



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 09/18/18**

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

### **Destruction of Filed Documents:**

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

### **Contacting the Probate Examiners:**

Probate Examiners' email address: [ProbateNotes@sb-court.org](mailto:ProbateNotes@sb-court.org)

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

nb0820/0912

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: 09/18/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1400772

CASE NAME: IRENE BENITEZ 2013 TRUST

**SEE ALSO 2**

HEARING:

Hearing Re: OSC RE: OBJECTIONS TO APP. FOR ORDER FOR PAYMENT A

COUNSEL:

IRENE BENITEZ 2013 TRUST	(TRU)...
JOE ZARAGOZA	(PET)...BANKS GARCIA & JANIS
LOUIS M BENITEZ	(RES)...MILLER & MILLER-BAZEMORE
SANDRA ZARAGOZA	(PET)...DAMIAN G GARCIA

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

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Objections to Application for Order for Payment of Attorney's Fees by Attorney Damian G. Garcia for Petitioner, Joe Zaragoza.

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

1. Matter set at 08/14/18 hearing, wherein, the Court ordered any objections to be served and filed by 4:00pm August 28, 2018; failure to serve and file objections as ordered will be deemed a waiver of the objections.
2. Notice given.
3. No objections as of the review of this matter.
4. No proposed order. Submit Order after Hearing.
5. Request for Dismissal filed 07/26/18.

RECOMMENDATION: Matter appears moot.

Court's discretion

(nb)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/18/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1400772

CASE NAME: IRENE BENITEZ 2013 TRUST

**SEE ALSO 1**

HEARING:

Ex parte hearing re: Application for Order for Payment of Attys  
Fees

COUNSEL:

IRENE BENITEZ 2013 TRUST	(TRU)...
JOE ZARAGOZA	(PET)...BANKS GARCIA & JANIS
LOUIS M BENITEZ	(RES)...MILLER & MILLER-BAZEMORE
SANDRA ZARAGOZA	(PET)...DAMIAN G GARCIA

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

See prior matter #1.

(nb)

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

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1500672

CASE NAME: FLOYD MARTIN CAMPBELL

HEARING:

FIRST AND FINAL Account and Report of JOHN D CAMPBELL III and  
Petition for allowance of fees filed.

COUNSEL:

BRUCE CAMPBELL (TP )...  
FLOYD MARTIN CAMPBELL (DEC)...  
JOHN D CAMPBELL III (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report; and for  
Final Distribution by Executor, John D. Campbell, III ["Petitioner"].

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

1. Inventory & Appraisal attached to petition has the following issues:
  - a. Sections 1 & 2 are incorrect. **Need** Checking Account on **Attachment 1**.
  - b. **Need** legal description of real property listed on **Attachment 2**.
  - c. Real property, vehicle, books, postcards and furnishings are items that must be appraised by the probate referee Pr.C. §8902. **Need** corrected inventory
2. Accounting period 04/07/15 to 05/31/18.
3. Assets on Hand \$457,274.72 consisting of cash.
4. Statutory compensation of \$21,869.05 requested. However, statutory compensation cannot be determined until appraisal by Probate Referee and correction of final inventory.
5. Disbursements – Schedule D includes mileage; airfare; rental car; lodging and gas that are considered overhead and not allowed per Local Rule 20-909. **Need** corrected schedule.
6. Disbursements – Schedule D **requires** further clarification via verified supplement as to the following:
  - a. Multiple fast food; coffee shop and restaurant expenditures;
  - b. Apple Base;

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

- c. Michaels; 7 Eleven; Costco; Trader Joes; THJ; Vantex; \$1,000 to San Bernardino Court.
7. Disbursements – Schedule D includes the following:
  - a. \$4,800 to John Campbell for water blasting, painting landscaping, Bids;
  - b. \$4,000 to John Campbell for bids and house restoration;
  - c. \$2,236.06 New Loan Fee;
  - d. \$6,800 to John Campbell for water blasting, painting landscaping, Bids;
  - e. \$4,750 for Drainline Plumbing for new Sewer Line;
  - f. \$6,780 to Jorge Vizcaino for exterior painting;
  - g. \$4,800 to John Campbell for finish plumbing, managing contractors;
  - h. \$2,000 to John Campbell to strip wallpaper, empty house, basement;
  - i. \$35,586 to Hope Broderick for staging costs reimbursement.Does Court wish to require further itemization and/or invoices? **JTD.**
8. Schedule G indicates cash and personal property distributions have already been made without prior court authority. There does not appear to be harm to creditors or the estate. **JTD.**
9. **Need** copies of investment/bank statements to support cash balances on hand per Local Rule 20-908.
10. **Need** copy of escrow closing statement per Local Rule 20-910.
11. **Need** proof of service to Notice of Proposed Action re Sale of Real Property.
12. **Need** Notice of Hearing with proof of service.
13. Petitioner requests authority to withhold the sum of \$10,000 as a reserve. **JTD.**

**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 amended accounting that complies with Pr. C. §1060 et seq. to be set on first check calendar on **11/06/18**.

(nb)

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

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700402

CASE NAME: MTR OF JOHN DUANE MAISCH

HEARING:

First and Final Account and Report of WILHELM MAISCH and  
Petition for allowance of fees filed.

COUNSEL:

JOHN DUANE MAISCH (DEC)...  
US SPECIALTY INSURANCE COMPANY (TP )...PRO/PER  
WILHELM MAISCH (PET)...CONSTANCE J LARSON

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Administrator, Wilhelm Maisch ["Petitioner"].

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

1. Accounting period 01/19/17 to 06/07/18.
2. Assets on Hand \$118,076.85 consisting of cash.
3. Statutory fees of \$5,534.64 requested. Calculated.
4. Attorney requests reimbursement of costs advanced of \$1,614.00. Itemized.
5. Petitioner requests to withhold the sum of \$2,000 as a reserve.
6. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing date for receipts and final discharge  
for **10/01/19**.

(nb)

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

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700452

CASE NAME: MTR OF JUAN J DAVILA JR

HEARING:

Hearing Re: STATUS

COUNSEL:

DENISE M. SANZBERRO	(OBJ)...HARTNELL LAW GROUP
JUAN J DAVILA JR	(DEC)...
LAURA A QUIGLEY	(PET)...MATTHEW E SHEASBY
NATASHA MARIE AGUIRRE	(PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by NATASHA MARIE AGUIRRE is GRANTED

Request for Waiver of Court Fees and Costs filed by LAURA A QUIGLEY is GRANTED

No notes – Status.

