



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 07/16/18

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.

(07/02/18 & 07/11/18 ww)(06/24/18 & 07/11/18 cs)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500100

CASE NAME: MTR OF AMPARO V RAMOS

HEARING:

Hearing Re: INVENTORY & APPRAISAL

COUNSEL:

SANDRA L MARTINEZ	(PET)...	J. DAVID HORSPOOL
DONALD F RAMOS	(PET)...	FULLERTON LEMANN SCHAEFER & DO
RONALD R RAMOS	(PET)...	PRO/PER
AMPARO V RAMOS	(DEC)...	
SUSAN L FLORES	(PET)...	BETTY AUTON-BECK
STATE OF CALIFORNIA FRANCHISE TAX BOARD (TP)...		

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Inventory & Appraisal

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

1. Matter set by Court at the Hearing re: Accounting Review on 03/12/18.
2. Counsel stated they are agreeable to providing informal accounting at this time.
 - a. Does Court wish for an informal accounting be filed? **JTD**
3. **Need** Final Inventory and Appraisal.

RECOMMENDATION

Court's discretion re note 2 and need to clear note 3.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 1A Add-on

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600431

CASE NAME: MTR OF ROBERT HYATT

HEARING:

FIRST AND FINAL Account and Report of JOHN JAMES HYATT and
Petition for allowance of fees filed.

COUNSEL:

JOHN JAMES HYATT (PET)...PRO/PER
ROBERT HYATT (DEC)...

GENERAL INFORMATION

Continued from 05/14/18 and 06/18/18 at request of petitioner to clear probate notes.

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by son, John Hyatt, [Executor/Petitioner]

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

1. Assets on Hand **\$346,361.10** consisting of **\$30.10** in cash and remaining in real and personal property per supplement filed 06/28/18.
2. No statutory fees requested.
3. Petitioner's signature on Report and Verification is not dated. [LF pgs. 7 & 8] **JTD**
4. Total Charges and Total Credits do not match. (**Supp. 06/06/18 provides an updated Summary of Account which total charges and total credits do not match.**) Need corrected Summary of Account and affected schedules. (**Supp. 06/28/18 includes a revised Summary of Account and affected schedules that now balance.**)
5. Notice given.
6. No Proposed Order.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **07/29/19**.

(cs/ww/cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600982

CASE NAME: BILL TED SHOOK

SEE ALSO 3, 4

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500.00 FOR FTA BURGESS.DELEON

COUNSEL:

EVELYN EMMA BURGESS (PET)...NEIL J DE LEON
BILLY TED SHOOK (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions of \$500.00 for failure to appear

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

1. Matter set on 05/21/18 during accounting review hearing, wherein, Court set sanction for failure to appear as to Evelyn Burgess and Attorney Neil De Leon.
2. Evelyn Burgess and Attorney Neil De Leon are ordered to personally appear at next hearing.
- 3.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 3

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600982

CASE NAME: BILL TED SHOOK

SEE ALSO 2, 4

HEARING:

Hearing Re: OSC RE: SURCHARGE \$1500 FOR FAILURE TO FILE I&A

COUNSEL:

EVELYN EMMA BURGESS (PET)...NEIL J DE LEON

BILLY TED SHOOK (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Surcharge \$1500 for failure to file I&A

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

1. Matter set on 05/21/18 during accounting review hearing, wherein, Court set sanction for failure to file Inventory and Appraisal as to Evelyn Burgess.
2. Evelyn Burgess and Attorney Neil De Leon are ordered to personally appear at next hearing.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600982

CASE NAME: BILL TED SHOOK

SEE ALSO 2, 3

HEARING:

Accounting Review by ***

COUNSEL:

EVELYN EMMA BURGESS (PET)...NEIL J DE LEON
BILLY TED SHOOK (DEC)...

GENERAL INFORMATION

Continued from 05/21/18 No appearance or contact by Petitioner or Counsel. OSC re sanctions of \$500 for failure to appear and OSC re surcharge for failure to file I&A set.

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 Evelyn Burgess, daughter, on 04/20/17; full authority, \$205,000.00 bond.
2. **Need** Final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.
(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700673
CASE NAME: LUIS ALONSO ARROYO
HEARING: Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

ENRIQUE ARROYO (PET)...RANDAL P. HANNAH
LUIS ALONSO ARROYO (DEC)...

Address: 10344 Bella Lane, Adelanto, CA 92301

Appraised Value: \$190,000.00 per petition. However, Final Inventory and Appraisal has not been filed. **Need** same.

Sale price: \$185,000.00.

First overbid: \$194,750.00

Deposit: \$2,000.00. **Insufficient.** Deposit of 10% in the amount of **\$18,500.00** is required absent special circumstances per local rule 20-807(a).

Commission: 6% total commission, \$11,100.00 divided equally between buyer and seller.

Additional bond: \$170,000.00. Sufficient.

Reason for Sale: Necessary to pay debts and expenses of administration.

Exposure to Market: MLS (Multiple Listing Service)

Notice: **Need** Notice of Hearing to buyer Jacquelin Diaz. Also, Court's discretion re: proof of publication as temporary order indicates "publication of notice be waived or reduced to a period of no more than 5 days. "

Does Court still require proof of posting by clerk's office? **JTD**

No Proposed Form Order.

(ww)

Future Hearing: 7/30/18 Petition for Letters of Administration

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800542

CASE NAME: MTR OF ALEJANDRO DE JESUS MUNOZ

HEARING:

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

COUNSEL:

REBECCA L MUNOZ

ALEJANDRO DE JESUS MUNOZ

(PET)...CHRISTINA FERRANTE

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Rebecca Munoz, relation unknown

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

1. Bond in the amount of \$217,500.00 is being requested. Ok. Net value of the estate consists of \$383,500.00 of which \$217,500.00 is personal property.
2. Section 3c as to decedent's residence at time of death is incomplete. Court may wish to inquire, or in alternative, need verified supplement. **JTD**
3. Section 5 is incomplete as to whether there was or was not issue of a predeceased child. Court may wish to clarify on record or in alternative; need verified supplement. **JTD**
4. Petitioner is not listed in section 8 of the petition and it is unclear what the petitioner's relationship to the decedent is. **Need** verified supplement to include name, relationship, age and address.
5. Petitioner is nominated by Marada Munoz-Young, daughter; Izaiah Munoz, son; and Maria Munoz, mother; however, it is not clear if Rebecca as priority to act as her relation is unknown.
6. Notice to Petition to Administer Estate and proof of service filed 06/19/18; however, need clarification of note 3 to determine that all persons entitled to notice were served.
7. **Need** proof of publication
8. ~Proposed Form Order: 06/06/18

RECOMMENDATION

Need to clear notes 4 & 7 then Court's discretion re: remaining notes. Bond \$217,500.00. If approved, set Accounting/Status Review **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800543

CASE NAME: MTR OF DELLIE ZAZWETA SALDANA

HEARING:

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

COUNSEL:

PHILLIP ESPINOSA SALDANA (PET)...DUANE P BOOTH
DELLIE ZAZWETA SALDANA (DEC)...

GENERAL INFORMATION:

Phillip Espinosa Saldana is appointed Special Administrator with powers for listing and selling real property, no bond, funds to be placed in blocked account. Court notes it will not grant IAEA powers.

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

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

1. All heirs waive bond. Net estate value \$126,895 consisting of \$126,000 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. ~Proposed Form Order: 06/06/18

RECOMMENDATION:

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800562

CASE NAME: FRANCIS BARBUSH

HEARING:

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

COUNSEL:

ARTHUR A CAPPILLA (PET)...JOHN D MICKUS
FRANCIS BARBUSH (DEC)...

GENERAL INFORMATION

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Arthur Cappilla, prior conservator/non-relative

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

1. Bond in the amount of \$302,000.00 is being requested. Ok. . The estate consists of \$301,990.00 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner indicates that there are no known relatives and that an heir search will be conducted after Letters are issued. [LF. pg. 5] **JTD**
3. **Need** Duties and Liabilities form.
4. **Need** Confidential Supplement to Duties and Liabilities form.
5. **Need** proof of publication
6. No Form Order Provided.

RECOMMENDATION

Need to clear notes 3-5. \$302,000.00 bond. If approved, set Accounting/Status Review **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 9

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

DATE: 07/16/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800581

CASE NAME: MAGDALEN R FITZ

HEARING:

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

COUNSEL:

CHARLES FITZ (PET)...PRO/PER
MAGDALEN R FITZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Charles Fitz, son

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

1. Petitioner alleges to be sole heir and waives bond. Net value of the estate consists of \$191,000.00 of which \$0 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner indicates that there is no predeceases spouse; however, attached death certificate indicates that the decedent was widowed. [LF pg. 7] **Need** verified supplement.
3. Notice to Petition to Administer Estate and proof of service filed 06/26/18; however, it is still unclear if the predeceased spouse left any issue. **See note 2.**
4. **Need** proof of publication
5. ~Proposed Form Order: 06/14/18

RECOMMENDATION

Need to clear notes 2 & 4 then Court's discretion re: note 2 and bond. If approved, set Accounting/Status Review **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS**

DATE: 07/16/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800036

CASE NAME: MTR OF JOHN N MOORE

SEE ALSO 11

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION TO REMOVE TRUSTEE

COUNSEL:

EUGENIA MOORE (PET)...PRO/PER

JOHN N MOORE (DEC)...

FAMILY LIVING TRUST OF JOHN NEAL MOORE (TRU)...

Waiver of Court Fees and Costs filed by EUGENIA MOORE is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Dismissal of Petition to Remove Trustee

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

1. Matter set on 05/21/18 due to no contact or appearance by petitioner.

RECOMMENDATION

Court's discretion re OSC.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 11

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

DATE: 07/16/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800036

CASE NAME: MTR OF JOHN N MOORE

SEE ALSO 10

HEARING:

Petition for to Remove John A Moore as Trustee, Submit Trust to
Jurisdiction of the Court to Bring Action

COUNSEL:

EUGENIA MOORE (PET)...PRO/PER
JOHN N MOORE (DEC)...
FAMILY LIVING TRUST OF JOHN NEAL MOORE (TRU)...

NOTICE:

Notice of Hearing filed 05/07/18 as to John A. Moore; Janet Morris; Cami Howard; Walter Ford; Darnelle Ford; Marthenia Ford; and Calvin Moore; however, an incorrect hearing date of 05/22/18 is on the notice, less than 30 days' notice given, and notice must also be sent to Karen Darby and Helen Smith, disinherited heirs. **Need** corrected notice.

