$16,669.87. Calculated.
5. Attorney requests reimbursement of costs of \$1,295.69. Itemized.
6. Petitioner indicates the real property of the estate was distributed by agreement by the heirs, providing for an equalizing payment (not specified) by Jennifer Morales to Petitioner, pursuant to the full authority under IAEA granted by this court and the Notice of Proposed Action. Does Court wish to require a copy of subject agreement? **JTD.**
7. **Need** bank statement to support date of death balances per Local Rule 20-908.
8. No proposed order. Submit Order after Hearing.

RECOMMENDATION

Need to clear note 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **07/23/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700878

CASE NAME: CAROLYN S NEMETH

HEARING:

Petition for Final Distribution on waiver of Account and Report  
of GARY HOWARD MARTELL JR and Petition for allowance of fees  
filed.

COUNSEL:

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Gary H. Martell, Jr. ["Petitioner"].

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

1. Sole beneficiary waives accounting.
2. Petitioner waives statutory compensation.
3. Assets on Hand \$401,448.83 consisting of \$382,371.18 in cash and remaining  
in personal property.
4. Proposed Form Order 06/01/18 does not include findings re: sole and separate  
property; or findings re: known creditors.

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge on **07/23/19**.

(nb)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700888

CASE NAME: MOHAMMAD ASIF

HEARING:

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

COUNSEL:

LISA E SPIWAK ESQ (TP)...SPIWAK & IEZZA  
MOHAMMAD ASIF (DEC)...  
MOHAMMAD HARRIS BIN ASIF (PET)...MICHAEL C MADDUX

#### GENERAL INFORMATION

Continued from **01/08/18** on Court's motion.

**Continued from 04/10/18 at request of counsel.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Mohammad Asif, son

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

1. All heirs waive bond. Net estate value is \$137,286 with \$35,000 in personal  
property. The court may for good cause require that a bond be given, either  
before or after issuance of letters. Prob. Code §8481(b). **JTD.**
2. Declination/nomination by surviving spouse, Shahnaz Asif filed 01/08/18.
3. ~Proposed Form Order: 09/18/17

#### RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **09/16/19**.  
Any account to be filed 30 days in advance local rule 20-901. Note requirements of  
local rule 20-908.

(cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700889

CASE NAME: THE BROWN FAMILY TRUST

HEARING:

Petition for TERMINATION OF TRUST PROBATE CODE 17200(b)(13)

COUNSEL:

LAUREL MCLINDEN                      (PET)...JOHN G WURM  
THE BROWN FAMILY TRUST              (TRU)...

Currently under review by Legal Research.  
(LR)

Notice given; however, Trust's Certification indicates original and all copies of trust  
have been lost or destroyed.  
(lh/cs/nb)

Superior Court of Calif, County of San Bernardino

Page: 9A ADD ON

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800419

CASE NAME: BRIAN WAYNE DAVIS

HEARING:

Petition to determine succession to Real Property

COUNSEL:

BRIAN WAYNE DAVIS (DEC)...  
BRIDGET D. GREGOIRE (PET)...PRO/PER

**X-REF: GARPS 1800126**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by Guardian of the Estate of Alyssa Lynn Davis, Bridget D. Gregoire ["Petitioner"].

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

1. Petitioner requests a determination that decedent's real property located in San Bernardino County pass to petitioner without administration. Petitioner is the Guardian of the Estate of decedent's daughter, Alyssa Lynn Davis.
2. Petition includes a "Waiver of Interest in Estate" [LF, p.12] signed by decedent's surviving spouse, Michelle Dausman aka Michelle Davis, under Pr. C. §141.
3. ~Proposed Form Order 05/01/18.

RECOMMENDATION:

Court's discretion.

(nb)

FUTURE HEARING DATES:

08/09/18 Report Sale and Petition for Order Confirming Sale

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

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

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800519

CASE NAME: ELLA JEAN MUSGROVE

HEARING:

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

COUNSEL:

ANGELA MUSGROVE (PET)...BRIAN C MILES  
ELLA JEAN MUSGROVE (DEC)...

**X-REF: PROPS 1800520**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with limited authority under IAEA by daughter, Angela Musgrove ["Petitioner"].

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

1. Angela Musgrove appointed Special Administrator on 06/06/18, \$20,000 bond. Bond posted, no letters.
2. Petitioner requests bond of \$20,000 to be fixed. Insufficient. Estimated estate valued at \$53,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
3. **Need** proof of publication.
4. ~Proposed Form Orders 05/29/18.

RECOMMENDATION:

Need to clear note 3 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. 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: STANFORD E. REICHERT

-----  
DATE: 07/10/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800520

CASE NAME: RUDOLPH MUSGROVE

**MOVED FROM S35P TO BE HEARD WITH PROPS1800519**

HEARING:

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

COUNSEL:

ANGELA MUSGROVE

(PET)...BRIAN C MILES

RUDOLPH MUSGROVE

(DEC)...

**X-REF: PROPS 1800519**

GENERAL INFORMATION:

Ex Parte orders granted on 06/06/18. Angela Musgrove appointed Special  
Administrator, \$20,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with  
limited authority under IAEA by daughter, Angela Musgrove ["Petitioner"].