(nb)

Future Hearing:

02/13/19 Readiness calendar

02/13/19 Petition for probate of lost will and etc.

03/11/19 Court Trial

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800531

CASE NAME: MARY GRACE MEDINA

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

MARY GRACE MEDINA

(DEC)...

RICHARD MEDINA

(PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 07/10/18 at request of petitioner.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by son, Richard Medina ["Petitioner"].

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

1. Petition indicates all heirs waive bond. **Need** signed, Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by petitioner and sibling, Faustino Medina.
2. Estimated estate valued at \$240,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. **Need** proof of publication.
4. ~Proposed Form Order/Letters 06/01/18.

RECOMMENDATION:

Need to clear notes 1 & 3 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **11/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)



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

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800741

CASE NAME: Donald Smith Sr.

HEARING:

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

COUNSEL:

DONALD SMITH Jr (PET)...LAW OFFICE OF J PATRICK RAGAN  
DONALD SMITH Sr (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by son, Donald Smith, Jr. ["Petitioner"].

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

1. Heirs waive bond. Estimated estate valued at \$885,000. 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 publication.
3. ~Proposed Form Order/Letters 08/03/18

RECOMMENDATION:

Need to clear note 2 then Court's discretion re: bond. If approved, set future hearing  
for Accounting Review on **11/26/19**. Any account to be filed 30 days in advance of  
hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/18/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800752

CASE NAME: MILDRED J. JONES

HEARING:

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

COUNSEL:

MILDRED J JONES (DEC)...  
RUTH L HENRICKS (PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority and w/WA under IAEA by nominee, Ruth Hendricks ["Petitioner"].

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

1. Will is not self-proving. **Need** Proof of Subscribing Witness.
2. Nomination of this petitioner affixed [LF, p14]. However, **need** declination to act by Marchelle Rene (Hughes) Moore.
3. Tanya Forbes named as Successor Executrix. **Need** Declination to Act by same.
4. Will waives bond. Estimated estate valued at \$125,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
5. Petitioner requests proceeds of sale to be deposited in a blocked account. **JTD**.
6. **Need** proof of publication.
7. Notice does not include Gregory Hughes or Tanya Forbes. **Need** proper service.
8. ~Proposed Form Order/Letters 08/08/18.

RECOMMENDATION:

Need to clear notes 1-3 & 5-6 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **11/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS AND MOTIONS**

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DATE: 09/18/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST, DATED  
JUN

**SEE ALSO 10**

HEARING:

Petition for TO COMPEL ACCOUNTING AND PRODUCTION OF TRUST RELATED DOCUMENTS; REMOVE TRUSTEE; APPOINT SUCCESSOR

COUNSEL:

CHARLES BUCHANAN	(PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOC	(TRU)..
KENNETH W. BUCHANAN	(PET)...DORSEY & WHITNEY
KENNETH W. BUCHANAN, TRUSTEE O	(TP )...DORSEY & WHITNEY LLP

Currently under review by Legal Research.  
(LR)

Notice was given.

(lh)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/18/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1700872

CASE NAME: JOYCE A HOCKENBERRY 2002 REVOCABLE TRUST, DATED  
JUN

**SEE ALSO 9**

HEARING:

Verified Account and Report of KENNETH W. BUCHANAN and Petition  
for allowance of fees filed.

COUNSEL:

CHARLES BUCHANAN	(PET)...ROSS LAW GROUP, APC
JOYCE A HOCKENBERRY 2002 REVOC	(TRU)..
KENNETH W. BUCHANAN	(PET)...DORSEY & WHITNEY
KENNETH W. BUCHANAN, TRUSTEE O	(TP )...DORSEY & WHITNEY LLP

GENERAL INFORMATION:

**Continued from 07/03/18 at request of counsel to clear notes. Court sets filing deadline for supplement to accounting for 4pm August 20, 2018; any objections to the accounting to be filed by 4pm September 4, 2018**

THIS CASE IS SET FOR HEARING ON Verified Accounting and Petition for Fees by Trustee, Kenneth W. Buchanan ["Petitioner"-son].

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

1. Petition is not verified. **Need** same.
2. Accounting period 03/23/16 to 04/30/18.
3. Asset on Hand \$276,429.09 consisting of cash and securities.
4. Trust waives bond.
5. Petitioner requests lessor fees of \$20,000. Billed at \$75/hour for more than 450 hours' time (exceeds \$33,750). Not itemized. **Need** itemization via verified supplement.
6. Attorney requests outstanding fees of \$4,546.00 through 04/30/18. **Need** hourly rate(s), hours; and itemization via verified supplement.
7. **Need** mandatory form, Summary of Account and supporting schedules, to include Assets on Hand at Beginning of Account Period and Ending Assets on Hand at End of Account Period, via verified supplement.
8. Disbursements **require** further clarification via verified supplement as to the following:

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- a. Found stuff;
  - b. Credit card accounts and refund;
  - c. Travel expenses;
  - d. Reclaimed payments by US Bank;
  - e. Attorney fees to Dorsey & Whitney;
  - f. Attorney fees to Hillsboro Law Group;
  - g. Two Bros. Painting;
9. Real property was sold during this account period. **Need** copy of Escrow Closing Statement.
  10. **Need** proof of service to Notice of Proposed Action re: sale of real property.
  11. **Need** statement regarding notice to Director of Health Care Services. Alternatively, notice per Pr. C. § 9202(a).
  12. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board. Alternatively, notice per Pr. C. § 9202(b).
  13. **Need** statement regarding notice to Franchise Tax Board. Alternatively, notice per Pr. C. § 9202(c)(1).
  14. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C.§1064(a)(5).
  15. **Need** findings re: sole and separate property.
  16. **Need** findings re: known creditors;
  17. **Need** bank/financial statements to support opening and closing balances.
  18. Notice does not give 30 days; notice per Pr. C. §17203. **Need** proper service.
  19. Petitioner requests authority to withhold the sum of \$5,000 as a reserve. **JTD.**
  20. **Objections filed by Charles Buchanan requests denial of the settlement of Trustee's account; denial of fees and reimbursement; removal of Trustee; and appointment of Objector as Successor Trustee of the Trust; and for attorney fees (unspecified).**
  21. No proposed order. Submit Order after Hearing.

RECOMMENDATION: Matter is contested.

