



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 07/23/18**

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](mailto: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.

(07/09/18 & 07/18/18 ww) (06/29/18 cs & 07/18/18 cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500110

CASE NAME: ALAN R. ARMSTRONG LIVING TRUST DATED 8/28/06

HEARING:

Hearing Re: Status of Mediation

COUNSEL:

MARISSA ARMSTRONG	(PET)...MARY M BADER
ALAN R. ARMSTRONG LIVING TRUST	(TRU)...
ALYSSA MAY ARMSTRONG	(MIN)...
ALANA MARCY ARMSTRONG	(MIN)...
ALAN R ARMSTRONG JR	(RES)...MITCHELL I ROTH

Future Hearings:

09/24/18 Readiness Calendar  
09/24/18 Petition for Relief of Breach of Trust  
10/22/18 Court Trial (Day 1)  
10/23/18 Court Trial (Day 2)  
10/24/18 Court Trial (Day 3)  
10/25/18 Court Trial (Day 4)  
10/26/18 Court Trial (Day 5)

No notes – Status. JTD

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501121

CASE NAME: LUCY JOHNSON

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CAROLINE DALTON-ALVAREZ (PET)...GREGORY PAUL BENTON  
LUCY JOHNSON (DEC)...

GENERAL INFORMATION:

Continued from **04/10/17, 08/14/17, 10/16/17, and 12/04/17**

**Continued from 05/21/18. A stipulation as to the distribution is being circulated. if counsel requests to waive the accounting, he is to file a written request with the court.**

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 Caroline Dalton-Alvarez, daughter, on 06/09/16, limited authority, \$20,000 bond.
2. **Need** Final Inventory and Appraisal.
3. Declaration of attorney Gregory Benton filed 11/02/17 wherein he indicates the estate is not solvent and requests a continuance to come up with an agreement as to distribution. **JTD**

RECOMMENDATION:

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

(nb/ww/cs/ww)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600041

CASE NAME: DANIEL B GIELLA

HEARING:

Accounting Review by \*\*\*

COUNSEL:

MELODIE Z SCOTT	(PET)...BRYAN C HARTNELL
DANIEL B GIELLA	(DEC)...
DEPT OF HEALTH CARE SRVCS	(TP )...PRO/PER
PACIFIC WESTERN BANK	(HEMAR, ROUSSO & HEALD, LLP)
GOOD DEEDS, INC	(JEFFREY A COLEMAN)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review/Status

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

1. Letters of Administration issued to Melodie Scott, PPF, on 03/04/16, full authority \$40,000 bond.
2. First status report approved 10/16/17.
3. Need Accounting or status report.

RECOMMENDATION:

Inquire status.

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601132

CASE NAME: DONALD A. MILLER

HEARING:

Accounting Review by \*\*\*

COUNSEL:

LAUREN GASKILL	(PET)...LAW OFFICE OF ANDREW R DELOACH
DONALD A. MILLER	(DEC)...
JASON L GAUDY	(PET)...LAW OFFICE OF ANDREW R DELOACH

GENERAL INFORMATION

**Continued from 05/21/18. The clerk's office is allowed to calendar the accounting for 07/23/18 as long as the accounting is filed by 06/25/18 at 4pm.**

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 Jason Gaudy, nominee, on 03/13/17; full authority, \$410,000 bond.
2. Final Inventory and Appraisal filed 10/18/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status.

(cs/ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601282

CASE NAME: ESTATE OF GARY ROSS MONTGOMERY

HEARING:

Hearing Re: TO ADDRESS MULTIPLE ISSUES

COUNSEL:

ANDREW MONTGOMERY (PET)...PRO/PER  
JAYLYNN MONTGOMERY (PET)...LAW OFFICES OF ANNETTE L ISAAC  
CHASE MONTGOMERY (PET)...LAW OFFICES OF ANNETTE L ISAAC  
GARY ROSS MONTGOMERY (DEC)...  
DEPT OF HEALTH CARE SRVCS (TP )...PRO/PER

GENERAL INFORMATION:

Continued from **07/26/17**. No appearance by Counsel Annette Isaac. Court orders that Counsel –Annette Isaac to be personally present at next hearing for OSC re Sanction of \$1,500 on Counsel for failure to appear on 08/28/17. Notice given by Judicial Assistant. Continued from **08/28/17, 10/30/17** and **12/18/17**.

Continued from **01/22/18**. Joanne Schryver states she has objections to the filings of guardian ad litem, Jack Osborn. Objections to the petition must be in writing and served and filed by 4 PM on 02/26/18. If the objections are not served and filed by that date and time, then they will be waived permanently. In addition, written objections must be complete: If matter proceeds to trial, the court will consider only evidence relevant to the objections that were filed with the court. Objections must be in proper form, not in narrative form. Unless otherwise provided by law, the court will not consider any objections not set forth in your written objections, and will not consider any evidence thereon. Joanne Schryver states she understands admonishment.

Continued from **03/26/18**. Court deems the objections, if there are any, of Joanne Schryver are waived as filing deadline has passed.

**Continued from 05/21/18 at request of counsel due to recording of letters is still in process.**

THIS CASE IS SET FOR HEARING ON to Address Multiple Issues.

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

1. Matter set at 05/22/17 hearing, wherein, Court set hearing to address issues stated on the record: the disposition of property, creditor's claims of Department of Health Services & Shryver, the trailer, the Polaris-off road 2000, and Toyota Tacoma.

2. Receipt by Andrew Montgomery filed 09/20/17 indicates the following in regards to the issues above:
  - a. ½ interest of the title in the real property was transferred to him.
  - b. ½ of the remaining proceeds in the two Bank of America bank accounts 0998 and 4433 after payment of creditor's claims has been received by him.
  - c. The distributive share has been received from the sale of the Carso Carrier Trailer Flat Bed 2005, Polaris off road 2000, and Toyota Tacoma.
3. Receipt by GAL for Jaylynn and Chase filed 10/30/17 indicates the following regarding the issues above:
  - a. ½ interest of the title in the real property was transferred to Jack Osborn as GAL.
  - b. ½ of the remaining proceeds in the two Bank of America bank accounts 0998 and 4433 after payment of creditor's claims are now held in a blocked account.
  - c. The Carso Carrier Trailer Flat Bed 2005, Polaris off road 2000, and Toyota Tacoma have been sold on behalf of minors and the distributive shares are in the minor's account.
4. No objections in file for review.
5. Order appointing Attorney Jack Osborn as Guardian Ad Litem filed 04/16/18; however, he was previously appointed on 03/06/17.

RECOMMENDATION:  
Court's discretion.

(nb/lh/nb/ww/cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601283

CASE NAME: CAROL JEANNE HARRISON

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ADAM TAGLE (PET)...WILSON & WILSON  
JEFF NORMAN (PET)...WILSON & WILSON  
CAROL JEANNE HARRISON (DEC)...  
STATE OF CA FRANCHISE TAX BOOARD (TP )...PRO/PER

GENERAL INFORMATION

**Continued from 05/14/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Special Administration, no IAEA, no bond, issued to Adam Tagle and Jeff Norman, sons, on 02/08/17 then general Letters of Administration with **limited** authority, no bond, issued on 03/06/17.
2. Partial Inventory and Appraisal filed 09/29/17; however, section 3 indicates that it is all of the estate. Court may wish to inquire if it should have been marked as the Final? **JTD**
  - a. **Need** Final Inventory and Appraisal.
3. Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account in the amount of \$118,183.23 filed 05/24/18 of proceeds from sale of real property.
4. **Need** accounting or status report.

RECOMMENDATION

Inquire status of Final Inventory and Appraisal and accounting.

(cs/ww)



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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700111

CASE NAME: MTR OF MAURO LUIS QUINONES

HEARING:

Probate status report filed.

COUNSEL:

ROSANNE WEATHERS	(PET)...PRO/PER
MAURO LUIS QUINONES	(DEC)...
EDWARD E COREY	(TP)...COREY & COREY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by daughter, Rosanne Weathers [Administrator/Petitioner].

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

1. Letters of administration issued to Rosanne Weathers on 04/06/17.
2. Petitioner alleges the estate is not in a condition to be closed as real property located in Apple Valley is currently in escrow.
3. Petitioner requests an additional 6 months to close the estate.
4. Need Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. §10950. **This form of notice is mandatory.**
5. No proposed order. Submit after hearing.

RECOMMENDATION:

Need to clear notice. If approved, set next Accounting/Status Review for **01/28/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700230

CASE NAME: TREVELYN C PATTON

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DONNA L PATTON (PET)...PRO/PER  
TREVELYN C PATTON (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 Donna Patton, daughter, on 06/19/17; full authority, no bond.
2. **Need** Final Inventory and Appraisal
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700270

CASE NAME: THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG

**SEE ALSO 10**

HEARING:

Hearing Re: DETERMINATION OF GAL/PLACEMENT OF FUNDS

COUNSEL:

BRANDY MOODY (PET)...FARHAT LAW FIRM, APC  
THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG (TRU)...  
MINOR CHILDREN (MIN)...LENITA A SKORETZ

**XREF: GARPS1600582** MTR OF MAKAYLAH MARIE DUBERG

GENERAL INFORMATION:

Continued from **02/05/18** Counsel report Chase has placed funds in an investment account instead of a blocked account. The Court will allow investment account only if it is restricted to conservator investments, the bank is acting as a fiduciary, and if account is blocked. Counsel report guardianship of the estate of both minors will be filed. Ms. Skoretz to speak with father of Andrew to determine if he has any objection to petitioners requesting guardianship of the estate as to both minors. The Court notes guardianship of the person is currently before Judge Reichert. The Court will hear guardianship of the estate.

**Continued from 04/16/18 Matter reassigned to S35 for July 23, 2018.**

THIS CASE SET FOR HEARING ON Determination of GAL/Placement of Funds

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

1. Matter set on 11/06/17 wherein Court approved all funds being placed in blocked account in the name of the trust in lieu of bond.
2. Counsel to determine whether social security death benefits are going to be paid for minor's support.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700270

CASE NAME: THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG

**SEE ALSO 9**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BRANDY MOODY (PET)...FARHAT LAW FIRM, APC  
THE REVOCABLE LIVING TRUST OF NICOLE MARIE DUBERG (TRU)...  
MINOR CHILDREN (MIN)...LENITA A SKORETZ

**XREF: GARPS1600582** MTR OF MAKAYLAH MARIE DUBERG

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Accounting Review

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

1. On 06/19/17, Court confirmed Brandy Moody as trustee of the Revocable Living Trust of Nicole Marie Duberg, funds ordered to be placed in blocked account on 11/06/17; current account now due.
2. No accounting filed.

RECOMMENDATION:

Inquire status.

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800220

CASE NAME: MTR OF PIRI GALOS

HEARING:

PETITION FOR FINAL DISTRIBUTION ON WAIVER OF Account and Report  
of JOSEPH GALOS and Petition for allowance of fees filed.

COUNSEL:

JOSEPH GALOS (PET)...PRO/PER  
PIRI GALOS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Joseph Galos, son/sole heir.