Currently under review by Legal Research

LR

(ww)

Superior Court of Calif, County of San Bernardino

Page: 12

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIP

DATE: 07/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700271

CASE NAME: MURRY NEAL BOULTON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of EUGENIA PARKER-BOULTON

COUNSEL:

EUGENIA PARKER-BOULTON (PET)...SCHWARTZBERG& LUTHER, APC

MURRY NEAL BOULTON (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Eugenia Parker-Boulton (mother), appointed conservator of the person on 02/05/18.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-3. Inquire Status.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 12A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 07/16/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800071

CASE NAME: MTR OF JOSEPH SUPANGKAT

HEARING:
Petition for Appointment of Conservator

COUNSEL:
KUSHARIYANTO SUPANGKAT (CP)...PRO/PER
VONNY TIDAYOH (CP)...PRO/PER
JOSEPH SUPANGKAT (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from **04/23/18** Capacity Declaration filed. Court clears probate notes 4, 7, 8, & 9. Certificate of completion of the conservatorship training class received by the court. Request to continue by IRC granted. Jennifer Daniel is appointed for Joseph Supangkat. Continued for reports from IRC and Ms. Daniel.

Continued from 06/18/18 at request of counsel. Need time to meet with her client and file report.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Kushariyanto Supangkat and Vonny Tidayoh, parents

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed 04/23/18; however, form is not dated at signature line on page 1. **JTD**
3. Proposed conservatee is developmentally disabled. **Need** report of Jennifer Daniel, Court appointed counsel.
4. Proposed conservatee is developmentally disabled. **IRC report filed 06/15/18.**
5. Petitioners request Pr. C. § 2351.5 decisions concerning education, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, the right to consent or withhold consent to marriage/domestic partnership, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee,.
6. Petitioner seeks civil rights not be limited without court order.
7. Return of citation filed 04/18/18. Per minute order 04/23/18 note cleared.

8. Certificates of Completion of the Conservatorship Training Class filed 04/18/18.
9. CI reports filed 04/17/18.
10. ~Proposed Form Order: 04/18/18

RECOMMENDATION

Need report of Court appointment Counsel/IRC. If approved, set hearing for Compliance Review for **08/26/18** 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. (ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800111

VACATED

CASE NAME: ROSE ALMEDIA

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

ROSE ALMEIDA

(CEP)...HARTNELL LAW GROUP

Order on Ex parte petition to dispense with 8th accounting by PG filed on 06/25/18 . Next accounting review to be set on **10/01/19**.

(ww)

Future Hearing:

7/27/18 Court Trial for Reestablishment of Conservatorship

10/01/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100242

CASE NAME: ISIAH ADAMS

HEARING:

Hearing Re: STATUS OF CONSERVATORSHIP ESTABLISHED IN NEVADA

COUNSEL:

BARBARA ADAMS (CP)...PRO/PER
ISIAH ADAMS (CTP)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Status of Conservatorship Established in Nevada

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

1. Matter set on 05/21/18 during possible referral to Public Guardian hearing, wherein, Conservator reports that she is in the process of moving to Las Vegas.
2. Court continued matter to give Ms. Adams time to establish a conservatorship case in Nevada and to show proof thereof. May appear by courtcall at next hearing if necessary.
3. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200037

CASE NAME: MTR OF WILLIE MINOR

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
WILLIE MINOR (CEP)...

GENERAL INFORMATION

Conservatee passed away on 10/04/16.

Continued from 08/15/16, 03/06/17 and 12/11/17 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. First Account by PG approved on 01/27/14.
2. **Need** 2nd and final account to include pre and post death accounting periods beginning with date of 05/10/14.

RECOMMENDATION:

Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/cs/ww)

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

HEARING:

Petition for ORDER REFERRING CONSERVATEE FOR AN ASSESSMENT BY
THE MENTAL HEALTH INVESTIGATOR OF SB

COUNSEL:

ARTHUR A CAPPILLA	(CPE/CP)...J. DAVID HORSPPOOL
SHAWN P HUGHES	(CEP)...EDWARD B FISCHEL
EDWARD B. FISCHEL	(PET)...EDWARD B FISCHEL & ASSOC
BARBARA E BOWERSOCK	(TP)...BARBARA E BOWERSOCK

GENERAL INFORMATION:

Continued from **04/04/17 and 07/24/17** at request of counsel.

Continued from **10/16/17** to be heard by Judge Reichert.

Continued from 04/23/18 at request of counsel to be heard after hearing in criminal matter.

THIS CASE IS SET FOR HEARING ON Petition for Order Referring Conservatee for an Assessment by the Mental Health Investigator of San Bernardino County [Welfare & Inst. Code § 5650.5].

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

1. Petitioner, Arthur A. Capilla, is the conservator of the person and estate of Shawn Hughes. Petitioner was subsequently appointed as the LPS Conservator of the person, but that conservatorship proceeding was terminated. Both the probate conservatorship and the LPS conservatorship proceedings were pending in Riverside County, when, on 02/7/14, the probate conservatorship was transferred to San Bernardino County.
2. Petitioner alleges the LPS conservatorship was to have been transferred at the same time, but, due to a clerical error, it was not transferred to San Bernardino County until 03/10/14, after it was terminated by operation of law. Petition indicates there is currently no pending LPS proceeding for Shawn Hughes.
3. Petition indicates that on 06/22/13, Shawn Hughes was arrested in the related case and on 11/14/13, Shawn was found mentally incompetent. On 03/20/15, Shawn

was found mentally competent to stand trial and the criminal proceedings were reinstated.

4. Petitioner states that on 02/07/17, Petitioner was informed that Shawn was going to be readmitted to Patton State Hospital for further treatment for his mental capacity.
5. Petitioner proffers Welfare & Inst. Code § 5650.5 as authority for this Court to re-establish the LPS Conservatorship and requests this matter be referred to the Mental Health Investigator of the County of San Bernardino, or to such other person or entity that has been designated by the Director of the San Bernardino County Department of Behavioral Health, for an assessment by the local mental health system to determine if the conservatee has a treatable mental illness, including whether the conservatee is gravely disabled as result of a mental disorder and is unwilling to accept, or is incapable of accepting, treatment voluntarily; and directing that the assessment be filed with this Court within 30 days from the date of the referral.
6. **Confidential Assessment filed 04/04/17.**
7. **Report of Court-Appointed Attorney, Edward B. Fischel, filed 06/20/17.**
8. Notice given.
9. ~Proposed Order 02/22/17.

RECOMMENDATION:

Court's discretion.

(nb/cs)

Future Hearing: 6/23/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1500008

CASE NAME: BARBARA L KELTS

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
BARBARA L KELTS (CEP)...

GENERAL INFORMATION

Continued from 08/15/16, 03/06/17 and 12/11/17.

THIS CASE SET FOR HEARING ON Accounting Review

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

1. PG appointed as temporary conservator of the person and estate on 01/28/15 then as general conservator of the person and estate on 06/25/15.
2. **Need** 1st accounting beginning with date of 01/28/15.

RECOMMENDATION

Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(nb/cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600336

CASE NAME: MTR ARDEN DEAN DUNKIN

SEE ALSO 19

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of PUBLIC GUARDIAN

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ARDEN DEAN DUNKIN (CEP)...

GENERAL INFORMATION

Continued from **09/11/17** at request of Counsel to complete Inventory and Appraisal. Court clears probate notes 4 and 5.

Continued from 10/30/17 continued at request of counsel to clear probate notes.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Public Guardian appointed temporary conservator of the person and estate on 11/21/18 then as general conservator of the person and estate on 02/06/17, no bond.
2. Notice of the Conservatee's Death filed on 05/04/17. Conservatee passed away on 04/29/17.
3. **Need** final accounting to include pre and post death accounting periods.

RECOMMENDATION

Need to clear note 3.

(ww/lh/cs)

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600336

CASE NAME: MTR ARDEN DEAN DUNKIN

SEE ALSO 18

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ARDEN DEAN DUNKIN (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Court to see notes on previous matter # 18.
2. Public Guardian appointed conservator of the person and estate on 02/06/17, no bond
3. Need final accounting to include pre and post death accounting periods.

RECOMMENDATION

Inquire status of accounting.

(cs)

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS01768

CASE NAME: MTR OF AARON SWARTZ ET AL

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
AARON SWARTZ (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

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

1. 11th account of PG approved on 07/25/16.
2. Conservatee passed on 02/02/18. Notice filed 02/08/18.
3. **Need** 12th and final accounting to include pre and post death accounting periods beginning with date of 08/01/15.

RECOMMENDATION:

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS1151

CASE NAME: IN THE MATTER OF MARVIN LEWIS JONES

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARVIN LEWIS JONES (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire:06/01/19

Continued from 12/11/17 at request of public Guardian to file accounting or wavier of accounting.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex parte petition to dispense with 37th accounting by PG approved on 04/22/16.
2. **Need** 38th accounting or waiver of accounting beginning with 01/31/16.

RECOMMENDATION:

Inquire status of accounting.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 22

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

DATE: 07/16/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS6359

CASE NAME: IN THE MATTER OF JOHN BAERNSTEIN

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

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JOHN BAERNSTEIN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expire: 12/08/18

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

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

1. Accounting period: 11/14/14-12/31/15
2. Assets on Hand \$10,283.14 of which \$8,483.14 is cash and \$1,800.00 in a burial trust.
3. Public Guardian requests fees totaling \$2,800.00. Approving and confirming \$1,200.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$1,600.00 which was previously collected by petitioner. Generally itemized.
4. County Counsel request fees in the amount of \$1,400.00 Approving and confirming and \$600.00 will be deferred until such time as the conservatorship estate has sufficient funds for such purpose; approving and confirming \$800.00 was previously collected by petitioner. Generally itemized.
5. Public Guardian and Counsel failed to date at signature line. [LF pg. 8] **JTD**
6. Notice given.
7. Proposed Order: 10/12/17 total property on hand in line 28 does not match amount in line 13c.

RECOMMENDATION:

Court's discretion. If approved, set for next Accounting Review in 60 days as second account current is overdue.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

DATE: 07/16/18 TIME: 1:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 24, 25

HEARING:

Hearing Re: COURT TRIAL (FIRST DAY OF TRIAL)

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVCS	(TP)...
ALAN SHEPPARD	(PRO/PER)

No Notes-Court Trial- JTD.

