



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/13/18

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.

08/13lc

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: 09/13/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500773

CASE NAME: JAMES PAUL LYNCH

HEARING:

Accounting Review by ***

COUNSEL:

JAMES PAUL LYNCH

(DEC)...

JULIE LYNCH WILEY

(PET)...GREGORY T ANNIGIAN

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 Julie Wiley, daughter, on 06/05/17; limited authority, \$125,000 bond.
2. Previous status report approved 09/14/17.
3. **Need** accounting or further status report.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 09/13/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600031

CASE NAME: BEVERLEY DAWN HEBERT

HEARING:

Accounting Review by ***

COUNSEL:

BEVERLEY DAWN HEBERT (CEP)...JENNIFER DANIEL

NICOLE MARIE HEBERT (CPE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. 1st Account for Nicole Hebert, granddaughter, approved on 12/14/17.
2. **Need** 2nd Account beginning with 06/01/17.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/13/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600131

Vacated

CASE NAME: MTR OF NANCY L DUGAN

HEARING:

Hearing Re: RECEIPTS & FINAL DISCHARGE AS TO MARGARET DUGAN

COUNSEL:

CYNTHIA J WILLIAMS (CEP)...AMY L GOSTANIAN

MARGARET T DUGAN (CPE)...AMY L GOSTANIAN

NANCY L DUGAN (CEP)...

Final discharge filed 01/08/18 re Margaret Dugan.

(lc)

Future Hearing: 07/25/19 Accounting Review re ***Cynthia Williams***.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

SEE ALSO 2, 3

HEARING: Petition for ORDR TO RECOVER POSSESSION OF PERSONAL
PROPERTY BELONGING TO ESTATE

COUNSEL:

EVELYN JOYCE MURRAY (DEC)...
KIMBERLI MURRAY (TP)...BRENT D GRIDER
KIMBERLY PATRICE MURRAY (PET)...PRO/PER
VINCENT EUGENE MURRAY (PET)...THOMAS W DOMINICK

GENERAL INFORMATION:

Continued from 5/16/16 and 08/03/16. Counsel request M.S.C.

Continued from 10/19/16, 01/11/17, 03/22/17, and 10/18/17. Stipulated trial date.

Continued from 02/15/18 and 03/14/16 as parties agree to mediation set for 05/02/18.

Continued from 05/02/18. Matter not re-reviewed. Trial requested. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Petition to recover possession of estate personal property Pr.C. § 850 by Vincent Murray, son.

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

1. Vincent Murray, administrator, petitions for recovery of personal property allegedly belonging to the estate.
2. Petitioner alleges that respondent Kimberly Murray has retained possession of the subject personal property but does not have an ownership interest in those items. Petitioner adds that he has made written demand for the items but that respondent has failed to return the property.
3. Petitioner requests an order determining the estate ownership of the property, for return of the property by respondent within five days, for the issuance of a writ of possession for the property, for \$500/mo as reasonable use of the property, for double damages pursuant to Pr.C. 859, and for costs of suit.
4. The subject property is listed at Exhibit A to petition (furnishings, antiques, electronics, jewelry, etc.).
5. **Objection filed 5/12/16 by Kimberly Murray.**
6. ~Proposed Order 3/29/16.

RECOMMENDATION

Matter is opposed.

(ds/sa/lc/lh)

Future Hearing:

09/24/18 *Court Trial*

09/24/18 Petition for order to recover possession etc.

09/24/18 First account and report etc.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

SEE ALSO 1, 3

HEARING:

FIRST Account and Report of VINCENT EUGENE MURRAY and Petition
for allowance of fees filed.

