



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/17/18

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.

(08/27/18 cs)(09/12/18 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**

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 2, 3, 4

HEARING:

Hearing Re: PETITION TO DETERMINE HEIRSHIP

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
CAROLYNN CROWE	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
THE SALVATION ARMY	(PET)...LEE HONG DEGERMAN KANG & W
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

GENERAL INFORMATION:

Continued from **05/15/17** at request of counsel. Notice to be given by Harry Histen.

Continued from 07/30/18 Counsel to the Court that agreement has been reached by counsel and parties and request the court vacate the trial dates. Court continues the hearings on the petitions to the date of 09/17/18 and vacates the trial date.

THIS CASE IS SET FOR HEARING ON Petition to Determine Heirship and Entitlement to the Estate by brother to decedent, Harold P. Bricker ["Petitioner].

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

1. Petitioner is Harold P. Bricker, brother of decedent. Petitioner alleges that decedent died without leaving any surviving spouse, issue, or parent. Decedent's heirs-at-law appear to be 7 siblings.
2. Petition includes proportional shares; a genealogical chart showing said relationships to Decedent; and documentary proofs showing said relationships to Decedent [LF, pgs. 6-31].
3. Petitioner requests that the court determine heirship and entitlement to the estate.
4. **Objections filed on 05/02/17 by The Salvation Army.**
5. **Joinder to Objections filed on 05/09/17 by The Humane Society of the U.S.**

6. **Petition for Administration filed by the Salvation Army and The Humane Society. However, petition appears moot as letters have already issued.**
7. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion.

(nb/cs)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 1, 3, 4

HEARING: Re: PETITION FOR LETTERS OF ADMIN W/ WILL ANNEXED

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
CAROLYNN CROWE	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
THE SALVATION ARMY	(PET)...LEE HONG DEGERMAN KANG & W
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

GENERAL INFORMATION

Continued from **11/06/17**. Court continues this petition to the date of the readiness hearing and notes that the same pre-trial orders apply to this petition.

Continued from 07/30/18 Counsel to the Court that agreement has been reached by counsel and parties and request the court vacate the trial dates. Court continues the hearings on the petitions to the date of 09/17/18 and vacates the trial date.

THIS CASE SET FOR HEARING ON Petition for Probate of will for Letters of Administration WWA with Full Authority under IAEA by Salvation Army and Humane Society of the United States for Candyce Bozner and Carolynn Crowe, neighbors

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

1. The estate consists of \$514,242.22 in personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. No bond is being requested; however, section 3d is blank as to reasons why no bond should be required.
 - a. Letters of administration were previously issued to Candyce and Carolynn as co-administrators on 12/03/15 with bond of \$331,000.00.
3. Petitioners allege that other named executors will not act due to declination. **Need** declination by Bank of America.

4. Section 8 of petition failed to list Candyce Bozner and Carolynn Crowe. **Need** verified supplement.
5. **Objections filed by Harold Bricker, brother of decedent.**
6. ~Proposed Form Order: 10/27/17

RECOMMENDATION

Need to clear notes 3 & 4. Court's discretion re bond. Accounting has already been filed.

(ww/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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 1, 2, 4

HEARING:

Motion Re: Summary Judgment on Harold P Brickert's Objections to Petition Filed
by Petitioner The Salvation Army, Humane Society Of The United States

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
CAROLYNN CROWE	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
THE SALVATION ARMY	(PET)...LEE HONG DEGERMAN KANG & W
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

Currently under review by Legal Research

LR

(ww/cs)

Future Hearings:

8/27/18 Court Trial (Day 1)
8/28/18 Court Trial (Day 2)
8/29/18 Court Trial (Day 3)
8/30/18 Court Trial (Day 4)
8/31/18 Court Trial (Day 5)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1500881

CASE NAME: JAMES L BRICKER

SEE ALSO 1, 2, 3

HEARING: FIRST & FINAL Account and Report of CANDYCE E BOZNER,
CAROLYNN CROWE and Petition for allowance of fees filed.

COUNSEL:

CANDYCE E BOZNER	(PET)...HARRY J HISTEN
CAROLYNN CROWE	(PET)...HARRY J HISTEN
JAMES L BRICKER	(DEC)...
HAROLD P BRICKER	(PET)...SNYDER & HANCOCK
THE SALVATION ARMY	(PET)...LEE HONG DEGERMAN KANG & W
KEMP & ASSOCIATES, INC.	(TP)...LAURA WOODWARD
SCOTT A HANCOCK	(SCOTT A HANCOCK)
HUMANE SOCIETY	(LEE, HONG, DEGERMAN, KANG & WA)

GENERAL INFORMATION:

Continued from **03/20/17** and **05/15/17** at request of counsel. Court clears note 2 & 6 on the record. Court deems signature dated on 01/19/17 and that the court does not require further itemization on extraordinary fees.

Continued from **07/24/17**. To clear probate notes. Supplement to be filed by 4pm October 6th.

Continued from **11/06/17**. Matter is continued to date of readiness.

Continued from 07/30/18 Counsel to the Court that agreement has been reached by counsel and parties and request the court vacate the trial dates. Court continues the hearings on the petitions to the date of 09/17/18 and vacates the trial date.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Personal Representatives, Candyce E. Brozner and Carolyn Crowe.

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

1. Final Inventory and Appraisal filed 10/12/16 does not affix bank/financial statements per Local Rule 20-908; and Section 5 re Property Tax Certificate is incomplete. **Need** corrected Final Inventory and Appraisal and supporting bank statements.
2. Accounting period 08/06/15 to 12/31/16.
3. Assets on Hand \$386,754.51 consisting of cash.

4. Statutory Compensation of \$12,810.70 requested. Calculated. However statutory fees are based on the value of the estate accounted for based on the total amount of the appraisal value of the property in the inventory, plus gains, plus receipts, less losses from the appraisal value on sales. Pr. C. § 10800 (b). **Need** verified supplement recalculating basis for fees.
5. Petitioner requests extraordinary fees of \$10,000 for services rendered in connection with the sale of real property and numerous, personal property. Billed at \$125/hour for at least 80 hours. **Need** itemization per CRC 7.702 indicating the specific amount requested for each category of service provided by each person.
6. Attorney requests extraordinary fees of \$4,240 for services rendered in connection with the sale of real property and numerous, personal property. Billed at \$280-\$360/hour for 18.4 hours' attorney time and 1.9 paralegal hours.' **JTD**
7. Attorney requests reimbursement of costs advanced of \$1,099.03. Itemized [LF, p. 5]. **JTD**
8. No Summary of Account. **Need** same via verified supplement.
9. No Assets on Hand at the Beginning of Account Period Schedule. **Need** balance and description of the assets on hand, specifically noting the amount of cash included in said balance. Local Rule 20-614c via verified supplement.
10. Disbursements – Schedule D [LF, p. 10] includes postage and mailing which is usually considered overhead when fees are being requested. Does Court wish to reduce reimbursement of costs in the amount of \$47.75? **JTD**.
11. Schedule D [LF, p. 12] does not include losses on personal property sold at auction. **Need** same via verified supplement.
12. Question the status of the Honda? **Need** verified supplement.
13. **Need** findings re: sole and separate property.
14. Real Property was sold during this administration. Need copy of closing escrow statement per Local Rule 20-10.
15. **Need** proof of service to Notice of Proposed Action re Sale of Real Property to Debra Muse of the Humane Society of the U.S. and Laura Woodward of Kemp & Assoc.
16. **Need** Assets on Hand at End of Account Period Schedule via verified supplement.
17. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).
18. Petitioner requests authority to withhold the sum of \$2,000 as a reserve. **JTD**.
19. **Need** Notice of Hearing and proof of service to include those requesting special notice and creditor for personal property taxes.
20. **Objections filed 03/09/17 by Harold P. Bricker, brother of decedent.**
21. Proposed Form Order 01/19/17 reflects incorrect statutory fees and does not comply with Local Rule 20-614.

RECOMMENDATION:

This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. Need proper, amended account per Pr. C. § 1060 et seq. to be set on first check calendar no

sooner than **10/29/18**. Any account to be filed 30 days' before hearing. Note requirements of Local Rules.

(nb/ww/cs)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600313

CASE NAME: MTR OF ALICE MARIETTA BENNETT

HEARING:

First and final report of administrator; wvr of Account and Report of LARI ANN BAIZA and Petition for allowance of fees filed.

COUNSEL:

LARI ANN BAIZA	(PET)...POONAM K KOCH
ALICE MARIETTA BENNETT	(DEC)...
INHERITANCE FUNDING	(TP)...STEVEN D SCHROEDER

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON First and Final on Waiver of Account and Petition for allowance of Fees, by Lari Baiza, [Administrator/Petitioner]

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

1. All heir waive accounting.
2. Corrected Inventory and Appraisal filed 01/02/18; however, date of death is missing, section 4 re appraiser is incomplete; section 5 re property tax is incomplete, form is not dated at signature line by petitioner, section 7 re bond is incomplete, attorney did not sign or date form and Attachment 2 does not conform to Pr.C. §8850(c) re community or separate property. **Need** corrected I&A.
3. Assets on hand indicated as \$208,436.52 cash and remaining in non-cash assets [LF p20]. **Need** a value for each entry and a total for all assets on hand.
4. Bond set at \$20,000.00.
5. Statutory fees in the amount of \$8,920.00 requested. Calculated
 - a. **Need** detailed schedules of receipts and gains or losses on sale as it appears fees calculated include gains of the sale of real property and not the amount listed on the Inventory and Appraisal.
6. Petitioner requests authorization to pay payment the following Creditor's claims:
 - a. California Business Bureau, Inc. for San Antonio Regional Hospital of \$1,065.00; and
 - b. California Business Bureau, Inc. for UC Irvine Health System of \$1,000.
7. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).

8. Petitioner requests to be discharge and bond exonerated; however, petitioner cannot be discharged until receipts are filed and ex parte order is approved.
9. Personal representative seeks a reserve of \$1,500. **JTD**
10. Notice given.
11. Proposed Order fled 07/16/18 is not compliant with Local Rule 20-614. Need total assets on hand, caption is incomplete and need address of individuals receiving real property. Need findings re sole and separate property; re known creditors; and all taxes paid. Need statement re bond amount. Bond exoneration and discharge cannot occur until receipts are filed and an Ex Parte Petition and order has been approved.

RECOMMENDATION:

Need to clear notes 2-3, 5, & 7, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **09/30/19**.

(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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600803

CASE NAME: MTR OF THOMAS FREDERICK LIEDBLAD

HEARING: Petition For Final Distribution On Waiver Of Account and Report
of DOUGLAS W LIEDBLAD and Petition for allowance of fees filed.