(ww)

Future Hearings:

7/17/18 Court Trial (Day 2)

7/18/18 Court Trial (Day 3)

7/19/18 Court Trial (Day 4)

7/20/18 Court Trial (Day 5)

Superior Court of Calif, County of San Bernardino

Page: 24 add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 07/16/18 TIME: 1:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 23, 25

HEARING: Re: Probate status report filed

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVCS	(TP)...
ALAN SHEPPARD	(PRO/PER)

GENERAL INFORMATION

Continued from **03/15/18**. Prior to matter being called, Judicial Assistant receives message of George Theios who indicated he would not be present for hearing this date. Court trails this matter to the date set for readiness calendar.

Continued from 06/20/18 no appearance.

THIS CASE SET FOR HEARING ON Status Report.

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

1. Letters of Successor Administration issue to Rosemary Dominquez, daughter, on 12/02/17, full authority no bond.
2. Administrator seeks an additional year to close the estate in order to handle issues related to real property repairs, title and sale.
3. ~Proposed order 12/07/17.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **03/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/cs)

Future Hearings:

7/17/18 Court Trial (Day 2)

7/18/18 Court Trial (Day 3)

7/19/18 Court Trial (Day 4)

7/20/18 Court Trial (Day 5)

Superior Court of Calif, County of San Bernardino
Page: 25 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 07/16/18 TIME: 1:30 DEPT: S35P

CASE#: SPR SS06182

CASE NAME: MTR OF DAVE TONY DOMINGUEZ

SEE ALSO 23, 24

HEARING:

Petition for TO CONFIRM TITLE OF REAL PROPERTY TOTHE ESTATE AND TO
CANCEL DOCUMENTS ETC

COUNSEL:

LUIS A TRUJILLO	(PET)...EVA HOLCOMB-MALHOTRA
DAVE TONY DOMINGUEZ	(DEC)...
ROSEMARY C DOMINGUEZ	(PET)...HARTNELL, LISTER & MOORE
ROSEMARY C DOMINGUEZ	(PET)...RYAN J GALLANT
DEPT OF HEALTH CARE SRVCS	(TP)...
ALAN SHEPPARD	(PRO/PER)

GENERAL INFORMATION

Continued from **03/01/17**.

Continued from **06/07/17**. Trial dates set; time estimate one week. Court makes pretrial orders.

Continued from 06/20/18.

THIS CASE SET FOR HEARING ON Petition to Confirm Title of Real Property to the Estate and to Cancel Documents, etc. by Rosemary Dominguez.

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

1. Mailed Notice of Hearing to heirs, Allan Shepard (purchaser of real property), Luis Trujillo (former personal representative), respective counsel, and the Department of Health Care Services, filed 02/01/17.
2. Decedent died intestate; heirs are: Anthony Dominguez (son), Alexander Dominguez (son), Michael Dominguez (son), David Dominguez (son), Rosemary Dominguez (daughter), and the children of post deceased son Frederic Dominguez.
3. **Need** verified supplement setting forth the names, addresses, and ages of all persons requiring notice, including the heirs of post-deceased son Frederic Dominguez. Sufficiency of notice cannot be determined without this supplement.
4. **Need** proof of publication as ordered for service as to Luis Trujillo.
5. **Need** 30-days personal service to Alan Shepard, per PC 851(a)(2); see next note.

6. **Objections filed by Alan Shepard on 05/03/17. Does court wish to deem served? JTD**
7. ~Proposed Order: 12/27/16.

RECOMMENDATION

Need to clear notes #3-5. Matter is contested.

(lh/cs)

Future Hearings:

7/17/18 Court Trial (Day 2)

7/18/18 Court Trial (Day 3)

7/19/18 Court Trial (Day 4)

7/20/18 Court Trial (Day 5)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0700214

CASE NAME: ** MF ** CINDA J RATLEY

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

CODY RATLEY (PET)...TIMOTHY G MISHLER
CINDA J RATLEY (DEC)...
CATRINA RATLEY (PET)...DIANE E ROBBINS
RALPH L RATLEY (PET)...ROBBINS & HOLDAWAY
ADVANCE INHERITANCE (TP)...JAMES L LEESTMA
BOND SERVICES OF CALIFORNIA
BURDETTE M GARVIN
LAW OFFICE OF MILES & HATCHER

Address: 3623 June Street, San Bernardino, CA and adjacent vacant land at same address.

Appraised Value: \$59,900.00 per I&A filed 04/17/18.

Sale price: \$52,500.00. Amount is less than 90% of the appraised value. **JTD**

First overbid: \$55,625.00.

Deposit: \$5,000.00. **Insufficient.** Deposit of 10% in the amount of \$5,250.00 is required absent special circumstances per local rule 20-807(a)

Commission: 6% total commission, however, section 5b as to the written exclusive contract fails to list whom the contract was entered with. It is unclear if the commission is to be divided among anyone. **Need** verified supplement.

Additional bond: None; however, section 6a as to amount of bond before sale is incomplete and should reflect bond of \$20,000.00. **JTD**

Reason for Sale: Expenses of administration, taxes, best interest of the interested persons.

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

Exposure to Market: Listed and marketed

Notice: **Need** Notice of Hearing and proof of service. Notice must also be to Richard Centeno, buyer.

Proof of posting by clerk's office filed 05/23/18; however, the Court zip code is incorrect.
JTD

Proof of Publication per Pr.C. § 10300 filed 06/18/18.

~Proposed Form Order: 05/23/18

(ww)

Future Hearing: 5/15/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

SEE ALSO 3

HEARING:

Petition for AUTHORITY TO SELL AND PURCHASE REAL PROPERTY

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION:

Continued from **11/14/17** and **01/08/18**.

Continued from 04/16/18. Written report received from Attorney Mitchell Roth. Court appoints Carolyn Michaelis as an expert witness under Evidence Code Section 730. Court appoints Bud Garvin as the probate referee. Attorney Roth to submit order.

THIS CASE IS SET FOR HEARING ON Petition for Authority to Sell and Purchase Real Property by Successor Trustee, Noreen T. Fontaine ["Petitioner"] of the Luis F. Avalos Special Needs Trust. [Pr.C. § 17200(b)].

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

1. Petition indicates that the property on hand at the end of the third account ending on 08/31/15, consists of monthly annuity payments for life and real property located at 9320 Frankfort Avenue, Fontana, CA ["Frankfort Property"].
2. Petitioner states that the property the property was built in 1952; was purchased in August 2001 for \$128,000 and is currently worth \$320,000; alleges that while the real property is shown to have experienced a 130.7% increased value since 2001, its' physical condition needs attention; as minimal improvements and upgrades have been done.
3. Petitioner believes that it would be advantages to the Trust and ultimately the beneficiary for a sale of the Frankfort property and purchase of a newer one at this time. Petitioner states the goal is to sell the Frankfort real property and purchase a newer property in the City of Perris, via an all cash transaction.
4. The Trustee requests Court authority to sell the property located on 9320 Frankfort Avenue, Fontana, CA and purchase a comparably priced property in San Bernardino or Riverside County.

5. Copies of bank statement as of 07/31/17 and home estimates are affixed to petition.
6. Current bond of \$6,000. Petitioner seeks an increase to bond to \$150,000.
Insufficient. Suggest bond increase by \$287,000 for a new bond total in the amount of \$293,000. **JTD. [Supp. 11/14/17 Petitioner accepts a bond of \$293,000.00.]**
7. Notice is complete.
8. Appraisal report by Burdette Garvin filed on 05/24/18.
9. **Need** Report by Carolyn Michaelis per Order Re: Appointment of Expert Witness filed 05/01/18.
10. ~Proposed Order: 11/14/17

RECOMMENDATION:

Need report then Court's discretion. \$293,000 bond.

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1100815

CASE NAME: LUIS F AVALOS SPECIAL NEEDS TRUST

SEE ALSO 2

HEARING:

Petition for settlement of 4th Account and Report of NOREEN T
FONTAINE ESQ and Petition for allowance of fees filed.

COUNSEL:

BANK OF THE WEST (PET)...BURGH, BALIAN & BERGSTEIN
LUIS F AVALOS SPECIAL NEEDS TRUST (TRU)...
NOREEN T FONTAINE ESQ (PET/STE)...NOREEN T FONTAINE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Fourth Account Current of SNT and Petition for Allowance of Fees by Noreen Fontaine, successor trustee.

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

1. Accounting period: 09/01/15-12/31/17
2. Assets on hand: \$214,712.45 of which \$86,153.66 is cash and the remainder in real property.
3. Current bond: \$100,000.00. Sufficient.
4. Petitioner is requesting to reserve the right to see compensation at a future date. [LF pg. 4] and indicates that there is an attached declaration; however, declaration is not attached. **Need** same.
5. Petitioner indicates that there is an outstanding trust liability of \$23,368.86 against the Aero Mobility customized van.[LF pg. 4]. Copy of statement is attached as LF pg. 20.
6. Notice given.
7. Proposed order: 04/17/18 need accounting period and description of assets on hand.

RECOMMENDATION

Court's discretion. If approved, set Accounting/Status Review for **07/29/19** if 1 year or on **07/20/20** if 2 years. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(ww)

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

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1401134
CASE NAME: Celia A Ramirez

HEARING: Hearing re Final Discharge

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS-R
CELIA A RAMIREZ (DEC)...
ESTHER M DAVID (PET/TP)...HARTNELL LAW GROUP
DEPARTMENT OF HEALTH CARE SERVICES (PRO/PER)

Waiver of Court Fees and Costs filed by ERIC B RAMIREZ is GRANTED

GENERAL INFORMATION

Continued from 05/14/18. No appearance. Court orders counsel to be present at next hearing.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. The need for a final formal accounting is not required as the Court deemed the accounting shown at mediation as sufficient per minutes of 05/01/18 Accounting Review hearing.
2. A settlement was reached on 05/01/18 between the heirs.
3. Per Order on Mutual General Release and Settlement Agreement filed 05/01/18 a reserve of \$5,000.00 for taxes and unforeseen contingencies was allowed. **Need** informal accounting by Esther David of expenditures or distribution from the reserve of \$5,000, together with receipts of expenditures or distribution per Local Rule 20-911.
4. **Need** receipts by Attorney Linda Robert-Ross for shares received by heirs Eric Ramirez, Sylvia Vizcarra and Jose Ramirez in the amount of \$29,979.76 each.
5. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.
(ww)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600454
CASE NAME: MTR OF ALEJANDRA CASTILLO

HEARING: Accounting Review by ***

COUNSEL:

ELAINE ARIAS MONTES (PET)...PRO/PER
ALEJANDRA CASTILLO (DEC)...
DEUTSCHE BANK NATIONAL TRUST (TP)...WRIGHT, FINLAY & ZAK

GENERAL INFORMATION:

Continued from **10/31/17** and **12/12/17**. No appearances. Citation issued as to Elaine Arias Montes who is cited and required to appear.