COUNSEL:

EVELYN JOYCE MURRAY (DEC)...
KIMBERLI MURRAY (TP)...BRENT D GRIDER
KIMBERLY PATRICE MURRAY (PET)...PRO/PER
VINCENT EUGENE MURRAY (PET)...THOMAS W DOMINICK

GENERAL INFORMATION

**Continued from 3/30/16, 5/16/16, 08/03/16, 10/19/16, 01/11/17, 03/22/17, 10/18/17,
02/15/18, 03/14/18 and 05/02/18. Matter not re-reviewed. Trial requested. Nothing
new filed.**

THIS CASE IS SET FOR HEARING ON 1st Account Current and Petition for Fees

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

1. Letters of Administration issued 4/15/14, no bond.
2. Account period covers 12/12/13 – 12/31/15.
3. Assets on hand \$161,585.30 consisting of cash and personal property. However, some items listed are not appraised. Question why these items are not appraised or are these the items to be recovered. **Supp 05/06/16: Petitioner states that these items have yet to be marshalled and are the subject of the pending petition to recover them from Objector. If items are recovered, appraisals will be obtained.**
4. Petitioner alleges the estate is not in a condition to be closed as certain personal property that was removed from decedent's residence is yet to be recovered. Petitioner requests additional time in order to recover the property or file an 850 petition.
5. Petitioner requests an extension of 9 months in order to close the administration.
6. Petitioner and attorney request 70% of the \$11,823.48 statutory fees totaling \$8,275.00. JTD.
7. **Objections filed by Kimberly Murray on 03/09/16**

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.

8. **Response to Objections filed 05/06/16 as “Supplement to First Account Current and Report of Administrator.”**
9. ~Proposed order: 2/16/16

RECOMMENDATION:

Matter is contested. If approved, court to set hearing re accounting review for **12/05/18**

(sa/dl/sa/lc/lh)

Future Hearing:

09/24/18 *Court Trial*

09/24/18 Petition for order to recover possession etc.

09/24/18 First account and report etc.

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

SEE ALSO 1, 2

HEARING:
Readiness Calendar

COUNSEL:

EVELYN JOYCE MURRAY	(DEC)...
KIMBERLI MURRAY	(TP)...BRENT D GRIDER
KIMBERLY PATRICE MURRAY	(PET)...PRO/PER
VINCENT EUGENE MURRAY	(PET)...THOMAS W DOMINICK

Readiness – No notes – JTD

(lc)

Future Hearing:

09/24/18 *Court Trial*

09/24/18 Petition for order to recover possession etc.

09/24/18 First account and report etc.

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500340

CASE NAME: ROY LLOYD DAVENPORT

HEARING:

Accounting Review by ***

COUNSEL:

CATHLINE MAYS	(OBJ)...NIKKI B ALLEN
CATHLINE MAYS	(PET)...NIKKI B ALLEN
RICARD PAUL DAVENPORT	(PET)...PRO/PER
ROY LLOYD DAVENPORT	(DEC)...

GENERAL INFORMATION

Continued from 06/07/18 and 08/09/18 to file accounting.

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Cathline Mays, partner, appointed executor on 03/27/17; full authority no bond. However, Letters Testamentary recently issued 06/19/18.
2. Final Inventory and Appraisal filed 08/08/18.
3. **Need** accounting or status report.

RECOMMENDATION

Need to note 3; however, as letters have recently issued accounting appears to be premature Pr.C. § 10950(b).

(lc)

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600846

CASE NAME: MTR OF RONALD LEE NELSON

HEARING:

Accounting Review by ***

COUNSEL:

JEFFREY A NELSON (PET)...PRO/PER
RONALD LEE NELSON (DEC)...

GENERAL INFORMATION

Continued from 12/14/17, 3/08/18, 04/19/18 and 05/31/18. Inventory and Appraisal still with probate referee. Administrator is now pro per.

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 Jeffrey Nelson, son, on 12/05/16; **limited** authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report. Status report was returned on 06/04/18 for lack of fees paid.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700935
CASE NAME: MTR OF JAMES RALPH TOLLIVER
HEARING: Petition for PROBATE OF LOST WILL & LETTERS OF
ADMINISTRATION WITH LIMITED AUTHORITY

COUNSEL:

DAVID SHERAK OF VOGT,RESNICK (PET)...VOGT,RESNICK & SHERAK, LLP
JAMES RALPH TOLLIVER (DEC)...