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

1. No bond, no Letters of Special Administration.
2. Petitioner seeks limited powers, thus reducing requirement for bond. Petitioner requests bond of \$20,000 based on estimated estate value of \$53,000. Does court wish to require maximum bond of \$53,000 or minimum bond of \$20,000?  
**JTD.**
3. **Need** proof of publication.
4. Section 5 to notice requests full authority to administer the estate under IAEA. However, caption to petition requests limited powers. Court to confirm.
5. ~Proposed Form Orders/Letters 05/29/18

RECOMMENDATION:

Need to clear note 3 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/10/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1800527

CASE NAME: MTR OF VIRGINIA MARTHA VICKERS

HEARING:

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

COUNSEL:

MATTHEW WILLIAM VICKERS      (PET)...PRO/PER

VIRGINIA MARTHA VICKERS      (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration w/WA and full authority under IAEA by grandson, Matthew W. Vickers ["Petitioner"].

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

1. Will names Jason Stanley Ford (grandson), as second alternate executor.  
**Need** Declination to Act by same.
2. Will does not waive bond as to this petitioner. Estimated estate valued at \$10,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
3. **Need** Proof of Holographic Instrument.
4. **Need** proof of publication.
5. **Need** Notice of Petition to Administer Estate with proof of service.
6. ~Proposed Form Order/Letters 05/31/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **09/17/19**. 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/10/18 TIME: 8:30 DEPT: S37P  
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CASE#: VG VS02118

CASE NAME: SPECIAL NEEDS TRUST OF MAX WINN

HEARING:

SECOND Account and Report of JOHN W WINN and Petition for allowance of fees filed.

COUNSEL:

JOHN W WINN

(GE )...J. TERRENCE MOYNIHAN

MADISON PICABO WINN

(MIN)...

MAX MICHAEL WINN

(MIN)...MITCHELL I ROTH

GENERAL INFORMATION:

Father, Michael Winn, passed away on 06/26/17.

Continued from **09/11/17** at request of counsel to file amended I & A. Attorney Roth to file supplement report re: sale of shares. Court approves caretaker fees. Court notes Social Security benefits for Max will be reinstated in 2018. Court recommends Social Security be contacted re: survivors' payments. Court orders case changed to Special Needs Trust of Max Winn.

Continued from **01/08/18** at request of Attorney Roth. The court requests clarification of receipts.

**Continued from 04/10/18. Court approves bond to be reduced to \$143,000.00. Court continues matter for Mr. Roth to file his report. Once report is reviewed matter will be transferred to Riverside County.**

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees by Trustee, John W. Winn for the SNT

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

1. Accounting period 03/01/16 to 03/31/17.
2. Assets on Hand \$128,537.99 consisting of \$56,537.99 in cash and remaining in stock ownership in a closely-held corporation with Russ Davis.
3. Petitioner requests fees of \$300.00 for professional services rendered to the trust, and the trust beneficiary. Generally described. JTD.
4. Attorney requests fees of \$4,515.00. Billed at \$350/hour for attorney's time. Itemized [LF, pgs. 18-19]. 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](mailto:ProbateNotes@sb-court.org) for clarification of the notes only - **no legal or procedural advice will be given.**

5. Current bond of \$206,750.00. Petitioner requests bond reduction per **Supp. filed 09/06/17 to the amount of \$143,000.00. Appears sufficient.**
6. Corrected Inventory and Appraisal filed 09/11/17
7. Disbursement – Schedule C [LF, p. 15] includes mail and copy fees totaling \$38.77 which are normally considered overhead per Local Rule 20-1311(d). **Supp. filed 09/06/17 indicate fees are for milling costs in corresponding with Russ Davis, Inc. incurred on behalf of trustee and an outstanding costs incurred by the attorney for the trustee falling outside of the normal overhead costs.**
8. Supplement filed 09/06/17 indicates current plans to establish a conservatorship of the person of Max Winn in Riverside County.
9. Petition indicates beneficiary resides in Lake Elsinore, Riverside County with Tera Winn, caretaker. **Trustee resides in West Covina, Los Angeles County. Suggest Court transfer case to Los Angeles County. If so, court to set control date. JTD.**
10. Statement of Revenue filed 01/04/18.
11. Notice given.
12. **Need** Report attorney Mitchell Roth.
13. No proposed order. 09/06/17

RECOMMENDATION:

Need Report of Mitchell Roth, then Court's discretion re fees and transfer to LA County. If matter transferred, Court to set control date.

(cs/nb)



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**

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DATE: 07/10/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1701068

CASE NAME: ESTATE OF SHIRLEY MAE ZUPA

HEARING:

Petition for (verified) to confirm:(1)existence and validity of trust

COUNSEL:

BONNIE JOHNSON

(PET)...ZACHARY R HAGENBUCH

SHIRLEY MAE ZUPA

(DEC)...