Amended accounting filed in form of supplements at second check. Set on first check calendar no sooner than **11/20/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/18/18      TIME: 8:35      DEPT: S35P  
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CASE#: TRU PS1800061

CASE NAME: SHEEHAN FAMILY TRUST

HEARING:

Hearing Re: Amended Petition For Order Transferring Asset

COUNSEL:

ANTHONY SHEEHAN

(PET)...BENARI & NGUYEN LLP

SHEEHAN FAMILY TRUST

(TRU)...

Currently under review by Legal Research.

(LR)

Notice:

**Need** Notice of hearing to Timothy Sheehan and Jennifer Sheehan fka Jennifer Cordero.

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.

(nb)

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Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/18/18      TIME: 8:35      DEPT: S35P  
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CASE#: TRU PS1800152

CASE NAME: Estate of Eleanor Cynthia Hollis

HEARING:

Petition for To Instruct Trustee

COUNSEL:

ELEANOR CYNTHIA HOLLIS      (TRU)...

LORI ANN NORTHRUP      (PET)...TREVOR

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 09/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

**SEE ALSO 14**

HEARING:

Hearing Re: OSC RE SANCTIONS ON COUNSEL FOR FAILURE TO FILE

COUNSEL:

CLIFFORD MOORE	(PET)...CHRISTINA FERRANTE
GLORIA MOORE	(CEE)...
JOHN MARANAN	(PET)...CHRISTINA FERRANTE
SANDY TURNER	(PET)...SANDRA TURNER
SURETEC INSURANCE COMPANY	( )...

GENERAL INFORMATION:

Conservatee passed away on 11/07/17.

Continued from **04/17/18**. Court sets deadline for the filing of the accounting to 06/29/18.

**Continued from 07/31/18. No appearance. Prior to matter being called, Judicial Assistant received telephonic request for continuance by office staff of Christina Ferrante. Court noted that there was a filing deadline set by the court and counsel did not file the accounting by 4pm June 29, 2018. Court sets an OSC re sanctions in the amount of \$500.00 on counsel for their failure to file the accounting by that deadline- OSC is set for September 18, 2018 at 9:30am in Department S35. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions on Counsel for Failure to File** on Accounting Review

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

1. John Maranan and Clifford Moore appointed conservators of the person and estate on 02/07/17, \$59,000 bond.
2. **Need** separate pre and post death accounting per Pr. C. §2620.
3. **Accounting filed and set for 10/18/18.**



RECOMMENDATION:  
Court's discretion.  
(nb)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/18/18

TIME: 9:30

DEPT: S35P  
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CASE#: CON PS1600261

CASE NAME: GLORIA MOORE

**SEE ALSO 13**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CLIFFORD MOORE

GLORIA MOORE

JOHN MARANAN

SANDY TURNER

SURETEC INSURANCE COMPANY

(PET)...CHRISTINA FERRANTE

(CEE)...

(PET)...CHRISTINA FERRANTE

(PET)...SANDRA TURNER

( )...

See prior matter #13.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/18/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1600333

CASE NAME: MTR OF RICHARD MCNUTT

HEARING:

First And Final Account and Report of INLAND COUNTIES REGIONAL CENTER, INC., and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTE	(CE )...LAYNE A BARTHOLOMEW
MARK J ANDREW FLORY	(PET)...
RICHARD MCNUTT	(TRU)...
RICHARD MCNUTT	(CEE)...
DEPT OF HEALTH CARE SERVICES	(PRO/PER

GENERAL INFORMATION:

Beneficiary passed away on 11/13/17.

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees by Trustee of SNT, Inland Counties Regional Center, Inc. ["Petitioner"].

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

1. Accounting period 04/17/17 to 11/13/17 (pre) and 11/14/17 to 05/31/18 (post)
2. Assets on Hand \$70,264.98 consisting of cash held in a pooled investment account.
3. On 04/25/18, the court approved court-appointed attorney fees to Brown White and Osborn in the amount of \$4,091.50. Unfortunately, the payment of the fees did not occur until after the cut-off date of this accounting. Normally, petitioner would simply request a reserve which would encompass the fees that were paid but not shown on the accounting. However, with the court's new local rule regarding additional accounting requirements for a reserve in excess of \$1,500.00 petitioner would rather not include those fees in the reserve. Therefore, petitioner simply requests that the court include those previously ordered fees to Brown, White and Osborn included in the order as being paid prior to payment of the remaining assets to the Department of Health Care Services. **JTD.**

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

4. Attorney requests fees of \$5,100.00 for the period 05/10/16 to 07/24/18. Billed at \$250/hour for 13.6 hours' attorney time and \$100/hour for 17 hours' paralegal time. Itemized [LF, pgs. 65-68]. **JTD.**
5. Petitioner requests approval and ratification of payment of trustee fees in the amount of \$2,057.13 (Pre and Post -Death Periods) already paid to Master Trust of California for services to the trust. estate during this accounting period pursuant to their fee schedule dated February 14, 2012, attached hereto [LF, pgs. 73-74]. **JTD.**
6. Petitioner requests the Court order all remaining assets of SPECIAL NEEDS TRUST OF RICHARD McNUTT to be transferred to the DEPARTMENT OF HEALTH CARE SERVICES in partial satisfaction of its claim after payment of its claim after payment of attorney fees, trustee fees and administration expenses. **JTD.**
7. Petitioner requests a reserve in the amount of \$1,000. **JTD.**
8. Petitioner requests that the court terminate the SNT. **JTD.**
9. ~Proposed Order07/25/18

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/01/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/18/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1700022

CASE NAME: MTR OF MARLENE M YANEZ

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of SILVIA L YANEZ

COUNSEL:

MARLENE M YANEZ (CTP)...JACK B OSBORN  
SILVIA L YANEZ (CP )...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Notification of Conservatee's Rights; including a Determination of Conservatee's Appropriate Level of Care; and Care Plan filed.

RECOMMENDATION:

None.  
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER

**SEE ALSO 18**

HEARING:

Hearing Re: STATUS OF PETITION/OBJECTIONS

COUNSEL:

BEULAH MAE TOLLIVER

(CTP)...MITCHELL I ROTH

CARLA RAE TOLLIVER

(CP ).. PRO/PER.