Continued from **01/30/18**. The Court orders the Administrator to file a status report by 02/19/18. Elaine Arias Montes is ordered to be present at next hearing.

Continued from **03/19/18**. Parties are working with an accountant to prepare the accounting.

Continued from 05/14/18. Parties are to file an accounting forthwith. Clerk's office to set on calendar for 07/16/18.

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 Elaine Montes, daughter, on 06/28/17, full authority, no bond.
2. Proof of personal service of citation filed 01/19/18; however section 2 as to documents served is blank but the service is always of a copy of the citation and the minute order. **JTD**
3. Partial Inventory and appraisal filed 11/03/16 reflecting "all" of estate. Court may wish to inquire if it is actually the Final Inventory and Appraisal? If so, **need** corrected final inventory and appraisal with section 5 as to property tax certificate completed and bank statements in support of date of death for Bank of America acct #s 5178 & 4809 per Local Rule 20-809.
4. **Need** accounting or status report.
5. Amended Proof of Personal Service of Citation on Elaine Montes filed 04/25/18.

RECOMMENDATION:

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

(nb/ww)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600636

CASE NAME: GLORIA ANN YOUNG

HEARING:
Hearing re Final Discharge

COUNSEL:

MARK R YOUNG (PET)...GEORGINA LEPE
GLORIA ANN YOUNG (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Mark Young, son, approved on 02/14/18.
2. No receipt required, petitioner is sole heir/beneficiary.
3. Informal accounting of expenditures and distribution from the reserve of \$1,500.00, per Local Rule 20-911 filed 07/10/18.
4. Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b) received on 07/10/18 and forwarded to department for review..

RECOMMENDATION

Court's discretion.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 7

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700204

CASE NAME: MTR OF FIDENCIO SALAZAR

HEARING:

Accounting Review by ***

COUNSEL:

ROSIE ADAME (PET)...PRO/PER
FIDENCIO SALAZAR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Rosie Adame, daughter, 06/13/17; full authority, \$20,000.00 bond.
2. **Need** Final Inventory and Appraisal
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 8

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700206

VACATED

CASE NAME: MTR OF CLAUDIA ANNE PROXEE

HEARING:

Accounting Review by ***

COUNSEL:

PETER JOHN PROXEE JR (PET)...PRO/PER

CLAUDIA ANNE PROXEE (DEC)...

(ww)

Future hearing dates: 08/13/18 Ptn for Final Distribution on Wvr of Account and Report

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800006
CASE NAME: ESTATE OF HENRY DAVID LUNA

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

COUNSEL:

HERMAN LUNA (PET)...MARIVEL M ZIALCITA
HENRY DAVID LUNA (DEC)...

GENERAL INFORMATION

Continued from **02/08/18**. Counsel will have until 04/13/18 to file and serve objections. Objections will be deemed waived if not filed by this date. Hearing continued at request of counsel. Reason: for objections to be filed.

Continued from 05/14/18. Objections will not be filed by Attorney Kerry Zeiler as they have been withdrawn from his client. Matter is continued for petitioner to do a corrected publication. Petitioner to file a petition for letters for special administration to sell the real property.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Herman Luna, brother.

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

1. Petitioner seeks bond of \$400,000. Ok.
2. Supplement filed indicating decedent's middle name is actually **Daniel**, not David. Court may wish to require that the Clerk's Office correct his middle name in the system. **JTD**
3. Proof of publication filed 01/29/18; however, there is no indication of IAEA powers sought. **Need** corrected publication.
4. Notice of Petition to Administer Estate filed 01/05/18 and 05/15/18; however, the Court zip code incorrectly indicates **92401**. **JTD**
5. ~Proposed Form Order/letters: 01/03/18; however, order reflects incorrect Court zip code and middle name David.

RECOMMENDATION

Need to clear note 3 and Court's discretion re note 4. \$400,000 bond. If approved, set Accounting/Status Review for **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww)

Superior Court of Calif, County of San Bernardino

Page: 10

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800146

VACATED

CASE NAME: MTR OF DAISY CRUZ

HEARING:

Hearing Re: Will Contest and Grounds of Opposition to Probate

COUNSEL:

LUIS GODINA

(PET)...PRO/PER

DAISY CRUZ

(DEC)...

MARIA VARGAS

(OBJ)...

Matter reset onto 08/09/18 by the Court on 06/26/18.

(ww)

Future hearing dates:

08/09/18 Readiness Calendar

08/09/18 Hearing Re: Will Contest and Grounds of Opposition to Probate

08/23/18 Hearing re: Court Trial on Spousal Property Ptn

08/13/18 Hearing re: Will Contest and Grounds of Opposition

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800525
CASE NAME: MTR OF TINA BROOKANN HARTE

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

COUNSEL:

KYLE HARTE	(PET)...MATTHEW DONAHUE
CORINA HARTE	(PET)...MATTHEW DONAHUE
ROBERT KELLY HARTE	(PET)...MATTHEW DONAHUE
TINA BROOKANN HARTE	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Kyle and Corina Harte (surviving issues) for Kyle and Robert Harte (ex-spouse and son) to be co-executors.

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

1. All beneficiaries waive bond. Net value of the estate consists of \$254,176.00 of which \$24,000.00 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Decedent died 2 days after the will was signed.
3. The petition for probate is on an outdated form. **JTD**
4. Petitioner Robert Harte is not listed in section 8 of the petition; however, it is clear that petitioner is the ex-spouse. **Need** verified supplement to include his name, relationship, age and address.
5. Petitioner Robert Harte failed to sign the petition. **Need** verified supplement.
6. **Need** proof of publication.
7. ~Proposed Form Order: 05/31/18

RECOMMENDATION

Need to clear notes 4-7 then Court's discretion re bond and note 3. If approved, set Accounting/Status Review for **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800534

CASE NAME: ROGER GONZALEZ SR

HEARING:

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

COUNSEL:

NENETTE GONZALEZ (PET)...PRO/PER
ROGER GONZALEZ SR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Nenette Gonzalez, relation unknown

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

1. All heirs waive bond. The estate consists of \$123,951.00 in real property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Section 5 is incomplete as to whether there was or was not issue of a predeceased child. Court may wish to clarify on record or in alternative; need verified supplement. **JTD**
3. Section 8 of the petition fails to list all persons' relationships to the decedent. Court may wish to clarify on record or in alternative, need verified supplement as to Ruben Gonzalez. **JTD**
 - a. Supplement filed 06/04/18 appears to indicate that Nenette Gonzalez is the daughter of decedent.
 - b. Copy of Death Certificate filed 06/04/18 indicates that Roger Gonzalez is the son of decedent.
4. Duties and liabilities is missing telephone number of petitioner; however, it can be found in caption of form. **JTD**
5. Notice to Petition to Administer Estate and proof of service filed 06/08/18; however, proof of service is incomplete in section 3 re: whether envelope was deposited with USPS or placed for collection. **JTD**

6. **Need** proof of publication
7. ~Proposed Form Order: 06/04/18

RECOMMENDATION

Need to clear notes 6 then Court's discretion re bond and remaining notes. If approved, set Accounting/Status Review **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

Superior Court of Calif, County of San Bernardino
Page: 12A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 07/16/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300446

CASE NAME: ESTHER DURAN

HEARING:

Hearing Re: Ptn for Atty Fees to be taken under submission

COUNSEL:

ESTHER DURAN	(DEC)...
JANET DURAN	(PET)...DAMIAN G GARCIA
LORIANNE M DURAN	(PET)...PRO/PER
STEVEN DURAN	(PET)...HORSPOOL & HORSPOOL
TOYOTA MOTOR CREDIT CORP	(TP)...SCOTT WELTMAN

XREF: CONPS1100062 (*Lorianne M Duran SNT*)

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Ptn for Atty Fees to be Taken Under Submission

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

1. Matter set by Court on 06/26/18 at the hearing re: Petition for Attorney Fees.
2. Counsel, Jennifer Daniel, to file a declaration regarding balance of trust and claims of reimbursement by 07/16/18.
3. **Objection of Janet Duran, sister, to Petition for Attorney's Fees filed 06/21/18.**
4. No appearance is necessary.

RECOMMENDATION

Court's discretion.

(ww)

Future Hearing: 8/14/18 Status of Settlement/Selection of Final Accounting Date

Superior Court of Calif, County of San Bernardino

Page: 13

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 14

HEARING:

Second and Final Account and Report of GEORGE DEKTEROV and
Petition for allowance of fees filed.

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BARRY
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
VICTOR DEKTEROV	(PET/APP/OBJ)...AMY M COHEN
SURETEC INSURANCE	(PRO/PER)

XREF: PROPS1400495 *THE SAVAGE TRUST*

GENERAL INFORMATION:

Continued from **12/14/17** to be heard with trust account. Court orders Victor Dekterov to file written objections by 01/02/18.

Continued from **01/17/18**. Court orders Attorney John Setlich to be present in court if he still represents Victor Dekterov.

Continued from **03/19/18**. Court, counsel and objector confer on the record.

Matter is continued for parties to meet and confer

Continued from 05/07/18. Trial setting conference is set for 07/16/18. Parties are ordered to meet and confer prior to trial setting conference for possible resolution of issues.

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd and Final Conservatorship Account and Petition for Allowance of Fees by George Dekterov, son.

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

1. Conservatee died on 08/21/16.

2. Accounting period 04/01/16 - 10/31/16. Normally pre and post death accountings are required per Pr. C. § 2620(b). However, all assets were transferred to trust post death. **JTD**
3. Assets on hand \$0.
4. Current bond \$20,000.
5. Conservator waives fees.
6. Attorney seeks fees of \$39,764.06 at \$350 per hour to be paid by Trust. Costs of \$239.06 for copies and postage appear to be overhead per local rule 20-1406(d). [Acct. 10/30 LF pgs. 27-33]. **JTD**
7. Notice given.
8. **Objections filed by Victor Dekterov, son, on 01/26/18.**
9. **Reply by George Dekterov to objections by Victor Dekterov filed 01/17/18.**
10. No proposed order. Submit after hearing.

RECOMMENDATION

Matter is contested. Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **07/29/19**.