Currently under review by Legal Research.  
(LR)

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)

Superior Court of Calif, County of San Bernardino  
Page: 13A ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY **CONSERVATORSHIP**

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DATE: 07/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1100139

CASE NAME: PAUL ANDREW WILKIE

HEARING:  
Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:  
BRENDA G PATTERSON (CP)...PRO/PER  
PAUL ANDREW WILKIE (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on courts motion on 06/21/18 after receipt and review of CI Report filed 06/18/18 and orders that counsel be appointed for conservatee.
2. **Need** report by court-appointed counsel.

RECOMMENDATION:  
Need report then 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

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DATE: 07/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700429

CASE NAME: MTR OF ZACHARY DUDECK

HEARING:

Petition for Appointment of Conservator

COUNSEL:

STEPHANIE DUDECK

(CPE)...SOHEILA S AZIZI & ASSOCIATES P

ZACHARY DUDECK

(CEP)...CRAIG M PARKER

**X-REF: FAMRS 1201076**

**GENERAL INFORMATION:**

Continued from **01/23/18**. Father reports he will object/file petition for co-conservatorship. Request for estate powers are withdrawn as the only monies are \$250 from SSI and child support. Matter referred to Court Investigator for father to be interviewed. Referred to Court Investigator for investigation and report. Attorney Craig M Parker is appointed for Zachary Dudeck. Notice by Judicial Assistant **Continued from 04/03/18 on courts motion for IRC report. Court is still in need of the IRC report. Matter is re-referred to IRC for report. Report of Craig Parker received and reviewed today. Mr. Parker indicates that father no longer objects to petition for conservatorship. This Court will adopt the family law custody and visitation orders into this case and orders shall remain in full force and effect for the duration of the conservatorship case.**

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by mother, Stephanie Dudeck ["Petitioner"].

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

1. Section 1 [LF, p. 2] does not specify orders or powers requested. **Need** verified supplement.
2. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Craig M. Parker, filed.
3. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. §§ 2351.5 – 2474 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records,

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paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make, give or withhold consent to all medical decisions for the proposed limited conservatee.

5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Citation returned served.
7. Court Investigator Reports filed 01/18/18 & 03/15/18.
8. Inland Regional Center Report filed.
9. Certificate of Completion re Conservatorship Class filed.
10. ~Proposed Form Order/Letters 11/21/17 & 01/08/18

**RECOMMENDATION:**

Need to clear note 1. If approved, set hearing for Compliance Review for **02/12/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

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DATE: 07/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700439

CASE NAME: MTR OF STEVEN SCHAEFER

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAWN SCHAEFER (CP )...PRO/PER  
STEVEN SCHAEFER (CTP)...MARK J. FLORY

GENERAL INFORMATION

Continued from **01/08/18** on Court's motion. Training Class filed in open Court. Report of Court Investigator has been read and considered by the Court.

**Continued from 04/10/18 on courts motion to clear notes. Court refers Ms. Schaefer to legal aide. Ms. Schaefer informs the Court that proposed conservatee was taken to the hospital and she was having a difficult time being allowed to make medical decisions. Court grants Ms. Schaefer temporary conservatorship. Dawn Schaefer is appointed Temporary Conservator. Mr. Flory to prepare order and letters of temporary conservatorship.**

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, make decisions re: education, medical, psychological services, social and vocational opportunities. JTD
2. Petitioner seeks civil rights not be limited without court order. JTD
3. Section 5a indicates minor will be an adult; however, date is not provided. **Need** verified supplement.
4. Petition is not signed or dated. **Need** corrected petition.
5. Petitioner seeks medical powers. Capacity Declaration filed 12/01/17; however, section A re hearing date is incomplete; section 5 re ability to attend court hearing is incomplete and form is not dated at signature line on page 1. **Need** completed form.
6. Confidential Conservator Screening form provides information for minor at section 1. **Need** information for proposed conservator. **Need** corrected form.

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

7. Proposed conservatee is developmentally disabled. Report of Mark Flory, Court appointment counsel, filed.
8. Proposed conservatee is developmentally disabled. IRC report filed.
9. Certificate of Completion of the Conservatorship Training Class filed.
10. Court Investigator report filed.
11. Return of Citation with Proof of Service filed 12/15/17
12. ~Proposed Form Order: 12/01/17

#### RECOMMENDATION

Need to clear notes 3-6. If approved, set hearing for Compliance Review for **02/11/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.  
(cs/nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/10/18      TIME: 9:30      DEPT: S37P  
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CASE#: EAP PS1800080

CASE NAME: Golston vs Lewis

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

ELLA L GOLSTON                      (PP )...PRO/PER

JOHNNY LEWIS Jr                    (RP )...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Notice given.

(nb)

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

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DATE: 07/10/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS01379

CASE NAME: IN THE MATTER OF ALEX NOE LLAMAS

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ALEX NOE LLAMAS	(CEP)...
MARIA LLAMAS	(CP )... HARTNELL LAW GROUP
MARIA LLAMAS	(CPE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

**Continued from 04/10/18 at request of counsel.**

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

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

1. Order Settling Ninth Account entered 07/25/17; eighth account now due beginning 02/10/17.
2. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)