



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/12/18

The notes on the following pages were updated approximately three court days prior to the hearing to reflect newly-filed documents. Documents filed now after that update typically will not be reviewed except on the date of hearing at the judge's discretion.

Destruction of Filed Documents:

Shredding/destruction of all court documents filed and imaged before January 2011 will begin soon. All filed/imaged documents are shredded one year after filing pursuant to court policy. Any filed original documents not retrieved timely will be permanently lost. (Wills and codicils lodged into the will vault will not be affected.)

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received, or to request the clearing of notes. No legal or procedural advice may be given by examiners in response to your email.

08/23/18lh; 09/06/18lh

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 09/12/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1501163

CASE NAME: MTR OF ROBERT T CHAMP, JR

HEARING:

Hearing re Final Discharge

COUNSEL:

ROBERT T CHAMP III

(PET)...J BENJAMIN SELTERS III

ROBERT T CHAMP JR

(DEC)...

XREF: PROPS1500953 *ROBERT T CHAMP JR*

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Robert T. Champ III, executor/trustee

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

1. Proposed Ex Parte Petition for Final Discharge and Order submitted 08/30/18 not in LF at time of review. Clerk's office notified.
2. Robert T. Champ, III, is sole beneficiary as trustee. No receipts required.

RECOMMENDATION

None.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1701093

CASE NAME: AARON VON BEAVOR

HEARING:

Hearing Re: STATUS OF SPECIAL ADMINISTRATION

COUNSEL:

ALBERT P. DIROCCO JR. (PET)...PETTLER AND MILLER
AARON VON BEAVOR (DEC)...
CONNIE VON BEAVOR (TP)...FORD WALKER HAGGERTY & BEHAR

No notes—status—JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIPS

DATE: 09/12/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700391

CASE NAME: MTR OF: AMETHYST OF HEAVEN OTUVAI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of VILIAMI M OTUVAI

COUNSEL:

VILIAMI M OTUVAI

(CP)...PRO/PER

AMETHYST OF HEAVEN OTUVAI

(CTP)...JAMES B CHURCH

NEHUSITA OTAVAI

(CPE)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Viliami M. Otuva and Nehusita Otuva appointed Limited Co-Conservators of the person on 02/07/18.
2. Proof of Mailing of Notification of Conservatee's Rights filed 04/05/18; however, item #5 is missing date of Order served with notice. **Need** proper service to include copy of Order Appointing Conservator.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan was filed 04/05/18.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800113

CASE NAME: Billie Jean Allen

SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN S34

HEARING:

Hearing Re: RECEIPT OF CI REPORT

COUNSEL:

SONJA ALLEN (CP)...
BILLIE JEAN ALLEN (CTP)...JEANNE E KENNEDY/ MITCHELL I ROTH (GAL)
SHEILA ALLEN (CPE)...TATIANNA

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Receipt of CI Report

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

1. Matter set on 07/18/18, wherein, Court appointed Mitchell I. Roth as Guardian Ad Litem for Billie Jean Allen. Matter was re-referred to Court Investigator for both Petitions for Conservatorship to be investigated, and for CI Report to be prepared by 09/12/18.
2. **Need CI Report.**
3. **Need GAL Report by Mitchell I. Roth.**

RECOMMENDATION

Inquire status.

(lh)

Future Hearings:

10/10/18: Petition for Appointment of Conservator

10/10/18 Petition for Appointment of Conservator of the Person & Estate

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

DATE: 09/12/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02023

CASE NAME: MTR OF NANCY L. MANN

HEARING:

Accounting Review

COUNSEL:

J. L. MERRITT	(CPE)...BRYAN C. HARTNELL
NANCY L. MANN	(CEP)...
RONALD KNOBLOCK	(TP)...PRO/PER

GENERAL INFORMATION

Continued from 03/14/18. Counsel intends to file Application to Terminate Court Supervision and requests a continuance.

THIS CASE IS SET FOR HEARING ON Accounting Review re J.L. Merritt and Debra Stevens

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

1. Eighth Account Current of co-conservators/co-trustees, J.L. Merritt and Debra Stevens, approved on 11/30/16 for account period ending 01/10/16.
2. No accounting or status report of administration. **Need** same.

RECOMMENDATION

Inquire status.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200275

CASE NAME: FREDERICO QUIJADA, JR. SPECIAL NEEDS TRUST

HEARING:

PETITION FOR APPROVAL OF SEVENTH Account and Report of CITIZENS BUSINESS BANK and Petition for allowance of fees filed.

COUNSEL:

CITIZENS BUSINESS BANK (PET)...RANDOLPH M SHARON

FREDERICO QUIJADA, JR. SPECIAL NEEDS TRUST (TRU)...

GLADYS QUIJADA (PET)...VELASCO LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 7th Account Current, Petition for Authorization for Modifications and Allowance of Fees by Citizens Business Bank, Trustee

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

1. Accounting period: 04/01/17 to 05/31/18
2. Assets on hand \$901, 157.47 of which \$26,758.86 is cash.
3. Trustee seeks court ratify fees already taken of **\$8,650.23** calculated at a 1.5% x a pro ration factor, minus a 50% discount. [Acct.07/13/18 LFpg71-74]
4. Randolph M. Sharon, attorney for trustee, seeks fees of **\$6,750** and costs of \$230 for 15 hours at \$450 per hour. [Acct, 7/13/18, LFpg11-12], itemization of 15 hours at \$450/hour. **JTD**
5. Attorney Misty L. Colwell, attorney for limited conservator, seeks **\$2,063.45** for attorney and paralegal services at \$395/\$190 per hour, plus costs. Itemized. [Acct, 07/13/18; LFpg4; 76-79]. **JTD**
6. Court authorized petitioner to pay up to **\$35,000** to modify Winchester Property to accommodate beneficiary. The modification includes a retaining wall, patio and slope for wheelchair needs. Order entered 10/02/17. Trustee initially hired *JDA Construction* ("JDA") to complete project; however, *JDA* abandoned the job. Trustee made a claim against bonding company for \$13,792.20 and made a claim against *JDA*, currently in arbitration at no additional expense to Trust.
7. Petitioner hired *Beyond General Contracting* to complete the project. Beneficiary's mother, Gladys Quijada, agreed to pay remaining monies owed to *Beyond General Contracting* subject to her right to claim reimbursement from Trust.