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

1. Assets on Hand: \$329,852.38 which includes 3 pieces of real property and 36 shares of Kaman Corp stock.
2. Petitioner is sole heir and waives the accounting.
3. Petitioner waives statutory compensation.
4. Petitioner indicates that no notice was given to the Franchise Tax Board or the IRS [LF pg. 3]; however, notice to Franchise Tax Board is required per Pr.C. § 9202(c)(1). Does Court wish for notice to be completed? **(Unverified Supp. 07/12/18 Petitioner attached copies of undated letters to the Franchise Tax Board and to the IRS.) JTD**
5. Petitioner indicates that the decedent's household furniture, furnishings and personal effects were donated or given away in order to avoid unnecessary expenses. No profit was made from the disposition of said items. [LF pg. 4] **JTD**
6. Petitioner further indicates that grant deeds for the Kern County property have been completed to transfer the property to petitioner. **JTD**
7. Petitioner also indicates that decedent was exempt from filing returns for at least 10 years prior to death. Court to inquire.[LF pg. 3]
8. **Need** findings re: sole and separate property via verified supplement.
9. Proposed Order: 06/12/18, Court address in caption is incorrect, hearing date is incorrect, need statement re: notice per Pr.C. § 9202, debts/costs paid, statement re: sole/separate property, need address of heir receiving real property, order indicates attachments of deeds; however, none are attached.

RECOMMENDATION

Need to clear note 8 then Court's discretion re: remaining notes. If approved, set hearing re receipts and final discharge for **08/05/19**.

(ww)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800321

CASE NAME: MTR OF GAIL J SCHWARTZ

HEARING:

Hearing Re: RESTRAINING ORDER (RE PROPERTY)

COUNSEL:

KIMBLE LOUISE ANDERSON (PET)...PRO/PER  
GAIL J SCHWARTZ (DEC)...

#### GENERAL INFORMATION

Letters of special administration issued to Kimble Anderson, daughter, with no IAEA, no bond, on 04/13/18.

**Continued from 05/21/18 Mr. Selski has filed a notice of limited scope representation. The Court orders Mr. Selski to either file a substitution of attorney by 4pm on 06/25/18 to formally represent Ms. Anderson or she will remain as self-represented until further notice, Ms. Anderson will represent herself. Temporary restraining order is extended to 07/23/18.**

THIS CASE SET FOR HEARING ON Restraining Order (re Property)

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

1. Matter set on 04/13/18 at the Ex Parte Hearing re: Application for TRO; memorandum, of P&A.
2. Temporary Restraining Order and Order to Show Cause re: enjoining Reverse Mortgage Funding LLC C/O Quality Loan Service Corporation from foreclosing upon and selling the real property filed on 04/13/18.
3. Notice to be served by 4pm April 20, 2018. **Notice filed on 04/18/18.**
4. Any opposition to be served and filed by 4pm on May 4<sup>th</sup>, 2018. **No oppositions are in file for review.**
5. Substitution of attorney filed 06/25/18 indicating Berl Hillel Selski as attorney of record.

#### RECOMMENDATION

Court's discretion.

(ww/cs)

Future Hearing: 7/29/19 Accounting Review

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800471

CASE NAME: MTR OF CONSTANCE L CAIN

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MARK T SOLORIO	(PET)...PRO/PER
CONSTANCE L CAIN	(DEC)...
BECKY A SOLORIO	(PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Becky Solorio, Cindy Fulcher, Brian Cain and Dianna Kaady, surviving children

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

1. Petitioner Becky Solorio seeks 100% interest in decedent's 100% interest; in real property located in Apple Valley per the will; however, will leaves decedent's estate to children in equal shares. **Need** Assignments of interest by Cindy, Brian and Dianna.
2. Notice given.
3. ~Proposed Form Order: 06/18/18

#### RECOMMENDATION

Need to clear note 1 the Court's discretion.

(ww)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800553

CASE NAME: MTR OF GEORGE W SPELLMAN

HEARING:

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

COUNSEL:

TINA M SPELLMAN (PET)...PRO/PER  
GEORGE W SPELLMAN (DEC)...

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with *Limited* Authority under IAEA by daughter Tina Spellman, [Administrator/Petitioner].

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

1. It appears petitioner is sole heir and waives bond. Net estate value \$416,058 with \$2,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. Section 3(h)(3)(4) re resident status of Administrator is incomplete. **Need** verified supplement.
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication.
5. ~Proposed Form Order: 06/11/18

RECOMMENDATION

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

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800591

CASE NAME: BRIAN KEITH WALTERS

HEARING:

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

COUNSEL:

LORENE RUSSELL (PET)...FARHAT LAW FIRM, APC  
BRIAN KEITH WALTERS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Lorene Russell, sister

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

1. Petitioner requests in lieu of bond that all funds from any bank account and sale of any property be placed in a blocked account. Net value of the estate consists of \$270,000.00 of which \$20,000.00 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. Petitioner failed to date at signature line. Need same via verified supplement. **(Supp. 07/13/18 indicates that all documents were signed on 06/14/18) JTD**
3. **Need proof of publication. (Supp. 07/13/18 indicates that the current newspaper cannot complete the publication and that American News will complete it in the allowed amount of time.)**
4. ~Proposed Form Order: 06/19/18

#### RECOMMENDATION

Need to clear note 3 then Court's discretion re bond and note 2. If approved, set Accounting/Status Review **09/30/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

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DATE: 07/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1300048

CASE NAME: CHARLYE KING

HEARING:

Hearing Re: ACCOUNTING REVIEW ON SPECIAL NEEDS TRUST

COUNSEL:

DAVID HWANG

(CPE)...ANDREW KIM

CHARLYE KING

(CEP)...E JOAN NELMS

CHARLYE KING

(PET)...JAMES B CHURCH & ASSOCIATES

Waiver of Court Fees and Costs filed by DAVID HWANG is GRANTED

**XREF: CIVDS1106399** HWANG -V- NARANJO

GENERAL INFORMATION:

Continued from **05/23/17** and **06/21/17**.

**Continued from 12/04/17 at request of counsel to file accounting**

THIS CASE IS SET FOR HEARING ON accounting review (special needs trust).

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

1. Petition to create special needs trust granted 9/14/15. Public Guardian appears to be named Trustee.
2. **Need**1st SNT accounting.

RECOMMENDATION:

Inquire status of accounting. When the trustee fails to file and accounting as ordered, the court may take the action specified in Pr.C. § 800 and CCP § 128.

(ds/lc/ww/cs)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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DATE: 07/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS1300199

CASE NAME: Glenna Ada Beckman

HEARING:

Hearing Re: ACCOUNTING REVIEW

COUNSEL:

PUBLIC GUARDIAN

(CPE )...COUNTY COUNSEL

GLENNADA BECKMAN

(CTE)...HARTNELL LAW GROUP

GENERAL INFORMATION:

**Continued from 04/10/17 and 01/08/18.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 1<sup>st</sup> Account by PG approved on 04/13/15.
2. Notice of the Conservatee's Death filed 03/15/18 indicating that the conservatee died on 03/05/18.
3. **Need** 2nd and final account to include pre and post death accounting period beginning with date of 08/01/14.

RECOMMENDATION:

Inquire status of accounting.

(nb/cs/ww)

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

-----  
DATE: 07/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1400142

CASE NAME: MERALIE ADAMS DODGE  
HEARING: FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and  
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MERALIE ADAMS DODGE (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First and Final Account , Petition for Fees and  
Petition for Discharge of Temporary Conservator.

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

1. Public Guardian was appointed temporary LPS conservator on 05/16/14.  
Thereafter temporary conservatorship was ordered terminated on 06/27/17.
2. On 06/01/15 Public Guardian indicated no assets were marshaled in the estate and  
requested a waiver of account and discharge which was granted. Matter taken off  
calendar
3. Accounting period 05/16/14-06/30/14.
4. Assets on hand \$511.20 cash.
5. Public Guardian and County counsel both waive fees.
6. Petitioner alleges after payment of fees there will be no assets remaining on hand  
for disbursement; however, there are no fees requested. **Need** proposed  
distribution.
7. Petitioner seeks discharge as conservator upon filing of Ex Parte Petition for Final  
Distribution and Order; however, discharge does not happened until receipts are  
filed and final discharge order has been approved.
8. Notice given.
9. Proposed Order 10/12/17 allows discharge upon filing of a final discharge order  
instead of approval, thereof and order does not indicate distribution of assets on  
hand.

RECOMMENDATION:

Need to clear note 6, then Court's discretion.

(cs)

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

-----  
DATE: 07/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1600254

CASE NAME: MICHAEL PARKER BRADFORD

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

MICHAEL PARKER BRADFORD

(CPE)...COUNTY COUNSEL

(CEP)...CRAIG M PARKER

GENERAL INFORMATION

Letters expire: 05/18/19

**Continued from 12/18/17.**

THIS CASE SET FOR HEARING ON Accounting review

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

1. Public Guardian appointed as temporary conservator of the person and estate on 09/19/16 and appointed general conservator of the person and estate on 10/17/16, no bond.
2. Final Inventory and Appraisal filed 10/27/16
3. **Need** First Account beginning with 09/19/16.

RECOMMENDATION

Inquire status of accounting.

(cs/ww)

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

-----  
DATE: 07/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1800173

CASE NAME: MTR OF LEODA M ASHMORE  
HEARING: Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
LEODA M ASHMORE (CEP)...

GENERAL INFORMATION:

Public Guardian appointed temporary conservator of the person and estate on 06/25/18, no bond.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Public Guardian, Petitioner

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

1. Assets are listed as unknown. Public Guardian requests to waive bond.
2. Petitioner seeks the following:
  - a. Pr.C. §2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
  - b. Authority to deposit up to \$5,000 in an irrevocable burial trust and authority to purchase cemetery commodities.
  - c. Authority to abandon and/or donate personal property with value of \$300 or less; storage or a sale would be a burden on the estate.
  - d. Power to become the representative payee for any benefits conservatee is entitled to receive from Social Security Administration due to conservatee's legal incompetence.
  - e. Deputy Public Guardian be authorized to act on behalf of the Office of the Public Guardian of San Bernardino.
3. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
4. Petitioner seeks medical powers. Capacity Declaration filed 05/29/18.
5. Citation with proof of service filed 06/26/18.
6. **Need** notice of hearing and proof of service.
7. **Court Investigator report filed 07/17/18.**
8. ~Proposed Form Order: 05/29/18

RECOMMENDATION

Need to clear notes 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); 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 **09/30/19**. Any accounting to be filed 30 days in advance.

(cs)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1800176  
CASE NAME: MTR OF EARL BALE

HEARING: Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
EARL BALE (CEP)...

GENERAL INFORMATION

PG appointed as temporary conservator of the person and estate on 06/25/18, no bond.

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of person and estate by PG

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000.00 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300.00 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical and dementia powers. Capacity Declaration filed 05/29/18.
5. Petitioner requests dementia powers; Attorney Duane Booth appointed as counsel. **Need** report of court appointed counsel.
6. County Counsel failed to date petition at signature line. [LF pg. 9] **JTD**
7. Confidential Supplemental Information form is incomplete as to section 6a or b as to estate management assistance.[LF pg. 5] **JTD**
8. Citation and proof of service filed 06/21/18; however, server's phone number is missing in section 4a. **JTD**.
9. Notice given.
10. **Need** CI report.
11. ~Proposed Order: 05/29/18

RECOMMENDATION:

Need Report of Counsel and CI report 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); Care

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

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

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 07/23/18      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS02682

CASE NAME: MTR RE JOSEPH LAWRENCE

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
JOSEPH LAWRENCE

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

VACATE – Per register of action Order that conservator need not present 7<sup>th</sup> annual account approved on 04/30/18.

(cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS2050

CASE NAME: IN THE MATTER OF GENEVA SLOAN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
GENEVA SLOAN (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

**Continued from 10/5/15, 3/14/16** for final accounting.

**Continued from 09/12/16, 02/27/17, 12/11/17.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 31<sup>st</sup> account by PG approved on 08/22/14.
2. Conservatee passed away on 11/15/15 per Legal Receipt filed 01/21/16.
3. **Need** final accounting to include pre and post death accounting periods beginning with date of 07/03/14.

RECOMMENDATION:

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

(sa/nb/cs/ww)

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

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DATE: 07/23/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1601251

CASE NAME: Martin Williamson  
HEARING: Re: SPECIAL SETTING RE ISSUES- NOT CONTESTED

COUNSEL:

CHRISTINA MUCHA	(PET)...SHARON GRIER
MARTIN WILLIAMSON	(DEC)...
RENE M. BANKS	(PET)...JACKSON & EFTING
SURETEC INSURANCE	(TP )...

GENERAL INFORMATION

**Continued from 05/23/18 As Judge Reichert is unavailable to hear this matter today. The judicial assistant contacted both counsel in this matter and set next agreeable date on 07/23/18 AT 1:30pm, Dept. S35.**

THIS CASE IS SET FOR HEARING ON Special Setting Re Issues- Not Contested

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

1. On 03/07/18, Court approved Petition to Remove Administrator, Christina Mucha, and appointed Successor Administrator, Rene M. Banks. Supplemental Petition for Probate with Full IAEA powers by Rene M. Banks was granted; \$400,000 bond. Orders signed; Letters issued this date.
2. Previous Administrator, Christina Mucha, to turn over items collected from estate to successor administrator, Rene M. Banks by 04/09/18,
3. Court vacated accounting review hearing re prior administrator, Christina Mucha, and ordered accounting to be filed by 06/06/18.
4. On 03/12/18, Court prepared Issues Synthesis for discussion at 05/23/18 hearing. Notice of Minute Order sent by Judicial Assistant with Attachment re issues.

RECOMMENDATION

Court's discretion.

(lh/cs)

Future Hearings:

11/13/18 Readiness Calendar

11/13/18 Petition for Determination of Entitlement to Estate Distribution

09/11/19 Accounting Review re Successor Administrator Rene M. Banks

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **PROBATE**

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1400760

CASE NAME: MERLIN FACTOR

HEARING: Amended Accounting & Petition for Distribution Account and Report of CASSANDRA HUDSON and Petition for allowance of fees filed.

COUNSEL:

CASSANDRA HUDSON	(PET)...DALE K GALIPO
MERLIN FACTOR	(DEC)...
DALE K. GALIPO	(PET)...DALE K GALIPO

GENERAL INFORMATION:

**Continued from 05/21/18 to clear probate notes.**

THIS CASE IS SET FOR HEARING ON **[Amended filed 06/26/18]** Accounting and Petition for Distribution by sister, Cassandra Hudson [Administrator/Petitioner].

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

1. It appears that Petitioner is not requesting compensation.
2. Attorney does not request fees as to probating the Estate as the Court issued a prior order approving attorney's fees in the amount of \$20,000 in the underlying civil rights lawsuit.
  - a. **Need** receipt.
3. Assets on Hand consists of \$30,066.77 cash.
4. **Need** summary of account per Pr.C. §1062.
5. **Need notice to Franchise tax board per Pr.C. §9202(c) including to other government agencies per Pr.C. § 9201 if applicable.**
6. **Need** schedule of receipts, gains or losses per Pr.C. §1062. **[Amended Acct 06/26/18] indicates this section is not applicable; however, it appears there are interests on account reported including IOLTA account interest reimbursement . JTD**
7. **Need** schedule of disbursements as attorney was awarded attorney's fees per order filed 02/2/17. **[Amended Acct 06/26/18] indicates no disbursement have been made. JTD**
8. **Need** findings re: all taxes have been paid, or reserve made for taxes. **[Amended acct 06/26/18] indicates that to Petitioner's knowledge decedent did not owe any taxes. Decedent did not own any real property and was not employed at**

**the time of his death. Further indicates that the Estate's account can be used as reserves for any unknown taxes. JTD**

9. Notice of Hearing with proof of service of amended accounting filed 06/26/18; however, section 3 re method of mailing is incomplete. **Need** corrected proof.
10. Proposed order: 06/26/18 is missing statement re Franchise Tax Board

RECOMMENDATION:

Need to clear notes 2a, 4-5 & 9, then Court's discretion re notes 6-8. If approved, set next hearing for receipts and final discharge for **08/12/19**.

(cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700234

CASE NAME: THE JOANNA SABLE REVOCABLE TRUST

**SEE ALSO 3**

HEARING: OSC re: FTA/FAILURE TO FILE AN ACCOUNTING filed by THE NATIONALHUMANE EDUCATION SOCIETY

COUNSEL:

NATIONAL HUMANE EDUCATION SOCIETY (PET)...HOLSTROM BLOCK & PARKE  
THE JOANNA SABLE REVOCABLE TRUST (TRU)...  
DAVID M. WILSON (STE)...PRO/PER

GENERAL INFORMATION:

Continued from **07/17/17**. Citation not served. Court re-issues citation as to Eerin Shumway. Notice to be given by Attorney Craig Weinstein.

Continued from **09/25/17** On miscellaneous Petition For Probate of the National Humane Education Society order to show cause hearing held (Probate). Court re-issues the citation as to Eerin Shumway for their failure to appear/file an accounting as ordered by the court. Citation issued

Continued from **11/06/17** It appears the citation was never issued from the clerk's office. Citation issued to Eerin Shumway.

Continued from **12/18/17** On miscellaneous petition for probate of the National Humane Education Society OSC hearing held. Non-appearance by Eerin Shumway, nor has the return of citation been submitted. Citation issues Eerin Shumway, who is cited and required to appear on 03/12/18 and show cause why FTA/Failure to file an accounting.

Continued from **03/12/18** Court notes that the Sheriff has been unsuccessful in serving the citation on Eerin Shumway. Court Re-issues citation and set an OSC Re Sanctions as to Eerin Shumway. Citation issued to Eerin Shumway who is cited and required to appear on 05/21/18 to show cause why FTA/Failure to file accounting/sanctions. OSC set re sanction filed by the National Humane Education society.

**Continued from 05/21/18 Court needs to review declaration re the surcharge.**

THIS CASE IS SET FOR HEARING ON OSC re FTA/Failure to File Accounting

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

1. Matter set at 05/22/17 hearing, wherein, the Court removed Eerin Shumway as trustee and appointed David Wilson as Successor Trustee.
2. Citation reissued as to Eerin Shumway who has failed to appear or file an accounting as ordered by the court.



3. Proof of unsuccessful service of citation filed **07/01/18**, 02/20/18, 04/30/18 and 05/01/18.
4. Court to see Declaration of Attorney Breanna Dominguez re Notice filed on 05/14/18.

RECOMMENDATION:  
Court's discretion.

(nb/cs/ww/cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 07/23/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700234

CASE NAME: THE JOANNA SABLE REVOCABLE TRUST

**SEE ALSO 2**

HEARING:

OSC re: Sanctions filed by THE NATIONALHUMANE EDUCATION SOCIETY

COUNSEL:

NATIONAL HUMANE EDUCATION SOCIETY (PET)...HOLSTROM BLOCK & PARKE

THE JOANNA SABLE REVOCABLE TRUST (TRU)...

DAVID M. WILSON

(STE)...PRO/PER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC re: Sanctions filed

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

1. Matter set on 03/12/18 at OSC re FTA/Failure to file an accounting by Eerin Shumway.
2. Citation issued to Eerin Shumway who is cited and required to appear on 05/21/18.
3. Proof of unsuccessful service of citation filed **07/01/18**, 04/30/18 and 05/01/18.
4. Court to see Declaration of Attorney Breanna Dominguez re Notice filed on 05/14/18.

RECOMMENDATION:

Court's discretion.

(cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800340

CASE NAME: MTR OF KAREN ROSE PIERCE

**SEE ALSO 5**

HEARING:

Petition for VERIFIED PETITION TO DETERMINE OWNERSHIP OF REAL  
PROPERTY BY KAREN ROSE PIERCE

COUNSEL:

EDWARD EARLE BURROWS

KAREN ROSE PIERE

(PET)...PRICE LAW FIRM, APC

(DEC)...

Currently under review by Legal Research.  
(LR)

**Notice:**

Notice of Hearing filed 05/24/18 and 04/24/18; however, notice does not comply with mandatory requirements of Pr.C. §851(c). Notice indicate there is an Exhibit A attached; however, there is no exhibit attached. **JTD**

Notice of Acknowledgment of Receipt filed 05/04/18 as to Francis Anderson, Edward Burrows, Janet Stonebrook and Yolanda Burrows.

(CS)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800340

CASE NAME: MTR OF KAREN ROSE PIERCE

**SEE ALSO 4**

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

COUNSEL:

EDWARD EARLE BURROWS (PET)...PRICE LAW FIRM, APC  
KAREN ROSE PIERE (DEC)...

GENERAL INFORMATION

Continued from **05/21/18** objection and competing petition to be filed by Attorney Amy York  
Garrett.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full  
Authority under IAEA by friend, Edward Burrows, [Executor/Petitioner]

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

1. Will waives bond. Net estate value consist of \$222,661.79 with \$200,000 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. Proof of Subscribing Witness filed 04/19/18.
3. Arvin Wenzelberg is an individual mentioned in the will; however, not listed in  
section 8 of petition. **Need** verified supplement .
4. As of review of file, no objections have been filed.
5. **Objections filed 07/17/18 by Donald E. Pierce; however, objections not in LF at  
time of review.**
6. **Note: It appears a competing petition has been filed by Donald E. Pierce and  
set for hearing on 09/05/18. Court may wish to trail matter. JTD**
7. ~Proposed Form Order: 04/12/18

RECOMMENDATION

Contested matter.

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

Note requirements of local rule 20-908.

(cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800396

CASE NAME: CARMEN H KOLESSER

HEARING:

Spousal Property Petition hearing.

COUNSEL:

GARALD A KOLESSER (PET)...LAW OFFICES OF HOWARD R HAWKIN  
CARMEN H KOLESSER (DEC)...

GENERAL INFORMATION:

**Continued from 05/21/18 at request of counsel**

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

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

1. Petitioner requests determination and confirmation of property passing to the surviving spouse as community property. Specifically, real property at Rancho Cucamonga, in San Bernardino County.
2. Attachment 7 [LF, p. 4] to petition indicates the decedent owned the single family residence at the date of marriage. It appears the subject property is decedent's separate property. **Need** copy of vesting document.
3. Decedent died intestate with three adult issue who would also share a two-thirds distribution in the estate per Pr.C. §6401, if the real property is the separate property of decedent.
4. ~Proposed Form Order 04/23/18.