COUNSEL:

DOUGLAS W LIEDBLAD (PET)...PRO/PER
THOMAS FREDERICK LIEDBLAD (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Distribution on Wavier of Accounting for
allowance of Fees, by Douglas Liedblad [Administrator/Petitioner]

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

1. All heirs waive accounting.
2. Inventory and Appraisal lists bank account for and machinery located at business known as Jaydee Design. **Supp.09/11/18 indicates business terminated with death of decedent. The business closed and machinery was sold. All proceeds from the sale as well as any cash in account was deposited into estate account.**
3. Assets on hand \$169,129.92 consisting of cash (not totaled).
4. It appears no statutory fees are being requested.
5. Notice given.
6. Personal representative seeks a reserve of \$1,000. **JTD**
7. Proposed Order 09/11/18 assets on hand of do not match petition.

RECOMMENDATION:

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for
09/30/19.

(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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600973

CASE NAME: MARY ELLEN CARROLL

VACATED

HEARING:

Hearing re Final Discharge

COUNSEL:

LAMONT A CARROLL (PET)...PRO/PER
MARY ELLEN CARROLL (DEC)...

VACATE- Ex-Parte Petition for Final Discharge and Order routed to department for signature.

(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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700387

CASE NAME: PATRICIA DIANE BALDWIN

HEARING:

Accounting Review by ***

COUNSEL:

JASON A WHITTAKER (PET)...FULLERTON LEMANN SCHAEFER & DO
PATRICIA DIANE BALDWIN (DEC)...

XREF: PROPS1500300 *ILA MAE BALDWIN*

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 Jason Whittaker, son, on 07/26/17; full authority, \$95,000 bond.
2. Partial #1 and Partial #2 Inventory and Appraisal filed 09/11/17 and 04/05/18; however, section 4 re probate referee and section 7 re bond are incomplete. Amended Partial #2 I & A filed 09/04/18 does not indicate whether bond of \$95,000 is sufficient. **Need** corrected partials #1 & #2 and Final Inventory and Appraisals.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status

(cs)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800073

CASE NAME: MTR OF MICHAEL P VOLLANDT
HEARING: Re: PTN for instructions re: the sale of encumbered

COUNSEL:

BURDTTE "BUD" M GARVIN (PET)...THOMAS W DOMINICK
MICHAEL P VOLLANDT (DEC)...

THIS CASE SET FOR HEARING ON Petition for instructions re the sale of encumbered property

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

1. **Verified supplement filed 09/11/18; however, not in Laserfiche at time of review.**
2. Petitioner, Burdette M. Garvin was appointed Special Administrator on 02/01/18, and regular administrator on 02/26/18, full authority, no bond.
3. Petitioner seeks an order confirming the sale of the estate's only asset consisting of real property which is heavily burdened by liens.
4. There is an offer of \$430,000 and potential buyer requests a 30 day escrow, or the offer will be withdrawn if the sale is not approved. Attorney's Declaration [LFp. 8] indicates offer of \$430,000 and an offer of \$480,000. **Court to clarify.**
5. Petitioner alleges first lien holder, Wells Fargo, filed a notice of default on 07/10/18 and will foreclose on the property if an order for the sale is not granted.
6. Petitioner proposes payment in full to Wells Fargo (first lien holder), expenses of the sale, commissions and fees be paid through escrow. All junior liens to be removed from title and the net proceeds of the sale be divided equitably between the remaining lien holders by agreement, or upon further order of the court.
7. Attorney further requests that proceeds be deposited into Fullerton, Lemann, Schaefer & Dominick, LLF attorney trust account until distribution is worked out.
8. Petitioner alleges every lien holder is in agreement with the sale except for Franchise Tax Board. Petitioner expects to have an agreement regarding the reduced payout to the Franchise tax board soon.
9. Notice given.
10. ~Proposed Order: 08/03/18.

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 5/06/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800321

CASE NAME: MTR OF GAIL J SCHWARTZ
HEARING: Re: RESTRAINING ORDER (RE PROPERTY)

COUNSEL:

KIMBLE LOUISE ANDERSON (PET)...BERL HILLEL SELSKI
GAIL J SCHWARTZ (DEC)...

Waiver of Court Fees and Costs filed by KIMBLE LOUISE ANDERSON is GRANTED

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. **Continued from 07/23/18 Court continues the restraining order to the date of September 17, 2018; counsel for reverse mortgage funding has no objection to the continuance.**

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 4th, 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

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800562

CASE NAME: FRANCIS BARBUSH

SEE ALSO 11A

HEARING:

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

COUNSEL:

ARTHUR A CAPPILLA	(PET)...JOHN D MICKUS
FRANCIS BARBUSH	(DEC)...
LEWIS BARBUSH	(TP)...HARTNELL LAW GROUP
W.C. COX AND COMPANY	(LAYNE A BARTHOLOMEW)

X-REF RCRS00466 (Conservatorship of Francis Barbush)

GENERAL INFORMATION:

Continued from 07/16/18 at request of counsel to clear probate notes.

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

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

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

RECOMMENDATION:

RFA. Court's discretion re \$302,000.00 bond. If approved, set Accounting/Status Review **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

Superior Court of Calif, County of San Bernardino

Page: 11A late add-on

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: RC RS00466

CASE NAME: FRANCIS BARBUSH

SEE ALSO 11

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)...

XREF: PROPS1800562 FRANCIS BARBUSH

GENERAL INFORMATION

Continued from 09/13/18 Non-appearance by counsel nor the conservator. It comes to the courts attention there is a related probate case, PROPS1800562 in S35 on 09/17/18. Court will continue this case to heard with related case.

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. **See notes on previous matter #11.**
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of receipt and discharge order.

(lc/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: 09/17/18 TIME: 8:30 DEPT: S35P

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:

Continued from 07/23/18 at request of counsel to file proof of publication.

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. **(Supp. 07/13/18 indicates that all documents were signed on 06/14/18) JTD**
3. ~Proposed Form Order: 06/19/18

RECOMMENDATION:

Court's discretion re bond and note 2. If approved, set Accounting/Status Review **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800622

CASE NAME: DAVID T. BURKHART

HEARING: Petition for SPOUSAL PROPERTY PETITION

COUNSEL:

DONNA J BURKHART (PET)...SUZANNE M GRAVES
DAVID T BURKHART (DEC)...

GENERAL INFORMATION:

Continued from 08/06/18 at request of counsel to clear probate notes.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Donna J. Burkhart,
spouse/petitioner

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

1. Petitioner, Donna Burkhart, requests determination of property passing to the surviving spouse as community property. Specially, real property located at Rancho Cucamonga, CA. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property. **Supp. 07/30/18 indicates petitioner and decedent were married 06/12/76. Property was acquired on 07/14/14 using community funds. A living trust was created; however, real property was never transferred into the trust. Copy of deed affixed, LF p.7**
2. Attachment 9 to petition [LF, p13] does not include relationships and ages of persons listed. Supp. 07/30/18 indicates relationship; however, does not include age of persons listed. **JTD**
3. ~Proposed Form Order: NOT SUBMITTED

RECOMMENDATION:

Courts discretion.

(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: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800691

CASE NAME: MTR OF SALLY ANN MORENZ

HEARING:

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

COUNSEL:

MARSHALL REDDICK (PET)...CURT R CRATON
SALLY ANN MORENZ (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner requests bond of \$968,000. Estate value \$968,000 consisting of \$718,000 in personal property. Bond appears sufficient.
2. Named executor is deceased. Nominations filed by Richard Morenz and Donna Schwede, cousins. [petition, LFp. 18 and filed 08/17/18].
3. Typed copy of Second Codicil does not match decedent's written codicil. **Need** corrected typed copy. [Petition, LFp. 16].
4. **Need** DE147 Duties and Liabilities
5. **Need** DE-147S Confidential Statement of Birth Date and Driver's License number.
6. No proposed Form Order. Submit after hearing.

RECOMMENDATION

Need to clear notes 3-5, then Court's discretion re bond. If approved, set Accounting/Status Review for 11/25/19. 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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800702

CASE NAME: Mtr of James Lewis Yaegle

HEARING:

Petition for Letters of Admin w/ full IAEA

COUNSEL:

LEE R YAEGLE (PET)...PRO/PER
JAMES LEWIS YAEGLE (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner appears to be sole heir and waives bond. Estate value \$381,924 with \$186,924 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** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication.
4. ~Proposed Form Order: 07/19/18

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. 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: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800703

CASE NAME: Mtr of Johnny Pacheco

HEARING:

Petition for Will and for Letters of Admin w/ Will Annexed

COUNSEL:

NICOLI J PACHECO	(PET)...KAREN J SIMONSON
DELANIE J PACHECO	(PET)...KAREN J SIMONSON
JOHNNY PACHECO	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary W/WA, Full Authority under IAEA, by son/daughter Nicoli and Delanie Pacheco, Administrators/Petitioners

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

1. Petitioners seek bond of \$96,000. Net estate value is \$96,000 with 90,000 in real property. Bond appears sufficient. **JTD**
2. Julia Baribault, named executor declines to act.
3. No Proposed Form Order: Submit after hearing.

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. 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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800712

CASE NAME: Maria Dolores Zarate

HEARING: Spousal Property Petition hearing.

COUNSEL:

OCTAVIO ZARATE MANDUJANO (PET)...PRO/PER
MARIA DOLORES ZARATE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Octavio Mandujano

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

1. Petitioner requests a determination and confirmation of his half of community property and determination that decedent's half transfers to petitioner without administration. Specifically, real property in the City of San Bernardino, San Bernardino County.
2. Petitioner and decedent were married on 02/01/92. Petitioner indicates property was acquired during the marriage as community property. Petitioner was the sole provided as Decedent had no income, and therefore, decedent's name did not appear on title. Copy of grant deed attached [LFp.12].
3. Petitioner alleges that once the property was paid off, he requested the finance company place decedent and petitioner's names as husband and wife on the deed. However, when petitioner attempted to get a new loan it was brought to his attention that the deed was recorded as single persons.
4. Decedent died intestate with two 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.
5. Notice given.
6. ~Proposed Form Order: 08/07/18

RECOMMENDATION:

Court's discretion.

(cs)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800720

CASE NAME: ALBERT RAZO

HEARING:

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

COUNSEL:

ALBERT RAZO JR (PET)...BRIAN C MILES
ALBERT RAZO (DEC)...

GENERAL INFORMATION

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

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

1. Petitioner request \$120,000 bond. Estate value appears to be \$0; however, gross fair market value of real property listed is \$119,000. Court to clarify estate value.