8. Petitioner requests reimbursements to *Gladys Quijada* totaling **\$56,258.95** for the following improvements:
 - a. **\$42,958.95** for retaining wall, patio and slow for wheelchair;
 - b. An additional **\$3,800** for gravel pavement on driveway for wheelchair access.
 - c. An additional **\$4,500** to widen home's door entrance for wheelchair access;
 - d. An additional **\$5,000** to repaint home's interior with washable paint. Petitioner requests reimbursement to Gladys Quijada for said sums.
 - e. Question authority to make improvements above and beyond the \$35,000 limit approved by Court Order entered 10/02/17? **Need verified supplement along with itemization of improvements and costs.**
9. Notice is complete.
10. ~Proposed Order 07/13/18

RECOMMENDATION

Need to clear note #8. If approved, set Accounting/Status Review for **07/31/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600060

CASE NAME: MTR OF JEAN SUZANNE SCATES

HEARING:

Hearing re Final Discharge

COUNSEL:

SANDY DIEDERICH (PET)...PRO/PER
JEAN SUZANNE SCATES (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge re Sandy Diederich, Executor
THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. **Need** receipts from beneficiaries, Douglas Scates, Karen Dakin, and Julie Scates.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600156

CASE NAME: LILY MARTINEZ

HEARING:

Hearing Re: Status of Settlement

COUNSEL:

ESTHER GUARDADO (PET)...FULLERTON LEMANN SCHAEFER & DO
LILY MARTINEZ (DEC)...
MARY MARIN (PET)...HARTNELL LAW GROUP
DEPT OF HEALTH CARE SRVCS (TP)...PRO/PER
INHERITANCE FUNDING (PRO/PER)...PRO/PER
CA VICTIM COMPENSATION BOARD (PRO/PER)
JOE MARTINEZ
DANIEL MARTINEZ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status of Settlement

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

1. Matter set on 06/27/18, wherein, parties indicated matter settled after mediation.
Attorney Brian Hartnell to prepare order.

RECOMMENDATION

Inquire status of Order.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600626

CASE NAME: MTR OF MICHAEL DAVID CUNNINGHAM

HEARING:

Accounting Review

COUNSEL:

MARGARET LOUISE CUNNINGHAM (PET)...PRO/PER
MICHAEL DAVID CUNNINGHAM (DEC)...

GENERAL INFORMATION

Continued from 01/10/18. No appearance, nor has an account been filed.

Continued from 03/14/18. No appearance. Citation issued to Margaret Louise Cunningham who is cited and required to appear on 05/09/18.

Continued from 05/09/18. No appearance. Court notes that the Citation issued on 03/14/18 to Margaret Louise Cunningham has not been returned to Court. Petition is not present in Court today. Citation issued to Margaret Louise Cunningham who is cited and required to appear and show cause re failure to appear/failure to file accounting.

Continued from 06/27/18. No appearance. Court notes Margaret Louis Cunningham failed appear at today's hearing and failed to file accounting. Citation issued to Margaret Louise Cunningham who is cited and required to appear on 09/12/18.

THIS CASE IS SET FOR HEARING ON **OSC Re FTA/Accounting** Review re:
Margaret Cunningham

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

1. Letter Testamentary issued to Margaret Louise Cunningham on 10/26/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need same.**
4. Declaration of Non-Service of Citation filed 05/04/18 and 08/03/18. **Need return of Citation as to Margaret Louise Cunningham. JTD**

RECOMMENDATION

Court's discretion re OSC and non-service of citation.

Inquire status.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

SEE ALSO 6, 7, 8, 9

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
MITCHELL I. ROTH	(SPA)...MITCHELL I ROTH
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP)...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO)
INHERITANCE FUNDING	(PRO/PER)
LIBERTY MUTUAL INSURANCE	(PRO/PER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

Waiver of Court Fees and Costs filed by KIMBERLY P TREBING is GRANTED

No notes—TSC—JTD

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

SEE ALSO 5, 7, 8, 9

HEARING:

Hearing Re: LETTERS OF ADMINISTRATION (SUCCESSOR)

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
MITCHELL I. ROTH	(SPA)...MITCHELL I ROTH
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP)...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	
TIMOTHY J MCELFISH	(FERRUZZO & FERRUZZO)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO)
INHERITANCE FUNDING	(PRO/PER)
LIBERTY MUTUAL INSURANCE	(PRO/PER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

GENERAL INFORMATION

Mitchell Roth appointed Special administrator on 11/15/17, bond \$300,000.

Continued from **12/20/17**.

Continued from **03/01/18** by Court to be heard with 2nd Account and Report of Kimberly Trebing.

Continued from **03/28/18**. Matter continued to trail second accounting.

Continued from 06/06/18. Counsel reports a possible settlement agreement in preparation. Notice to be given by Mitchell Roth.

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administrator with **limited** authority under IAEA by Shawn Peterson, son, for Mitchell Roth.

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

1. Letters of Special Administration issued to Kimberly Trebing on 09/07/16 and general Administration on 12/29/16; limited authority \$250,000 bond. Powers suspended on 11/15/17; Letters of Special Administration issue to Mitchell Roth on 11/30/17, \$300,000 bond.
2. Petitioner requests bond of \$250,000 (present bond in estate), for monies to be held in estate account and used for the orderly administration of the estate with all other assets/receipts to be placed into a blocked account. Estate consists of \$3,269,200 with \$957,200 in personal property. JTD
3. Randall and Peterson Patterson, sons, nominate Mitchell Roth.
4. **Objections filed 12/12/17 by Kimberly Trebing. Need** proof of service.
5. ~Proposed Form Order: 11/09/17

RECOMMENDATION

Need proof of service of objections. Court's discretion re bond. Matter is contested. If approved, set Accounting/Status Review for **11/20/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/lc/lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

SEE ALSO 5, 6, 8, 9

HEARING:

Motion Re: Application for order of immediate removal of
personal representative Filed by Petitioner SHAWN PETERSON

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
MITCHELL I. ROTH	(SPA)...MITCHELL I ROTH
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP)...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO)
INHERITANCE FUNDING	(PRO/PER)
LIBERTY MUTUAL INSURANCE	(PRO/PER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

Waiver of Court Fees and Costs filed by KIMBERLY P TREBING is GRANTED

Currently under review by legal research.