RECOMMENDATION:

Deny. Require proper petition.  
(nb/cs)

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800506

CASE NAME: ROBINA JEAN RODRIGUEZ

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

COUNSEL:

RUBEN ESPINOZA RODRIGUEZ (PET)...BANKS GARCIA & JANIS  
ROBINA JEAN RODRIGUEZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Ruben Rodriguez, [Executor/Petitioner]

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

1. Petitioner alleges will waives bond. Estate value is \$300,000 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. Section 5(b) re whether decedent was survived by stepchild or foster child is incomplete. **Need** verified supplement.
3. Petition indicates copy of will attached as 3f(2); however, there is no attachment. **Need** copy of will.
4. Petitioner is not listed in section 8 of petition. **Need** verified supplement.
5. **Notice to Petition to Administer Estate and proof of service filed 07/18/18; however, not in Laserfiche at time of review. Unable to determine if notice is complete until copy of will provided. [see note 3].**
6. **Proof of publication filed 07/18/18; however, not in Laserfiche at time of review.**
7. ~Proposed Form Order: 05/25/18

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond. If approved, set Accounting/Status Review for **09/30/19**. 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

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800540

CASE NAME: MTR OF JESSE WILLARD CAMPBELL JR

HEARING:

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

COUNSEL:

CARTER CAMPBELL (PET)...THE GOLDMAN LAW FIRM  
JESSE WILLARD CAMPBELL JR (DEC)...

#### GENERAL INFORMATION

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

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

1. Petitioner is an out of state resident and requests bond of \$328,000. Estate value of \$328,000 in real property. Bond appears sufficient.
2. ~Proposed Form Order: 06/05/18

#### RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **09/30/19**. 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

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800546

CASE NAME: MTR OF SHEILA WHITE

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

ANTWAN CHILDRESS (PET)...MELINDA S. BELL  
SHEILA WHITE (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner alleges all heirs waive bond; however, Elijah Childress is a minor. A bond waiver has been signed by Sharon Sadrudeen as minor's guardian. Question if Sharon Sadrudeen has been appointed guardian of the estate, or guardian ad litem of minor. Pr.C. §1003. **Need** verified supplement. **JTD**
2. Estate value of \$240,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b). **JTD**
3. Section 8 of petition does not list ages of heirs. **Need** verified supplement.
4. **Need** Notice to Petition to Administer Estate and proof of service. Notice filed 06/14/18; however, there is no proof of service attached.
5. ~Proposed Form Order:

RECOMMENDATION

Need to clear notes 1 and 3-4. Court's discretion re bond. If approved, set Accounting/Status Review for **09/30/19**. 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

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800554

CASE NAME: Loyal Leiver Mefferd

HEARING:

Petition for letters of administration w/full IAEA

COUNSEL:

ERIKA MUNGUIA (PET)...RODRIGO LAW FIRM  
LOYAL LEIVER MEFFERD (DEC)...

#### GENERAL INFORMATION

Erika Munguia appointed special personal representative on 06/18/8, \$100,000 bond

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

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

1. Petitioner seeks \$100,000 bond. Estate value consists of income from real property of \$100,000. Court to clarify if estate consists of income of real property, or of personal property. Bond appears adequate.
2. Nomination by spouse attached to petition, [LFp. 7].
3. ~Proposed Form Order: 06/11/18

#### RECOMMENDATION

RDA. Court's discretion re bond. If approved, set Accounting/Status Review for **09/30/19**. 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

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800555

CASE NAME: MARIA GERARDA KLINKENBERG

HEARING:

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

COUNSEL:

ELISABETH CORDELL (PET)...FULLERTON LEMANN SCHAEFER & DO  
MARIA GERARDA KLINKENBERG (DEC)...

#### GENERAL INFORMATION

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

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

1. All heirs waive bond; however, need bond waiver by Lourens Klinkenberg. Estate value \$250,000 with \$5,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b).
2. **Need** proof of publication.
3. ~Proposed Form Order: 06/11/18

#### RECOMMENDATION

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

(cs)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800586

CASE NAME: NATHAN WALKER MCCUIN

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

COUNSEL:

AHLYNN MICHELLE DIDONATO (PET)...THOMAS J CALLAWAY  
NATHAN WALKER MCCUIN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Ashlynn DiDonato, [Petitioner] appointing Thomas Callaway as administrator.

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

1. All heirs waive bond; however, need bond waiver by Skyler Rubio, or in the alternative, proposed administrator is an attorney, does court wish to require minimum bond. Estate value of \$175,000 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b). **JTD.**
2. Nomination by Petitioner attached to petition, LF p. 6.
3. Petition indicates decedent's father had no recent contact with decedent and his whereabouts are unknown. **Need** Request to Excuse Notice with Due Diligence Declaration.
4. Petition indicates Skyler Rubio (son) is to sign a nomination and Janice McCuin (decedent's mother) is to sign consent to nomination; however, no consent or nomination filed. **Need** Nomination and Declination by same.
5. **Need** Notice to Petition to Administer Estate and proof of service.
6. **Need** proof of publication.
7. ~Proposed Form Order: 06/15/18

RECOMMENDATION

Need to clear notes 3-6. Court's discretion re bond. If approved, set Accounting/Status Review for 09/30/19. 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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS**

-----  
DATE: 07/23/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700244

CASE NAME: THE BAREA EZZEDDINE 2013 TRUST

HEARING:

Petition for determine Angela Ezeddine's entitlement to distribution after violation of no contest clause

COUNSEL:

ANGELA EZZEDDINE (PET)...FITZGERALD YAP CREDITOR

THE BAREA ESSEDDINE 2013 TRUST (TRU)...

TENA EZZEDDINE (PET/OBJ)...ALYSSA C WESTOVER

Currently under review by Legal Research.

(LR)

(CS)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1701174

CASE NAME: THE GERALDINE R HENDON TRUST

HEARING:

Petition for Determine the Existence of a Trust; to Compel the  
Trustee to Provide a Copy of Terms

COUNSEL:

KEVIN TODD HENDON (PET)...RICHARD G ANDERSON  
THE GERALDINE R HENDON TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice given.  
(nb/cs)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 8:35 DEPT: S36P  
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CASE#: TRU PS1800040

CASE NAME: RIVAS FAMILY TRUST 02/14/2004

HEARING:

Petition for TO DETERMINE THE EXISTENCE AND VALIDITY OF THE RIVAS FAMILY TRUST, AND TO CONFIRM TRUSTEE ETC

COUNSEL:

FERNANDO E RIVAS (PET)...THE BOUTIQUE LAW GROUP APLC  
THE RIVAS FAMILY TRUST (TRU)...

Currently under review by Legal Research.  
(LR)

Notice

NOTICE:

1. Notice of hearing and proof of service filed 03/09/18; however, less than 30 days' notice provided and notice must contain full description of the subject property ; a description of relief and from whom it is against if Pr.C. § 859 is being pursued; and a statement advising persons whom have interest in said property that they may file a response to the petition.
  - a. Notice of hearing filed 06/11/18; however, per Pr.C. §851(c) notice is missing a statement advising any person interested in the property that he or she may file a response to the petition. **Need** corrected notice.

(ww/cs)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 07/23/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1500305

CASE NAME: MTR OF BUDDY LEE SAILOR

HEARING:      FIRST Account and Report of THERESA L PRINCE and Petition for allowance of fees filed.

COUNSEL:

THERESA L PRINCE                      (CPE)...DAVID M GROSSMAN  
BUDDY LEE SAILOR                      (CEP)...WALTER T. MOORE

**XREF: FAMSS1509076** JANICE SAILOR -N- BUDDY LEE SAILOR

GENERAL INFORMATION:

Continued from **06/20/17** for notes to be cleared. The Court notes that this case will not be transferred to Orange County until the related family law matter is resolved completely.

Continued from **09/12/17** A final I & A cannot be filed due to pending family law matter. - Attorney Grossman to file a supplement - also requesting partial fees. Attorney Walter Moore to file a petition for fees also to be heard the same day.

Continued from **11/07/17** and **12/05/17**.

Continued from **02/20/18** for resolution of family law matter.

Continued from **04/02/18** at request of petitioner's counsel.

**Continued from 06/04/18 to clear probate notes.**

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Fees by Conservator of the Person and Estate, Theresa L. Prince (daughter).

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

1. Accounting period 12/16/15 TO 12/15/16. However, account period should begin on **11/10/15. JTD**
2. Petitioner has not used mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use mandatory form(s) on future accountings. **JTD**
3. Assets on Hand \$590,853.45 consisting of \$226,735.76 in cash and remaining in real and personal property.
4. Current bond of \$562,000. Insufficient. Suggest bond of \$650,000 (includes recovery). **JTD.**
5. Partial Inventories 1 & 2 indicates estate includes community property interests that are unknown until the outcome of the related Family Law Case. Need complete,

final inventory and appraisal. **(Supp. 08/14/17 indicates a final inventory and appraisal cannot be filed until settlement from the Family Court in the related matter.)**

6. Petitioner does not request compensation.
7. Attorney requests fees of \$11,146.00 for 22.3 hours' attorney time billed at \$350/hour and 25.7 hours' paralegal time billed at \$130/hour. **Itemized [see supp. 08/14/17, LF, pgs. 7-8]. JTD.**
8. Attorney requests reimbursement of costs advanced of \$465.00. **JTD**
9. Value is not given; purportedly unknown or not valued by Probate Referee for a business known as Integrity Design Group or Orange County Container Group LLC Profit Sharing. Question the status of these assets? **Supplement 08/14/17 indicates these assets are currently being valued as part of the community assets by the Family Court and will be inventoried upon valuation and division of the community property.**
10. **Need** bank/investment statements verifying date of death and ending balances per Local Rule 20-908 for US Bank Acct. XXX4068 and Boeing Investment Plan. Also, Assets on Hand at End of Account Period US Bank Acct. XXX4068.
11. **Schedule E- Assets on Hand at End of Account Period [Acctg. 04/20/17-LF, p25] does not include Chase Checking Acct. XXX2508 or Savings Acct. XXX6083 affixed to supp. filed 08/14/17 [LF, p73]. Need** amended Schedule E and affected schedules via verified supplement.
12. During the accounting period, petitioner paid Julia Chavez and Francesca Kelium for caregiving expenses of \$3,532.55. **(Supp. (08/14/17) affixes weekly time cards.) Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
13. Conservatee resides in Fountain Valley, CA which is located in Orange County. Suggest transfer. If so, Court to set control date. **JTD.**
14. Proposed Order: 04/20/17 does not comply with Local Rule 20-614.

RECOMMENDATION:

Need to clear notes, \$650,000 bond. If approved, set next hearing for Accounting Review for 60 days out as 2<sup>nd</sup> accounting is overdue.