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER

**SEE ALSO 17 THIS HEARING IS MOVED TO 09/19/18 S35P  
CALENDAR**

HEARING:

Petition for APPOINTMENT OF CONSERVATOR OF THE ESTATE

COUNSEL:

BEULAH MAE TOLLIVER (CTP)...MITCHELL I ROTH  
CARLA RAE TOLLIVER (CP).. PRO/PER.

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of the estate, only by Conservator of the Person, Carla Rae Tolliver ["Petitioner"- daughter].

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

- 1 Estimated estate valued at \$404,924. Suggest bond of \$65,000. **JTD.**
- 2 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**
- 3 Petitioner requests waiver of Court Investigator's fees on basis that proposed conservatee's income is \$4,577/month and would impose a financial burden to conservatee's estate. **JTD.**
- 4 Petitioner requests authority to apply for and receive such public benefits, Social Security and SSI benefits minors may be entitled to receive. **JTD.**
- 5 Court to determine whether the Court should take jurisdiction of the Tolliver Family Trust dated 06/21/95. **JTD.**
- 6 Citation returned served.
- 7 No proposed order/letters. Submit Order after Hearing.

#### RECOMMENDATION:

Court's discretion re: bond. If approved, set hearing for Compliance Review on **04/24/19** for the filing of the following: proof of service of Order with Notification of

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

Conservatee's Rights per Pr.C. §1830(c); Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C. §2610; and recordation of letters if applicable per Pr.C. §2313.

Set hearing re Accounting Review for **11/27/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/18/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1800220

CASE NAME: Joseph Dean Cowles

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DWAYNE K COWLES                      (CP )...PRO/PER

JOSEPH DEAN COWLES                (CTP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by father, Dwayne Cowles ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. **Need** Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. **Need** Citation returned.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.
9. **Need** Certificate of Completion re Conservatorship Class.

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

10. **Need** Notice of Hearing with proof of service to include Inland Regional Center and maternal grandmother or file due diligence declaration.
11. ~Proposed Form Order/Letter 07/26/18 & 09/11/18.

**RECOMMENDATION:**

Court to appoint counsel then need to clear notes. If approved, set hearing for Compliance Review for **04/23/19** 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.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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

CASE#: CON PS1800221

CASE NAME: RISHAB VINAY DOJODE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

RISHAB VINAY DOJODE	(CTP)...
SARASWATI MAHINDRAKAR	(PET)...JEFFREY A GOTTLIEB
VINAY SHANKAR K DOJODE	(PET)...JEFFREY A GOTTLIEB

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Saraswati Mahindrakar and Vinay Shankar K Doijode ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Medical Capacity Declaration filed.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Citation returned served.
7. Court Investigator Report filed.
8. **Need** Inland Regional Center Report.

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

9. Certificates of Completion re Conservatorship Class filed.
10. ~Proposed Form Order 07/25/18.

**RECOMMENDATION:**

Court to appoint counsel then need to clear notes 2 & 8. If approved, set hearing for Compliance Review for **04/23/19** 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.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

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DATE: 09/18/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1400108

CASE NAME: Davison Family Trust dated 7/9/90

HEARING:

Hearing re Final Discharge

COUNSEL:

DAVISON FAMILY TRUST DATED 7/9      (TRU)...  
SAN BERNARDINO PUBLIC ADMINIST      (PET)...CRAG M PARKER  
SAN BERNARDINO PUBLIC ADMINIST      (STE)...CRAG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge re Successor Trustee, Public Administrator.

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

1. Order Settling First and Final Account entered 09/12/17.
2. No receipts. **Need** same.
3. **Need** informal account for reserves per Local Rule 20-911.
4. **Need** Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**MISC**

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DATE: 09/18/18    TIME: 1:30    DEPT: S35P  
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CASE#: PRO PS1700611

CASE NAME: MTR OF FREDERICK HAYS

**VACATED**

HEARING:

Hearing Re: COURT TRIAL (SECOND SESSION)

COUNSEL:

FREDERICK HAYS

(DEC)...

JAMES B JENSEN

(PET)...JEREMIAH RAXTER

LISA CARLSON

(PET)...GAUDY LAW, INC

Future Hearing:

09/19/18 Court Trial

09/20/18 Court Trial

09/21/18 Court Trial

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: CIV RS1400249

CASE NAME: MERCEDES MURRAY -V- DAVINA MICHELLE PATTERSON

HEARING:

Hearing Re: OSC RE:DISMISSAL

COUNSEL:

ARROWHEAD CREDIT UNION	(CC )...KNAPP, PETERSEN &
DAVINA MICHELLE PATTERSON	(DEF)...PRO/PER
MERCEDES MURRAY AND MONICA MUR	(PLA)...OSBORN/LAW

Request for Waiver of Court Fees and Costs filed by DAVINA MICHELLE PATTERSON is GRANTED

**XREF: PROPS1300718** (David Lee Patterson)

GENERAL INFORMATION

**Continued from 10/19/17** for dismissal to be filed.

**Continued from 01/04/18** at request of Court to verify settlement. Oral report given by Mitchell Roth and Barbara Colino.

**Continued from 02/21/18.** Court and counsel confer on the record. Matter is continued as parties are awaiting signatures on settlement agreement. Richard Osborn and Blair Berkley are order to appear at next hearing.

**Continued from 04/03/18.** Court notes Attorneys Richard Osborn and Blair Berkley has failed to appear at today's hearing and did not contact the Court as to non-appearance. On February 21, 2018, Court ordered Attorneys Richard Osborn and Blair Berkley to appear at today's hearing. There being no appearance by either counsel, Court will ordered Bench warrant to be issued as to both, Attorneys Richard Osborn and Blair Berkley-- BAIL: \$5,000.00. Court will hold issuance of Bench Warrant and Bail until May 1st, 2018. Attorney Mitchell Roth to give notice. Pursuant to stipulation Court orders the April 18, 2018 hearing on related case PROPS1300718, VACATED.

**Continued from 05/01/18.** Bench warrant quashed before issuance. Court and counsel confer on the record.

**Continued from 07/10/18 to resubmit dismissal.**

THIS CASE SET FOR HEARING ON OSC re Dismissal

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

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

1. Matter set at settlement OSC on 08/24/17.
2. Counsel Roth to submit application for good faith. Order determining settlement of Plaintiffs to be in good faith filed 09/07/17.
3. Declaration by Mark Skapik filed 04/18/18 and for review in open access.
4. Declaration by Richard Osborn filed 04/18/18 and for review in open access.
5. Notice of Entry of Dismissal and proof of service filed on 05/08/18 as to Arrowhead Credit Union and for review in open access.