GENERAL INFORMATION

Letters of Special Administration issued to David Sherak, named executor/creditor,
09/28/17.

THIS CASE SET FOR HEARING ON Petition for Probate of lost will, Letters Testamentary
with **limited** Authority under IAEA by David Sherak, named executor/creditor.

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

1. Will waives bond. Net estate value is TBD. **JTD**
2. Caption appears to be ambiguous as to letters testamentary or administration WWA [both sections checked]. Petitioner appears to be 1st named executor. **Need** verified supplement or court to clarify on record as petition for lost will, letters testamentary.
3. Petitioner has attached a statement regarding lost will per Pr.C. § 6124 as petitioner allegedly does not have access to decedent's personal records. However, believes will may be possessed by Katharyn Gabriel, sister. Will must be lodged per Pr.C. § 8200 and court could order persons to produce a will per Pr.C. § 8201. **JTD**
4. Dispositive portions of the will are holographic. **Need** proof of holographic instrument.
5. Notice filed; however, **Need** Notice to Petition to Administer Estate and proof of service.
6. **Need** proof of publication.
7. ~Proposed Form Order: 08/02/18.

RECOMMENDATION

Need to clear notes 2-6, Court's discretion re bond. If approved, set Accounting/Status Review for **11/21/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Future Hearing:

10/04/18 Hearing re: Status of administration

10/04/18 Probate status report

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800024

CASE NAME: Jack L Dooley Jr

HEARING:

Petition for Final Account and Report of RACHELLE PATTISON and
Petition for allowance of fees filed.

COUNSEL:

JACK L DOOLEY Jr (DEC)...
RACHELLE PATTISON (PET)...LEAH LARKIN

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Rachelle Pattison, daughter.

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

1. Assets on hand \$139,960 in cash and vehicle.
2. Both heirs waive accounting.
3. Administrator and Counsel seek statutory fees of \$12,390 each. Ok.
4. Administrator seeks reimbursement of costs totaling \$14,942.94. Itemized and other heir consents.
5. Counsel seeks reimbursement of costs with a balance due of \$189.55.
6. Counsel seeks extraordinary fees of \$1,035 for 2.3 hours at \$450 per hour. **JTD**
7. Administrator seeks a reserve of \$2,000.
8. ~Proposed Order: 07/30/18.

RECOMMENDATION

RFA subject to Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **09/26/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800225

CASE NAME: MTR OF FRANK FRANCIS PERRICELLI

HEARING:

FIRST AND FINAL REPORT OF EXECUTOR WITH WAIVER OF Account and Report of WILLIAM G MITCHELL and Petition for allowance of fees filed.

COUNSEL:

FRANK FRANCIS PERRICELLI (DEC)...
WILLIAM G MITCHELL (PET)...TREVOR

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by William Mitchell, executor/non-relative.

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

1. Assets on hand \$551,405.30 in cash and real/personal property.
2. Executor and counsel seek statutory fees of \$14,176.11 each. Ok.
3. Sole beneficiary Wayne Goodheart waives accounting.
4. ~Proposed Order: 07/31/18.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **09/26/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 09/13/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900260

CASE NAME: GREGORY MICHAEL CONTRERAS

HEARING:

Hearing Re: STATUS ON DISSOLUTION PETITION

COUNSEL:

CARRIE L CONTRERAS

(CPE)...HANSON, GORIAN,

GREGORY MICHAEL CONTRERAS

(CEP)...JACK B OSBORN

GRAGORY MICHAEL CONTRERAS

(PET)...E JOAN NELMS

GENERAL INFORMATION

Continued from 03/29/18. Counsel Costales needs to file substitution of attorney [filed].

Continued from 05/10/18. Dissolution is currently on hold due to conservatorship.