JTD

2. **Need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication.
4. No proposed Form Order: Submit after hearing.

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. 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: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800742

CASE NAME: JAMES ANDERSON JR

HEARING:

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

COUNSEL:

DENISE LINCOLN	(PET)...RANDAL P HANNAH
GWENDOLYN ANDERSON	(PET)...RANDAL P HANNAH
JAMES ANDERSON JR	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Denise Lincoln and Gwendolyn Anderson, [Executors/Petitioners]

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

1. Will waives bond. Estate value of \$245,000 consisting of real property. The court may for good cause require that a bond be given, either before or after issuance of letters. Pr.C. §8481(b).
2. **Need** Proof of Holographic Instrument (DE-135).
3. **Need** Notice to Petition to Administer Estate and proof of service.
4. **Need** proof of publication
5. ~Proposed Form Order: 08/03/18

RECOMMENDATION

Need to clear note 2-4, then Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. 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

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800751

CASE NAME: RICHARD ASHLEY SMITH

HEARING:

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

COUNSEL:

MICHAEL ASHLEY SMITH (PET)...PRO/PER
RICHARD ASHLEY SMITH (DEC)...

GENERAL INFORMATION

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

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

1. Petition indicates all heirs waive bond. However, **need** waiver of bond by Michelle Lawing, Kimberly Lugo, Nancy Parent, and Jason Smith. Estate value is \$225,000 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).
 - a. Waiver of bond signed by Diana Smith; however, form is an outdated version. **JTD.**
2. Section 5 of Petition indicates spouse; however, section 7a indicates decedent had no predeceased spouse. Court clarify.
 - a. **If spouse exists, need** declination and nomination to act as administrator by spouse.
3. Section 8 of petition fails to mention relationship to decedent of those listed. **Need** verified supplement indicating relationship.
4. **Need** Notice to Petition to Administer Estate and proof of service.
5. **Need** proof of publication.
6. ~Proposed Form Order: 08/07/18

RECOMMENDATION

Need to clear notes 1-5. Court's discretion re bond. If approved, set accounting/Status Review for **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 20A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800672

CASE NAME: MTR OF KATHLEEN LORETTA CUBE

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

COUNSEL:

JANE MARIE MANASUK

(PET)...BROWN WHITE & OSBORN LLP

KATHLEEN LORETTA CUBE

(DEC)...

GENERAL INFORMATION

Letters of special administration with special powers, with full authority, \$20,000 bond issued to Jane Manasuk on 07/31/18.

Continued from 08/27/18. Matter continued for Proof of Publication. All existing temporary orders shall remain in full force and effect until further order of the Court. Letters of Special Administration with full authority vacated 08/09/18; as they incorrectly granted full authority instead of no authority. Letters of Special Administration, no authority issued 08/30/18.

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

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

1. Bond in the amount of \$20,000.00 is being requested; however, as estate value is indicated as unknown-TBD it is unclear if requested amount is sufficient. Court to inquire. **JTD**
 - a. Bond of \$20,000.00 filed on 07/31/18 re: special letters.
2. Marie Hanson, mother, has higher priority per Pr.C. § 8461; however, no objections or competing petitions filed. **JTD**
3. Petitioner is not listed in section 8 of the petition; however, it is clear that petitioner is the sister. **JTD**
4. ~Proposed Form Order: 07/18/18

RECOMMENDATION

Court's discretion re sufficiency of \$20,000.00 bond. If approved, set Accounting/Status Review **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/kd/cs)

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

DATE: 09/17/18 TIME: 8:35 DEPT: S35P

CASE#: PRO PS1501173

CASE NAME: MICHAEL HAKEM DIAB SPECIAL NEEDS TRUST

HEARING: Petition for approval of fifth Account and Report of CITIZENS
BUSINESS BANK and Petition for allowance of fees filed.

COUNSEL:

HAKEM DIAB	(PET)...PHILLIPI & NUTT LLP
MICHAEL HAKEM DIAB	(MIN)...
CITIZENS BUSINESS BANK	(PET)...RANDOLPH M SHARON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 5th SNT Account and Petition for Allowance of Fees
for Citizen's Bank, Trustee.

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

1. **Supplement filed 09/09/18; however, not in Laserfiche at time of review.**
2. Accounting period 06/01/17 – 05/31/18.
3. Assets on hand \$4,191,411.03 of which \$148,217.80 is in cash.
4. Trustee seeks court ratify fees of \$63,469.94 taken per terms of trust to receive periodic payments at an annual rate of 1.5%. Calculation [Acct. 07/12/18 LFpg63-64].
5. Attorney seeks fees of \$3,300 and costs of \$230. Generally itemized [FL,p.8]. **JTD**
6. Schedule C – Disbursement indicates payment of legal fees made to attorney in the amount of \$3,693.69 per order dated 04/17/18; however, order authorized a total payment of \$3,530. **Need** verified supplement clarifying.
7. ~Proposed order. 07/12/18

RECOMMENDATION

Need to clear note 6, then Court's discretion. If approved, set Accounting/Status Review for **08/05/19**. 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: STANFORD E. REICHERT **CONSERVATORSHIPS**

DATE: 09/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300111

CASE NAME: LUIS ALONSO BILLARD

SEE ALSO 23

HEARING:

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

COUNSEL:

GLORIA M ROTHROCK	(CP)...PRO/PER
LUIS ALONSO BILLARD	(CTP)...
GUADALUPE ONEIL	(TP)...PRO/PER

GENERAL INFORMATION

Continued from 08/06/18 Court imposes the sanctions of \$1,000 on Conservator for their failure to appear for today's hearing. Matter is called at 9:56am and there has been no appearance and no contact with the department by the conservator.

THIS CASE SET FOR HEARING ON OSC re Sanctions of \$1,000.00 on Conservator.

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

1. OSC set on 07/09/18 when conservator Gloria Rothrock failed to appear at the Hearing Re: OSC re Possible Transfer to Orange County.
2. Sanctions of \$1,000.00 may be imposed if conservator fails to appear again.

RECOMMENDATION

Court's discretion re OSC.

(ww/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: 09/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1300111

CASE NAME: LUIS ALONSO BILLARD

SEE ALSO 22

HEARING:

Hearing Re: OSC RE POSSIBLE TRANSFER TO ORANGE COUNTY

COUNSEL:

GLORIA M ROTHROCK (CP)...PRO/PER

LUIS ALONSO BILLARD (CTP)...

GUADALUPE ONEIL (TP)...PRO/PER

GENERAL INFORMATION

Continued from **05/21/18** due to no appearance or contact from conservator Gloria Rothrock. Gloria Rothrock is ordered to be personally present at next hearing.

Continued from **07/09/18**. No appearance. Matter is called at 10:10am. Court sets osc re sanctions of \$1,000.00 on conservator for failure to appear for today's hearing. Court orders conservator to be present at next hearing date.

Continued from 08/06/18 matter is called at 9:56am and there has been or appearance or contact with the department by the conservator. Matter is continued, Court sets OSC re sanctions in the amount of \$1,000 for failure to appear. Court orders conservator to be personally present on 09/17/18. OSC re sanctions are as to failure to appear.

THIS CASE SET FOR HEARING ON OSC re Possible Transfer to Orange County.

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

1. OSC set on 04/23/18 after Court review of Court Investigator Report which indicates that conservatee resides in Orange County.

RECOMMENDATION

Court's discretion re OSC.

(ww/cs/ww/cs)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800172

CASE NAME: DILLON NICHOLAS SMITH

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GARY SMITH	(PET)...ANDREW M ROSENFELD
NADINE SMITH	(PET)...ANDREW M ROSENFELD
DILLON NICHOLAS SMITH	(CEE)...JEANNE E KENNEDY

GENERAL INFORMATION

Continued from 07/30/18 Court clear notes re IRC report, Section 11 of petition, confidential supplement filed 06/08/18 and notes that conservatorship training class certificates have been reviewed and therefore the note on the certificate is cleared. Attorney Jeanne Kennedy is appointed for Dillon Smith

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Gary and Nadine Smith, parents

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

1. No bond- person only
2. Capacity Declaration filed 06/08/18.
3. Report of attorney Jeanne Kennedy filed 08/29/18.
4. IRC report filed 07/25/18.
5. Petitioners request Pr. C. § 2351.5 powers to make decisions re: education, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee, the right to consent/withhold consent to marriage/registered domestic partnership, the right to control social/sexual contacts and relationships.
6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. Certificates of Completion of the Conservatorship Training Class filed.
8. Citation and proof of service filed 06/29/18.
9. Notice given.

10. CI report filed 07/25/18.

11. ~Proposed Form Order: 06/08/18

RECOMMENDATION

Courts discretion. If approved, set hearing for Compliance Review for **04/22/19** 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/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: 09/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800212

CASE NAME: MTR OF ROBERT LOUIS WEINER

HEARING: Petition for Appointment of Conservator

COUNSEL:

DIANA MALEKOW

(CPE)...LAMB MORRIS & LOBELLO

ROBERT LOUIS WEINER

(CEP)...

GENERAL INFORMATION:

Diana Malekow is appointed temporary conservator of the estate only on 08/01/18, bond \$814,000

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate, by daughter, Diana Malekow, Petitioner

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

1. Petitioner seeks bond of \$814,000. Estate consists of \$668,000 personal property and \$72,000 annual income. Suggest \$819,000 (includes 10% recovery). **JTD**
2. Petitioner is nominated as conservatee of the person only via Advanced Health Care Directive, [Petition, LFp.13].
3. Petitioner has also been appointed as Power of Attorney over proposed conservatee, [Petition, LFp.29].
4. Section 1k re dementia orders is not checked; however, petitioner indicates capacity declaration will be filed. **Need** Capacity Declaration.
5. If Petitioner is seeking dementia powers. **Need** appointment of counsel for report. Court to inquire.
6. List of Required Contacts filed 7/18/17 is missing Laruen Malekow and Taylor Hall-Carrillo. **Need** completed form.
7. Citation with proof of service filed 7/27/17.
8. **Certificate of Completion of the Conservatorship Training Class filed 09/06/18.**
9. CI report filed 08/30/18.
10. ~Proposed Form Order: 07/18/18

RECOMMENDATION

Need to clear notes 4, 6. Courts discretion re Bond. If approved, set hearing for Compliance Review for **04/22/18** 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 **11/25/19**. 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: 09/17/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800213

CASE NAME: MTR OF NICOLE ELIZABETH ROGERS

HEARING:
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

CYNTHIA ROGERS (CP)...CHARLES A COMPTON
VERNON ROGERS (CP)...PRO/PER
NICOLE ELIZABETH ROGERS (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Case Management Conference re

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

1. Cynthia Vernon (mother) appointed Conservator of the person only on 06/17/10 in Nevada.
2. Matter was transferred to San Bernardino County Superior Court per court order of 05/31/18.
3. It appears the last court investigator report was filed 04/26/17. Does court wish to require a Court Investigator report per Pr.C. § 2217(b)(3)? **JTD**
4. **Need** post move notice per CRC 7.1063(c).
5. **Need** amended letters to reflect this county.