(nb/ww/cs)



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

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DATE: 07/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700350

CASE NAME: MTR OF EUGEN IRIMIA

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of VIORICA IRIMIA

COUNSEL:

VIORICA IRIMIA (CPE)...PRO/PER  
EUGEN IRIMIA (CEP)...JAMES B CHURCH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Viorica Irimia, spouse, appointed conservator of the person and estate on 12/18/17, 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.
5. **Need** Final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. If 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 2-7. Inquire Status  
(cs)

Future Hearing: 2/25/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700394

CASE NAME: MTR OF CARLOS GUTIERREZ ROSALES

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DULCE M ROSALES

COUNSEL:

DULCE M ROSALES (CP)...PRO/PER  
CARLOS GUTIERREZ ROSALES (CTP)...SANDRA TURNER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Dulce Rosales, mother, appointed limited conservator of the person on 12/18/17.
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. Inquire Status  
(cs)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800006

CASE NAME: TERRY CORTEZ

**SEE ALSO 20**

HEARING:

Petition for appointment of conservator for the person and estate filed by Susie Salazar

COUNSEL:

RAYMOND CORTEZ	(PET)...PRO/PER
TERRY CORTEZ	(CTP)...MITCHELL I ROTH
SUSIE SALAZAR	(CPE/OBJ)...PRO/PER

GENERAL INFORMATION

Raymond Cortez, son, appointed as Temporary Conservator of the person only on 01/22/18, no bond. Counsel represents that Ms. Cortez consents to conservatorship. Continued from **02/20/18**.

**Continued from 04/02/18** Court will continue matter; Judge Pro Tem, Mitchell Roth, is the assigned Attorney for Terry Cortez.

Continued from **06/11/18**. Raymond Cortez wants to resign as temporary and withdrew his petition. Suzie Salazar to file a petition for temporary and general conservatorship. Court directs clerk's office to set temporary on 06/20/18 once filed.

**Continued from 06/20/18 Susie Salazar needs to file a petition for temporary conservatorship. On 06/21/18 Court accepted resignation of temporary conservator, Raymond Cortez. Ex parte orders granted to Susie Salazar, no bond. Court ordered Raymond Cortez to appear at the next hearing. Attorney Mitchell to prepare citation for his appearance.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person by son, Raymond Cortez ["Petitioner"].

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

1. **Petition by Susie Salazar filed. See notes on next matter.**
2. No bond – person only.
3. Petition has the following issues:
  - a. Section 1d requests 2590 powers;
  - b. Section 1g does not request medical powers;
  - c. Section 1k re dementia is incomplete;

- d. Section 11 does not include petitioner or indicate relationships of those listed. Does Court wish to require an amended petition or verified supplement? **JTD.**
4. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with Dementia Attachments GC-313 & GC-335A.
  5. Petitioner does not request dementia powers although temporary petition indicates conservatee has dementia. Report of Counsel, Mitchell I. Roth, filed on 02/20/18.
  6. List of Required Contact Information is missing all relatives within the second degree as listed in the petition. **Need** completed form.
  7. CI report filed 02/13/18.
  8. Certificate of Completion re Conservatorship Class filed 02/01/18.
  9. **Need** return of Citation.
  10. **Need** Notice of Hearing and proof of service to all relatives within the 2<sup>nd</sup> degree.
  11. **Objections filed 05/23/18 by Susie Salazar (daughter of proposed conservatee). Need proof of service to Ricky Cortez.**
  12. Exhibits and witness list filed 05/23/18 by Susie Salazar. **Need** proof of service.
  13. ~Proposed Form Order: 01/05/18.

RECOMMENDATION:

Matter is moot.

(nb/ww/cs/lh/cs)

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

-----  
DATE: 07/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800006

CASE NAME: TERRY CORTEZ

**SEE ALSO 19**

HEARING: Petition for Appointment of Conservator

COUNSEL:

RAYMOND CORTEZ	(PET)...PRO/PER
TERRY CORTEZ	(CTP)...MITCHELL I ROTH
SUSIE SALAZAR	(CPE/OBJ)...PRO/PER

GENERAL INFORMATION

**Ex parte orders granted to Susie Salazar, no bond. Court ordered Raymond Cortez to appear at the next hearing. Attorney Mitchell to prepare citation for his appearance**

THIS CASE SET FOR HEARING ON Petition for Appointment of **Successor** Conservator, of the person and estate by daughter, Susie Salazar, Petitioner

Need Due Diligence Declaration as to Frankie (son).

Petitioner is not listed in section 8 of petition.

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

1. Petitioner seeks no bond due to proposed conservatee has minimal assets which consist of social security. Estimated total personal assets of \$6,000. Question the need of estate powers. Court to inquire.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Section 5d indicates that proposed conservatee voluntarily requests the appointment of conservator; however, there is no attachment 5d. Court to clarify.
4. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. List of required contacts filed 06/19/18 does not include Lorenzo Esparza, Annie Garcia, Connie Ramirez, and all grandchildren mentioned in petition. **Need** complete form.
7. Section 8 of Petition does not include relationship of Connie Ramirez. **Need** verified supplement.
8. **Need** return of Citation.

9. **Certificate of Completion of the Conservatorship Training Class by Susie Salazar filed 07/05/18.**

10. **Need** notice of hearing and proof of service.

11. **Need** Court Investigator report.

12. ~Proposed Form Order: 03/22/18

RECOMMENDATION

Need to clear notes 5-10. 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 **09/30/19**. Any accounting to be filed 30 days in advance.

(cs)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800126

CASE NAME: ORA MAE WILSON

HEARING: Petition for Appointment of Conservator

COUNSEL:

MICHAEL WILSON (CPE)...PRO/PER  
CAROL WILSON (CPE)...PRO/PER  
ORA MAE WILSON (CEP)...J BENJAMIN SELTERS III

GENERAL INFORMATION

**Continued from 06/04/18 Attorney J Benjamin Selters III is appointed for Ora Mae Wilson.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Michael and Carol Wilson, son and daughter-in-law/Petitioners

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

1. Petitioners did indicate bond amount. Estimated value of estate is \$569,932, with \$19,932 in personal property of which \$16,932 is public benefits. Suggest bond of \$21,926.00 which includes cost of recovery. **Court to inquire if proposed conservatee resides in personal residence listed in petition.** If conservatee does not reside in her own residence suggest bond of \$628,323.84.
  - a. **Supp. 05/31/18 indicates petitioners seek bond of \$21,926.00 or amount court deems proper.**
2. Petitioners seek medical powers. Capacity Declaration filed 05/08/18; however, has the following issues:
  - a. Section 1 re Doctor's name, office address and phone number is incomplete.
  - b. Section 4 re Conservatee's name is blank.
  - c. Section 6D is incomplete.**Need** completed Capacity Declaration.
3. Petitioners appear to be seeking dementia powers; however, section 1k as to 2356.5 dementia placement/treatment powers is not marked, but the attachment requesting special orders is provided. [LF pg. 6]
  - a. Supp. 05/31/18 indicates not seeking order related to dementia powers.
4. Report of Court appointed counsel, J. Benjamin Selters, III filed 06/18/18.

5. Petitioners indicate that a conservatorship was opened in Los Angeles on 11/27/17 and that the Court indicated that San Bernardino should have jurisdiction, case number 17STPB10621. Matter was dismissed on 02/05/18.
6. Court Investigators Referral Report indicates that proposed conservatee lives in Rancho Cucamonga and Los Angeles.
7. Citation and proof of service filed 05/08/18.
8. Certificates of Completion of the Conservatorship Training Class filed 05/03/18 and 05/31/18 for Michael and Carol.
9. Notice given.
10. CI report filed 05/23/18.
11. ~Proposed Form Order: 04/27/18

#### RECOMMENDATION

Need to clear note 2, 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); 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.

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

(ww/cs)



CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1200918

CASE NAME: SARAH J. MCCLASKEY

HEARING:  
Hearing re Final Discharge

COUNSEL:

LARRY PARKER (PET)...RICHARD I GONZALEZ  
SARAH J MCCLASKEY (DEC)...

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

GENERAL INFORMATION

Continued from **07/28/15** and **09/22/15** to determine where or whom the funds are to be distributed to as Counsel states there is a pending probate case in Ireland for an heir.

Continued from **12/01/15** to retain attorney service in Ireland to retrieve documents.

Continued from **02/09/16** Counsel still investigating re sister (heir) in Ireland.

Continued from **04/12/16, 6/13/16, 8/22/16 and 11/07/16.**

Continued from **06/27/17**. Amended order to be filed. Matter continued for Counsel to further verify son's and son's counsel's identity. Counsel has determined there is no Irish probate filed.

Continued from **08/22/17** on Court's motion to contact Irish Consulate. If proof of probate, bank account information and proper identification is not provided by a certain deadline, monies may be held. Notice to be given by Mr. Gonzalez.

Continued from **11/28/17** at request of counsel. Mr. Holohan, currently in Ireland, is attempting to assist Counsel in locating heir. Notice to be given by Mr. Gonzalez.

Continued from **02/13/18**. Mr. Holohan is currently in Ireland attempting to locate heir. Mr. Holohan may file a fee declaration.

**Continued from 04/23/18.**

THIS CASE IS SET FOR HEARING ON Final Discharge of Larry Parker, nephew/administrator w/will annexed.

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

1. First and Final Account of Larry Parker, nephew, approved on 07/29/14.
2. No receipts filed. **Need** same.
3. **Need** Ex-Parte Petition/Order for Final Discharge.

4. Declaration filed 02/03/16 alleges Lillian Thompson may be deceased and requests additional time to further investigate when/if Ms. Thompson died.
5. Notice of Hearing filed 11/04/16 does not give 15 days' notice. **Need** proper service.
6. Notice filed 11/04/16 affixes a declaration by Attorney Richard L. Gonzalez regarding final distribution, which indicates that an amended order is forthcoming. **Need** amended Order.
7. **Need** verified supplement identifying son and son's counsel.

RECOMMENDATION:

Need to clear notes. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(nb/dl/sa/lc/nb/lh/nb/ww)

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500047  
CASE NAME: Peter Fredric Williams

HEARING: Probate status report filed.

COUNSEL:

SUSAN WILLIAMS (PET)...  
PETER FREDRIC WILLIAMS (DEC)...

GENERAL INFORMATION:

Continued from **05/15/17** at request of counsel.

Continued from **07/24/17** and **10/16/17**.

**Continued from 04/23/18. Ms. Williams reports that attorney Dina Farhat no longer represents her in this matter. Need additional time to finalize accounting.**

THIS CASE IS SET FOR HEARING ON Status Report

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

1. Letters of administration with will annexed issued on 03/27/15 to Susan Williams, mother, full IAEA, \$20,000.00 bond.
2. Petitioner alleges the estate is not in a condition to be closed as the First and Final Account needs to be completed.
3. Petitioner requests an additional 3 months to close the estate. **(Supp. 07/16/18 indicates that they need 3-6 months.)** Supplement, verification and attached proof of service are not dated or signed. Court may wish to require the petitioner to bring in the original that may have been returned to them instead of the copy. **JTD**
4. In the **Supp. 07/16/18** Petitioner is also requesting for review of the proposed accounting format and as to the rules required to complete the accounting; however, it would be legal advice. **All accountings must follow Pr.C. § 1060 et seq.**
5. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
6. No proposed order.

RECOMMENDATION:

Require notice then Court's discretion. If approved, set next Accounting Review for **12/17/18**.

(nb/lh/ww)

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600319

CASE NAME: ESATE OF GILDA JOAN DONCHE

HEARING:

Probate status report filed.