Continued from 06/28/18. Court advised a petition re Successor Conservator will be filed.

THIS CASE SET FOR HEARING ON Status on Dissolution Petition.

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

1. Court set matter on its own motion after review of 02/14/18 Court Investigator report.
2. Notice of dissolution filed 10/13/17.

RECOMMENDATION

Inquire status.

(lc)

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

DATE: 09/13/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700106

CASE NAME: JUAN MERCADO GONZALEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MA VIRGINIA MERCADO

COUNSEL:

JUAN MERCADO GONZALEZ (CEE)...JAMES B CHURCH
MA VIRGINIA MERCADO (PET)...PRO/PER

GENERAL INFORMATION

Continued from 03/08/18 and 05/10/18. *Interpreter*. Need care plans.

Continued from 06/28/18. Conservator not present. Citation issued. Attorney Church will provide JA with best known address.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Ma Virginia Mercado, daughter, appointed conservator of the person only on 08/03/17.
2. Notification of Conservatee's rights filed 09/19/17.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.
5. **Need** issuance and return of citation.

RECOMMENDATION

Need to clear notes 3-5.

(lc)

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

DATE: 09/13/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS00466

CASE NAME: FRANCIS BARBUSH

HEARING:
Hearing re Final Discharge

COUNSEL:

ARTHUR A CAPPILLA	(CE)...BARBARA E BOWERSOCK
ARTHUR A CAPPILLA	(CE)...JOHN D MICKUS
ARTHUR A. CAPPILLA	(CPE)...JOHN D MICKUS
FRANCIS BARBUSH	(CEP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Arthur Cappilla, PPF, approved on 09/07/17; order signed 10/02/17.
2. **Need** receipts for administrator of Estate of Francis Barbush. It appears there is a current probate commenced; however, petitioner Arthur Cappilla has not yet been appointed. **PROPS1800562 (09/17/18 S35)**.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipt and discharge order.

(lc)

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

DATE: 09/13/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS00116

CASE NAME: MTR OF CONSERVATORSHIP OF MARTIN ACOSTA

HEARING:

Hearing Re: Final Account

COUNSEL:

JOAQUIN A ACOSTA	(PET)...
MARTIN ACOSTA	(CEP)...PRO/PER
SANDRA ACOSTA	(PET)...STANLEY W HODGE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review re Final Account.

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

1. Matter set on 07/19/18 hearing re Petition to Terminate Conservatorship.
2. Mother, Sandra Acosta, appointed Limited Conservatorship, person/estate, on 7/11/97, no bond. (Last waiver of account approved 10/19/10 and appears the estate consist solely of public benefits. Proposed Waiver of Account and Order returned for correction on 4/25/14 and 6/4/15.) Accounting Review on 01/06/16. Counsel stated that the conservators will **not be returning** to California and appears will not be filing an accounting.
3. **Need** final account.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

MISC

DATE: 09/13/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700726

CASE NAME: THE PASILLAS REVOCABLE TRUST

SEE ALSO 14, 15

HEARING:

Mediation Settlement Conference

COUNSEL:

EMILIANO SANCHEZ PASILLAS JR.

(PET)...HORSPPOOL & HORSPPOOL

GUILLERMO PASILLAS

(PET)...JAMES B CHURCH

THE PASILLAS REVOCABLE LIVING

(TRU)...

M.S.C. – No notes – JTD

(lc)

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

DATE: 09/13/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700726

CASE NAME: THE PASILLAS REVOCABLE TRUST

SEE ALSO 13, 15

HEARING:

Petition for 1) To compel trustee to account; 2) For removal of
Trustee due to Breach of fiduciary duties

COUNSEL:

EMILIANO SANCHEZ PASILLAS JR.	(PET)...HORSPPOOL & HORSPPOOL
GUILLERMO PASILLAS	(PET)...JAMES B CHURCH
THE PASILLAS REVOCABLE LIVING	(TRU)...

Currently under review by Legal Research.