RECOMMENDATION

Need to clear notes 4-5, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PUBLIC GUARDIAN**

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0800286

CASE NAME: MTR OF PHILIP BARRETT

HEARING:

Accounting Review by ***

COUNSEL:

THOMAS BARRETT

(CE/CPE)...JAMES B CHURCH

PHILIP BARRETT

(CTP/CEP)...

COURTNEY L BARRETT

(OBJ)...NOREEN T FONTAINE

GENERAL INFORMATION

Continued from **04/17/17**. Public Guardian directed to marshal the IRA and file accounting.

Continued from **08/17/17** to be heard with other pending hearings.

Continued from 11/13/17 for accounting to be filed.

THIS CASE IS SET FOR HEARING ON Accounting Review (re Public Guardian)

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

- 1 Public Guardian appointed Successor Conservator of the estate, only, on 02/11/16, no bond.
- 2 **Need** Final Inventory and Appraisal. Supplemental #1 and #2 filed.
- 3 **Need** 1st accounting beginning with 02/11/16.

RECOMMENDATION:

Inquire status of accounting. Court to set a final discharge hearing set for **prior Conservator Thomas Barrett** for **11/19/18**. When documents are not filed as ordered, court may set a hearing in accord with Pr.C. §2655.

(/lc/nb/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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300267

CASE NAME: JACQUELINE CHANDLER

HEARING:

Second Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JACQUELINE CHANDLER

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Letters expire 12/01/18.

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Allowance of Fees

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

1. Accounting covers period: 07/01/15-06/30/16
2. Assets on hand: \$116,793.96 (cash \$114,993.96; burial trust \$1,800).
3. PG requests to approve and confirm collected fees of \$2,400.00. JTD.
4. County Counsel requests to approve and confirm collected fees of \$1,200.00. JTD.
5. ~Proposed Order: 12/14/17

RECOMMENDATION

RFA subject court's determination re fees. If approved, set next accounting review for **12/03/18** as next accounting is now due. 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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1700035

CASE NAME: RUTH ELIZABETH ULLRICH

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

RUTH ELIZABETH ULLRICH

(PET)...COUNTY COUNSEL

(CEE)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Public Guardian appointed temporary conservator of the person and estate on 02/06/17, no bond. However, letters and order reflect of the estate only.
2. Conservatee passed away before general petition was approved.
3. **Need** Final Inventory and Appraisal.
4. **Need** 1st and final Account to include pre and post death accounting periods.

RECOMMENDATION

Inquire status of accounting.

(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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800025

CASE NAME: MTR OF GRACE Z HULTS

SEE ALSO 31, 32, 33, 34

HEARING:

Hearing Re: Receipt of CI Report

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GRACE Z HULTS

(CEP)...SHERRI L KASTILAHN

JOLEAN MILLER TRUJILLO

(CPE)...PRO/PER

Waiver of Court Fees and Costs filed by GRACE Z HULTS is GRANTED

Waiver of Court Fees and Costs filed by JOLEAN MILLER TRUJILLO is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Receipt of CI Report

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

1. Matter set on 05/01/18 during petition for appointment of successor conservator of the person and estate, wherein, Court referred matter to Court Investigator.
2. **Court Investigator Special Report filed 08/28/19.**

RECOMMENDATION:

Court's discretion.

(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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800025

CASE NAME: MTR OF GRACE Z HULTS

SEE ALSO 30, 32, 33, 34

HEARING:

Hearing Re: Receipt of CI Report

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GRACE Z HULTS

(CEP)...SHERRI L KASTILAHN

JOLEAN MILLER TRUJILLO

(CPE)...PRO/PER

Waiver of Court Fees and Costs filed by GRACE Z HULTS is GRANTED

Waiver of Court Fees and Costs filed by JOLEAN MILLER TRUJILLO is GRANTED

See notes on previous matter # 30.

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800025

CASE NAME: MTR OF GRACE Z HULTS

SEE ALSO 30, 31, 33, 34

HEARING:

Hearing Re: OSC RE WAIVER OF OBJECTIONS

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
GRACE Z HULTS	(CEP)...SHERRI L KASTILAHN
JOLEAN MILLER TRUJILLO	(CPE)...PRO/PER

Waiver of Court Fees and Costs filed by GRACE Z HULTS is GRANTED

Waiver of Court Fees and Costs filed by JOLEAN MILLER TRUJILLO is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Waiver Of Objections

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

1. Matter set on 06/04/18 during trial setting conference, wherein, both Josana Howell and Jolean Miller Trujillo are ordered to be personally present at the next hearing.

RECOMMENDATION:

Court's discretion.

(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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800025

CASE NAME: MTR OF GRACE Z HULTS

SEE ALSO 30, 31, 32, 34

HEARING:

Hearing Re: PETITION FOR CONSERVATORSHIP BY JOLEAN TRUJILLO

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
GRACE Z HULTS	(CEP)...SHERRI L KASTILAHN
JOLEAN MILLER TRUJILLO	(CPE)...PRO/PER

GENERAL INFORMATION

Public Guardian appointed Temporary Conservator of the person and estate on 03/01/18. **Continued from 05/01/18. Referred to Court Investigator for investigation and report. As to the Petition filed by Public Guardian: The Court is advised the eviction from the mobile home was stopped. Rent is being paid. Return of Citation was filed 02/22/18. Probate notes 10 re notice & 11 re CI report filed are cleared by Court. As to petition of Jolean: Josanna Howell is duly sworn and examined. The Court finds the statements made on the declaration, previously filed, are true under penalty of perjury. As to probate note #22, Jolean Trujillo is directed to file an amended corrected proof of service with attachment serving all parties. As to objections filed by Josanna Howell on 04/23/18, all parties must be served. Trial setting orders issued. All parties are ordered to return.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Appointment of Conservator person and estate by ***Public Guardian.***

Petition #2: Petition for Appointment of Successor Conservatorship of person and estate, by ***granddaughter, Jolean Miller Trujillo*** ["Petitioner"].

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

Petition #1 by PG:

1. ***Court Investigator's Special report filed 08/28/18***
2. No bond- PG.
3. Petitioner seeks medical powers. Capacity Declaration filed 01/29/18.

4. Petitioner seeks dementia powers. Sherry Kastilahn appointed as counsel. **Need** report of Counsel.
5. 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.
6. Petitioner seeks additional order for the granting of powers under Pr.C. §2591 (c) (1)-(2). **JTD**
7. Petitioner seeks authority to deposit up to \$5000.00 into an Irrevocable Burial Trust and authority to purchase cemetery commodities. **JTD**
8. Petitioner seeks authority to abandon and/or donate personal property with a value of \$300.00 or less. **JTD**
9. Court to see Declaration of Chanteil Guy filed 03/26/18 as it makes reference to a cross reference case UDBS1800429. Does Court wish for a Notice of Related Cases be filed? **JTD**
10. **Court to see Declaration/Opposition to Conservatorship filed by Josanna Howell on 03/23/18.**
 - a. **Petitioner failed to date at signature line. JTD**
 - b. **Declaration/Opposition is not verified by Josanna. Need verification per Pr.C. § 1021.**
 - c. **Clerk's office was informed at the time of filing by Josanna that it is not an opposition. No fee was taken and Josanna was not added as a party.**
11. ~Proposed Form Order: 01/29/18

Petition #2 by Jolean:

12. Court Investigator's Special report filed 08/28/18

13. Petitioner requests no bond be required as she is conservatee's granddaughter. Estimated value of estate \$118,000. Suggest bond of \$130,000 [includes recovery]. **JTD.**
14. Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **JTD**
15. Petitioner seeks medical and dementia powers. Medical Capacity Declaration formerly filed on 01/29/18 by PG.
16. Certificate of Assignment gives petitioner's information instead of conservatee's. **Need** proper Certificate of Assignment.
17. **Need** Notification to Court of Address on Conservatorship form.
18. **Need** report of court appointed counsel, Sherri Kastilahn.
19. **Need** Court Investigator's Report.
20. Certificate of Completion re Conservatorship Class filed.
21. **Objections filed by Josanna Howell on 04/23/18.**
22. **Supplemental Declaration in support of opposition to conservatorship filed 04/26/18 Jolean Miller Trujillo.**
23. ~Proposed Form Order/Letters 03/26/18.

RECOMMENDATION: Matter is contested. If continued, place on a Monday/PG calendar.
Petition #1 by PG:

Need Report of Counsel, then Court's discretion re remaining notes.

Petition #2 by Jolean:

Need Report of Counsel and to clear notes 16, & 17, then Court's discretion re bond

If approved, set hearing for Compliance Review for **11/25/19** 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 & 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 **11/25/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(ww/nb/ww/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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800025

CASE NAME: MTR OF GRACE Z HULTS

SEE ALSO 30, 31, 32, 33

HEARING:

Trial Setting Conference

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

GRACE Z HULTS

(CEP)...SHERRI L KASTILAHN

JOLEAN MILLER TRUJILLO

(CPE)...PRO/PER

Waiver of Court Fees and Costs filed by GRACE Z HULTS is GRANTED

Waiver of Court Fees and Costs filed by JOLEAN MILLER TRUJILLO is GRANTED

No notes – TSE. JTD

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS00952

CASE NAME: IN THE MATTER OF DAVID PEEK

HEARING:

Accounting Review by ***

COUNSEL:

DAVID PEEK	(CEP)...MARK J. ANDREW FLORY
WILLIAM PEEK	(SC/CPE)...KELLER & KELLER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
THE SPECIAL NEEDS TRUST OF DAVID PEEK (TRU)...	
MEDICAL CENTER	(TP)...SUSAN G KOONTZ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. First Account for Public Guardian, conservator, of the estate and person approved on 03/19/18.
2. **Need** Second account.

RECOMMENDATION:

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 35A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1100236

CASE NAME: IN MATTER RE MAURO RESENO

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(PET)...COUNTY COUNSEL

MAURO RESENO

(CEP)...