COUNSEL:

BRUCE BRAZEAU (PET)...ROBERT G PETROVICH  
GILDA JOAN DONCHE (DEC)...

GENERAL INFORMATION

**Continued from 04/23/18.**

THIS CASE IS SET FOR HEARING ON Status Report.

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

1. Letters of Administration issued to Bruce Brazeau, brother, on 05/27/16; limited authority, \$493,000.00 bond.
2. Petitioner requests an additional 6 months to close the estate.
3. Estate is not in a condition to close due to the need to sell the one remaining piece of real property as both primary heirs are incarcerated. Only cash is allowed to be placed into their accounts.
  - a. Real property at 61887 Grand View Circle, Joshua Tree, was sold on 12/18/17 per Court order; however, due to a problem with the legal description, the sale of the real property at 61843 Valley View Circle, Joshua Tree had to be terminated.
    - i. The property has since sold on 05/08/18 with the Order confirming filed on 06/18/18.
4. Notice given.
5. Proposed Order: 03/08/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **10/01/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601186

CASE NAME: MTR OF THE BROWN TRUST U/D/T DATED OCT 3,2000

HEARING:

FIRST Account and Report of CHRISTINA BARNES and Petition for allowance of fees filed.

COUNSEL:

RUTH ANITA BELL	(PET)...ZUBIATE BEAUCHAMP LLC
VALERIE ANN JOHNSON	(PET)...ZUBIATE BEAUCHAMP LLC
THE BROWN TRUST	(TRU)...
CHRISTINA BARNES	(PET/OBJ)...JAMES B CHURCH

**CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,**

GENERAL INFORMATION

Continued from **09/13/17**. Christina Brown's name to be changed to Christina Barnes. Counsel Church stated escrow is pending. Money cannot be withdrawn from Trust Account without attorney and through court order. Counsel Church to submit order re name correction.

Continued from **03/14/18** at request of Court to clear probate notes/trail motion set. Notice to be given by Ms. Zubiata-Beauchamp

**Continued from 04/16/18.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Allowance of Fees by Christina Barnes, Trustee.

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

1. **Note: Request for dismissal as to the entire action was received on 07/11/18 and forwarded to Department for review.**
2. Accounting period: 09/23/15 – 04/13/17.
3. Assets on hand: \$4,888.82 in cash.
4. Real property in Pico Rivera is not included in accounting. **JTD**
5. Christina Barnes' name appears to be Christina Brown on the record. Additionally, first line of report states Kristine Merrill is successor Trustee. **Need** verified supplement clarifying parties.
6. Page 2 of report is highly illegible. Court may wish to require new page. **JTD**
7. **Need** list of beneficiaries per California Rule of Court 7.902.

8. **Objections filed by Ruth Bell and Valerie Johnson on 08/23/17, supplemental objections filed 09/07/17.**
9. **Reply to Objections filed by Christina Michaelae Barnes on 09/21/17.**
10. **Need** notice as directed by court.
11. No proposed order. Submit after hearing.

#### RECOMMENDATION

**See note 1 as all parties appear to agree to dismiss the case.** Matter is contested. Need to clear notes 5 & 7. *If court retains jurisdiction* of trust, set next Accounting review for **08/20/18**.

(lc/lh/cs/ww)

Future Hearings:

8/09/18 Petition for Order Confirming Trust Assets Petition to Compel Accounting Etc

8/09/18 Readiness Calendar

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 6, 7**

HEARING:

Petition for LETTERS TESTAMENTARY W/ FULL IAEA

COUNSEL:

JAMES F BAKER	(PET)...	BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...	
KURT BECKSTROM	(PET)...	ROBERT J SPITZ

GENERAL INFORMATION:

Continued from **03/20/17 and 05/24/17**. Court will require bond of \$602,140 for Mr. Baker and \$75,000 as to Mr. Beckstrom. Parties to meet and confer re rental properties.

Continued from **07/26/17** Court recommends hiring a property manager. Counsel stipulate to property manager Samson Debebe, to be manager of the properties subject to James Baker residing in the home. Discovery to be conducted.

Continued from **09/21/17**. By agreement the Court will appoint Samson Debebe as special administrator to handle the properties. Matter continued for Mr. Debebe to be contacted and asked if he wants to accept the appointment. If he does not want to act as Special Administrator, Court requests Counsel attempt to find another person who would be willing to act in that capacity. The Court orders Mr. Baker provide mortgage statements and proof of payments made to counsel.

Continued from **10/03/17 and 12/05/17** at request of counsel to trail other hearings set. Notice waived.

Continued from **02/13/18**. Public Administrator to be appointed as Special Administrator. Matter continued for Public Administrator to accept appointment as Special Administrator to handle the sale of real property. Clerk's Office to notify Public Administrator. The Court grants Mr. Debebe authority as agent to conduct sale/sign sale documents. Proof of service of objections by James Baker to be filed.

**Continued from 04/23/18. Discover underway. Public Administrator appointed as special administrator, no bond.**

THIS CASE IS SET FOR HEARING ON

- Petition 1 - Petition for Letters Testamentary with **full** authority under IAEA by named executor, **James F. Baker, friend**.

- Petition 2 - Petition for Letters of Administration with **limited** authority under IAEA by **Kurt Beckstrom, brother/caretaker**.

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

**Petitioner 1 – James Baker, friend.**

- 1 Sole beneficiary waives bond. Need bond of \$602,140.
- 2 Proofs of Subscribing Witness filed.
- 3 **Objections by Kurt Beckstrom filed 03/03/17.**
- 4 **Reply to Opposition filed by Kurt Beckstrom on 09/18/17.**
- 5 **Will Contest and Grounds of Opposition of Purported Will filed by Kurt Beckstrom on 09/21/17. Return of served Summons filed 02/14/18.**
- 6 ~Proposed Form Order 01/10/17.

**Petitioner 2 – Kurt Beckstrom, brother/caretaker.**

- 7 Petitioner alleges he is sole heir and waives bond. Personal property valued at \$27,400; real property net \$520,000. As petitioner is seeking limited authority, court may wish to require bond of \$27,400. JTD
- 8 **Objections by James F. Baker filed 09/08/17. Need proof of service.**
- 9 **Declaration by Attorney Spitz filed 09/18/17.**
- 10 **Declaration of Real Estate Broker, Samson Debebe, filed 09/18/17. Supplemental filed 09/21/17.**
- 11 ~Proposed Form Order: 03/03/17.

RECOMMENDATION:

Matter is contested. Need to clear note 8 then Court's discretion. If approved, set future hearing for Accounting/Status Review on **07/01/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/lc/lh/lc/cs/nb/ww)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 07/23/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 5, 7**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/LIMITED IAEA

COUNSEL:

JAMES F BAKER

(PET)...BANKS GARCIA & JANIS

ERNEST ALLEN BECKSTROM

(DEC)...

KURT BECKSTROM

(PET)...ROBERT J SPITZ

See notes on matter 5.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700017

CASE NAME: ERNEST ALLEN BECKSTROM

**SEE ALSO 5, 6**

HEARING:

Trial Setting Conference

COUNSEL:

JAMES F BAKER	(PET)...BANKS GARCIA & JANIS
ERNEST ALLEN BECKSTROM	(DEC)...
KURT BECKSTROM	(PET)...ROBERT J SPITZ

Trial Setting Conference- No notes- JTD

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700218

CASE NAME: MTR OF BEATRICE ROSEKAMP

HEARING:

Accounting Review by \*\*\*

COUNSEL:

LIZABETH GOODIE (PET)...THOMAS W DOMINICK  
BEATRICE ROSEKAMP (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 Lizabeth Goodie, daughter, on 05/15/17; full authority, \$175,000.00 bond.
2. Final Inventory and Appraisal filed 06/22/18; however, **need** bank/financial statements in support of date of death account balances.
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701058

CASE NAME: MTR OF THE LYDIA R GARCIA TRUST

**SEE ALSO 10**

HEARING:

Hearing Re: VERIFIED TRUST CONTEST/WILL CONTEST OF C. GARCIA

COUNSEL:

CARLOS GARCIA	(PET)...EDWARD B FISCHER & ASSOC
THE LYDIA R GARCIA TRUST	(TRU)...
CHRISTINE SHILES	(OBJ)...PHILLIP MYER APC

Currently under review by legal research.

Continued matter. Notice not re-reviewed.

(ww)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701058

CASE NAME: MTR OF THE LYDIA R GARCIA TRUST

**SEE ALSO 9**

HEARING:

Probate status report filed.

COUNSEL:

CARLOS GARCIA	(PET)...EDWARD B FISCHER & ASSOC
THE LYDIA R GARCIA TRUST	(TRU)...
CHRISTINE SHILES	(OBJ)...PHILLIP MYER APC

GENERAL INFORMATION

**Continued from 04/23/18. Court sets this matter for mediation. Mediation briefs are to be filed two weeks prior to mediation. Counsel agrees to advance the 05/23/18 hearing to today and continue it to 07/23/18.**

THIS CASE IS SET FOR HEARING ON Status Report by Christine Shiles, objector.

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

1. Petitioner requests an additional 6 weeks to file accounting of all mother's accounts from 3 days prior to death to 11/30/17 per minutes of 12/14/17.
2. Petitioner indicates that she has been unwell and currently doesn't have the funds to purchase the statements from the bank.
3. **Need** verification signed by the personal representative per Pr.C. § 1021.
4. **Court to see Declaration re: accounting filed by Christine Chiles on 04/20/18.**
5. Notice given.
6. No proposed order.

RECOMMENDATION:

Need to clear note 3. If approved, set next hearing for **08/13/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww)

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

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DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800069

CASE NAME: Richard A Mumford

**SEE ALSO 12**

HEARING:

OSC re: Dismissal

COUNSEL:

JAIME LYNN STRAHAN (PET)...PRO/PER  
RICHARD A MUMFORD (DEC)...

GENERAL INFORMATION:

Continued from **02/20/18**. No appearance.

**Continued from 04/23/18. No appearance. Need proof of publication.**

THIS CASE IS SET FOR HEARING ON **OSC re: Dismissal of** Petition for Letters of Administration with full authority under IAEA by daughter, Jaime L. Strahan ["Petitioner"].

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

1. Court set OSC as there was no appearance by petitioner at hearing on 02/20/18,
2. Net value of the estate consists of \$159,737.78 of which \$67,408.70 is personal property.
  - a. Petitioner requests no bond be fixed and attaches waivers of bond by both heirs. However, petitioner is a non-resident and court has discretion to require bond per Pr. C. §8571. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).  
**JTD.**
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. No Form Order Provided.

RECOMMENDATION:

Need to clear notes 3 & 4 then Court's discretion re bond and OSC. If approved, set future hearing or Accounting/Status Review on **09/30/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800069

CASE NAME: Richard A Mumford

**SEE ALSO 11**

HEARING:

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

COUNSEL:

JAIME LYNN STRAHAN (PET)...PRO/PER  
RICHARD A MUMFORD (DEC)...

See notes on matter 11.

(ww)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 07/23/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800317

***VACATED- MATTER SET ON THIS DATE IN ERROR.***

CASE NAME: CHRISTOPHER DAVID BISHOP

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GAYNOR E DEWEESE (PET)...PRO/PER  
CHRISTOPHER DAVID BISHOP (DEC)...