(lc/lh/ww/cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 13

HEARING:

Trial Setting Conference

COUNSEL:

GEORGE DEKTEROV	(CP/CPE)...ELIZABETH MCDONOUGH BARRY
DIANE D HARKISON	(CE)...MARIELLEN ROSS
LIDIA KEKTEROV	(PCE/CEP)...THE ALVAREZ FIRM
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
VICTOR DEKTEROV	(PET/APP/OBJ)...AMY M COHEN
SURETEC INSURANCE	(PRO/PER)

XREF: PROPS1400495 *THE SAVAGE TRUST*

Trial Setting Conference- No notes- JTD

(ww)

Superior Court of Calif, County of San Bernardino

Page: 15

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 16

HEARING:

Petition for ATTORNEY FEES BY COURT APPOINTED COUNSEL

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO	(CEP/CEE)...JAMES B CHURCH

GENERAL INFORMATION:

Continued from **10/31/17**. Notice waived.

Continued from 03/20/18 to be heard with accounting. Notice given by Attorney David Colella.

THIS CASE IS SET FOR HEARING ON Petition for Fees and Compensation by Court-appointed counsel, James B. Church ["Petitioner"].

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

1. Petitioner was appointed on 03/06/15. Petitioner alleges that services have been rendered for which counsel has not been compensated.
2. Attorney requests fees of \$43,113.75. Billed at \$375/hour for 105.9 hours' attorney time and \$75-150/hour for 24.75 hours' paralegal time. Itemized [LF, pgs. 9-18]. **JTD.**
3. Attorney requests reimbursement of costs advanced of \$24.00. Itemized. **JTD**
4. Petitioner requests and order authorizing and directing Conservator of the Estate, Lucio Coronado III, to pay for services rendered.
5. Petitioner requests to be relieved as counsel for the conservatee, herein. **JTD**
6. Notice given.
7. ~Proposed Order 09/18/17

RECOMMENDATION:

Court's discretion.

(nb/ww)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500110

CASE NAME: LUCIO CORONADO

SEE ALSO 15

HEARING:

Second Current Account and Report of LUCIO CORONADO III and
Petition for allowance of fees filed.

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO	(CEP/CEE)...JAMES B CHURCH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second and Current Account by Lucio Coronado III, son

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

1. Accounting period: 01/01/17-12/31/17
2. Assets on hand: \$62,457.64 in cash.
3. Current bond: \$20,000.00 and the proceeds from the sale of the real property \$61,523.38 is in a blocked account. Sufficient.
4. Petitioner and Attorney are not requesting compensation at this time but reserve the right to seek it in a separate petition. [LF pg. 5] **JTD**
5. Petitioner indicates that real property was sold during the accounting period. Closing statement provided with confidential bank statements. [LF pg. 60]
6. Notice of Hearing and Proof of service filed 06/05/18; however, the Court zip code is incorrect. **JTD**
7. ~Proposed Order: 06/05/18

RECOMMENDATION:

Court's discretion. If approved, Court to next accounting date on **04/29/19**.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 17

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700260

CASE NAME: MTR OF JOSE RICARDO MEDRANO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARIA ESPARANZA MEDRANO

COUNSEL:

MARIA ESPARANZA MEDRANO

(CP)...PRO/PER

JOSE RICARDO MEDRANO

(CTP)...MELVIN L FRIEDLAND

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Medrano, mother, appointed limited conservator of the person only on 12/11/17, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700274

CASE NAME: MARY DONLEY

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of IRENE DONLEY-KIMBLE

COUNSEL:

IRENE DONLEY-KIMBLE (PET)...HORSPPOOL & HORSPPOOL
MARY DONLEY (CEE)...E JOAN NELMS
MARILYN R MASON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Irene Donley-Kimble, daughter, appointed conservator of the person and estate on 12/11/17, \$50,000.00 bond.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care form, Care Plan filed 12/14/17.
3. **Need** Final Inventory & Appraisal per Pr.C.§2610.
4. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
5. The conservatorship estate holds interest in real property, **need** proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C.§2313.

RECOMMENDATION

Need to clear notes 3-5.

(ww)

Future Hearing: 2/25/19 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 19

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

SEE ALSO 20

HEARING:

Hearing Re: APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

LETICIA PEACOCK (CP)...MAREND M GARRETT
MARIA FELIPA PEACOCK (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Temporary orders denied on 01/03/18. Walter Moore appointed as counsel for proposed conservatee.

Continued from **02/05/18**. Parties agree to advance 3/6 hearing to today and continue it to 03/19/18.

Continued from 03/19/18 and 05/14/18.

THIS CASE SET FOR HEARING ON [**Amended 01/29/18**] Petition for Appointment of Conservator person only by Leticia Peacock, daughter

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

11. No bond- person only
12. Petitioner seeks medical powers. **Need** Capacity Declaration.
13. Petitioner indicates that proposed conservatee has dementia. **Need** Report of Counsel Walter Moore.
14. Petitioner indicates that proposed conservatee resides currently in **Florida**.
15. Section 3b(1) as to whether petition is or is not a creditor is incomplete. Court may wish to inquire; or in alternative, need verified supplement. **JTD**
16. Section 8 is conflicting as 8a indicates that proposed conservatee will attend the hearing and then in 8d that conservatee is out of state and will not attend. Court may wish to inquire; or in alternative, need verified supplement. **JTD**
17. Section 9 as to medical treatment is marked; however, 2355 powers are not requested in section 1g. **JTD**
18. Court to see Confidential Supplemental Information.
19. **Need** return of citation as to amended petition.

20. Certificate of Completion of the Conservatorship Training Class filed 03/19/18.
21. **Court to see** Notice of no report by CI filed on 01/23/18.
22. **Court to see** Notice of Lodgment re: Physician's report filed 01/29/18.
23. **Objection by Maria Perez, proposed conservatee to initial petition filed on 01/03/18; however, need proof of service.**
 - a. **Declaration by Ana Thomson in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
 - b. **Declaration by Michael Blaskey in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
24. No objections to the amended petition are in file for review.
25. Notice given.
26. ~Proposed Form Order: 12/27/17

RECOMMENDATION

Matter is contested. Need Report of Counsel and need to clear notes 2 & 9 and Court's discretion re remaining notes. If approved, set hearing for Compliance Review for **02/25/19** 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.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

SEE ALSO 19

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CHERI SIPLE	(CPE)...PRO/PER
LUCIO CORONADO III	(CPE)...FULLERTON LEMANN SCHAEFER & DO
LUCIO CORONADO	(CEP/CEE)...JAMES B CHURCH

See notes on matter 19.

(ww)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800105

CASE NAME: MTR OF HECTOR JOSE BUGARIN

HEARING:
Petition for Appointment of Conservator

COUNSEL:

ADRIANA PARRA (CP)...CHAVEZ LAW GROUP
HECTOR JOSE BUGARIN (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 05/21/18. Attorney Jennifer Daniel appointed for Hector Bugarin.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, of the person only, by mother, Adriana Parra, [Petitioner]

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

1. Person only- no bond.
2. Proposed conservatee turned age 18 on 05/02/18.
3. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, right to have exclusive authority to give or withhold consent to medical treatment; and make decisions re-education.
JTD
4. Petitioner seeks civil rights be limited. **JTD**
5. Section 3(b)(1) is incomplete re if petitioner is a creditor of proposed conservatee. Court to clarify on record. **JTD**
6. Petitioner seeks medical powers. Capacity Declaration filed 04/12/18.
7. Proposed conservatee is developmentally disabled. IRC report filed 05/18/18.
8. Proposed conservatee is developmentally disabled. Jennifer Daniel appointed on 05/21/18. **Need** Report of Counsel.
9. Consent and nomination of petitioner to be conservator of the person by Hector Guillermo Bugarin, father, filed on 05/14/18
10. Citation and proof of service filed 05/14/18.
11. Certificate of Completion of the Conservatorship Training Class filed 05/08/18 and 05/21/18.
12. Notice given.
13. CI report filed 05/09/18.
14. ~Proposed Form Order: 04/12/18.

RECOMMENDATION

Need Report of Counsel then Court's discretion re: remaining notes. If approved, set hearing for Compliance Review for **02/25/19** 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/ww)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800106
CASE NAME: MTR OF JIMMY RIVAS
HEARING: Petition for Appointment of Conservator

COUNSEL:

PAIGE RIVAS (CP)...FULLERTON LEMANN SCHAEFER & DO
JIMMY RIVAS (CTP)...J BENJAMIN SELTERS III

GENERAL INFORMATION

Continued from 05/21/18. Benjamin Selters III appointed for Jimmy Rivas.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by mother, Paige Rivas [Petitioner]

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

1. No Bond- Person only.
2. Proposed conservatee is developmentally disabled. It appears a petition for limited is appropriate.
 - a. An IRC report is optional per Pr.C. §1827.5(b). Does Court wish to require?
 - i. Court to see Confidential Letter from the IRC filed 05/18/18.
 - b. As this is not a petition for Limited Conservatorship, Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470.
 - i. Benjamin Selters III appointed as Counsel on 05/21/18. Report of Counsel filed 06/18/18.
3. Notice given.
4. Citation with proof of service filed 04/25/18.
5. Petitioner seeks medical powers. Capacity Declaration filed 05/17/18; however, the doctor's office telephone number in section 2 is missing. **JTD**
6. Certificate of Completion of the Conservatorship Training Class filed 04/18/18.
7. CI report filed 05/14/18.
8. ~Proposed Form Order: 04/09/18

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **02/25/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355); and Care Plan per Pr.C. §2352.5.

(cs/ww)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800164

CASE NAME: Beatriz Guadalupe Vasquez

HEARING:
Petition for Appointment of Conservator

COUNSEL:
AURA MARINA LOPEZ (CP)...PRO/PER
BEATRIZ GUADALUPE VASQUEZ (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Aura Lopez, mother

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

1. No bond- Person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. List of Required Contacts (Local form SB-12224) filed 06/04/18; however, it is missing the proposed conservatee's 3 minor children. **Need** completed form.
4. **Need** return of Citation.
5. **Need** Certificate of Completion of the Conservatorship Training Class.
6. **Need** Notice of Hearing and proof of service.
7. CI report filed 07/11/18.
8. ~Proposed Form Order: 06/04/18

RECOMMENDATION

Need to clear notes 2-6. If approved, set hearing for Compliance Review for **02/25/19** 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

(ww)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800166

CASE NAME: MTR OF AMBER NICOLE MEDINA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

DONNA JARAMILLO (CPE)...BUXBAUM & CHAKMAK
AMBER NICOLE MEDINA (CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person and estate by Donna Jaramillo, mother

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

1. **Note: Proposed conservatee will not be 18 until 10/07/18.**
2. Petitioner requests to waive bond as proposed conservatee's income is IHSS. The estate appears to consist of public benefits. Court to clarify if estate powers are needed. **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 06/05/18.
4. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Petitioners request Pr. C. § 2351.5 powers- authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee, authority to consent or withhold consent to marriage/domestic partnership, right to control social and sexual contacts and relationships, and decisions concerning education.
 - a. Attachment "1h" appears to be attachment 1j on regards to the Pr.C. § 2351.5 powers. [LF pg. 11]
7. Petitioner seeks civil rights not be limited without court order. **JTD**
8. Petitioner seeks that proposed conservatee be disqualified from voting.[LF pg. 12]

JTD

9. Confidential Supplemental Information filed 06/05/18; however, section 5f as to alternatives considered is incomplete. **JTD**.
10. **Need** return of citation.
11. Certificate of Completion of the Conservatorship Training Class filed 07/05/18.
12. **Need** Notice of Hearing and proof of service.
13. CI report filed 07/09/18.
14. ~Proposed Form Order: 06/05/18

RECOMMENDATION

Need appointment of Counsel, IRC report, and to clear notes 10 & 12. Court's discretion re: bond. If approved, set hearing for Compliance Review for **02/25/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

If estate is approved Set hearing re Accounting Review for **09/23/19**. Any accounting to be filed 30 days in advance.