GENERAL INFORMATION

Continued from 06/19/17, 01/22/18 and 9/10/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 2nd Accounting by PG approved on 06/06/16.
2. Notice of Conservatee's Death filed 11/07/17 indicating conservatee passed away 10/30/17.
3. **Need** Third and Final Account for pre-death and post-death accounting periods per Pr. C. §2620 beginning with date of 05/01/15.
 - a. Request to waive accounting filed 09/04/18 as Public Guardian did not receive any income on the conservatee's behalf. JTD

RECOMMENDATION:

Inquire status of accounting.

(nb/cs/ww/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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS3971

CASE NAME: IN THE MATTER OF JOHN J MENDOZA

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JOHN MENDOZA

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge by Public Guardian

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

1. Twenty-Third and Final Account was approved on 09/18/17.
2. **Need** receipt for County Counsel and Jessie Mendoza.
3. Ex Parte Petition for Final Discharge and Order return on 12/22/17 due to missing receipts. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 36A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800199

CASE NAME: TOINI K SAULNY

SEE ALSO 36B

VACATED

Petition for Appointment of Conservator

COUNSEL:

DIANA A SAULNY

(CPE)...THOMAS A BUCKLEY

TOINI K SAULNY

(CEP)...

XREF: CONPS1800211 *TOINI KAARINA SAULNY*

VACATE – Request for Dismissal approved on 08/24/18.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 36B add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1800211

CASE NAME: TOINI KAARINA SAULNY

SEE ALSO 36A

HEARING:

Petition for Appointment of Conservator

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

TOINI KAARINA SAULNY

(CEP)...MITCHELL I ROTH

XREF: CONPS1800199 *TOINI K SAULNY*

GENERAL INFORMATION

Ex parte orders granted 07/23/18. Court ordered case to be related to CONPS1800199. Court granted request of Sherri Kastilahn to be relieved as Counsel due to unavailability and appointed Mitchell I. Roth. Public Guardian appointed Temporary Conservator of person and estate. No bond. Notice given by Judicial Assistant.

Continued from 08/27/18. Competing petition by daughter, Dian Saulny was dismissed on 08/24/18. Court clears probate note involving service as to Diana Saulny due to the Court dismissing her petition today. Need report of court appointed attorney Mitchell Roth. THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Public Guardian

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

1. No bond—PG
2. Petitioner requests additional orders to deposit up to \$5,000 in Irrevocable Burial Trust; authority to purchase IBT and cemetery commodities; to abandon personal property valued at \$300 or less; power to become representative payee; 2591 powers to sell real or personal property of estate for conservatee's care. **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 07/16/18.
4. Petitioner seeks dementia powers. **Initial Report of Counsel Mitchell I. Roth filed 08/23/18.**
5. Petitioner alleges there are no relatives in the second degree; however, competing petition was filed by daughter, Diana A Saulny. Report of counsel also refers to Diana A. Saulny as the daughter. **Need** verified supplement including notice to same.

6. List of Required Contact Information is missing Diana Saulny, daughter. **Need** completed form.
7. **Need** Notice of Hearing and Proof of Service by mail as to, Diana A. Saulny (daughter).
8. **Court Investigator report filed 08/10/18.**
9. Return of Citation and Proof of Personal Service filed 07/31/18.
10. ~Proposed Form Order: 07/16/18.

RECOMMENDATION:

Matter is contested. Need to clear notes 5-7. If approved, set hearing for Compliance Review for **04/22/19** for the filing of the required documents and hearing re Accounting Review for **11/25/19**. Any accounting to be filed 30 days in advance.

(lh/ww/cs/kd/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: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS723

CASE NAME: IN THE MATTER OF DANIEL JOYCE

HEARING:

Petition for ORDER AUTHORIZING DONATING OF PERSONAL PROPERTY

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

DANIEL D. JOYCE

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition for Order Authorizing Donating of Personal Property, by Public Guardian

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

1. Petition indicates Conservatee owns miscellaneous household furniture, furnishings and personal property located at the Public Guardian's warehouse in Rialto. Appraised in October 2011 with value of \$200.00.
1. Petitioner indicates that it would be in the best interest and to the advantage of the estate to donate said property.
2. Petitioner requests authority to donate all rights, title and interest of said property of conservatee.
3. Notice given. No written objections.
4. ~Proposed Order: 07/26/18

RECOMMENDATION:

Court's discretion.

(cs)

Future Hearing: 6/03/19 1st Account & Report of Public Guardian

Superior Court of Calif, County of San Bernardino

Page: 37A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/17/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400163

CASE NAME: FRANK ESCALANTE

HEARING:

Hearing re: Petition for authority to establish an Irrevocable Burial Trust.

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

FRANK ESCALANTE

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to establish Irrevocable Burial Trust by Public Guardian.

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

1. An order Authorizing Irrevocable Burial Trust was approved on 06/11/18. **Need** further clarification as an Irrevocable Burial Trust has been approved.
2. Petitioner alleges the current assets on hand are \$3,126, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
3. Petitioner requests authority to deposit up to \$5,000.00 in an Irrevocable Burial Trust.
4. Notice given.
5. ~Proposed Order: 09/04/18

RECOMMENDATION:

Need to clear note 1, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

DATE: 09/17/18 TIME: 1:30 DEPT: S35P

CASE#: PRO PS1700611

CASE NAME: MTR OF FREDERICK HAYS

VACATED

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

JAMES B JENSEN

(PET)...JEREMIAH RAXTER

FREDERICK HAYS

(DEC)...

LISA CARLSON

(PET)...GAUDY LAW, INC

Future Hearings:

9/18/18 Court Trial (Day 2)

9/19/18 Court Trial (Day 3)

9/20/18 Court Trial (Day 4)

9/21/18 Court Trial (Day 5)

Not notes – Trial. JTD

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: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200084

CASE NAME: NORA ANITA ABRAMS LIVING TRUST

SEE ALSO 2

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY SCHOENDIENST (PET)...BLUMBERG LAW CORPORATION
THE NORA ANITA ABRAMS REVOCABLE TRUST (TRU)...
ROBERT J SPITZ (PET)...BRIAN CHANG
LOIS LEFLAR (PET)...ROBERT M EBINER
STAPHANIE GILES (OBJ)...MATTHEW E SHEASBY

XREF: CIVRS1108600 *NORA ABRAMS -V- MARY SCHOENDIENST*
CONPS1200152 *NORA ANITA ABRAMS*

GENERAL INFORMATION:

Continued from **02/02/16** and **04/20/16**.

Continued from 03/05/18 to resolve remaining issues.

THIS CASE IS SET FOR HEARING ON Final Discharge of Trustee of "The Nora Anita Abrams Irrevocable Trust dated July 12, 2013"

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

1. First and Final Account of Trustee was approved on 12/11/14. Order Settling First and Final Account of Trustee filed 12/18/15.
2. Receipts filed by Distributees on 12/11/15.
3. **Need** informal accounting and receipt(s) as to how the \$20,000 reserve was expended or distributed.
4. **Need** Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear notes 3 & 4.

(nb/sa/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200084

CASE NAME: NORA ANITA ABRAMS LIVING TRUST

SEE ALSO 1

HEARING:

Hearing re Final Discharge

COUNSEL:

MARY SCHOENDIENST (PET)...BLUMBERG LAW CORPORATION
THE NORA ANITA ABRAMS REVOCABLE TRUST (TRU)...
ROBERT J SPITZ (PET)...BRIAN CHANG
LOIS LEFLAR (PET)...ROBERT M EBINER
STAPHANIE GILES (OBJ)...MATTHEW E SHEASBY

XREF: CIVRS1108600 NORA ABRAMS -V- MARY SCHOENDIENST
CONPS1200152 NORA ANITA ABRAMS

GENERAL INFORMATION:

Continued from **02/02/16** and **04/20/16**.

Continued from 03/05/18 to resolve remaining issues.

THIS CASE IS SET FOR HEARING ON Final Discharge of Trustee of "The Nora Anita Abrams Irrevocable Trust dated July 12, 2013"

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

1. First and Final Account of Trustee was approved on 12/11/14. Order Settling First and Final Account of Trustee filed 12/18/15.
2. Receipts filed by Distributees on 12/11/15.
3. **Need** informal accounting and receipt(s) as to how the \$20,000 reserve was expended or distributed.
4. **Need** Ex-parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear notes 3 & 4.

(nb/sa/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

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 and 07/23/18 to clear probate notes.

THIS CASE IS SET FOR HEARING ON **[2ND Amended filed 08/20/18]** Accounting and
Petition for Distribution by sister, Cassandra Hudson [Administrator/Petitioner].

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

1. **Assets on Hand consists of \$30,071.18 of which \$30,008.92 is in estate account and \$62.26 in attorney Galipo client trust account).**
2. **Summary of account summarizing accounting filed; however there is no summary of account per Pr.C. §1061(a) and 1062. JTD**
3. It appears that Petitioner is not requesting compensation.
4. 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.
5. Notice given.
6. Proposed order: 08/30/18

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for
09/30/19

(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: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600250

CASE NAME: ELLSWORTH TROMBLEY

HEARING:

Hearing re Final Discharge

COUNSEL:

CHRIS BURKHARDT

(PET)...CARL LARSON

ELLSWORTH TROMBLEY

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final account/distribution of Chris Burkhardt, nephew, approved on 09/11/17.
2. **Need** receipt for Sandra Witt.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(ww)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700035

CASE NAME: Fred D. Utley

HEARING: First and Final Account and Report of CHERYL UTLEY and Petition
for allowance of fees filed.

COUNSEL:

CHERYL UTLEY (PET)...DAVID E SIMON
FRED D. UTLEY (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Cheryl
Utley and Petition for allowance of fees filed.

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

1. Partial and Final Inventory and Appraisal filed 07/26/18 and 06/25/18; however,
section 4 re appraiser and section 5 re property tax certificate are incomplete.
 - a. **Need** complete inventory.
 - b. Need bank statement supporting date death balances. Local Rule 20-908.
2. Assets on Hand \$157,566.80 consisting of \$156,045.90 cash and \$1,520.90 in
receivable.
3. Bond of \$141,000.
4. Administrator and Attorney requests statutory fees of \$6,513.64. Calculated.
5. Petition requests reimbursement for costs advanced of \$2,097.56 for airfare from
Illinois, car rentals, lodging, costs of meals, gas for the rental vehicles and fed ex bill
to overnight documents. Itemized, [LF, p.8]. **JTD**
6. Attorney requests extraordinary fees of \$2,920 for services rendered in connection
with the sale of real property. Billed at \$400/hour for a total of 7.3 hours' time.
Itemized [Dec. Supp. 08/01/18, LF, p. 5-6]. **JTD.**
7. Notice given.
8. Petitioner request reserves of \$1,500 for closing expenses.
9. No Proposed Order. Submitted after hearing.