(ww)

Future hearing dates: **07/23/19** Accounting Review



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIPS**

-----  
DATE: 07/23/18      TIME: 8:30      DEPT: S37P  
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CASE#: CON PS1800078

CASE NAME: MTR OF DOUGLAS OVIDO MARTINEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IRIAN A MARTINEZ

(CP)...PRO/PER

DOUGLAS OVIDO MARTINEZ

(CTP)...LENITA A SKORETZ

GENERAL INFORMATION

**Continued from 04/23/18. The Court denies the declaration of due diligence filed 03/26/18. The Court has concerns with the living situation of the conservatee and that the conservatee is not involved with a day program. Hearing continued at request of counsel. Reason: has not had time to meet with her client, and to clear notes. The Court requests IRC to write a report. Clerk's Office to notify IRC.**

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

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed 03/14/18.
3. Proposed conservatee is developmentally disabled. Lenita Skoretz appointed. Report of counsel filed 07/17/18
4. Proposed conservatee is developmentally disabled. IRC report filed 04/19/18.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, 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.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. Citation and proof of service filed 03/26/18.

8. Due Diligence Declarations filed 03/26/18 as to Virginia Martinez (paternal grandmother), Evelin Martinez (sister), and Juan Martinez (father).
  - a. Declarations were denied by Court on 04/23/18.
9. **Need** Certificate of Completion of the Conservatorship Training Class.
10. CI report filed 04/18/18.
11. ~Proposed Form Order: 03/14/18

#### RECOMMENDATION

Need to clear note 9. 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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 07/23/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1400298

CASE NAME: STEPHEN H DOTY II

HEARING:

Hearing Re: COURT INVESTIGATOR'S REPORT

COUNSEL:

APRIL R PODOLECE	(CP )...PRO/PER
STEPHEN H DOTY II	(CTP)...E JOAN NELMS
SONJA WHITE	(OBJ)...PRO/PER
STEPHEN HEINRICH DOTY	(PRO/PER)

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Court Investigator's Report

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

1. Matter set by Court after review of Court Investigator's Report filed 03/15/18.
2. Court ordered that Counsel be appointed for conservatee and matter placed on calendar.
3. Attorney James Church appointed. **Need** report of counsel.
4. Attorney Melvin Friedland reappointed as guardian ad litem for conservatee. **Need** report of GAL.

#### RECOMMENDATION

Court's discretion.

(ww)

Future hearing dates:

08/14/18 Hearing re: Court Investigator's Report

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1500115

CASE NAME: MARIA TOMASA TRUJILLO

HEARING:

Petition for PAYMENT OF COURT APPOINTED ATTY'S FEES AND COSTS

COUNSEL:

MARIA GRINDE	(CPE)...R.M. SCHLOSSER
MARIA TOMASA TRUJILLO	(CEP)...MATTHEW E. SHEASBY
MATTHEW E SHEASBY	(PET)...SHEASBY AND ASSOCIATES

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Matthew Sheasby, Esq.

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

1. Petitioner, Matthew Sheasby, Esq. was appointed counsel on 05/07/15.
2. Petitioner requests fees of \$7,236.46 for 15.80 hours at \$360 per hour for attorney services. Itemized [Decl. 06/13/18 LF pgs. 8-11].
  - a. Petitioner also indicates that there are anticipated fees for 1 hour for drafting this Petition and 1 ½ hours of appearance time for a total fee request of **\$8,136.46. JTD**
3. Petitioner also requests for \$0.46 in postage; however, postage is considered overhead and should be absorbed in costs per Local Rule 20-1406. **JTD**
4. Notice of hearing and proof of service filed 07/03/18; however, **need** notice sent to conservatee also.
5. ~Proposed Order: 06/13/18, if postage fee is approved then the order is pre-approved for signature.

RECOMMENDATION

Need to clear note 4 then Court's discretion.

(ww)

Future Hearing: 8/14/18 Final Account & Report of Maria Grinde

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600037

CASE NAME: MTR OF CHRIS CLAYTON JACKSON JR.

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CHRISTINA JACKSON

COUNSEL:

CHRISTINA JACKSON (PET)...PRO/PER  
CHRIS CLAYTON JACKSON JR (PCE)...MARK J. ANDREW FLORY

GENERAL INFORMATION:

Referred to Court Investigator for investigation and report on 04/12/16.

Continued from **07/12/16**. No appearance.

Continued from **09/20/16** by stipulation. Counsel's report to report notice of conservatee's right was sent.

Continued from **12/05/16, 02/03/17 and 04/17/17**. Counsel states that he has not located his client. There is a possibility Conservator and Conservatee are in Washington State. Attorney Flory reported last known address 1356 Watson Ave Costa Mesa, CA 92626. Referred to CI.

Continued from **10/16/17**. Court does not require a Statement of Care Plan, thus clearing probate note 2. Mr. Flory informs the Court Conservatee is currently in custody in Orange County. Pursuant to Public Guardian's request, Court relieves PG in this matter.

Continued from **12/18/17** at request of Counsel to clear probate notes. Court will keep matter in San Bernardino for now. Counsel gives oral report that Conservatee is still in custody.

**Continued from 04/16/18. The Court requests Counsel's report be filed informing the court regarding conservatee's current in custody status.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Christina Jackson, sister, appointed Conservator of the person on 04/15/15 in Riverside County.
  - a. Proposed San Bernardino Letters received on 12/05/16. However, the box for "conservator" in section 1 is not checked and the Court address is incorrect. **Need** proper letters.

2. Determination of Conservatee's Appropriate Level of Care filed 12/22/15.
3. Court Investigator Special Report filed 04/19/17.
4. **Need** report of court-appointed counsel, Mark Flory.
5. Post-Move Notice of Change of Address filed 10/16/17; however, proof of service is not dated at signature line. JTD
6. ~Proposed letters 12/05/16.

RECOMMENDATION:

Need Report of counsel and to clear note 1, then Court's discretion.

(lc/nb/ww/nb/cs/ww)

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

-----  
DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN

**SEE ALSO 19**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ROBBIN YAN-SINGZON

COUNSEL:

ROBBIN YAN-SINGZON	(CPE)...BRYAN C HARTNELL
FORTMAN S YAN	(CEP)...WALTER T. MOORE
FORTMAN S YAN	(CPE)...BRYAN C HARTNELL

GENERAL INFORMATION

Order Appointing Temporary Conservator entered 05/17/16.

Order appointing Robbin Yan-Singzon, Conservator of the person and estate entered 07/27/16, \$20,000 bond.

Continued from **01/31/17** to clear notes.

Continued from **04/18/17**. Robbin Yan-Singzon and Fortman S Yan are ordered to be present at next hearing if required documents are not filed.

Continued from **06/20/17** at request of counsel.

Continued from **09/05/17** at request of court.

Continued from **11/13/17**. Counsel will file Inventory and Appraisal this date.

Continued from **01/17/18** at request of Court to clear probate notes. Additional bond to be posted in the amount of \$47,000.00.

**Continued from 04/16/18.**

THIS CASE IS SET FOR HEARING ON Compliance Review by Robbin Yan-Singzon

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

1. Section 4b to proof of service to Notification of Conservatee's Rights filed 02/21/17 is blank. **Need proper service to include copy of order.**
2. Statement of Care Plan filed 05/10/17.
3. Determination of Conservatee's Appropriate Level of Care filed 02/01/17.
4. Inventory and Appraisal filed 11/13/17.
5. Proof of additional bond in the amount of \$27,000 filed 02/13/18; however, Court ordered additional bond of \$47,000. **Surety rider in the amount of \$47,000.00 filed 04/20/18.**

RECOMMENDATION:

Need to clear note 1 then Court's discretion.

(nb/lh/nb/lh/cs/ww)



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

-----  
DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1600098

CASE NAME: MTR OF FORTMAN S YAN

**SEE ALSO 18**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ROBBIN YAN-SINGZON	(CPE)...BRYAN C HARTNELL
FORTMAN S YAN	(CEP)...WALTER T. MOORE
FORTMAN S YAN	(CPE)...BRYAN C HARTNELL

GENERAL INFORMATION

**Continued from 09/05/17, 03/05/18 and 05/21/18.**

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Robbin Yan-Singzon, daughter, was appointed as temporary conservator of the person and estate on 05/17/16 then as Conservator of the person and estate on 06/28/16, bond \$47,000.
2. Partial No. 1 Inventory and Appraisal filed 11/13/17 and Partial No. 2 filed 04/24/18. **Need** final inventory and appraisal.
3. **Need** First accounting beginning with 05/17/16.

RECOMMENDATION

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

(cs/ww)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1700207

CASE NAME: MTR OF MADISON LEANN TIBKE

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

DENISE TIBKE (CP)...PRO/PER  
MADISON LEANN TIBKE (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **08/01/17**. Attorney Walter Moore appointed for Madison Leann Tibke.

Continued from **09/26/17**. No appearances. Notice by Judicial Assistant.

Continued from **11/21/17** on courts motion for petitioner to be present. Notice by Judicial Assistant.

Continued from **02/13/18**. Notices filed in the courtroom. The Court notes paternal grandfather is deceased and paternal grandmother has dementia. The Court finds all notice requirements are complete. Petitioner to file a declaration regarding paternal grandmother's dementia. Counsel will submit an ex parte declaration to the Court ordering the doctor or his/her designee to complete the capacity declaration.

**Continued from 04/23/18. Mr. Moore has the capacity declaration prepared to send to the doctor. Court still needs the list of required contacts and certificate of completion of conservatorship training class.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Denise Tibke (mother)

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

1. Proposed conservatee is developmentally disabled. **Need** report of Counsel Walter Moore.
2. Petitioner seeks orders related to powers under Pr. C. §2351.5 to fix residence, access confidential records, control right to contract, make and consent to all medical decisions.
3. Proposed conservatee is developmentally disabled. IRC report filed 09/21/17.
4. Petitioner seeks civil rights not be limited without court order. **JTD**
5. Petitioner seeks medical powers. **Need** Capacity Declaration.

6. List of Required Contact Information form is missing paternal grandparents. **Need** completed form.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** return of Citation.
9. Court Investigator report filed 07/25/17.
10. ~Proposed Form Order: 06/05/17

#### RECOMMENDATION

Need Report of Counsel and to clear notes 5-8. 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.

(lh/nb/lh/nb/ww)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800047

CASE NAME: ERVIN AGUILAR

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
CARLOS E AUILAR (PET)...PRO/PER  
ERVIN A AGUILAR (CEE)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

**Continued from 04/16/18. The Court determines that all grandparents are deceased. The Court requests that IRC provide a report to the court in this matter. Clerk's Office to notify IRC. Attorney CANDICE A GARCIA-RODRIGO is appointed for ERVIN A AGUILAR. The case is referred to Legal Aid for legal assistance.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Carlos Aguilar, [father/Petitioner].