(ww)

Superior Court of Calif, County of San Bernardino

Page: 25

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: PRO PS1400495

CASE NAME: THE SAVAGE TRUST

SEE ALSO 26

HEARING:

Petition for Approval of First Account and Report of GEORGE DEKTEROV and Petition for allowance of fees filed.

COUNSEL:

THE SAVAGE TRUST	(TRU)...
DIANE D HARKISON	(PET/STE)...MARIELLEN ROSS
GEORGE DEKTEROV	(PET)...BARRY & BARRY
VICTOR DEKTEROV	(PRO/PER)

XREF: CONPS1300065 LIDIA DEKTEROV

GENERAL INFORMATION:

Continued from **01/17/18**. Court orders objections to be filed by 02/16/18 or court will deem waived.

Continued from **03/19/18** Court, counsel and objector confer on the record.

Matter is continued for parties to confer. Notice to be given by Attorney Roy Barry.

Continued from 05/07/18. Trial setting conference is set for 07/16/18. Parties are ordered to meet and confer prior to trial setting conference for possible resolution of issues.

THIS CASE IS SET FOR HEARING ON 1st Account of Successor Trustee, George Dekterov

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

1. Accounting period: 02/05/16 to 08/14/17, although it should commence as of date of appointment as Successor Trustee on **01/06/16**. However, the accounting appears to overlap with prior trustee's final accounting period ending 04/18/16. Need verified supplement. **(Supp 01/17/18 petitioner indicates that the trust property was not received from Diane Harkison until 02/05/16.)**
JTD
2. Assets on hand: \$73,137.14, cash. **Supplement filed 04/24/18 indicate decedent' residence is also a part of the trust; however, it was not valued**

by former trustee. Petitioner intends to appraise property and will be reflected on the next accounting period. JTD

3. Current bond: \$200,000.00.
4. Assets marshalled from former trustee, Diane Harkison, in the amount of \$161,761.84 are identified as Schedule "A" Receipts; however, they should be identified as assets on hand at beginning of account period. **JTD.**
5. Petitioner requests attorneys' fees of \$4,900; however, Exhibit "B" with itemization of attorney time and fees is not included as alleged. **Need** verified supplement. **(Supp. 01/17/18 includes itemization of 14 hours at \$350.00/hour attorney time for total of \$4,900.00.) JTD**
6. No proposed order submitted.

RECOMMENDATION:

Court's discretion. **If** trust accounting will continue to be required then Court to set next Accounting Review date for **10/29/18.**

(lh/ww/cs/ww)

Superior Court of Calif, County of San Bernardino

Page: 26

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

DATE: 07/16/18 TIME: 9:30 DEPT: S36P

CASE#: PRO PS1400495

CASE NAME: THE SAVAGE TRUST

SEE ALSO 25

HEARING:

Trial Setting Conference

COUNSEL:

THE SAVAGE TRUST	(TRU)...
DIANE D HARKISON	(PET/STE)...MARIELLEN ROSS
GEORGE DEKTEROV	(PET)...BARRY & BARRY
VICTOR DEKTEROV	(PRO/PER)

XREF: CONPS1300065 LIDIA DEKTEROV

No Notes- Trial Setting Conference- No notes- JTD

(ww)

11. Attorney requests reimbursement of total costs advanced of \$173.00 and in prayer of \$175; however, correct reimbursement amount should be \$173. Itemized, [LF, p.7].
12. Petition requests reimbursement for costs advanced of:
 - a. \$2,135.00 for fees paid [LF, p. 8].
 - b. \$5,225.00 associated with the refurbish of the two estate properties. Itemized, [LF, p. 7/8].
13. Petitioner requests reimbursement of \$8,790.00 to Vivian Williams for the costs associated with the Will contest and general probate fees. {LFp.7}. **JTD**
14. Notice given.
15. Petitioner seeks \$700 reserves for closing expenses and to pay any additional liabilities without additional accounting.
16. Petitioner requests discharge upon filing of final discharge; however, final discharge does not occur until filing of receipts and entry of final discharge.
17. ~Proposed Order submitted 05/22/18 statutory fees do not match petition, the total sales price of the properties do not match petition, reserves amount does not match petition, total assets on hand do not match petition, fees for reimbursement are not indicated, does not include statement re bond, does not include findings re estate is solvent, and findings re cc, Pr.C. §9200 allegations.

RECOMMENDATION:

Need to clear notes, then Court's discretion. If approved, set next hearing for receipt and final discharge for **07/29/19**.

(cs)

Future Hearing: 8/23/18 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 2

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

DATE: 07/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700549

CASE NAME: MTR OF KATHLEEN TIEKAMP

HEARING:

First & Final Account and Report of DANIEL TIEKAMP and Petition
for allowance of fees filed.

COUNSEL:

DANIEL TIEKAMP (PET)...SHAWN P PATTERSON
KATHLEEN TIEKAMP (DEC)...

Matter under review by examiner.

Superior Court of Calif, County of San Bernardino

Page: 3

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

DATE: 07/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700999

CASE NAME: CHRISTINA HOPE SAYLOR TRUST ESTABLISHED DEC 3, 200

HEARING:

Petition for TO COMPEL TERMINATION OF TRUST

COUNSEL:

CHRISTINA HOPE SAYLOR (PET)...ANDERSON & LEBLANC, A.P.L.C.
CHRISTINA HOPE SAYLOR TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice:

Notice filed as to "Joseph H. Saylor" on 10/09/17, 04/13/18 and 04/17/18. **Need clarification as to whether "James H. Saylor, Sr. or James H. Saylor, Jr." served.**

Need notice to James H. Saylor, Sr., James H. Saylor, Jr., Foundation for the Junior Blind, Trustors God Child Jamie L. Maggio, and issue of James Saylor and Jr. Joseph Saylor.

(CS)

Superior Court of Calif, County of San Bernardino

Page: 4

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

DATE: 07/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800237

CASE NAME: CHRISTINE ESTELLE BUCH

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

COUNSEL:

ERIC MUSTAD (PET)...KATHRINE D STAPLETON
CHRISTINE ESTELLE BUCH (DEC)...

GENERAL INFORMATION

Continued from 04/16/18 at request of counsel to clear notes.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary under WWA, and Full Authority under IAEA, by cousin, Eric Mustad, [Administrator/Petitioner]

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

1. Petitioner seeks bond of \$75,000. . Estate value is \$75,000 in real property. Bond appears sufficient
2. Declination to act by named personal representative: Sandra LaRusso Hartley and alternate personal representative Guy Edward Butler filed. Nomination by Guy Edward Butler also filed.
3. Appears to be an ancillary probate as decedent was a resident of Carson City, Nevada. Supp. filed 04/16/18 indicates decedent had real property in San Bernardino.
4. ~Proposed Form Order: 03/13/18

RECOMMENDATION

RFA Court's discretion re bond. If approved, set Accounting/Status Review for **09/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 5

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

DATE: 07/16/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800537

CASE NAME: James Wright Bennett

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

COUNSEL:

PAMELA SMITH (PET)...PRO/PER
JAMES WRIGHT BENNETT (DEC)...

GENERAL INFORMATION

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

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

1. **Supp. 07/10/18 requests bond of \$200,000.** Estate value is \$200,000 in real property. Bond appears sufficient.
2. Petition indicates minor heirs. Court may wish to appoint a Guardian ad Litem or Guardian of the estate for minor heirs.
3. Section 3(c) indicates decedent was an Oklahoma resident. **Supp. filed 07/10/18 indicates decedent did not own real property in Oklahoma. Appears to be an ancillary probate.**
4. Section 8 of petition is missing addresses for **minors**: Andrew Amento, Isabella Amento, Josiah Amento, and Annabelle Amento. **Need** verified supplement.
5. Duties and Liabilities of Personal Representative is missing telephone number at section 2. **Supp. 07/10/18 indicates a revised form is attached; however there is no attachment. Need** complete form.
6. **Need** proof of publication. **Supp. 07/10/18 indicates Daily Journal will be filing publication; however, no publication filed.**
7. ~Proposed Form Order: 06/04/18

RECOMMENDATION

Need to clear notes 4-6. Court's discretion re bond and GAL. If approved, set Accounting/Status Review for 09/23/19. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 6

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

DATE: 07/16/18 TIME: 8:30 DEPT: S37P

CASE#: VPR VS003090

CASE NAME: ESTATE OF DOROTHY M PATRICK

HEARING: Accounting Review by ***

COUNSEL:

LISA DIANE HOFFMAN	(PET)...PRO/PER
DOROTHY M PATRICK	(DEC)...
JEANNE E. KENNEDY	(TP)...CALDWELL, KENNEDY & PORTER

GENERAL INFORMATION:

Continued from **04/14/16**. Counsel to subpoena someone from the Assessor's Office to be present at the next hearing date of 10/17/16.

Continued from **10/17/16, 12/19/16, 03/27/17** and **06/19/17** at request of counsel.

Continued from **08/28/17** for issues to resolve or motion to be relived to be filed. Lisa Hoffman is ordered to be present.

Continued from **11/06/17** Lisa Hoffman is cited to appear at next hearing. Should she fail to appear, the bench warrant may be issued for her arrest. Substitution of attorney to be re-filed/located. Citation issued

Continued from **02/05/18** at request of counsel to clear notes/accounting with accountant.
Continued from 04/16/18 continued at request of counsel. Accounting is to be filed on or before 06/16/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 6th Report of Status of Administration by Lisa Hoffman, executor, approved on 04/14/16.
2. Substitution of Attorney filed.
3. Proof of unsuccessful service of Citation to Lisa Hoffman filed 01/29/18.
4. **Need** accounting filed.