RECOMMENDATION:

Need to clear notes 1 & 7, then Court's discretion. If approved, set next hearing for
receipt and final discharge for **09/30/19**.

(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: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700450

CASE NAME: MTR OF JANICE LYNN OLSON

HEARING: PETITION FOR DISTRIBUTION ON WAIVER OF FINAL Account and Report of ROBERT C OLSON and Petition for allowance of fees filed.

COUNSEL:

ROBERT C OLSON (PET)...GRESHAM SAVA GE NOLAN AND TILDEN
JANICE LYNN OLSON (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Distribution on Waiver of Account and for fees allowed, by Robert Olson, [Administrator W/WA/Petitioner]

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

1. Sole heir waives accounting.
2. Supplemental Income and Expense Declaration filed 03/29/18 is incomplete as to item 5 re property tax. **JTD**.
3. Assets on Hand \$517,271.86 consisting of \$136,971.68 in cash and remaining consisting of a trailer, stocks and real properties.
4. Bond set at \$75,000
5. Petitioner waives compensation.
6. Attorney requests statutory fees of \$13,949.26, which appear should be \$13,979.26. Calculated. **JTD**
7. Attorney requests extraordinary fees of \$\$2,445.50 for services rendered in connection with the sale of real property. Billed at \$205 -\$295/hour for a total of 10.70 hours' attorney and paralegal time. Itemized [LF, p. 18]. **JTD**
8. Notice given.
9. **Need** statement re whether estate is solvent.
10. Petitioner requests an order to pay timely filed claim by American Express of \$3,848.57.
11. Petitioner alleges distribution of remaining assets to the trust cannot be made in accordance with decedent's will because assets were not in the trust as of date of death of decedent. Petitioner indicates it is in the best interest to the sole beneficiary to distribute assets outright to beneficiary instead of to the trust. **JTD**
12. Proposed Order submitted: 08/09/18. Need finding whether estate is solvent.

RECOMMENDATION:

Need to clear notes 8, then Court's discretion. If approved, set next hearing for receipt and final discharge for 09/30/19.

(cs)

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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1701055

CASE NAME: MTR OF EDUARDO PINON GARCIA

HEARING: First and Final Account and Report of GABRIEL GUERRERO
GARCIA, GRACIE GUERRERO CASILLAS and Petition for allowance of fees filed.

COUNSEL:

GABRIEL GUERRERO GARCIA (PET)...DUANE P BOOTH
GRACIE GUERRERO CASILLAS (PET)...DUANE P BOOTH
EDUARDO PINON GARCIA (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for allowance of fees filed by Gabriel Guerrero Garcia and Gracie Guerrero Casillas

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

1. All heirs waive accounting.
2. **Need** bank statement to support date of death balance for Citi Bank xx5545, Chase Bank xx 0019, Union Bank account xx3643 and xx3810 per Local Rule 20-908.
3. Assets on Hand \$480,743.57. **Need** assets per Local Rule 20-614(c) specifically noting the amount of cash.
4. Bond set at 180,000.00
5. Attorney statutory fees \$12,975.45 requested. Calculated
6. Co Administrators request total statutory fees of \$12,975.45 (\$6,487.72 each). Calculated
7. Petitioners request reimbursement of costs advanced of \$2,872.00. Itemized, [LF,p.14].
8. Real property is being distributed. **Need** address of each distributee per Local Rule 20-907.
9. **Need** statement whether estate is solvent.
10. Notice given.
11. Petitioner requests reserves of \$3,000.00 for closing expenses and tax liability. **JTD**
12. Proposed Order: 08/22/18 does not include addresses of distributees and does not include findings re sole and separate property or whether estate is solvent.

RECOMMENDATION:

Need to clear notes 2,-3, and 8-9, then Court's discretion. If approved, set next hearing for receipt and final discharge for 09/30/19.

(cs) Future Hearing: 4/12/19 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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800206

CASE NAME: MTR OF JANE Y KEATON

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

COUNSEL:

LISA KAY SPERRIKO (PET)...HEATHER V WELLBORN
JANE Y KEATON (DEC)...

GENERAL INFORMATION

Continued from **04/09/18** at request of counsel to clear probate notes.
Continued from 06/11/18. For proof of publication to be filed.

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

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

- 1 Will waives bond. Estate value is \$95,400 with \$400 in personal property. However, petitioner is non-resident and court has discretion to require bond per Pr.C. §8571 or may for good cause require that a bond be given, either before or after issuance of letters. Pr.C. §§8481(b). **JTD**
- 2 Cheri Bosco (deceased) is mentioned in will but is not listed in section 8 of petition. **JTD**
- 3 Section 5(b) re whether decedent survived by stepchild or foster child is incomplete. **Need** verified supplement.
- 4 Duties and Liabilities is missing telephone number. **Need** same.
- 5 Notice to Petition to Administer Estate and proof of service filed 06/08/18; however, section 5 is incomplete as to IAEA authority sought. **Need** corrected notice.
- 6 ~Proposed Form Order: 04/03/18

RECOMMENDATION

Need to clear notes 3-5, Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/ww)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800745

CASE NAME: FRED W FLOTHO, JR.

HEARING:

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

COUNSEL:

GREGORY F FLOTHO (PET)...TONI MICHAELS
FRED W FLOTHO JR (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by son, Fred Flotho, [Executor/Trustee/Petitioner]

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

1. Petitioner as trustee and sole heir waives bond. Estate value consist of \$250,000 in personal property. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr.C. §§8481(b). **JTD**
2. Declination and appointment of alternate executor filed 08/03/18 by Kerry Flotho Flores.
3. Proof of Holographic Instrument filed 08/03/18.
4. Attachment "8b" indicates Notice given to Wildlife Images Rehabilitation and Education Center as that is the correct name for the entity named in the Trust.
5. ~Proposed Form Order: 08/03/18

RECOMMENDATION

Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. 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: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: TRU PS1800056

CASE NAME: DINWIDDIE FAMILY TRUST

HEARING:

Petition for Transfer Assets to the Dinwiddie Family Trust
(Probate Code 850)

COUNSEL:

DAVID R DINWIDDIE (PET)...PRO/PER
DINWIDDIE FAMILY TRUST (TRU)...

Currently under review by Legal Research

LR

NOTICE:

Notice of hearing to Kimberly Leisgang; David Dinwiddie, II; Christian Dinwiddie c/o David Dinwiddie (petitioner); Noah & Riley Leisgang c/o Kimberly Leisgang; William Dinwiddie; and Kirk Dinwiddie filed 04/05/18; however, **need** corrected Notice to include 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.

Continued matter from 04/30/18 and 06/18/18.

(ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: VPR VS002864

CASE NAME: ESTATE OF ERNEST MAYFIELD

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

YVETTE MAYFIELD (PET)...RANDALL & ASSOCIATES
ERNEST ANTHONY MAYFIELD (DEC)..
DERRICK MAYFIELD (PET)...RANDALL & ASSOCIATES
NINA KAYE MAYFIELD (PET)...LAW OFFICES OF C L FARRELL PC
DERRICK MAYFIELD (PET)...JOHN GUY
CAROL L KUNDERT (PET)...GARY E. MUNGER
BOND SERVICES OF CALIFORNIA (PET)...PRO/PER
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER
RICHARD A CHERRY (TP)...PRO/PER
AMERICAN CONTRACTORS INDEMNITY (LANAK & HANNA)

VACATE – First and Final account filed by successor administrator and set on 10/10/18.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 11A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/17/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800854

CASE NAME: MTR OF DELLA SMITH

HEARING:

Petition to determine succession to Real Property

COUNSEL:

JOHNNY KIES	(PET)...MARK W REGUS II
KENNY KIES	(PET)...MARK W REGUS II
CAROL KIES	(PET)...MARK W REGUS II
KAREN WANSHAFFE	(PET)...MARK W REGUS II
BRUCE COOPER	(PET)...MARK W REGUS II
BRIAN COOPER	(PET)...MARK W REGUS II
DELLA SMITH	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by surviving children: Johnny Kies, Kenny Kies, Carol Kies, Karen Wanshaffe, Bruce Cooper and Brian Cooper.

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

1. Petitioners seek 100% interest, each; in decedent's 1/6th interest; in real property per intestate succession.
2. Section 9(3)(4) re domestic partner and (7)(8) re issue of predeceased child are incomplete. **Need** verified supplement.
3. Income and Expense attached to petition is not signed by all petitioners. Need for all petitioners to sign I&A.
4. **Need** corrected notice.
5. ~Proposed Form Order: 09/10/18

RECOMMENDATION

Need to clear notes 2-4, then Court's discretion.

(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: 09/17/18 TIME: 8:35 DEPT: S36P

CASE#: PRO PS1700595

CASE NAME: THE ELVIRA T. RATHBUN LIVING TRUST

HEARING:

Petition for OF CO-TRUSTEE TO REMOVE ANOTHER CO-TRUSTEE

COUNSEL:

GAIL N GRINDLE

(PET)...DONNASUE ORTIZ

THE ELVIRA T RATHBUN LIVING TRUST (TRU)...

Currently under review by Legal Research.

(LR)

Notice given re initial hearing on 10/02/17. However, **need** copy of all trust documentation per Local Rule 20-1502 to verify whether notice is complete.

(nb/ww)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 09/17/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800156

CASE NAME: Mtr of Louis Uriel Stiefel

HEARING:

Petition for to Instruct Trustee

COUNSEL:

MONIQUE C SHARLEIN (PET)...TREVOR

LOUIS STIEFEL REVOCABLE LIVING TRUST (TRU)...

Currently under review by Legal Research.

(LR)

NOTICE:

Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

- (1) a description of the property, and for real property mandates the notice state the street address or, if none, a description of the property's location and assessor's parcel number;
- (2) a description of relief sought pursuant to Section 859 if applicable; and
- (3) a statement advising any interested person that he or she may file a response.

Need corrected Notice of Hearing filed as notice filed 08/08/18 does not comply with one of more of these mandatory requirements.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1100144

CASE NAME: CONTESSA MORSE

HEARING:

Hearing Re: Transfer to Los Angeles County

COUNSEL:

LINDA ELLIOTT

(CP)...PRO/PER

CONTESSA MORSE

(CTP)...

GENERAL INFORMATION:

Continue from 08/06/18 court orders the conservator Linda Elliott to be present at the next hearing.

THIS CASE SET FOR HEARING ON Transfer to Los Angeles County

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

1. Linda Elliott was appointed limited conservator of the person on 02/09/09 in Los Angeles County. Matter was transferred to San Bernardino County on 07/11/11.
2. Matter was set on review of CI Report, wherein, indicates conservatee, Contessa Morse, has been residing in Los Angeles, CA since May 1, 2018.
3. **Need** Post-Move Notice of Change of Conservatee's Residence (mandatory) with proof of mailed service. CRC 7.1063(c).
4. **Need** amended letters to reflect this county as letters never issued.