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

1. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds, however, does not indicate reason. Court to clarify if petitioner is seeking these powers. **JTD**
2. Petitioner seeks to be appointed successor conservator; however, does not indicate additional information. Court to clarify if proposed conservatee is currently under conservatorship. **JTD**
3. Petitioner alleges that proposed conservatee is developmentally disabled. As this is not a petition for Limited Conservatorship, an IRC report is optional per Pr.C. §1827.5(b). **Need** IRC report per minutes on 04/16/18. Court to see Confidential Letter by IRC filed 05/03/18.
4. Petitioner requests no bond be required; however, does not indicate reason. As the only assets reported are public assistance benefits of \$6,840 and \$100 in personal property. No bond would be required Pr.C. §2323 and §2628. **JTD**
5. Petitioner does not request medical powers in item 1g, yet indicates medical treatment in item 9. **Need** verified supplement clarifying requested powers. If medical powers sought, need Capacity Declaration.

- a. Capacity Declaration filed 05/17/18; however, it is incomplete as to Office address, telephone number, ability to attend court hearing, 7b is not initialed and signature is not dated on last page of form. **Need** completed form.
6. Notice given.
7. Proposed conservatee is developmentally disabled. Attorney Candice Rodrigo appointed as counsel. Report of counsel filed 07/13/18.
8. CI report filed 04/11/18.
9. Certificate of Completion of the Conservatorship Training Class filed 04/05/18.
10. Citation with proof of service filed 03/07/18.
11. No proposed Order/Letters: Submit after hearing. .

#### RECOMMENDATION

Need IRC report, and to clear note 5. 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.**

**If estate is granted** Court to set hearing re Accounting Review for **09/30/19**. Any accounting to be filed 30 days in advance.

(cs/ww)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800170

CASE NAME: KASANDRA GUADALUPE RODRIGUEZ

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

SERGIO RODRIGUEZ (PET)...PRO/PER  
ROSA RODRIGUEZ (PET)...PRO/PER  
KASANDRA GUADALUPE RODRIGUEZ (CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Sergio & Rosa Rodriguez, 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 06/07/18; however, the office telephone number in item 2 is missing. **JTD**
3. Proposed conservatee is developmentally disabled. Attorney Craig Parker appointed as counsel. **Need** report of counsel.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, 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.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. Confidential Supplemental Information filed 06/07/18; however, signatures are not dated on page 4. **JTD**
8. **Need** return of citation.

9. **Need** Certificates of Completion of the Conservatorship Training Class by Sergio and Rosa Rodriguez.
10. **Need** Notice of Hearing and proof of service.
11. CI report filed 07/16/18.
12. ~Proposed Form Order: 06/07/18

#### RECOMMENDATION

Need Report of counsel, IRC report, and to clear notes 8-10 then Court's discretion re notes 2 and 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); Level of Care and Care Plan per Pr.C.§2352.5.

(ww)

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800177

CASE NAME: Patrick Frank Joseph Connolly

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
KIMBERLY CONNOLLY (CPE)...SHEASBY AND ASSOCIATES  
PATRICK FRANCIS JOSE CONNOLLY (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION

**Kimberly Connolly appointed as temporary conservator of the person and estate on 06/20/18, \$20,000.00 bond.**

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

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

1. Petitioner seeks bond of \$20,000.00. Estimated value is \$459,600.00 of which \$19,600.00 is personal property.
  - a. Bond of \$20,000.00 filed on 06/29/18 as to temporary appointment.
2. Petitioner seeks medical powers. Capacity Declaration filed 07/16/18.
3. Petitioner seeks dementia powers. Attorney Donnasue Smith Ortiz appointed as counsel. **Need** report of Counsel.
4. Section 11 fails to list petitioner; however, it is clear that she is the proposed conservatee's daughter and her address can be found on the List of Required Contacts. **JTD**
5. Section 11 fails to list Christopher Connolly's relationship to proposed conservatee; however, the List of Required Contacts indicates that he is the son of proposed conservatee. **JTD**
6. List of Required Contacts (Local form SB-12224) filed 06/13/18; however, Christopher Connolly's contact number is missing. **JTD**
7. Confidential Supplemental form appears to be incomplete as to facts support petitioner's allegations, services provided, alternative to conservatorship, etc. Court may wish for the form to be completed by the proposed conservator. **JTD**
8. Confidential Screening form is incomplete as to item 6b. **Need** completed form.



9. CII referral is incomplete as to other member of household's date of birth and social security number. **Need** completed form.
10. **Need** return of citation.
11. **Need** Certificate of Completion of the Conservatorship Training Class.
12. Notice given.
13. CI report filed 07/10/18.
14. ~Proposed Form Order: 06/13/18

#### RECOMMENDATION

Need Report of Counsel, and to clear notes 2, 8-11. Bond \$20,000.00. If approved, set hearing for Compliance Review for **03/04/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

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

(ww)

Superior Court of Calif, County of San Bernardino

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

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DATE: 07/23/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS00089

CASE NAME: IN THE MATTER OF GREGORY L PENNINGTON

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GREGORY LYNN PENNINGTON (CEP)...ANNETTE G DE BELLEFEUILLE  
RICHARD PENNINGTON (CPE)...CRAIG M PARKER

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 10<sup>th</sup> Account for Richard Pennington, brother, approved on 08/15/17.
2. **Need** 11<sup>th</sup> Account beginning with date of 05/20/17.

#### RECOMMENDATION

Inquire status of accounting.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**TRIAL**

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DATE: 07/23/18      TIME: 1:30      DEPT: S37P  
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CASE#: PRO PS1700079

CASE NAME: \*\*\*MF MTR OF JAMES ODELL ROBINSON\*\*\*

**SEE ALSO 26, 27**

HEARING:

Court Trial set for PETITION FOR APPOINTMENT OF ADMINISTRATOR of  
EVELYN L ROBINSON

COUNSEL:

EVELYN L ROBINSON

(PET)...CHRISTOPHER B JOHNSON

JAMES ODELL ROBINSON

(DEC)...

KATHY ROBINSON

(PET)...GAUDY LAW, INC

GERALDINE SIMMONS

(PET/OBJ)...MARA C ALLARD

No Notes-Court Trial- JTD.

(ww)

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

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DATE: 07/23/18 TIME: 1:30 DEPT: S37P  
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CASE#: PRO PS1700079

CASE NAME: \*\*\*MF MTR OF JAMES ODELL ROBINSON\*\*\*

**SEE ALSO 25, 27**

HEARING:

Hearing Re: PTN FOR LTRS OF ADMINISTRATION (EVELYN ROBINSON)

COUNSEL:

EVELYN L ROBINSON	(PET)...CHRISTOPHER B JOHNSON
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC
GERALDINE SIMMONS	(PET/OBJ)...MARA C ALLARD

**XREF: PROPS1700759** (*Lily Mae Robinson*)

GENERAL INFORMATION

Continued from 04/05/17. Case Consolidated with PROPS17000150; PROPS1700079 master file. Copy of will to be filed by any party. Mr. Smith advised court that Lily Mae Robinson was never divorced from decedent. Kathy and Evelyn Robinson deny that is the case and are advised to file divorce decree. Bond of \$165,000 will be ordered.

**Continued from 06/07/17.** Petitioner confirmed this petition to be withdrawn. Petition by Kathy Robinson dismissed. Amended petition to be served on all parties. If objections are the same as to the original petition, objector to file a declaration stating they are the same. If they are different, new objections to be filed.

Continued from **08/30/17** and **10/11/17** (no appearances).

Continued from **12/12/17**. Oral reports given by counsel (both sides)

Continued from **03/06/18**. Trial requested.

**Continued from 06/14/18. Matter set for court trial.**

THIS CASE SET FOR HEARING ON

- Petition 1 - **Amended** Petition [filed 03/28/17] for Letters of Administration with full authority under IAEA by Evelyn & Kathy Robinson, daughter.
- Petition 2 - Petition for Letters of Administration with full authority under IAEA by Geraldine Simmons, alleged daughter, for Sam Hlavaty.

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

**Petitioner 1 - Evelyn Robinson daughter**

1. Petitioners seeks bond of \$200,000. Ok.
2. Consents to appointment filed by 5 heirs on 06/09/17.
3. **Objections filed by Geraldine Simmons, alleged daughter on 03/24/17.**
4. **Kathy Robinson withdraws and revokes request to be co-petitioner and nominates Evelyn Robinson filed on 06/02/17.**
5. Amended proposed form order not submitted.

**Petitioner 2 – Geraldine Simmons, alleged daughter, for Sam Hlavaty**

**PROPS1700150**

6. Petitioners seek bond of \$320,000. Ok.
7. Petitioner Hlavaty is nominated by Lily Robinson, Cecelia Banks and Karen Abrames.
8. Proof of publication reflects 06/15/17 hearing [which was original date, which court vacated and reset]. It appears re-publication would not be required per Pr.C. § 1205. JTD
9. Petition indicates 2 unknown children. **Need** due diligence. **Supp. (02/22/18)** alleges per Pr. C. §§6401(b)(3), 6402, Decedent's separate property passes 1/3<sup>rd</sup> to the estate of his wife Lily Mae Robinson and the balance passes equally to Decedents children thorough his estate. Petition indicates Geraldine Simmons was informed that Decedent had 2 unknown children and does not know their names of locations.
10. **Objections filed by Evelyn Robinson, daughter, on 03/05/18.**
11. ~Proposed Form Order: 03/20/17

RECOMMENDATION

Need to clear note 9; matter is contested. If approved, set Accounting/Status Review for **08/22/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh/ww/lc/lh/ww/nb/ww)

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

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DATE: 07/23/18 TIME: 1:30 DEPT: S37P  
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CASE#: PRO PS1700079

CASE NAME: \*\*\*MF MTR OF JAMES ODELL ROBINSON\*\*\*

**SEE ALSO 25, 26**

HEARING:

Spousal Property Petition hearing.

COUNSEL:

EVELYN L ROBINSON	(PET)...CHRISTOPHER B JOHNSON
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC
GERALDINE SIMMONS	(PET/OBJ)...MARA C ALLARD

**XREF: PROPS1700759** (*Lily Mae Robinson*)

GENERAL INFORMATION:

Continued from **10/24/17**. Notice to be given by Mr. Johnson.

Continued from **12/12/17** for counsel to file a supplement with deeds attached.

Continued from **03/06/18**.

**Continued from 06/14/18. Matter set for court trial.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Petitioner, Geraldine Simmons (daughter), proposed Personal Representative of spouse, Lily Mae Robinson.

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

1. Petitioner requests confirmation of property passing to the surviving spouse as community property. Specifically, six parcels of improved and unimproved real properties in San Bernardino County. Petition indicates parties were married on 11/14/56 but does not set forth facts sufficient to establish a community property interest in the California real properties. **Supp. (02/22/18) states Decedent acquired real property as his separate property, after he left Lilly Mae, and pursuant to Pr. C. §§6401(b)(3), 6402, the separate property passes 1/3<sup>rd</sup> to the estate of his wife Lily Mae Robinson and the balance passes equally to Decedents children through his estate. Petition indicates Geraldine Simmons was informed that Decedent had 2 unknown children and does not know their names of locations.**
2. Need copies of vesting documents as directed by Court on 12/12/17. **Copies of Deeds affixed to supplement filed on 02/22/18.**

3. **Objection filed by Evelyn Robinson, daughter, on 03/05/18.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:  
Matter is contested.

(nb/ww)