RECOMMENDATION:

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

(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 7

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRUSTS

DATE: 07/16/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800079

CASE NAME: The De Weert Family Trust dated November 13, 1997

HEARING:

Hearing Re: REMOVAL OF CO-TRUSTEE

COUNSEL:

SANDRA DE WEERT (PET)...HARTNELL LAW GROUP
THE DE WEERT FAMILY TRUST (TRU)...

Currently under review by Legal Research.
(LR)

Notice

Need notice of hearing and proof of service. **Need** copy of Trust filed. Copy may be filed confidentially. Local Rule 20-1502.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 07/16/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800127

CASE NAME: THE MANUEL AND CONNIE HERNANDEZ REVOCABLE TRUST

HEARING:

Petition for ordr confirming trust assets

COUNSEL:

MANUEL HERNANDEZ JR
THE MANUEL AND CONNIE HERNANDEZ

(PET)...THOMAS N LUEBKE
(TRU)...

Currently under review by Legal Research.
(LR)

Notice

Notice given.
(cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0800058

CASE NAME: In re Matter of Gloria Feaster

HEARING:

Final Account and Report of CHRISTINA ERICKSON-TAUBE and
Petition for allowance of fees filed.

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(PCR/CPE)...ALEX R BORDEN
GLORIA FEASTER	(PCE/CEP)...
KARIN E HORSPOOL	(PET)...HORSPOOL & PARKER
GLORIA FEASTER S.N. TRUST	(TRU)...
CHRISTINA ERICKSON-TAUBE	(CPE)...BORDEN LAW OFFICE
MELODIE Z SCOTT	(TP)...PRO/PER

CCP170.6 filed as to CYNTHIA A LUDVIGSEN

Waiver of Court Fees and Costs filed by CHRISTINA ERICKSON-TAUBE is GRANTED
TOTAL FEES WAIVED TO DATE: \$585.00

GENERAL INFORMATION:

Conservatee passed away on 01/19/17

THIS CASE IS SET FOR HEARING ON First and Final Account; Petition for Termination and Petition for Fees by PPF, Christina Erickson-Taube, [conservator Petitioner].

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

1. Period of account: 09/01/16-04/28/17 (includes pre and post death periods).
2. Assets on hand \$0
3. Petitioner and Attorney waives fees due to the insolvency of the estate.
4. Petitioner requests partial cost reimbursement of \$221.26 for partial reimbursement of costs advanced in the sum of \$720, for payment of case manager service to Aimee Armenta .
5. **Need** Citrus Care- Board & Care facility statements per Pr.C. § 2620(c)(5).
6. **Need** statement regarding conservatee's residences during accounting per Local Rule 20-1406(a).
7. Notice given .
8. Petitioner indicates the estate is insolvent, there are not assets to be distributed.

9. Petitioner seeks discharge. However, discharge does not occur until the entry of final discharge order.
10. Proposed Order: Need accounting period, status of estate solvent/insolvent, and asset distribution, and include fees waived. Estate cannot be terminated until final discharge has been approved.

RECOMMENDATION:

Need to clear notes 5-6, then Court's discretion. If approved, Court to set hearing on filing of final discharge for 07/29/19

(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 11, 12, 13, 13A

HEARING:

Hearing Re: PTN FOR ACCTG OF SOCIAL SECURITY FUNDS

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)... MATTHEW E SHEASBY
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
MARIA DE JESUS EQUIHUA	(PET)...JACK B OSBORN
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

Waiver of Court Fees and Costs filed by NELIDA MILLAN, ROBERT EQUIHUA, MARIA DE JESUS EQUIHUA & ARCELIA GARCIA is GRANTED

GENERAL INFORMATION:

Continued from **02/05/18**. Nelida Millan to prepare order after hearing re visitation. Notice to be given by Ms. Millan

Continued from 04/16/18 Robert Equihua is ordered to file accounting of any and all funds taken out of Maria Equihua's bank accounts or any accounts social security funds were placed in.

THIS CASE SET FOR HEARING ON Re: Petition for Accounting of Social Security Funds by daughter, Nelida Millan, [Conservator/Petitioner]

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

1. Conservator, requests that Roberto Equihua provide a full accounting of all cash withdraws and/or debit transactions made during the period of 06/2007 to 07/2013. Petitioner alleges Roberto had possession of conservatee's debit card and made withdrawals during that period and including while Conservatee lived with petitioner during the period of 11/12 to 07/23/13.

2. Petitioner requests that Roberto account for all of conservatee's money totaling \$60,680 and that he return any unaccounted money to the conservatee's estate with 10% interest for each year.
3. Petitioner objects to the Petition for Reimbursement filed 09/28/17 by Roberto Equihua for attorney Frank Prainito's fees. Petitioner alleges Roberto and Cosme's share of costs to pay such fees came from the non-payment of rent as it was pointed out in the accounting filed by previous estate conservator [Petition11/02/17,LF,p7-10].
4. Petitioner objects to fees claimed by Roberto Equihua for the driveway and property taxes paid as this was paid cash from the unaccounted social security income that Roberto was withdrawing from conservatee's account and not from his own account.
5. Petition is not verified. **Need** petition to be verified per Pr.C. §1021.
6. **Need** order after hearing re visitation as directed by court on 02/05/18.
7. **Need** notice of hearing and proof of service.
8. No proposed order: submit after hearing.

RECOMMENDATION:

Need to clear notes 5-8, then Court's discretion.

(cs)

Future Hearing: 6/19/18 Accounting Review for Ms. Millan

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 10, 12, 13, 13A

HEARING:

Hearing Re: PTN FOR REIMBURSEMENT

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)... MATTHEW E SHEASBY
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
MARIA DE JESUS EQUIHUA	(PET)...JACK B OSBORN
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION

Continued from **02/05/18** at request of court to clear probate notes. Court ordered Nelida Millan to prepare a summary of each repair, the costs, the amount paid, and the source of the funds.

Continued from 04/16/18 Petitioner reports that she is willing to drop request for reimbursement if Robert Equihua drops his request to be reimbursed.

THIS CASE IS SET FOR HEARING ON Petition for Reimbursement, **by daughter, Nelida Millan, [Conservator/Petitioner]**

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

1. Petitioner requests reimbursement for an addition of 2 bedrooms, a bathroom and an increase in square footage in the dining area of conservatee's home. Receipts provided. [petition reimbursement 11/02/17LF, p. 4-51].
2. Petitioner and Conservatee agreed that reimbursement of monies would be paid back in payments through rental income, or in a lump sum thought a refinance. However, siblings (Roberto and Cosme) moved into conservatee's home and promised to pay rent; but they have not paid.
3. **Need** a summary of each repair, the costs, the amount paid, and the source of the funds as directed by Court on 02/05/18.

- a. **Declaration in support of Accounting filed 07/09/18, [LF p. 3] indicates petitioner is not pursuing reimbursement for money spent for the investment in the real property. Appears matter is moot. Court to inquire.**
4. **Need** petition to be verified per Pr.C. § 1021.
5. **Need** notice of hearing and proof of service.
6. No proposed order: submit after hearing.

RECOMMENDATION

Need to clear notes 3-5, then Court's discretion.

(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 10, 11, 13, 13A

HEARING:

Hearing Re: Pet for proof of rental payments

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)... MATTHEW E SHEASBY
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
MARIA DE JESUS EQUIHUA	(PET)...JACK B OSBORN
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION:

Continued from **02/05/18** at request of Court to clear probate notes.

Continued from 04/16/18 at request of Court. The Court orders that Robert Equihua file proof that fair market rent has been paid during the period he has resided in Maria Equihua's home.

THIS CASE SET FOR HEARING ON Petition for Proof of Rental Payments made to Conservatee filed by daughter, Nelida Millan, [Conservator/Petitioner]

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

1. Nelida Millan requests Robert Equihua present proof of rental payments made for the period of 01/01/05 to 05/01/13 for occupying one room in conservatee's home located 8174 Tokay Avenue, Fontana, CA 92335.
2. Nelida Millan requests that Cosme Equihua present proof of rental payments made for the period of 01/01/06 to 05/01/13 for occupying one room conservatee's home located property located 8174 Tokay Avenue, Fontana, CA 92335.
3. **Need** petition to be verified per Pr.C. §1021.
4. **Need** Notice of Hearing and proof of service.
5. **Need proof of fair market rent paid per as directed by court on 04/16/18.**
6. No proposed order: submit after hearing

RECOMMENDATION:
Need to clear notes 3-5, then Court's discretion.
(cs)

Superior Court of Calif, County of San Bernardino

Page: 13

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA

SEE ALSO 10, 11, 12, 13A

HEARING:

Petition for REIMBURSEMENT by ROBERT EQUIHUA

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)... MATTHEW E SHEASBY
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
MARIA DE JESUS EQUIHUA	(PET)...JACK B OSBORN
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION:

Continued from **11/06/17** Court orders Mr. Equihua file proof of payment and proof of where monies were secured from as to attorney fees for quiet title action, property taxes from January 2007 through March 2011, \$2,000 retainer to Mr. Prainito and work on the home. As to the work on the home, the Court will also require receipts. Arcelia Garcia reports all documents/paperwork concerning her time as conservator were accidentally thrown in the trash. Visitation orders made. Court relieves Matthew Sheasby as guardian ad litem.

Continued from **02/05/18** at request of Court to clear probate notes. The Court ordered ROBERT EQUIHUA provide receipts signed under the penalty of perjury from all the people he paid to work on the home. Receipts for payment to specify the work performed as well as proof of payment. Robert Equihua is to prepare an informal accounting of all withdrawals from Maria Equihua's account for the time period of June 2007 to July 2013.

Continued from 04/16/18 at request of Court. The Court reiterates her previous orders and orders information to be filed at least two weeks prior to next hearing.

THIS CASE IS SET FOR HEARING ON Petition for Petition for reimbursement by Robert Equihua, son

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

1. Robert Equihua, submits receipts for work undertaken on behalf of the estate of Maria Equihua for the period of 01/2009 to present including payment for property taxes, totaling \$20,436.00, plus interest of 10% for each year since 2010, totaling \$34,744. Itemized [LF, pgs. 8–20].
2. Question whether this is a proper petition to request reimbursement suggest court require creditors claim to be served upon conservator. JTD
3. **Need** proof of where monies were secured from as to quiet title action attorney fees; property taxes from January 2007 through March 2011; \$2,000 retainer to Mr. Prainito; and work done on the home.
4. **Need** receipts for proof of payment. Receipts are to specify the work performed as well as proof of payment.
5. **Need** informal accounting of all withdrawals from Maria Equihua's account for the period of June 2007 to July 2013.
6. **Need** notice of hearing and proof of service.
7. Petition is not verified. **Need** verified petition per Pr.C. §1021.
8. **Response filed 11/02/17 in the form of objections by Conservator, Nelida Millan. Need proof of service to Robert Equihua.**
9. No proposed Order. Order to be submitted after hearing

RECOMMENDATION

Contested matter.