RECOMMENDATION:

Need to clear notes 3-4, then Court's discretion.

(cs)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200136

CASE NAME: MINH T SCHAFFER

HEARING: re Final Discharge

COUNSEL:

DAVEY H SCHAFFER	(CPE)...HARTNELL LAW GROUP
MINH T SCHAFFER	(CEP)...MARK J ANDREW FLORY
MARK J ANDREW FLORY	(PET)...BROWN WHITE & OSBORN LLP

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Third and Final Account was approved on 09/11/17.
2. Order granting Petition for Termination of Conservatorship of the estate approved on 10/13/16.
3. **Need** Post-Move Notice of Change of Conservatee's Residence (mandatory) with proof of mailed service.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800164

CASE NAME: Beatriz Guadalupe Vasquez

HEARING:
Petition for Appointment of Conservator

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

Waiver of Court Fees and Costs filed by BEATRIZ GUADALUPE VASQUEZ is GRANTED
GENERAL INFORMATION

Continued from 07/16/18. The case is referred to Legal Aid for legal assistance.

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

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

1. No bond- Person only
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. **Need** Certificate of Completion of the Conservatorship Training Class.
4. Notice of Hearing and proof of service filed 07/16/18; however, it is indicates as
"diligent search" as to Lionel Vasquez, brother.
 - a. **Need** Due Diligence form as to Lionel Vasquez, brother.
5. Citation and proof of service filed 07/16/18; however, section 4 is incomplete as to
the type of server and section 5 is not marked under penalty of perjury. **JTD**
6. CI report filed 07/11/18.
7. ~Proposed Form Order: 06/04/18

RECOMMENDATION

Need to clear notes 2-4 then Court's discretion re note 5. If approved, set hearing for
Compliance Review for **04/22/19** for the filing of the following: proof of service of Order
with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan
per Pr.C.§2352.5

(ww)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800166

CASE NAME: MTR OF AMBER NICOLE MEDINA

HEARING:
Petition for Appointment of Conservator

COUNSEL:

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

GENERAL INFORMATION

Continued from 07/16/18. Attorney Mitchell Roth is appointed for Amber Nicole Medina.

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

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

1. **Note: Proposed conservatee will not be 18 until 10/07/18.**
2. Petitioner requests to waive bond as proposed conservatee's income is IHSS. The estate appears to consist of public benefits. Court to clarify if estate powers are needed. **JTD**
3. Petitioner seeks medical powers. Capacity Declaration filed 06/05/18.
4. Proposed conservatee is developmentally disabled. Mitchell Roth appointed as counsel. **Need** report of counsel.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Petitioners request Pr. C. § 2351.5 powers- authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee, authority to consent or withhold consent to marriage/domestic partnership, right to control social and sexual contacts and relationships, and decisions concerning education.
 - a. Attachment "1h" appears to be attachment 1j on regards to the Pr.C. § 2351.5 powers. [LF pg. 11]

7. Petitioner seeks civil rights not be limited without court order. **JTD**
8. Petitioner seeks that proposed conservatee be disqualified from voting.[LF pg. 12]
JTD
9. Confidential Supplemental Information filed 06/05/18; however, section 5f as to alternatives considered is incomplete. **JTD**.
10. Declaration re: Missing original citation filed 07/11/18. Petitioner indicates that the conformed copy of the citation was served on 06/22/18.
 - a. Attached citation indicates that Donna Jaramillo, mother was served instead of proposed conservatee. **JTD**
11. Certificate of Completion of the Conservatorship Training Class filed 07/05/18.
12. **Need** Notice of Hearing and proof of service as to Valentin Medina, father.
13. CI report filed 07/09/18.
14. ~Proposed Form Order: 06/05/18

RECOMMENDATION

Need report of Counsel, IRC report, and to clear note¹². Court's discretion re: remaining notes and bond. If approved, set hearing for Compliance Review for **04/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

If estate is approved Set hearing re Accounting Review for **11/25/19**. Any accounting to be filed 30 days in advance.

(ww)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800195

CASE NAME: MTR OF KATHERINE DECKER

HEARING:
Petition for Appointment of Conservator

COUNSEL:

SUSAN POISSON (CPE)...ROSSANA MITCHEL
KATHERINE DECKERN (CEP)...DONNASUE ORTIZ

GENERAL INFORMATION:

Susan Poisson appointed temporary conservator of the person and estate on 08/06/18, \$100,000 bond. Court will grant powers to start the unlawful detainer matter.

Continue from 08/06/18 Attorney Donnasue Ortiz waives the return of citation on behalf of her client. Continue for petitioner to clear probate notes.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by daughter, Susan Poisson, Petitioner

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

1. Petitioner seeks bond of \$900,000. Estimated estate value is \$960,500. Suggest bond of \$1,065,760.00 (includes 10% recovery fee). **JTD**
2. Petitioner seeks powers under 1873 or 1901; however, attachment 1e specifying order not attached. **Need** attachment 1e.
3. Petitioner seeks powers and duties under section 2351-2358 to have care, custody, and control, charge of education, and the authority to authorize all medical and dental treatment including psychiatric and psychological treatment. etc.; however, attachment 1f specifying order not attached. **Need** attachment 1f.
4. Petitioner seeks orders related to dementia powers; however, attachment Requesting Special Orders Re Dementia not attached. **Need** same.
5. Attachments 3f re due diligence not provided. **Need** same.
6. Petitioner seeks medical powers. Capacity Declaration filed 07/23/18; however, form is incomplete as follows:
 - a. **Section 1 & 2 re name, address, and telephone number of physician is missing.**
 - b. **Section 4 re name of proposed conservatee is blank.**

- c. **Section 4b re whether patient under continuing treatment is incomplete.**
- d. **Section 5 is contradictory as to whether proposed conservatee will be attending court hearing.**
- e. **Form is not dated at signature line, page 1.**
- f. **Declaration is missing attachment GC-335A.**

Need Corrected Capacity Declaration.

- 7. **Need** List of Required Contacts (Local form SB-12224).
- 8. **Need** Confidential Screening (form GC-314).
- 9. **Need** Court Investigator Referral Report (Local form SB-360).
- 10. **Need** Order appointing Court Investigator (Form GC-330).
- 11. **Need** Notification of Court of Conservatorship Address (Local form SB-14522).
- 12. **Need** notice of hearing and proof of service.
- 13. Counsel for proposed conservatee waived return of citation.
- 14. Certificate of Completion of the Conservatorship Training Class filed 07/05/18.
- 15. Court to see Petition, LF p. 6.
- 16. Petitioner seeks dementia powers. **Need** report of Donnasue Ortiz, Court appointed counsel.
- 17. Court Investigator report filed 07/08/18
- 18. No Proposed Order. Submit after hearing.

RECOMMENDATION

Need report of court appointed counsel and to clear notes 2-12, then court's discretion re bond. If approved, set hearing for Compliance Review for **04/22/19** 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 **11/25/19**. Any accounting to be filed 30 days in advance.

(cs)

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800219

CASE NAME: MTR OF TYLER JAMES SAGE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

ARLENE KNUTH (CP)...PRO/PER
PAUL KNUTH (CP)...
TYLER JAMES SAGE (CTP)...SANDRA TURNER

XREF: GARPS1800054 TYLER JAMES SAGE

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator, of the person only, by maternal grandparents, Arlene and Paul Knuth, [Petitioners]

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

1. Note: proposed conservatee will be age 18 on 10/01/18. Does court wish to continue matter to a future date in October 22/18. **JTD**
2. Petitioners, Arlene and Paul Knuth were appointed guardians, of the person, of minor on 07/31/18.
3. Person only- no bond.
4. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract, and make decisions re medical and education. **JTD**
5. Petitioner seeks civil rights not be limited without court order.
6. Capacity Declaration filed 08/16/18.
7. Proposed conservatee is developmentally disabled. Report of attorney, Sandy Turner, filed 08/20/18.
8. Notice of hearing and proof of service filed as to IRC; however, only 19 days' notice allowed. **Need** proper 30 day-notice per Pr.C. §1461.4.
9. **Citation filed 09/11/18; however, proof of service indicates served 10 days' prior to hearing. Need property proof of service of Citation allowing 15 days Pr.C. §1824.**
10. **Need** Certificate of Completion of the Conservatorship Training Class.

11. Proposed conservatee is developmentally disabled. **Need** IRC report.

12. Court Investigator report filed 09/10/18.

13. ~Proposed Form Order: 07/26/18

RECOMMENDATION

Need IRC reports and to clear notes 8-10. If approved, set hearing for Compliance Review for **04/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: SC SS02714

CASE NAME: MATTER OF WENDY EDER

HEARING:

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

COUNSEL:

INLAND COUNTIES REG CNTR (CE)...STEVEN K BECKETT
WENDY EDER (CTE)...HARTNELL HORSPOOL & FOX

Currently under review by Legal Research - SNT Amendment.
(LR)

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Seventh Account Current and Petition for Allowance of Fees.

THE FOLLOWING ISSUES/DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting covers period: 06/01/16 - 05/31/18.
2. Assets on hand: \$15,973.12; cash.
3. Petitioner requests approval of trustee fees already taken by Master Trust of California in the amount of \$2,000. Billed at \$1,250 for the first \$50,000; 2% of the next \$250,000; 1.65% of the next \$450,000 and 1.50% of the next \$250,000.
4. Petitioner requests authority to allow Master Trust to begin taking quarterly fee payments according to its fee schedule dated 06/13/17. **JTD**
5. Attorney requests fees of \$1,452.00 for 8.80 hours at \$120/300 per hour for paralegal and attorney services. Itemized in separate declaration.
6. Petitioner requests to amend the Master Trust of California Agreement to include language concerning reimbursement for any benefits paid by any other state's Medicaid program and notice to such other state's appropriate agencies in the unlikely event that benefits are paid under another state's Medicaid program rather than by California's Med-Cal program in order to comply with recent reinterpretation

of certain Social Security regulations. A copy of revised Master Trust Agreement provided, [LF, pgs. 28-51]. **JTD [Referred to Legal Research]**

7. Trust does not require bond for Trustee.
8. ~Proposed Order: 08/07/18.

RECOMMENDATION:

Court's discretion. If approved, set hearing on next accounting review for **08/05/19** (if one year) or **08/03/20** (if two year). Accounting to be filed 30 days' in advance.