RECOMMENDATION

Court's discretion re OSC.

(lc/lh/nb/ww/nb)



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: 09/18/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1500286

CASE NAME: CARLOS MUNOZ

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CARLOS MUNOZ	(DEC)...
ESPERANZA C MUNOZ	(OBJ)...PRO/PER
ESPERANZA CASTILLON MUNOZ	(PET)...PRO/PER
GLORIA CASTILLON MURILLO	(PET)...PRO/PER

GENERAL INFORMATION:

Continued from **06/19/18** on courts motion. No appearance, inventory or accounting. Court orders Esperanza Castillon Munoz to be present at hearing. Notice by Judicial Assistant.

**Continued from 08/14/18. Matter is continued- Administrator is encouraged to contact counsel to assist with the administration of the estate. Court orders administrator, Esperanza Munoz to be present.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Esperanza C Munoz on 04/18/17, full authority, no bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500460

CASE NAME: CHARLES RICHARD WERNER

HEARING:

Hearing re Final Discharge

COUNSEL:

CHARLES RICHARD WERNER	(DEC)...
LORRAINE WARREN	(PET)...LENITA SKORETZ
SHIRLEY E WERNER	(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

**Continued from 07/24/18 to file required documents.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling First and Final Account entered 08/02/17.
2. **Need** Ex-Parte Petition/Order for Final Discharge.

RECOMMENDATION:

Need to clear note 2.

(nb)

Superior Court of Calif, County of San Bernardino

Page: 4

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

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

HEARING:

Hearing Re: PROOF OF DEPOSIT IN TO BLOCKED ACCOUNT

COUNSEL:

CHRISTINE LARSON	(PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON	(RES)...
CHRISTINE LARSON, TRUSTEE	( )...
JASON LARSON	(PET)...MICHAEL B HICKEN
JOSHUA LARSON	(MIN)...
MATTHEW LARSON	(MIN)...
THE GEORGE NEWMAN LIVING TRUST	(TRU)...

GENERAL INFORMATION:

**Continued from 07/17/18 at request of counsel to file bond and blocked accounts.**

THIS CASE IS SET FOR HEARING ON Proof of Deposit into Blocked Account.

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

1. Per Settlement Agreement and Order Thereon entered on 05/08/18, Trust assets will be placed into blocked accounts and that the total amount of assets subject to bond shall be no more than \$50,000.
2. **Need** proof of bond.
3. **Need** proof of blocked account.

RECOMMENDATION:

Need to clear note 2-3.

(nb)

Future Hearing:

11/13/18 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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

CASE#: PRO PS1600975

CASE NAME: MTR OF DEMETRICE CHARMAINE APPLEWHITE

HEARING:

Final Account and Report of SHANIA L WARREN-BENNIKE and Petition for allowance of fees filed.

COUNSEL:

DEMETRICE CHARMAINE APPLEWHITE (DEC)...

SHANIA L WARREN-BENNIKE (PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 08/07/18 on courts motion. Non-appearance by executrix. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Administration by Executrix, Shania L Warren-Bennike ["Petitioner"-daughter].

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

1. Final Inventory and Appraisal filed on 04/16/18 includes various documents that should be filed separately; including a partial accounting. **Need** the proper filing of a Final Inventory and Appraisal with Attachments 1 & 2 that includes an appraisal by Probate Referee; does not include "pay on death" accounts; with copies of supporting bank/financial statements.
2. Accounting period 05/30/17 to 03/31/18. Incorrect. Account should begin as of date of death (06/02/16).
3. Assets on Hand \$265,985.80
4. Property on Hand at Beginning of Account reflected on Summary of Account differs from Total on Final Inventory and Appraisal [see I & A filed 04/16/18, LF, p. 5].
5. Disbursements – Schedule B [see I & A filed 04/16/18, LF, p. 7] require further clarification as to the following:
  - a. Question whether Discover and Citi Card accounts are those of decedent and if so, whether there remains a balance?
  - b. Unidentified \$310 to petitioner.
6. **Need** to include a final report of administration per Pr. C. §1064 and Pr. C. §10954(c) (1) with required Pr. C. §9202 allegations.

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

7. Account does not include proposed distribution and prayer. **Need** same.
8. Purported Final Accounting filed on 06/22/18 does not comply with Pr. C. §1064 et seq.
9. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need amended accounting to be set on a first check calendar no sooner than **10/30/18**. Any account to be filed 30 days before hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700344

CASE NAME: MTR OF PAULA MARTINEZ

HEARING:

Accounting Review by \*\*\*

COUNSEL:

MARY D MARTINEZ (PET)...MITCHELL I ROTH  
PAULA MARTINEZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Mary D. Martinez on 07/11/17, full authority, \$85,000 bond.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status. Clerk to notice surety.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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

CASE#: PRO PS1700346

CASE NAME: MTR OF ABBAS ALI RAMAZAN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ABBAS ALI RAMAZAN (DEC)...  
PATRICIA MARIE RAMAZAN (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration w/WA issued to Patricia M. Ramazan on 07/11/17, full authority, no bond.
2. No accounting or status report. **Need same.**

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 8  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700356

CASE NAME: RICHARD DONALD LARSEN

HEARING:

FIRST AND FINAL Account and Report of RHONDA K ANDERSON and  
Petition for allowance of fees filed.

COUNSEL:

RHONDA K ANDERSON (PET)...ALBREKTSON & SHUMATE, LLP  
RICHARD DONALD LARSEN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Executrix, Rhonda K. Anderson ["Petitioner"].

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

1. All beneficiaries waive accounting.
2. Accounting period 05/15/16 to
3. Assets on Hand \$347,971.72 in cash.
4. Petitioner waves compensation.
5. Attorney requests statutory fees of \$9,689.22. Calculated.
6. Petitioner does not request reimbursement for costs totaling \$1,385.46.
7. Attorney requests reimbursement of costs advanced of \$465.00. Itemized.
8. Petitioner requests authority to withhold the sum of \$1,500 as a reserve.
9. ~Proposed Order 09/11/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**10/01/19.**

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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

CASE#: PRO PS1700356

CASE NAME: RICHARD DONALD LARSEN

HEARING:

FIRST AND FINAL Account and Report of RHONDA K ANDERSON and  
Petition for allowance of fees filed.