Continued matter; notice sufficient – notice not re-reviewed.

(lc)

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

DATE: 09/13/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700726

CASE NAME: THE PASILLAS REVOCABLE TRUST

SEE ALSO 13, 14

HEARING: SECOND Account and Report of GUILLERMO PASILLAS and Petition for allowance of fees filed.

COUNSEL:

EMILIANO SANCHEZ PASILLAS JR.	(PET)...HORSPPOOL & HORSPPOOL
GUILLERMO PASILLAS	(PET)...JAMES B CHURCH
THE PASILLAS REVOCABLE LIVING	(TRU)...

GENERAL INFORMATION:

Continued from 07/31/18 for objections to be filed and clear notes. Nothing new filed. Matter not re-reviewed.

THIS CASE IS SET FOR HEARING ON Second Account Current and Report by Guillermo Pasillas, Successor Trustee.

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

1. **Need** copy of all trust instrument(s) per Local Rule 20-1502.
2. Content of account does not comply with all of Pr. C. §16063. **Need** verified supplement.
3. Accounting period 01/01/17 to 12/31/17.
4. Assets on Hand \$421,046.50 consisting of \$311,046.50 in cash and remaining in real property.
5. No compensation or fees are requested.
6. Disbursements – Schedule C [LF, p. 12-13] **requires** further clarification via verified supplement as to the following:
 - a. Unspecified payments to Gonzalo Mejias; Ricardo Perez; Guillermo Pasillas; Edilberto Valdez; and Saul Gonzalez.
 - b. Attorney Fees of \$8,201.25 to Attorney Church.
 - c. Trustee Fees of \$13,500 to Petitioner.
7. Distributions to Beneficiaries – Schedule E reflect distributions totaling \$280,000. Question whether the Trust authorizes same? **Need** verified supplement.
8. ~Proposed Order 05/22/18

RECOMMENDATION:

Need to clear notes 1-2, 6-7 then Court's discretion. If approved, set next hearing for Accounting Review for **02/26/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 09/13/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1400709

CASE NAME: Maria Gutierrez

HEARING:

Accounting Review by ***

COUNSEL:

MARIA GUTIERREZ

(DEC)...

ROMELIA GUTIERREZ

(PET)...RICHARD G ANDERSON

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 Romelia Gutierrez, daughter, on 10/06/14; full authority, no bond.
2. Previous status report approved 03/01/18
3. **Need** final Inventory and Appraisal.
4. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 3-4.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700548

CASE NAME: MTR OF THE GARY W BUNTING 2008 REVOCABLE TRUST

HEARING:

Accounting Review by ***

COUNSEL:

NATALIE BLICKENSTAFF (PET)...JENNIFER M DANIEL
THE GARY W BUNTING 2008 REVOCA (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Natalie Blickenstaff, PPF, appointed Successor Trustee on 06/15/17; \$100,000 bond.
2. **Need** accounting.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

DATE: 09/13/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1100118

CASE NAME: ROGELIO ORTIZ JR

HEARING:

Accounting Review by ***

COUNSEL:

MARTHA ORTIZ

(CP)...PRO/PER

ROGELIO ORTIZ JR

(CTP)...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. Previous waiver of Account for Martha Ortiz, mother, approved on 08/23/17.
2. **Need** next Account or waiver beginning with 07/15/17.

RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800018

CASE NAME: STIRDIVANT VS McCARTHY

HEARING:
Readiness Calendar

COUNSEL:
DAVID STIRDIVANT (PP)...CHANDLER LAW FIRM
LESLIE MCCARTHY (RP)...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Notice sufficient as to respondent Leslie McCarthy.

Readiness – No notes – JTD

(lc)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/13/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800117

CASE NAME: MITCHELL V MITCHELL

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

EVAN RAY MITCHELL (RP)...
HARLAN RAY MITCHELL (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Respondent Evan Mitchell, served on 08/31/18 at West Valley Detention Center.

(lc)