(cs)

Superior Court of Calif, County of San Bernardino
Page: 20A add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 09/17/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1100128

CASE NAME: ANDREA RENEE MATHIS

HEARING:
Hearing Re: CI REPORT/APPOINT GAL

COUNSEL:
DIEDRA MATHIS (CP)...PRO/PER
ANDREA RENEE MATHIS (CTP)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON CI REPORT/APPOINT GAL

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

1. Matter set on 09/11/18 after review of Court Investigator memo. Attorney Walter Moore appointed GAL.
2. Need Report of GAL Water Moore.

RECOMMENDATION:
Need report of GAL, then Court's discretion.
(cs)

Future Hearing: 11/29/18 Hearing Re Special Report

Superior Court of Calif, County of San Bernardino

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CIVPRO San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CIVIL**

DATE: 09/17/18 TIME: 1:30 DEPT: S36P

CASE#: CIV DS1722299

CASE NAME: BENNER -V- FEINSTEIN

SEE ALSO 22

HEARING:

Mediation Settlement Conference

COUNSEL:

ALLEN BENNER (PLA)...SCHOMER LAW GROUP, APC

KENNETH S. FEINSTEIN (DEF)...FULLERTON LEMANN SCHAEFER & DO

XREF: PROPS1700626 *FEINSTEIN FAMILY TRUST*

No notes – Mediation Settlement Conference. JTD

(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: 09/17/18 TIME: 1:30 DEPT: S36P

CASE#: PRO PS1700626

CASE NAME: FEINSTEIN FAMILY TRUST,ORIGINALLY EST 04/23/1990

SEE ALSO 21

HEARING:

Mediation Settlement Conference

COUNSEL:

ALLEN R BENNER (PET)...SCHOMER LAW GROUP, APC
FEINSTEIN FAMILY TRUST (TRU)...
KENNETH S FEINSTEIN (OBJ)...FULLERTON LEMANN SCHAEFER & DO

XREF: CIVDS1722299 *BENNER -V- FEINSTEIN*

No notes – Mediation Settlement Conference . JTD

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 09/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500458

CASE NAME: Charles R. Saunders

HEARING:

Petition for final distribution on waiver of Account and Report
of BRADLEY DALE SAUNDERS and Petition for allowance of fees filed.

COUNSEL:

TERRY TRACY (PET)...GARY H BLAYLOCK
CHARLES R. SAUNDERS (DEC)...
BRADLEY DALE SAUNDERS (PET)...E. MARIE HENNING

Waiver of Court Fees and Costs filed by TERRY TRACY is GRANTED

GENERAL INFORMATION:

Continued from 07/16/18 at request of Court. Court orders copies of bills be filed and an itemized supplement regarding general probate fees. Counsel advised the Court will only approve reimbursement of costs advanced for the handwriting expert, publication and filing fees and charges. The Court requires all beneficiaries sign of on settlement. The Court approves \$1,000 reserve and advises counsel that an informal accounting will need to be filed with final discharge. The Court approves amount requested for refurbishment of the home and statutory fees as requested. The further approves distribution as indicated.

THIS CASE IS SET FOR HEARING ON First and Final Account upon Waiver and Petition for Distribution and for fees, by Bradley Saunders, [Administrator/Petitioner]

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

1. All heirs waive accounting.
2. Assets on Hand \$131,903.44 cash
3. Bond of \$203,500.00
4. **Need** detailed schedules of receipts and losses on sale as fees calculated are not based on the values listed in the Inventory and Appraisal per C.R.C. 7.550. **Supp. filed 07/09/18 and 09/11/18 indicate several expenses to get properties ready for sale, payment of delinquent water, electric bill. Properties sold under the appraised value due to the state of despair. JTD.**
 - a.

5. Statutory fees of \$6,550.00 requested as to petitioner and attorney; however, statutory fees due, based on total fee base, is \$5,9520.00. Calculated. **Supp. 07/09/18 indicates correct statutory fees of \$5,920.00.**
6. Attorney requests reimbursement of total costs advanced of \$173.00 and in prayer of \$175. **Supp. filed 07/09/18 indicates correct reimbursement of \$173.00 Itemized, [LF,p.7].**
7. Petition requests reimbursement for costs advanced as follows:
 - a. Bruce Saunders - \$2,135.00, [LF, p. 8]. **Supp. 9/11/18 indicates corrected reimbursement request of \$3,316 as it appears there was an error in the original calculation and bond premium payment made. Itemized [LF p.4-5]. However, it appears total should be \$3,017. JTD**
 - b. Bradley Saunders (Petitioner) - \$5,225.00 to, for fees paid associated with the refurbish of the two estate properties. Itemized, [LF, p. 7/8]. **Supp. 09/11/18 indicates corrected reimbursement should be \$5,480.00 as it appears a new amount of \$255 discovered. [LFp.21-30].JTD.**
8. Petitioner requests reimbursement of \$8,790.00 to Vivian Williams for costs associated with the Will contest and general probate fees. [LFp.7]. **Need** copies of bills and an itemized supplement re general fees of \$5,500 with a signed settlement by all heirs as directed by court on 07/16/18.
 - a. **Supp. 09/11/18 indicates \$5,500 is legal fee for contract between attorney and client to defend the Will Contest. JTD**
 - b. **Supp. 09/11/18 indicates general probate fees of \$1,210.00 are for filing fees and publication. Itemized, [LF p12-13]. JTD**
 - c. **Acct 05/22/18 indicates fees of \$1,920 for handwriting expert and \$160 for publishing. Itemized LF p. 7. JTD.**
9. **Affirmation of the Stipulation for Order attached to Supp. filed 09/04/18; however, need signed Affirmation by Bradley Saunders.**
10. Notice given.
11. Petitioner seeks \$1,000.00 reserves for closing expenses and to pay any additional liabilities.
12. Proposed Order submitted 09/11/18 Subject to correct reimbursement amount to Bruce Saunders; final discharge does not occur until receipts are filed and Final Discharge has been approved.

RECOMMENDATION:

Need to clear note 9, then Court's discretion. If approved, set next hearing for receipt and final discharge for **09/30/19.**

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1500518

CASE NAME: MTR OF RUBEN QUEZADA ALVARADO

HEARING:

Accounting Review by ***

COUNSEL:

GARY G QUEZADA SR (PET)...RONALD W ASK
RUBEN QUEZADA ALVARADO (DEC)...

GENERAL INFORMATION:

Continued from **06/19/17**. Hearing continued for notice to be given.

Continued from **08/28/17** continued at request of Counsel for property to be sold. Court clarifies property is not in Ojai but in Santa Paula.

Continued from 03/19/18 at request of Court for LA probate to close and for sale of real property.

THIS CASE IS SET FOR HEARING ON Status Report (filed 12/13/16) by Administrator, Gary G. Quezada ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as he is attempting to negotiate a buy-out of the Santa Paula property and if unsuccessful, intends to file a partition action, to force the sale of the property, to obtain the proceeds owed to the estate. Further, petitioner indicates he has commenced a probate action in LA County of his late brother's estate in order to seek restitution from his estate for promissory notes owed to this estate amounting to at least \$100,000.
2. Petitioner does not request a specific time in which to close estate. Suggest 6 months.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review on **02/25/19**.
(nb/lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/17/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800697

CASE NAME: TERRY NELSON NORMAN

HEARING:

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

COUNSEL:

KIRK NORMAN (PET)...GREG W JONES
TERRY NELSON NORMAN (DEC)...

GENERAL INFORMATION

Kirk Norman was appointed Special Administrator on 08/01/18, \$20,000 bond.

Continued from 08/27/18 for Proof of Publication.

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

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

- 1 All heirs waive bond. Estate value \$200,500 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 ~Proposed Form Order: 07/31/18

RECOMMENDATION

RFA. Court's discretion re bond. If approved, set Accounting/Status Review for **11/25/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/kd)

Superior Court of Calif, County of San Bernardino

Page: 2B add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 09/17/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800119

CASE NAME: Schabow vs Schabow

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

PHYLLIS R SCHABOW (PP)...PRO/PER

CAROLE ELIZABETH SCHABOW (RP)...

Notice to Carole Elizabeth Schabow, respondent, filed on 08/27/19.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 09/17/18

TIME: 10:00

DEPT: S37P

CASE#: CON PS1400051

CASE NAME: Shawn P Hughes

HEARING:

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

COUNSEL:

ARTHUR A CAPPILLA

(CPE)...J. DAVID HORSPOOL

SHAWN P HUGHES

(CEP)...EDWARD B FISCHER

BARBARA E BOWERSOCK

(TP)...BARBARA E BOWERSOCK

GENERAL INFORMATION:

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

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

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

Continued from 07/16/18 Ramona Verduzco requests a continuance for a representative from Department Of Behavioral Health to be present at the next hearing date.- position paper to be filed by 4pm August 20, 2018.

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

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

1. Petitioner, Arthur A. Capilla, is the conservator of the person and estate of Shawn Hughes. Petitioner was subsequently appointed as the LPS Conservator of the person, but that conservatorship proceeding was terminated. Both the probate conservatorship and the LPS conservatorship proceedings were pending in Riverside County, when, on 02/7/14, the probate conservatorship was transferred to San Bernardino County.
2. Petitioner alleges the LPS conservatorship was to have been transferred at the same time, but, due to a clerical error, it was not transferred to San Bernardino

County until 03/10/14, after it was terminated by operation of law. Petition indicates there is currently no pending LPS proceeding for Shawn Hughes.

3. Petition indicates that on 06/22/13, Shawn Hughes was arrested in the related case and on 11/14/13, Shawn was found mentally incompetent. On 03/20/15, Shawn was found mentally competent to stand trial and the criminal proceedings were reinstated.
4. Petitioner states that on 02/07/17, Petitioner was informed that Shawn was going to be readmitted to Patton State Hospital for further treatment for his mental capacity.
5. Petitioner proffers Welfare & Inst. Code § 5650.5 as authority for this Court to re-establish the LPS Conservatorship and requests this matter be referred to the Mental Health Investigator of the County of San Bernardino, or to such other person or entity that has been designated by the Director of the San Bernardino County Department of Behavioral Health, for an assessment by the local mental health system to determine if the conservatee has a treatable mental illness, including whether the conservatee is gravely disabled as result of a mental disorder and is unwilling to accept, or is incapable of accepting, treatment voluntarily; and directing that the assessment be filed with this Court within 30 days from the date of the referral.
6. **Confidential Assessment filed 04/04/17.**
7. **Report of Court-Appointed Attorney, Edward B. Fischel, filed 06/20/17.**
8. Notice given.
9. ~Proposed Order 02/22/17.

RECOMMENDATION:

Court's discretion.

(nb/cs)