(LR)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

SEE ALSO 5, 6, 7, 9

HEARING:

Petition for REMOVAL OF ADMINISTRATOR AND REVOCATION LETTERS OF
ADMINISTRATION; SURCHARGE AND REMOVAL ETC

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
MITCHELL I. ROTH	(SPA)...MITCHELL I ROTH
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP)...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO)
INHERITANCE FUNDING	(PRO/PER)
LIBERTY MUTUAL INSURANCE	(PRO/PER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

GENERAL INFORMATION

Continued from **05/31/17**. I&A to be filed by 06/30/17 and accounting by 08/31/17.

Discovery has not yet begun.

Continued from **09/27/17**. Mr. Annigan reports parties have met and conferred and are attempting settlement. He further reports his is waiting for the inventory and appraisal.

Notice to be given by Mr. Annigan.

Continued from **11/15/17 and 12/20/17**.

Continued from **03/01/18** at request of Court to be heard with 2nd Account and Report of Kimberly Trebing.

Continued from **03/28/18**. Matter to trail second accounting.

Continued from 06/06/18. Counsel reports a possible settlement agreement in preparation.

THIS CASE SET FOR HEARING ON Petition for Removal of Administrator and Revocation of Letters Pr.C. § 8503A, Surcharge for Breach or in the Alternative, appointment of independent Pr.C. § 16000 and Petition for Allowance of Fees by Randall Peterson, son.

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

1. Letters of Special Administration issued to Kimberly Trebing on 09/07/16 and general Administration on 12/29/16; limited authority \$250,000 bond.
2. Petitioner seeks removal of administrator Kimberly Trebing. Petitioner alleges that Kimberly has not taken any action relating to the decedent's rental property insurance. Petitioner further alleges that grounds for removal are based on wasted or mismanagement of estate. Rental property have reportedly past due utilities etc.
3. **Supp 09/25/17** contains further allegations as to improper accounting, property used for executor's benefit, unaccounted property, neglect, etc. However, no supporting documentation has been filed.
4. **Supp 11/07/17** asserts administrator continues to waste and mismanage estate; four properties remain unsold; administrator is incapable of properly executing duties and is now on her 5th attorney, and continues to defy court orders by failing to provide account statements every 60 days. Petitioners request a third-party administrator.
5. **Objection filed by Kimberly Trebing on 05/23/17 and 02/14/18.**
6. Bonding company has been noticed.

RECOMMENDATION

Court's discretion.

(lc/lh/lc/lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600757

CASE NAME: MTR OF VERNON JEROME PETERSON

SEE ALSO 5, 6, 7, 8

HEARING:

Second Account and Report of KIMBERLY P TREBING and Petition for allowance of fees filed.

COUNSEL:

KIMBERLY P TREBING	(PET/APP)...ANTHONY DREW ROWE
VERNON JEROME PETERSON	(DEC)...
MITCHELL I. ROTH	(SPA)...MITCHELL I ROTH
RANDALL PETERSON	(PET)...VOORHEES & RATZLAFF
KIMBERLY P TREBING	(PET)...KINLEY & STYSKAL
SHAWN PETERSON	(PET)...SCOTT K MAXWELL
INHERITANCE FUNDING	(TP)...PRO/PER
MICHAEL C MADDUX	(MICHAEL C MADDUX)
SURETEC INSURNACE COMPANY	
GREGORY T ANNIGIAN	
TIMOTHY J MCELFIH	(FERRUZZO & FERRUZZO)
DUSTIN D SICHON	(FERRUZZO & FERRUZZO)
INHERITANCE FUNDING	(PRO/PER)
LIBERTY MUTUAL INSURANCE	(PRO/PER)

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

GENERAL INFORMATION:

Letters of Special Administration issued to Kimberly P. Trebing on 09/07/16 with expiration date of 10/17/16; special letters were not reissued.

Letters of Administration with limited authority were issued to Kimberly P. Trebing on 12/29/16; \$250,000 bond.

Letters of Special Administration issued to Mitchell I Roth on 11/15/17 with \$300,000 bond. Present administrator was ordered to turn over all assets. Blocked accounts with respect to all but amounts needed for administration of estate to remain blocked. Monies needed for administration of estate to be turned over to new special administrator. Mr. Lewis will provide the exact amount of funds in operating account. All personal property is left to the discretion of the special administrator.

Continued from 03/28/18. Bond to remain in place. Attorney Mitchell Roth represents there are currently 3 houses in escrow, a 4th house will follow. Proceeds from sale to be placed in a blocked account. Mitchell Roth to prepare Order and give notice.

Continued from 06/06/18. Matters are continued due to possible settlement agreement in preparation.

THIS CASE IS SET FOR HEARING ON Second Account and Report and Petition for Allowance of Fees by [former] Administrator, Kimberly P. Trebing

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

1. Amended First Account of Special Administrator filed 06/20/17 has not been approved by Court. **Need Order on Amended First Account of Special Administrator prior to approval of this "Second" Account and Report.**
Note: Hearing on amended first account [of special administrator] set on 03/01/18 was previously vacated. However, no future hearing on calendar.
JTD
2. Accounting period: 12/29/16 through 11/15/17. It appears this is administrator's 'first account current' as accounting period commences the date general letters were issued. Does Court wish to deem this a first and final account? **JTD**
3. Declaration of Mitchell I. Roth filed 03/22/18 **and 08/23/18** regarding status of sale of real property.
4. Assets on hand: \$2,723,601.13, consisting of \$714,601.13 in cash and remaining in real property. However, not all assets have been marshalled.
5. Petitioner requests partial payment of statutory fees of \$21,500.00. **Supp filed 05/29/18 with calculation. JTD**
6. Petitioner requests reimbursement for advanced costs in the amount of \$8,508.76 and \$1,054.57.
 - a. Costs of \$1,054.57 includes copies and faxes (totaling \$168.41) generally not allowed per Local Rule 20-909.
 - b. **Supp 05/29/18** alleges costs of \$8,505.76 were carried over from first accounting and have not yet been paid. Costs are itemized within first accounting. However, first accounting costs total \$13,928.83 [See 1st Acct, 4/11/17, LFpgs11-13]. **Supplement does not clear note. Need reconciliation of costs requested from first accounting.**
7. **Need** bank statement re Logix account per Local Rule 20-908.
8. Notice was given.
9. No proposed order submitted.