COUNSEL:

RHONDA K ANDERSON

(PET)...ALBREKTSON & SHUMATE, LLP

RICHARD DONALD LARSEN

(DEC)...

**VACATE** - Duplicate setting.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1701255

CASE NAME: MATTER OF RALPH DAVID HILL

**SEE ALSO 10A**

HEARING:

Hearing Re: (amended)Ptn for Extention of Time to File I&A

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP )...

MARTHA SMITH

(PET)...ORSOLYA F SABADO

RALPH DAVID HILL

(DEC)...

GENERAL INFORMATION

**Continued from 08/16/18 to trail pending matter.**

THIS CASE SET FOR HEARING ON **Amended** (08/01/18) Petition for Extension of time to file Inventory and Appraisal Pr.C. § 8800(b).

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

1. Letters of administration issued to Martha Smith, daughter, on 02/22/18; limited authority, no bond.
2. Administrator seeks additional time to file final Inventory and Appraisal; as Inventory and Appraisal with original signature of probate referee was lost in mail. A copy was filed on 07/05/18.
3. Amended petition addresses and prays for relief that should be accounted for. **Need** proper accounting that complies with Pr. C. §1060 et seq.

RECOMMENDATION

Court's discretion.

(lc/nb)

FUTURE HEARING DATES:

04/12/19 Accounting Review

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/18/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1701255

CASE NAME: MATTER OF RALPH DAVID HILL

**SEE ALSO 10**

HEARING: Petition for Extention of Time to File Inventory and Appraisal

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP )...

MARTHA SMITH

(PET)...ORSOLYA F SABADO

RALPH DAVID HILL

(DEC)...

See prior matter #10.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800634

CASE NAME: CANG TRUNEG NGUYEN

HEARING:

Petition for LETTERS OF ADMINISTRATION WITH FULL IAEA

COUNSEL:

CANG TRUNEG NGUYEN

(DEC)...

THUY NGUYEN

(PET)...PRICE LAW FIRM, APC

GENERAL INFORMATION:

**Continued from 08/14/18. Court clears probate note 1. Court notes bond will be \$209,000.00**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Thuy Nguyen ["Petitioner"].

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

1. Estimated estate valued at \$209,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
2. **CLERK: correct spelling is "Trung."**
3. ~Proposed Form Order/Letters 07/03/18.

RECOMMENDATION:

RFA, \$209,000 bond. If approved, set future hearing for Accounting Review on **11/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800746

CASE NAME: Mtr of Anthony R Reyes

HEARING:

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

COUNSEL:

ANTHONY R REYES (DEC)...  
KATHERINE LIBBY (PET)...DAN PERRY ATTORNEY AT LAW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by daughter, Katherine Libby ["Petitioner"].

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

1. Section 2a to petition requests that decedent's will and codicils, if any, be admitted to probate. However, Section 2b requests to be admitted as administrator. **Need** verified supplement.
2. Duties and Liabilities of Personal Representative, Section 2 does not include telephone number. **Need** same via verified supplement.
3. Petitioner indicates she is the sole heir and waives bond. **Need** Mandatory Waiver of Bond by Heir or Beneficiary, form DE-142/DE-111, by petitioner.
4. Estimated estate valued at \$250,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
4. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **11/26/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

**SEE ALSO 14**

HEARING:

Petition for LETTERS OF SUCCESSOR ADMINISTRATION

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION

**Continued from 04/26/17, 07/25/17, 09/19/17, 12/19/17, 02/20/18, 04/24/18, 06/05/18 and 08/14/18.**

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administration with full authority under IAEA by Sandra Thomas Stell, great niece.

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

1. Letters of Administration with Will Annexed issued to Verna Grasso, paternal grandniece on 8/23/02, with funds held in blocked account in lieu of bond. Verna passed away on **12/29/16**.
2. As the will has already been admitted to probate, it appears to be a petition for successor administrator.
3. Petitioner requests bond of \$20,000; however, cash and real property appear to be valued at \$42,020. Court to require bond of \$42,020.
4. Notice to Petition to Administer Estate and proof of service filed 04/05/17. However, **need** Due Diligence Declarations as to heirs with unknown whereabouts.
5. Notice of Death of Administrator filed 04/05/17; **need** proof of service.
6. Proof of Publication filed 04/17/17 is not verified. **Need** amended Proof of Publication.
7. ~Proposed Form Order: 03/07/17.

## RECOMMENDATION

Need to clear notes 4-6 then Court's discretion re bond. If approved, set Accounting/Status Review for **12/05/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/nb)

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

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HONORABLE: JAMES MICHAEL WELCH

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

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN  
**SEE ALSO 13**

HEARING:

SIXTH Account and Report of VERNA GRASSO and Petition for allowance of fees filed.

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION:

Administrator Verna Grasso died on 12/29/16.

**Continued from 07/25/17, 09/19/17, 12/19/17, 02/20/18, 04/24/18, 06/05/18 and 08/14/18 for counsel to file a supplement to clear notes.**

THIS CASE IS SET FOR HEARING ON Sixth and Final Account and Petition for Fees by Attorneys for Petitioner C.L. Farrell and as former Attorneys for the late Verna Grasso, Deceased Administrator.

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

1. Accounting period 10/12/15 to 02/28/17.
2. Assets on Hand \$45,260.36 consisting of \$40,255.40 in cash and remaining in a ½ interest in unimproved real property.
3. Compensation is not requested.
4. Reimbursement for costs is not requested.
5. Petitioner requests an Order Authorizing the Estate to Abandon its Undivided one-half tenancy in common interest in the unimproved, vacant lot located in Newberry Springs, CA, having a 01/26/16 reappraised value of \$2,000 due to its demonstrated unmarketability, to conserve the Estate cash assets and enable the Estate assets to be distributed to its heirs at law and for the Estate to be brought to a close. Consents are not affixed as alleged. **Need same by all Nolen Estate Heirs.**
6. **Need** Notice of Hearing with proof of service.

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



7. Petitioner requests Attorney Farrell be authorized and directed to issue Final Distribution checks to the Nolen Heirs from the unblocked Community Bank Nolen Heirs Checking Account.
8. Petitioner requests an order authorizing and directing her to retain the sum of \$5,000 in the Community Bank Nolen Heirs Checking Account for closing costs.
9. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 5-6 then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/01/19**.