Need to clear notes 3- 8.

(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200288

CASE NAME: MARIA DE JESUS EQUIHUA
SEE ALSO 10, 11, 12, 13
HEARING: Re: ACCOUNTING REVIEW FOR MS. MILLAN

COUNSEL:

NELIDA MILLAN	(PET)...PRO/PER
MARIA DE JESUS EQUIHUA	(CTP/CEP)... MATTHEW E SHEASBY
ROBERT EQUIHUA	(CPE/OBJ)...PRO/PER
ARCELIA GARCIA	(CPE/CE)...DONNASUE ORTIZ
MATTHEW E SHEASBY	(PET)...
MARIA DE JESUS EQUIHUA	(PET)...JACK B OSBORN
COSME EQUIHUA	(PRO/PER)
WESTERN SURETY COMPANY	

GENERAL INFORMATION:

Court temporarily suspended Arcelia Garcia's appointment as Conservator of the Estate on 05/09/17.

Continued from 06/19/18 at request of Court to trail other hearings set.

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

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

1. Nelida Millan appointed Temporary Conservator of the estate on 05/09/17, \$20,000 bond.
2. Order and Letters entered on 08/28/17 & 09/14/18 include conservatorship of the person and are not temporary. **Need** proper order/letters.
3. **Need** final inventory and appraisal.
4. **Need** accounting by Nelida Milan.
5. **Declaration in support of Accounting filed 07/0918 (99 pages).**
6. Court may wish to notice bonding company.

RECOMMENDATION:

Inquire status of accounting and final Inventory and appraisal.
(nb/cs)

Superior Court of Calif, County of San Bernardino

Page: 14

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600117

CASE NAME: MTR OF JEFFREY CRAIG ANDERSON

HEARING:

FIRST Account and Report of DOUGLASS LEE GROVES and Petition for allowance of fees filed.

COUNSEL:

DOUGLASS LEE GROVES (CPE)...RONALD W ASK
JEFFREY CRAIG ANDERSON (CEP)...

GENERAL INFORMATION:

Continued from **02/05/18** at request of Court to clear probate notes. Court approves petitioner's request for reimbursement of costs in the amount of \$5,450 and attorney fee requests in the amount of \$10,805.89

Continued from 04/16/18 at request of counsel to clear notes.

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees, by Douglass Groves [Conservator/Petitioner]

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

1. Assets on hand \$20,832.93 consisting of \$20,082.93 in cash and \$750 personal property.
2. Accounting period reported is 01/23/17-11/16/17. Amended Letters issued on 01/23/17; however, **Supp 06/14/18 includes Summary and Schedules which reflect account period of 11/29/16 -11/16/17**
3. **Schedule C- Disbursements [Supp. 06/14/18, LFp. 10-12] indicate several entries as cash withdrawals as spending money for conservatee. Need clarification via verified supplement.**
4. **Supp. 06/14/18 includes Schedule C – Disbursement [LF p. 12] with a total which does not match Summary of Account. Need verified supplement.**
5. **Supp. 06/14/18 provide financial statement for acct xx8384 through 11/06/17. Need statement covering through the end of account period.**
6. Current bonds of \$20,000. Suggest bond of \$36,000. JTD.
7. Petitioner requests that the court reserve the issue of compensation of the conservator at this time.

8. Request for reimbursement of costs advanced of \$5,450.00 to attorney Ronald Ask approved on 02/05/18.
9. Attorney fee of \$10,805.89 approved on 02/05/18.
10. Notice given.
11. No proposed Order. Submit after hearing.

RECOMMENDATION:

Need to clear notes 3-5, then Court's discretion. If approved, set next hearing for Accounting Review for **02/04/19 (if one year) or 02/03/20 (if two years)**. Accounting to be filed 30 days in advanced. Note requirements of local rule 20-908.

(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700239

CASE NAME: EDWARD ANDREW MODZELEWSKI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SALLY LIU MODZELEWSKI

COUNSEL:

SALLY LIU MODZELEWSKI (CPE)...JIM L. DAVIS
EDWARD ANDREW MODZELEWSKI (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sally Modzelewski (step-mother) appointed limited conservator, of the person, on 10/10/17.
2. Notification of Conservatee's rights, Determination of Conservatee's Appropriate Level of Care form, Care Plan filed 02/16/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 11/15/17.
4. **Need** Care Plan in accord with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 4. Inquire Status
(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800169

CASE NAME: JOSEPH MICHAEL BARREDA

HEARING:
Petition for Appointment of Conservator

COUNSEL:
NANCY CHERYLANN BARREDA (CP)...PRO/PER
JOSEPH MICHAEL BARREDA (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by mother Nancy Barreda, Petitioner

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

1. **Notice of hearing, Capacity Declaration, and Citation filed 07/11/18; however, not in laserfiche at time of review**
2. No Bond- Person only.
3. Section 5 of petition indicates proposed conservatee is in a coma; however, section 8a indicates proposed conservatee will be attending the hearing. Court to clarify.
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. **Need** return of Citation.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need** notice of hearing and proof of service. .
8. **Need** report of Donnasue Ortiz, Court appointed counsel.
9. **Court Investigator report filed 07/09/18.**
10. ~Proposed Form Order: 06/07/18

RECOMMENDATION:

Need to clear notes 4-7. If approved, set hearing for Compliance Review for 02/25/19 for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800180

CASE NAME: Mtr of Kevin Shellabeer

HEARING: Petition for Appointment of Conservator

COUNSEL:

ANNA K CHILCOAT (CPE)...KARIN E HORSPPOOL
KEVIN SHELLABEER (CEP)...

GENERAL INFORMATION

Temporary orders granted on 06/20/18 to Anna Chilcoat as temporary conservator of the person and estate, no bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate, by nominee, Anna Chilcoat, Petitioner.

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

1. Petitioner seeks no bond due to very little assets of \$2,000; however, section 3(e)(5) indicates real property value of \$200,000. Suggest bond of \$222,200.
2. Nominations by son, Drury Chilcoat attached to petition.
3. Court to see Conservator Screening form.
4. Citation with proof of service filed 06/20/18.
5. Section 8 of petition does not list all relatives. **Need** verified supplement indicating status of parents and grandparents.
6. Petitioner seeks medical powers. **Need** Capacity Declaration.
7. **Need** notice of hearing and proof of service to Abbe Mullins, or file Due Diligence Declaration.
8. **Need** Certificate of Completion of the Conservatorship Training Class.
9. **Court Investigator report filed 07/11/18.**
10. ~Proposed Form Order: 06/13/18

RECOMMENDATION

Need to clear notes 5-8, then Court's discretion re bond. If approved, set hearing for Compliance Review for **02/25/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per

Pr.C. §2352.5; Inventory and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **09/23/19**. Any accounting to be filed 30 days in advance.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 18

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: RC RS00489

CASE NAME: ROBERT WILKINS FULLER

HEARING:

Hearing Re: BIENNIAL REVIEW

COUNSEL:

RANDALL R FULLER	(PET)...THOMAS J GAFNEY
JANET W FULLER	(PET)...THOMAS J GAFNEY
ROBERT WILKINS FULLER	(PCE)...DONNASUE ORTIZ

GENERAL INFORMATION

Continued from 04/09/18 at request of counsel for report from counsel to be filed.

THIS CASE SET FOR HEARING ON Biennial Review

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

1. Matter set by Court on 01/11/18 to discuss issues raised in the Interoffice Memo filed 12/19/17 by the Court Investigator.
2. Report of court appointed counsel, Donnasue Ortiz filed 04/06/18.

RECOMMENDATION

Court's discretion.

(ww/cs)

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS00809

CASE NAME: IN THE MATTER OF SONJA MARIE BERNAL

HEARING:

Hearing Re: REPORT OF COURT INVESTIGATOR

COUNSEL:

SONJA MARIE BERNAL	(CEP)...DONNASUE ORTIZ
INLAND COUNTIES REG CNTR	(CE)...BRUNICK MCELHANEY & BECKETT
LINDA BERNAL	(CP)...PRO/PER
LORI CERRITOS	(SC)...PRO/PER

GENERAL INFORMATION

Continued from 04/09/18 at request of counsel. Notice to be given by Donnasue Ortiz.

THIS CASE SET FOR HEARING ON Report of Court Investigator

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

1. Matter set by Court on 01/26/18 after court review of the Confidential Report of Court Investigator filed 01/17/18.
2. Attorney, Donnasue Ortiz, appointed for conservatee Sonja Bernal. **Need** report of Counsel Ortiz.
3. Court to determine if need for possible suspension of conservator and/or possible successor conservator exists.
4. Notice given.

RECOMMENDATION

Need reports of court appointed counsel. Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 20

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS00837

CASE NAME: IN THE MATTER OF LISA RIVERA

HEARING:

Hearing Re: REPORT OF COURT INVESTIGATOR

COUNSEL:

LISA RIVERA	(CEP)...WALTER T. MOORE
JOSE RIVERA	(CPE)...PRO/PER
LUCY RIVERA	(CPE)...PRO/PER

GENERAL INFORMATION

Continued from 04/09/18 parties do not stipulate to judge pro tem. All existing orders shall remain in full force and effect.

THIS CASE SET FOR HEARING ON Report of Court Investigator

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

1. Matter set by Court on 01/26/18 regarding elder sister's criminal history after court review of the Confidential Report of Court Investigator filed 01/16/18.
2. Attorney, Walter Moore, appointed for conservatee Lisa Rivera. **Need** report of Counsel Moore.

RECOMMENDATION

Need report of court appointed attorney. Court's discretion.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 21

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

DATE: 07/16/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS02728

CASE NAME: MTR OF JULIE A FISCHBACH

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

DONNA C FISCHBACH (CP)...PRO/PER
JULIE A FISCHBACH (CTP)...
DONNA C FISCHBACH (PET)...PRO/PER
SPECIAL NEEDS TRUST OF JULIE A FISCHBACH (TRU)...
DONNA C FISCHBACH (PET/TEE)...PRO/PER

VACATE – Signed Ex Parte Petition to dispense with accounting and order routed to clerk’s office for processing on 07/03/18.

(cs)