RECOMMENDATION:

Need Order on Amended First Account of Special Administrator.

Need to clear note #6- #7 then Court's discretion. If approved, Court to set hearing re receipts and final discharge for **09/25/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601214

CASE NAME: MTR OF RONALD CLIFFORD WADE

HEARING:
Accounting Review

COUNSEL:

BRIAN WADE (PET)...PRO/PER
RONALD CLIFFORD WADE (DEC)...

GENERAL INFORMATION

Continued from 05/02/18 at request of petitioner to file accounting.

Continued from 08/01/18 to retain Counsel and file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review re Brian Wade

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

1. Brian Wade was appointed Executor on 02/22/17 with full authority, letters issued 04/14/17. Sale proceeds to be placed in blocked account in lieu of bond.
2. Inventory and Appraisal filed 08/15/17.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status. When documents are not filed as ordered, Court may set a hearing in accord with Pr. C. §2655.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700144

CASE NAME: MTR OF NORMA L MATTHEWS

HEARING:

Accounting Review

COUNSEL:

SCOTT R MATTHEWS (PET)...PRO/PER
NORMA L MATTHEWS (DEC)...

GENERAL INFORMATION

Continued from 06/27/18. Court notes petitioner has failed to appear at today's hearing and did not contact Court as to nonappearance. Court orders Scott Matthews to personally appear at continued date. Notice given by Judicial Assistant.

THIS CASE IS SET FOR HEARING ON Accounting Review re Scott Matthews, administrator with will annexed

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

1. Letters of Administration with will annexed and limited IAEA authority issued to Scott Matthews (son) on 04/19/17; no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700325

VACATED

CASE NAME: MTR OF HOWARD LEE STOVALL

HEARING:

Accounting Review

COUNSEL:

LARRY STOVALL

(PET)...JONATHAN P HUBER

HOWARD LEE STOVALL

(DEC)...

First and Final Account and Report filed 07/27/18.

Future hearing date: 10/04/18 – First and Final Account of Larry Stovall, administrator

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700945

CASE NAME: MTR OF EDWARD EUGENE MILLER

HEARING:

FIRST AND FINAL Account and Report of TINA MARIE RHODES and
Petition for allowance of fees filed.

COUNSEL:

EDWARD EUGENE MILLER (DEC)...
TINA MARIE RHODES (PET/ADM)...WILLIAM K SWEENEY

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report; Petition
for Fees and Final Distribution by Tina Marie Rhodes, Administrator

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

1. Assets on hand: \$157,563.14, cash held in attorney-client trust account.
2. Statutory fees of **\$6,857**, each, requested by petitioner and attorney. Calculated. **JTD**
3. Administrator and her husband, Larry Rhodes, provided labor to prepare real property for sale. The property required substantial repairs due to deterioration and heavily smoke-stained interior. Petitioner and her husband charged \$40 per hour to make repairs, totaling \$3,960. Generally described. Acct, LFpg29]. **JTD**
4. Petitioner requests approval of reimbursements to heirs. Itemized [Acct, 7/31/18, LFpg28] as follows:
 - a. Tina Marie Rhodes - \$5,362.50 (includes labor described in note #3);
 - b. Patricia Boultris - \$1,000;
 - c. Kenneth Walton - \$1,829.86
5. Attorney requests reimbursement of \$507.09 for advanced costs; however, costs include \$46.59 in postage which is not reimbursable per Local Rule 20-909. **JTD**
6. Petitioner requests reserve of \$1,499.99. **JTD**
7. Notice is complete.
8. ~Proposed order: 07/31/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **09/25/19**.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700960

CASE NAME: MAURINE TINNEY AKA GERTRUDE AMMONS

HEARING:

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

COUNSEL:

KRISTA WAGNER	(PET)...PRO/PER
MAURINE TINNEY	(DEC)...
LARRY WAYNE AMMONS	(PET)...MICHAEL C MADDUX
GARY AMMONS	(PET)...PRO/PER

Address: 5440 Osburn Road, San Bernardino, CA 92404

Appraised Value: \$230,000. **Need** reappraisal per Pr. C. §10309.

Sale price: \$280,000

First overbid: \$285,000

Deposit: \$2,000. **Need** at least 10% down, unless FHA or VA loan per Local Rule 20-807.

Commission: 6%: 3.5% to Carlos Jaramillo/ 2.5% to BlockChain Realty

Additional bond: Funds to be placed in blocked account with CitiBank.

Reason for Sale: Administration expenses, debts, taxes, etc.

Exposure to Market: MLS listing, open house, direct mailings

Notice: Notice is complete.

~Proposed Form Order: 07/31/18

Future Hearing: 5/22/19 Accounting Review

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800334

CASE NAME: Mtr of Timothy Anast

HEARING:

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

COUNSEL:

TIMOTHY DAVID ANAST (PET)...FULLERTON LEMANN SCHAEFER & DO
TIMOTHY ANAST (DEC)...
DEBRA GOODRO (OBJ)...RICKARD L BORG

GENERAL INFORMATION

Continued from **05/16/18**. Objections have been filed by Debra Goodro. Matter continued for probate notes to be cleared and response to objections to be filed.

Continued from 07/18/18. Attorney Rickard Borg to file a will contest on behalf of his client by 09/05/18.

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Timothy Anast, son

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

1. Will waives bond. Estimated assets total \$180,000 consisting of \$120,000 in real property and remaining in personal property.
2. **Objection by Debra Goodro, daughter, filed 05/11/18. Supplement to Objection filed 06/18/18.**
3. **Will Contest by Debra Goodro, daughter, filed 08/13/18.** Will Contest and Summons must be served in the manner required in a civil action generally. Pr.C. §§8250; CCP §§412.10–417.40. **Need same.**
4. ~Proposed Form Order: 04/09/18

RECOMMENDATION

Matter is contested.