(nb)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/18/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1700676

CASE NAME: MTR OF PAUL JAMES LENHART

**SEE ALSO 15**

HEARING:

Waiver of Account and Report of JODIENNA ANN LUKACS and Petition for allowance of fees filed.

COUNSEL:

CA FRANCHISE TAX BOARD	(TP )...
JODIENNA ANN LUKACS	(PET)...MICHAEL C MADDUX
PAUL JAMES LENHART	(DEC)...

Request for Waiver of Court Fees and Costs filed by JODIENNA ANN LUKACS is GRANTED  
Fee waiver amount due \$1276.00  
\$695.00 for probate petition/special admin on 07/10/17  
\$90.00 for ex parte app on 08/17/17  
\$26.00 for certified copy on 08/28/17  
\$465.00 waiver of account on 03/07/18

**X-REF: CIVDS 1806440 (LBS FINANCIAL-V-THE ESTATE OF LENHART)**

GENERAL INFORMATION:

Continued from **04/17/18** to clear notes.

Continued from **05/22/18**. Counsel states he is still working on an outstanding creditor's claim.

**Continued from 08/28/18 on courts motion to trail motion for attorney's fees. No appearances. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Jodienee A. Lukacs ["Petitioner"].

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

1. Heirs waive accounting.
2. Assets on Hand **\$150,738.49** consisting of **\$5,738.49** in cash and remaining in real property.
3. Statutory fees of \$5,350.00 requested. Calculated.

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

4. Attorney requests extraordinary fees of \$4,950.00 for services rendered in connection with the stay of foreclosure. Billed at \$325/hour for a total of 14 hours' attorney time. Itemized [LF, p. 6]. **JTD.**
5. Petitioner requests that Court that a judgment in the total amount of \$10,300 be entered against the Estate and against each heir for \$3,417.60 each; Beth Atmold, Leta Lenhart and Codi Lenhart, jointly and severally, to secure attorney's fees, since the heirs intend to retain the estate property. **JTD.**
6. Petitioner requests the title to the real property located at 12262 Beaver Avenue, Victorville, CA 92392, be vested in above-named heirs as Tenants in Common at 33.33%, each. **JTD.**
7. Petitioner request remaining cash assets at Citibank Acct. No. XXX6134, totaling \$4,366.10, be paid to her as partial statutory fees. **JTD.**
8. Settlement agreement as to LBS Financial CU filed on 08/30/18. Does Court wish to ratify settlement agreement? **JTD.**
9. Proposed Order 03/07/18 includes deficiencies as noted above. Revised order not received. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for receipts and final discharge for **05/28/19.**

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

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DATE: 09/18/18 TIME: 8:35 DEPT: S36P  
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CASE#: PRO PS1700676

CASE NAME: MTR OF PAUL JAMES LENHART

**SEE ALSO 14A**

HEARING:

Motion Re: application for approval of supplemental atty's fees  
for extraordinary services Filed by Petitioner JODIENNA ANN  
LUKACS

COUNSEL:

CA FRANCHISE TAX BOARD	(TP )...
JODIENEE ANN LUKACS	(PET)...MICHAEL C MADDUX
PAUL JAMES LENHART	(DEC)...

**X-REF: CIVDS 1806440**

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Application for Approval of Supplemental Attorney's Fees for Extraordinary Services by Attorney Michael C. Maddux ["Petitioner"].

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

1. Petitioner indicates he has incurred additional attorney fees since filing the Waiver of Account and Report Jodienna Ann Likacs and Petition for Allowance of Fees; Petition for Final Distribution.
2. Petitioner requests extraordinary fees of \$7,150.00 for services rendered in connection with the defense of a deficiency complaint for money damages in the related case. Billed at \$325/hour for a total of 22 hours' attorney time. Itemized [LF, pgs. 3-4]. **JTD**.
3. Petitioner requests an order directing Jodienna Ann Lukacs to pay requested sum forthwith.
4. Petition is not verified. **Need** same.
5. ~Proposed Order 08/07/18.

RECOMMENDATION:

Need to clear note 4 then Court's discretion.

(nb)

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

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DATE: 09/18/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON PS1700096

CASE NAME: fausto sanabia

HEARING:

Hearing Re: STATUS ON 850 PETITION

COUNSEL:

CASTULO SANABIA                      (PET)...PRO/PER

FAUSTO SANABIA                      (CEE)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by FAUSTO SANABIA is GRANTED

No notes – Status.

(nb)

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

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

-----  
DATE: 09/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700144

CASE NAME: MTR OF CHARLIE BRANDON PARDO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JUAN CARLOS PARDO

COUNSEL:

AURORA TEMPLETON	(CP )...PRO/PER
CHARLIE BRANDON PARDO	(CTP)...LENITA A SKORETZ
JUAN CARLOS PARDO	(CP )...PRO/PER
KIMBERLY PARDO	(CP )...PRO/PER

GENERAL INFORMATION

Juan C. Pardo (father), Aurora Templeton (mother) and Kimberly Pardo (sister) appointed Limited Co-Conservators of the person on 08/22/17.

Continued from **03/27/18** at request of counsel. Counsel to give notice.

Continued from **05/15/18** on courts motion. Non-appearance by conservator; nor has the required documents been filed. Notice by Judicial Assistant.

**Continued from 07/24/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Care Plan and Appropriate Level of Care filed.
- 2 Notice of Conservatee's Rights filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 09/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800185

CASE NAME: Sergio Valdivia

HEARING:

Petition for Appointment of Conservator

COUNSEL:

AMPARO VALDIVIA (CP )...  
HERIBERTO VALDIVIA (CP )...  
SERGIO VALDIVIA (CTP)...JANET LATOURETTE

GENERAL INFORMATION:

**Continued from 07/24/18 to clear notes.**

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Sergio and Ampara Valdivia ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Report of court-appointed counsel, Janet La Tourelle, filed.
3. **Need** Medical Capacity Declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited conservatee's right to control his or her social and sexual contacts and relationships.
6. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.

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

7. Citation returned SERVED 07/02/18 [affixed to notice of hearing].
8. Confidential Conservator Screening Forms do not include driver's license numbers and #16 re: adverse interest is incomplete. **Need** verified supplement.
9. Court Investigator Report filed.
10. **Need** Inland Regional Center Report.
11. Certificates of Completion re Conservatorship Class filed.
12. Notice filed on 07/02/18 does not include Inland Regional Center. **Need** proper service.
13. ~Proposed Form Order/Letters 06/18/18.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **04/23/19** 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.