Need to clear note #3 then Court's discretion re bond. If approved, set Accounting/Status Review for **11/20/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800500

CASE NAME: Shelba Jean Kirkendall

SEE ALSO 15B

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

**SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN S34
COUNSEL:**

KENNETH KIRKENDALL (PET)...TERRY A BEECHER
LINDA SHELTON (PET)...JAMES L HEYWOOD AND
SHELBA JEAN KIRKENDALL (DEC)...

GENERAL INFORMATION

Continued from 06/28/18. Competing Petition and objection will be filed by daughter.

**Letters of special administration issued to Kenneth Kirkendall on 08/15/18;
\$325,000 bond.**

Continued from 08/30/18. Matter set for mediation on 09/12/18 in Dept S34.

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Letters of Administration with full authority under IAEA by ***Kenneth Kirkendall, son.***
- Petition 2 - Petition for Letters of Administration with full authority under IAEA by ***Linda Shelton, daughter.***

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

Petitioner 1 - Kenneth Kirkendall, son.

1. Petitioner seeks bond of \$25,000. Net estate value is \$310,500; \$2,500 is personal property. As petitioner seeks full authority, court may wish to require \$310,500 bond. **JTD**
2. **Objections filed on 07/18/18 by Linda Shelton alleging Kenneth has a copy of a will; however, no will has been admitted to probate; therefore, both heirs/petitioners have equal shares in estate.**
3. **Response to objections filed on 08/08/18 by Kenneth Kirkendall.**
4. ~Proposed Form Order: 05/22/18.

Petitioner 2 – Linda Shelton, daughter

5. Petitioner seeks bond; however, does not state amount. Net estate value is \$377,000 of which \$20,000 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).

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

6. **Need** proof of publication.
7. **Need** duties and liabilities form.
8. ~Proposed Form Order: 07/18/18.

RECOMMENDATION

Matter is contested. Need to clear notes 6-7, Court's discretion re bond. Parties have equal priority. If approved, set Accounting/Status Review for **11/07/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800500

CASE NAME: Shelba Jean Kirkendall

SEE ALSO 15A

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

SAME DAY HEARING: MEDIATION SETTLEMENT CONFERENCE @ 8:30 IN S34

COUNSEL:

KENNETH KIRKENDALL (PET)...TERRY A BEECHER
LINDA SHELTON (PET)...JAMES L HEYWOOD AND
SHELBA JEAN KIRKENDALL (DEC)...

See notes on prior matter #15.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800755

CASE NAME: LANCE MITCHELL PORTER

HEARING:

Petition to Determine Succession to Real Property

COUNSEL:

DOLORES VILLAHERMOSA (PET)...FD WHITLEY
LANCE MITCHELL PORTER (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Dolores Villahermosa, Trustee of the Lance Mitchell Porter Trust

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

1. Petitioner seeks 100% interest in decedent's 50% interest in real property per the will.
2. Notice is complete.
3. ~Proposed Form Order: 8/8/18

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST

SEE ALSO 16B

HEARING:

Petition for (VERIFIED) PETITION BY CHERYL FULKERSON FOR THE
REMOVAL OF DOLORES BERTOLINO ETC

COUNSEL:

CHERYL FULKERSON (PET)...GRESHAM SAVAGE NOLAN AND TIL
THE 1997 BERTOLINO FAMILY TRUST (TRU)...
CHERYL FULKERSON (PET)...ELIZABETH MCDONOUGH BARRY
DOLORES BERTOLINO (OBJ)...LEWIS RILEY LLP

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino
Page: 16B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/12/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700125

CASE NAME: THE 1997 BERTOLINO FAMILY TRUST

SEE ALSO 16A

HEARING:

Petition for (verified) by Cheryl Fulkerson for order compelling redress of breach of trust

COUNSEL:

CHERYL FULKERSON (PET)...GRESHAM SAVAGE NOLAN AND TIL
THE 1997 BERTOLINO FAMILY TRUST (TRU)...
CHERYL FULKERSON (PET)...ELIZABETH MCDONOUGH BARRY
DOLORES BERTOLINO (OBJ)...LEWIS RILEY LLP

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800074

CASE NAME: DAVIS FAMILY TRUST DATED OCTOBER 8, 2010

HEARING:

Petition for Require transfer of property to Succesor Trustee
and for atty's fees & costs & surcharge

COUNSEL:

DAVIS FAMILY TRUST (TRU)...
ANGEL DAVIS (STE)...HARTNELL LAW GROUP

Currently under review by legal research.

(LR)

NOTICE

Notice is complete. However, **need** copy of trust to confirm noticed individuals.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800154

CASE NAME: MTR OF THE WILLIAM R WALTON SEPARATE

HEARING:

Petition for AN ORDER COMPELLING TRUSTEE TO PERFORM DUTIES
OR IN THE ALTERNATIVE ETC

COUNSEL:

WILLIAM L WALTON (PET)...HART KING & COLDREN
BARBARA L BLACKAMORE (PET)...HART KING & COLDREN
STEVEN R WALTON (PET)...HART KING & COLDREN
THE WILLIAM R WALTON SEPARATE TRUST (TRU)...

Currently under review by legal research.

(LR)

NOTICE

Need Notice of Hearing and Proof of Service as to Ursula Ball-Walton in her individual capacity.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0700246

CASE NAME: JASON RICHARD SAMPSON

HEARING:

Hearing Re: Successor Conservator Petition

COUNSEL:

MARY JEAN DUPONT	(CP)...PRO/PER
STEPHEN P DUPONT	(CP)...PRO/PER
JASON RICHARD SAMPSON	(CTP)...SHERRI L KASTILAHN
ANGELA REED	(CP)...PRO/PER
JASON RICHARD SAMPSON	(CEE)...

GENERAL INFORMATION

Mary and Stephen Dupont were appointed co-conservators of the person of Jason Richard Sampson on 03/19/08.

Stephen Dupont passed away, and Angela Reed was appointed as successor co - conservator of the person on 03/13/11.

Court accepted Mary Dupont's resignation on 06/04/14, and Angela Reed was appointed Successor Conservator of the person only.

THIS CASE IS SET FOR HEARING ON Successor Conservator Petition as to Jason Richard Sampson

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

1. Matter set on 05/31/18, wherein, Court read and considered Court Investigator Report filed 05/25/18; Court reappointed Counsel Sherri Kastilahn for Jason Richard Sampson and set hearing re successor conservatorship petition.
2. **Need** report of counsel Kastilahn.

RECOMMENDATION

Inquire status of successor petition.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900106

CASE NAME: CANDICE MAY SIMMERS

HEARING:

Hearing Re: Amended Ptn for Appt of Probate Conservator

COUNSEL:

GEORGE J SIMMERS	(CPE)...CALDWELL, KENNEDY & PORTER.
CANDICE MAY SIMMERS	(CEP/CTP)...
VIRGEL PAUL SIMMERS	(CP)...JEANNE E KENNEDY
MARY ANN SIMMERS	(CPE)...JEANNE E KENNEDY
SANDRA L. TURNER	(PET)...DAVID & TURNER
G. DAN JOHNSON	(PET)...CALDWELL, KENNEDY & PORTER
ALICE LANDAU JOHNSON	(CEE)...

GENERAL INFORMATION

George Simmers (father) was appointed Conservator of the person and estate on 06/17/09; Mary Ann Simmers (mother) was appointed Co-Conservator of the person and estate on 01/27/10.

Amended Letters, person only, issued 10/20/10 as to George Simmers and Mary Ann Simmers.

George Simmers passed away 03/20/16.

THIS CASE SET FOR HEARING ON "Amended" Petition for Appointment of Conservator person only by Mary Ann Simmers, Conservator/mother

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

1. Petitioner, Mary Ann Simmers, requests appointment of herself and Virgel Paul Simmers (brother) as Co-Conservators of the person only. However, Order was already entered as to Mary Ann Simmers as conservator on 01/27/10. It appears this should be a Petition for Appointment of Co-Conservator, Virgel Paul Simmers, only. Does Court wish to deem petition to exclude request for appointment of Mary Ann Simmers, or alternatively require an amended petition? **JTD**
2. Petitioner seeks medical powers. Capacity Declaration filed 08/08/18.
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship, Court may wish to reappoint counsel, *Sandy Turner*, and require report for proposed conservatee per Pr.C. §1470. **JTD**

4. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
5. **Need** Court Investigator report.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. Return of Citation filed 08/29/18.
8. ~Proposed Form Order: 08/08/18

RECOMMENDATION

Need to clear notes 5-6. If approved, set hearing for Compliance Review for **04/17/19** 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)

Future Hearing: 10/24/18 Accounting Review re SNT

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300065

CASE NAME: LIDIA DEKTEROV

SEE ALSO 28

HEARING:

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

COUNSEL:

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

XREF: PROPS1400495 *THE SAVAGE TRUST*

GENERAL INFORMATION:

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

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

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

Matter is continued for parties to meet and confer

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

Continued from 07/16/18.

GENERAL INFORMATION

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

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

1. Conservatee died on 08/21/16.

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

RECOMMENDATION

Matter is contested.

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/25/19**.

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

Future Hearing:

10/11/18 Readiness Calendar

10/24/18 Court Trial on 2nd & Final Account

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300245

CASE NAME: ROSE MARY WILLIAMS

HEARING:

Accounting Review

COUNSEL:

JOYERIA LEDAY	(CP)...ARMENTA LAW
VALARIE EVANS-BURBANK	(CE)...ARMENTA LAW
GALE STINSON	(PET)...ARMENTA LAW
DONNA OSBORN	(CPE)...LAYNE A BARTHOLOMEW
ROSE MARY WILLIAMS	(CTE/CEP)...MITCHELL I ROTH
MITCHELL I ROTH	(PET)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Valarie Evans-Burbank

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

1. Court approved Amended First Account Current and Report on 01/02/18.
2. **Need** Second Account Current.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500020

CASE NAME: JOSEPH G EVANS SR

SEE ALSO 23A, 23B

HEARING:

Accounting Review

COUNSEL:

JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR
MARY TURCOTTE EVANS	(OBJ/PET)...PRO/PER

GENERAL INFORMATION

Continued from **04/25/18**.

Continued from 07/25/18. Counsel states accounting is complete and is pending client's review and verification.

THIS CASE IS SET FOR HEARING ON Accounting Review of Joseph G. Evans, Jr, Conservator

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

1. Court approved First Account and Report of Joseph G. Evans, Jr, on 10/18/17.
2. Conservatee passed away on 08/23/17.
3. **Need** Second and Final Account or Status Report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500020

CASE NAME: JOSEPH G EVANS SR

SEE ALSO 23, 23B

HEARING:

Petition for attorney fees

COUNSEL:

JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR
MARY TURCOTTE EVANS	(OBJ/PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Walter T. Moore

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

1. Petitioner, Walter T. Moore, GAL, for Joseph G. Evans, Sr, requests fees of **\$3,640** for 9.10 hours at \$400 per hour for attorney services during period of 03/06/16 to 03/29/17. Itemized. [Petition, 08/29/18, LFpg3]. **JTD**
2. **Petition was not filed until 08/29/18; proof of service shows notice was mailed prior to filing of petition on 08/28/18. JTD**
3. ~Proposed Order: 08/29/18

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500020

CASE NAME: JOSEPH G EVANS SR

SEE ALSO 23, 23A

HEARING:

Petition for attorney fees no. 2

COUNSEL:

JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR
MARY TURCOTTE EVANS	(OBJ/PET)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Walter T. Moore

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

1. Petitioner, Walter T. Moore, GAL, for Joseph G. Evans, Sr, requests fees of **\$5,737.50** for 15.3 hours at \$375 per hour for attorney services during period of 05/02/15 to 02/01/16. Itemized. [Petition, 08/29/18, LFpg3]. **JTD**
2. **Petition was not filed until 08/29/18; proof of service shows notice was mailed prior to filing of petition on 08/28/18. JTD**
3. ~Proposed Order: 08/29/18

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600014

CASE NAME: MTR OF GLORIA THORNTON

HEARING:

First Account and Report of NATALIE BLICKENSTAFF and Petition
for allowance of fees

COUNSEL:

DAVID LANDO	(CP)...ROBERTA L. TAYLOR & ASSOC
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL
GLORIA THORNTON	(PET/CEE)...JEANNE E KENNEDY
JEANNE E KENNEDY	(PET)...JEANNE E KENNEDY
NATALIE BLICKENSTAFF	(PET)...JENNIFER M DANIEL

GENERAL INFORMATION:

Continued from 07/02/18 for Ross Thorton to file written objections.