(nb)



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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800236

CASE NAME: Gloria Dean Redd

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
ALTHEA LANGE (CP )...  
GLORIA DEAN REDD (CTP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person, only, by daughter, Althea Lange ["Petitioner"].

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

1. Venue is improper as proposed Conservatee resides in Los Angeles County.
2. No bond – person only.
3. Petitioner seeks medical powers. Medical Capacity Declaration, Sections 4a & 5b; 5b(1)-(4) are blank; signature on page 1 is not dated; and 7b is not initialed. **Need** complete capacity declaration.
4. **Interoffice Memo** by Court Investigator filed.
5. Citation returned served.
6. **Need** Certificate of Completion re Conservatorship Class.
7. Supplemental Notice of Hearing filed on 09/04/18 does not give 15 days' notice. **Need** proper service.
8. ~Proposed Form Order/Letters 09/04/18.

RECOMMENDATION: Deny.

Need to clear notes. If approved, set hearing for Compliance Review for **04/23/19** 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.

(nb)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/18/18 TIME: 9:30 DEPT: S36P  
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CASE#: RC RS00375

CASE NAME: SYLVIA HERNANDEZ

HEARING:  
Hearing Re: CI REPORT/STATUS

COUNSEL:  
ELAINE L HERNANDEZ (PET)...ALTHOUSE & MCDONOUGH  
SYLVIA HERNANDEZ (CEP)...PATRICIA A LOBELLO  
SYLVIA HERNANDEZ (PCE)...CANDICE A GARCIA-RODRIGO  
XAVIER F HERNANDEZ (PET)...ALTHOUSE & MCDONOUGH

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on Courts motion upon receipt and review of CI Report filed 04/30/18.
2. Court appoints Attorney Candice Garcia-Rodrigo as attorney for conservatee.  
**Need** report.

RECOMMENDATION:  
Need report by court-appointed counsel then Court's discretion.  
(nb)

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HONORABLE: JAMES MICHAEL WELCH **MISC**

-----  
DATE: 09/18/18 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

HEARING:  
Hearing Re: SETTLEMENT CONFERENCE

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

No notes – Settlement Conference.  
(nb)

Future Hearing:  
09/24/18 Court Trial  
09/24/18 Petition for order to recover possession of personal etc.  
09/24/18 First account and report

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 09/18/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 2, 3**

HEARING:

Hearing Re: Receipt of Settlement Agreement

COUNSEL:

KELLY ZUNIGA

(OBJ)...DAWN HALL CUNNEEN

KELLY ZUNIGA

(PET)...DAWN HALL CUNNEEN

PIUS F HORNER DATED MAY 14, 19

(TRU)...

ROSEMARY HORNER

(PET)...ROBERT L KERN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Receipt of Settlement Agreement

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

1. Per register of actions, stipulation and order received and forwarded for review on 09/10/18.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 09/18/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 1, 3**

HEARING:

FOR APPROVAL OF FIRST Account and Report of ROSEMARY HORNER and  
Petition for allowance of fees filed.

COUNSEL:

KELLY ZUNIGA

(OBJ)...DAWN HALL CUNNEEN

KELLY ZUNIGA

(PET)...DAWN HALL CUNNEEN

PIUS F HORNER DATED MAY 14, 19

(TRU)...

ROSEMARY HORNER

(PET)...ROBERT L KERN

See notes on matter #3.

(nb)

Superior Court of Calif, County of San Bernardino  
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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 09/18/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600378

CASE NAME: PIUS F HORNER TRUST DATED MAY 14, 1993

**SEE ALSO 1, 2**

HEARING:

SUPPLEMENTED ACCOUNT (AMENDED FIRST ACCOUNT) Account and Report of ROSEMARY HORNER and Petition for allowance of fees filed.

COUNSEL:

KELLY ZUNIGA	(OBJ)...DAWN HALL CUNNEEN
KELLY ZUNIGA	(PET)...DAWN HALL CUNNEEN
PIUS F HORNER DATED MAY 14, 19	(TRU)...
ROSEMARY HORNER	(PET)...ROBERT L KERN

GENERAL INFORMATION:

Continued from **12/05/16**. The Court orders that a proper accounting be filed. Counsel to file a supplement to clear notes and a proper accounting. Request to appoint a paid professional fiduciary as temporary trustee is reserved.

Continued from **03/06/17** to review supplemental accounting. Court orders any objections being filed by Mr. Kern to be code compliant. Mr. Kern is to file any other objections by 4/3/17. If both parties cannot agree on accountings the court will appoint a professional fiduciary.

Continued from 05/22/17 at request of Mr. Kern. Parties do not stipulate to Pro Tem.

Continued from **07/31/17 and 01/18/18**. Matter set for settlement conference and possible Court Trial.

Continued from **01/31/18**. Counsel urged to continue settlement discussions.

**Continued from 05/17/18 at request of counsel for settlement agreement to be filed.**

THIS CASE IS SET FOR HEARING ON **Amended** (02/28/17) First Account Current and Petition for Fees by Successor Trustee, Rosemary Horner (surviving spouse) ["Petitioner"].

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

1. Accounting period 11/01/14 to 12/31/16.
2. Assets on Hand \$516,865.64 consisting of \$104,248.64 in cash; \$390,000 in carry value of real property; and remaining in personal property.

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

3. Trustee requests ratification of compensation taken in the amount of \$5,515.13.
4. Trustee requests reimbursement of costs advanced of \$1,733.98.
5. **Need** bank statement for Bank of America Account XXX7066.
6. Notice given.
7. No proposed order. Submit Order after Hearing.
8. **Objections et seq. filed 12/02/16, 05/18/17 and 07/25/17 by trust beneficiary, Kelly Zuniga.**

RECOMMENDATION:

Matter is contested. Need to clear note 5. If approved, set next Accounting Review for **08/21/18**. Any account to be filed 30 days before hearing date. Note requirements of Local Rules.

(nb/lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**ELDER ABUSE**

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DATE: 09/18/18      TIME: 9:30      DEPT: S37P  
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CASE#: EAP PS1800097

CASE NAME: CALDERON VS CALDERON

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

ALFRED PATRICK CALDERON                      (PP )...PRO/PER

GILBERT SANTOS CALDERON ALVARA (RP )...

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Proof of Unsuccessful Service filed 07/30/18 as to Gilbert Santos Calderon Alvarado.  
(nb)

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