THIS CASE IS SET FOR HEARING ON First and Current Account of **Conservator and Trustee** and Petition for Fees by Natalie Blickenstaff, PPF/conservator/trustee

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

1. **Note:** Petitioner indicates that the Court authorized the conservatorship and trust accounting to be filed in one document.
2. Accounting period: 07/27/16-12/15/17
3. Assets on hand: \$447,321.66 of which \$71,321.66 is cash and the balance in real property.
4. Petitioner requests fees in the amount of \$21,427.50 for 27.00 hours at \$95.00/hour and 150.90 hours at \$125.00/hour. Itemized. [LF, pgs. 30-69]. **JTD**
5. Attorney requests fees in the amount of \$68,207.50. Billed at 205.4 hours at \$325.00/hour attorney time and 10 hours at \$125.00/hour paralegal time; plus \$202.50 costs advanced. Itemized. [LF, pgs. 71-129]. **JTD**
6. Notice given.
7. **No written objections filed as of review on 08/27/18.**
8. Proposed Order: 05/29/18 Court's discretion re: notes 5 & 6

RECOMMENDATION:

Court's discretion. If approved, Court to set hearing next Accounting Review hearing on **07/15/19**.
(ww/lh)

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

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700360

CASE NAME: MTR OF BRITNY CLEVINGER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of RACHEL WATSON

COUNSEL:

RACHEL WATSON (CP)...PRO/PER
BRITNY CLEVINGER (CTP)...JANET LATOURETTE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review re Rachel Watson

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

1. Rachel Watson appointed Limited Conservator of the person on 02/07/18.
2. Notification of Conservatee's Right filed.
3. Determination of Conservatee's Appropriate Level of Care filed 08/31/18.
4. Care Plan filed 08/31/18.

RECOMMENDATION

None.

(lh)

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800115

CASE NAME: Gabriel R Baeza

SEE ALSO 26A

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JOAQUIN RODRIGUES BAEZA (CPE)...
GABRIEL R BAEZA (CEP)...J DAVID HORSPPOOL
GLORIA BAEZA (OBJ/PET)...PRO/PER

XREF: FAMSS1803922 GABRIEL R BAEZA -N- GLORIA BAEZA

GENERAL INFORMATION

Continued from **05/01/18**. Joaquin Rodrigues Baeza appointed Temporary Conservator of the person and estate; \$30,000 bond.

Continued from **05/30/18**. Return of Citation is waived as proposed conservatee is present this date. Matter continued to clear probate notes. Gloria Baeza to file written objections and competing petition. All existing temporary orders to remain in full force and effect.

Continued from 07/18/18. Gloria Baeza to file a competing petition for conservatorship. Court directs the clerk's office to set it on calendar for 09/12/18. All existing temporary orders to remain in full force and effect until 09/12/18.

THIS CASE SET FOR HEARING ON

- **Petition #1** [filed 04/18/18] for Appointment of Conservator person and estate by *Joaquin Rodrigues Baeza*, brother
- **Petition #2** Petition [filed 07/18/18] for Appointment of Conservator person and estate by *Gloria Baeza*, spouse

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED: Petition#1 by Joaquin Baez (brother)

1. Petitioner seeks bond of \$30,000. Estate assets appear to consist primarily of public assistance benefits, automobiles, and personal property totaling \$30,000. Question if proposed conservator is the representative payee; if so, question need for estate powers?

2. Petitioner requests orders authorizing powers under Pr. C. §2590. However, **need attachment 1d specifying powers and facts.**
3. Petitioner requests orders relating to capacity of proposed conservatee under Pr. C. §1873 or §1901; however, **need attachment 1e with specified orders and facts.**
4. Petitioner requests orders relating to powers and duties under Pr. C. §2351-2358; however, **need attachment 1f with specified orders and facts.**
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. Petitioner, Joaquin Baeza, alleges he was appointed guardian of proposed conservatee in the State of Nevada in 2015, case number G-15-041595-A. Court to inquire. See Petition, 4/18/18, LFpg12.
7. CI Report filed 05/15/18.
8. Report of Counsel J. David Horspool.
9. **Need** Confidential Screening form.
10. **Need** Notice of Hearing and Proof of Service as to Maria Baeza (mother) and siblings: Blanca Torres; Sylvia Saenz; Norma Ramirez; Veronica Ruiz; Anita Ballesteros; Jessica Kastanek; Carmen Eassa.
11. Return of Citation filed 07/13/18 with proof of mailed service. **Need** proper personal service if Conservatee will not attend hearing.
12. Proof of Completion of the Conservatorship Training Class filed.
13. **Objections by Gloria Baeza filed 05/29/18; however, it is not verified. Need same.**
14. ~Proposed Form Order: 04/18/18

Petition #2 by Gloria Baeza (spouse)

15. Petitioner seeks bond of \$30,000. Appears sufficient.
16. Petitioner seeks additional orders for powers under Pr. C. §2590 to buying/selling any personal or real property. **JTD**
17. Second Report of Counsel J. David Horspool filed 08/27/18.
18. CI Report filed 09/05/18.
19. Petitioner seeks medical powers. **Need** Capacity Declaration.
20. **Need** Certificate of Completion of the Conservatorship Training Class.
21. **Need** Notice of Hearing and Proof of Service as to Maria Baeza (mother) and siblings: Blanca Torres; Sylvia Saenz; Norma Ramirez; Veronica Ruiz; Anita Ballesteros; Jessica Kastanek; Carmen Eassa.
22. **Need** return of Citation.
23. Declaration by Gloria Baeza filed 07/18/18 responding to x-ref matter re Petition for Nullity of Marriage. However, response should be filed within family law matter.
24. **Objections by Joaquin Baeza filed 09/04/18.**
25. No proposed order submitted.

RECOMMENDATION

Matter is contested.

Need to clear notes #3-5; #8-11; #13; #19-22.

If approved, set hearing for Compliance Review for **04/17/19** for the filing of the required documents and hearing re Accounting Review for **11/20/19**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 26A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800115

CASE NAME: Gabriel R Baeza

SEE ALSO 26

HEARING:

PETITION FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

JOAQUIN RODRIGUES BAEZA (CPE)...

GABRIEL R BAEZA (CEP)...J DAVID HORSPOOL

GLORIA BAEZA (OBJ/PET)...PRO/PER

XREF: FAMSS1803922 GABRIEL R BAEZA -N- GLORIA BAEZA

See notes on prior matter #25.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800184

CASE NAME: MTR OF JAMES CHRISTOPHER ANDREW CORONADO II

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JAMES CORONADO (CP)...MARK H MCGUIRE

SHIRLEY CORONADO (CP)...MARK H MCGUIRE

JAMES CHRISTOPHER ANDREW CORONADO II (CTP)...

GENERAL INFORMATION

On 06/22/18, Court appointed attorney Mark Flory as GAL for James Coronado II.

Continued from 07/18/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by James and Shirley Coronado (parents)

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

1. Court to determine if a limited conservatorship is appropriate.
2. Petitioner seeks medical powers. Capacity Declaration filed 07/06/18.
3. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
4. **Report of Mark Flory (GAL) filed 08/22/18.**
5. **IRC Letter filed 07/12/18. JTD**
6. **CI Report filed 07/16/18.**
7. Proof of Completion of the Conservatorship Training Class filed.
8. Return of Citation filed 06/25/18.
9. ~Proposed Form Order: 06/15/18

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **04/17/19** 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)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500272

CASE NAME: MTR OF CHELSEA STOYKOVICH

HEARING:

Hearing Re: Status on Visitation

COUNSEL:

MERLINA BURTON	(PET)...PRO/PER
CHELSEA STOYKOVICH	(PCE)...MITCHELL I ROTH
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL

Waiver of Court Fees and Costs filed by MERLINA BURTON is GRANTED

No notes—status only—JTD

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

DATE: 09/12/18 TIME: 9:30 DEPT: S36P

CASE#: PRO PS1400495

CASE NAME: THE SAVAGE TRUST

SEE ALSO 21

HEARING:

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

COUNSEL:

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

XREF: CONPS1300065 LIDIA DEKTEROV

GENERAL INFORMATION:

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

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

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

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

Continued from 07/16/18. Victor Dekterov to file written objections to account by 08/31/18.

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

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

1. Accounting period: 02/05/16 to 08/14/17, although it should commence as of date of appointment as Successor Trustee on **01/06/16**. However, the accounting appears to overlap with prior trustee's final accounting period ending 04/18/16. Need verified supplement. **(Supp 01/17/18 petitioner indicates that the trust property was not received from Diane Harkison until 02/05/16.) JTD**

2. Assets on hand: \$73,137.14, cash. **Supplement filed 04/24/18 indicates decedent' residence is also a part of the trust; however, it was not valued by former trustee. Petitioner intends to appraise property and will be reflected on the next accounting period. JTD**
3. Current bond: \$200,000.00.
4. Assets marshalled from former trustee, Diane Harkison, in the amount of \$161,761.84 are identified as Schedule "A" Receipts; however, they should be identified as assets on hand at beginning of account period. **JTD.**
5. Petitioner requests attorneys' fees of \$4,900; however, Exhibit "B" with itemization of attorney time and fees is not included as alleged. **Need verified supplement. (Supp. 01/17/18 includes itemization of 14 hours at \$350.00/hour attorney time for total of \$4,900.00.) JTD**
6. **Objections by Victor Dekterov filed 09/04/18. Need verification and proof of service.**
7. No proposed order submitted.

RECOMMENDATION:

Matter is contested.

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

(lh/ww/cs/ww/lh)

Future Hearings:

10/11/18 Readiness Calendar

10/24/18 Court Trial on 1st Account

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 09/12/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0900588

CASE NAME: LASHONDA HOWARD

HEARING:

Accounting Review

COUNSEL:

INLAND COUNTIES REG CNTR (PET)...STEVEN K BECKETT

LASHONDA HOWARD (BEN)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re IRC

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

1. Court approved 7th Account Current of IRC on 10/18/17.
2. **Need** 8th Account Current.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700370

CASE NAME: MTR OF PHYLLIS VALENTINO

HEARING:

Accounting Review

COUNSEL:

JENOICE RAY (PET)...JAMES L HEYWOOD AND ASSOCIATES
PHYLLIS VALENTINO (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Jenoice Ray,
Administrator

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

1. Letters of Administration with full authority issued to Jenoice Ray, daughter,
on 07/05/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/12/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800528

VACATED

CASE NAME: JOHN S WHITBY

HEARING:
Accounting Review

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

Future hearing dates: 10/18/18 – Receipt of Bond
09/12/19 – Accounting Review

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 09/12/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400368

CASE NAME: GLORIA RODRIGUEZ

HEARING:

Hearing Re: COURT INVESTIGATOR REPORT

COUNSEL:

FRANCISCA MARTINEZ	(CP)...CHRISTOPHER A POULOS
JUAN MARCOS SARABIA	(CP)...CHRISTOPHER A POULOS
GLORIA RODRIGUEZ	(CEE)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 03/14/18. Ms. Daniel gives an oral report that she has been unable to locate her client. She has been informed that she is homeless, living with her boyfriend and pregnant. Court recommends Counsel contact APS and Conservatee's parole officer for assistance locating her.

THIS CASE IS SET FOR HEARING ON COURT INVESTIGATOR REPORT

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

1. Matter set on 01/19/18 upon Court's review of Court Investigator Special Report filed 12/27/17. Court appointed Jennifer M Daniel as Counsel for Gloria Rodriguez.
2. **CI Report filed 08/21/18.**

RECOMMENDATION

None.

(lh)