



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 09/19/18

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.

08/27/18lh; 09/14/18lh

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS0800133

CASE NAME: RICHARD P. WHITE

HEARING:

Hearing re Final Discharge

COUNSEL:

DARLA L. WHITE

(PET)...DANIEL C SEVER

RICHARD P. WHITE

(DEC)...

GENERAL INFORMATION

Final discharge continued from 2/19/14, 3/26/14, 5/14/14 and 6/25/14.

On 6/17/15 Court set OSC re Sanctions as there was no appearance or file required documents. Notice mailed. Nothing new filed.

Continued from **8/5/15**. No appearance. Notice to be sent to correct address of counsel.

Matter was taken off calendar on 09/16/15 and reset. Court vacated Sanctions. Administrator still making payments as to Creditor's Claims.

Continued from **09/15/16** to file receipts of creditor claims.

Continued from 09/20/17 to clear probate notes.

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Final distribution approved 5/28/13.
2. No receipt required from beneficiary as petitioner is the sole heir.
3. **Need** receipts of payment of creditor claims.
4. **Need** Ex-parte petition for final discharge order submitted with document recording information per Pr. C. §11753.

RECOMMENDATION:

Inquire status.

(gls/kra/lc/ww/lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600463

CASE NAME: ANN E. MCCOMBIE

HEARING:

Probate status report

COUNSEL:

KAREN A THRASHER	(PET)...PRO/PER
PHILIP C ADAMS	(PET)...PRO/PER
ANN E MCCOMBIE	(DEC)...

GENERAL INFORMATION:

Continued from 11/15/17. Matter is continued at request of Karen Thrasher for additional time to file an accounting due to unresolved vesting issues as to property in Santa Paula. Current hearing continued to 05/16/18.

Continued from 05/16/18. Petitioner is requests a Court Order for corrected deed to show interest in the Ventura property. Matter is continued for petitioner to file proper petition and notice to all required parties. Court suggests petitioner seek legal assistance.

THIS CASE IS SET FOR HEARING ON Status Report of Administration

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

1. Letters Testamentary issued to Karen A Thrasher and Philip C Adams on 07/14/16.
2. Petitioner alleges the estate is not in a condition to be closed as estate has unresolved vesting issues as to the property in Santa Paula, California. Petitioner has contacted an attorney to help resolve issues.
3. Petitioner requests an additional 3 months to close. Suggest Court continue for 12 months.
4. Declaration of Karen A. Thrasher filed 03/14/18 indicates estate is still not in a condition to be closed and requests Court to Order a "Corrective" deed to show interests in Ventura property. However, **need proper petition and noticed hearing.**
5. No proposed order submitted

RECOMMENDATION:

Inquire status of petition. If approved, set next hearing for Accounting Review on **01/16/19**.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600472

CASE NAME: ESTATE OF GARY DEE PINKERTON

SEE ALSO 4, 5

HEARING:

Hearing Re: amended and updated status report of adm

COUNSEL:

LEE JAY PINKERTON (PET)...KEVIN M MAHAN
GARY DEE PINKERTON (DEC)...

See notes on next matter #4.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600472

CASE NAME: ESTATE OF GARY DEE PINKERTON

SEE ALSO 3, 5

HEARING:

Hearing Re: OSC RE: \$500.00 SANCTIONS FTA (LEE JAY PINKERTON)

COUNSEL:

LEE JAY PINKERTON (PET)...KEVIN M MAHAN
GARY DEE PINKERTON (DEC)...

GENERAL INFORMATION:

Prior Status Report filed 11/13/17 was continued 01/08/18, 02/13/18, and 06/13/18, but was not approved.

Continued from 08/15/18. No appearance. Court orders personal representative to be present at next hearing and show case why sanctions of \$500 should not be imposed on each, attorney and client, for failure to appear at today's hearing.

THIS CASE IS SET FOR HEARING ON **OSC re \$500 Sanctions**/Amended Status Report [filed 06/13/18] by Executor, Lee Jay Pinkerton ["Petitioner"].

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

1. Final Inventory and Appraisal filed 06/12/18.
2. First and Final Account filed 08/13/18. Matter appears moot.
3. **Response to OSC filed 09/11/18.**

RECOMMENDATION:

Court's discretion re OSC.

(lh)

Future Hearing: 10/18/18 1st & Final Account

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600472

CASE NAME: ESTATE OF GARY DEE PINKERTON

SEE ALSO 3, 4

HEARING:

Hearing Re: OSC RE: \$500.00 SANCTIONS FTA (KEVIN MAHAN)

COUNSEL:

LEE JAY PINKERTON

(PET)...KEVIN M MAHAN

GARY DEE PINKERTON

(DEC)...

See notes on prior matter #4.

(lh)

Future Hearing: 10/18/18 1st & Final Account

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700001

CASE NAME: MTR OF KENNETH W BEARDEN SR.

HEARING:

Petition for distribution on waiver of Account and Report of
KENNETH W BEARDEN JR and Petition for allowance of fees filed.

COUNSEL:

KENNETH W BEARDEN JR (PET)...ANDERSON & LEBLANC, A.P.L.C.
KENNETH W BEARDEN SR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Distribution on Waiver of Account;
Petition for Final Distribution and Fees by Kenneth W. Bearden, Jr, Administrator

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

1. Assets on hand: \$76,444.01, cash.
2. Petitioner is sole beneficiary and waives accounting.
3. Attorney requests statutory fees of \$10,936, plus costs advanced totaling \$1,429.50. Calculated. Itemized. [Acct, 07/26/48, LFpg13].
4. There is a creditor's claim from Rohinder Kaur Sandhu for \$193.42 filed 06/23/17 for medical care. **Need** satisfaction or release of claim.
5. ~Proposed order: 07/26/18

RECOMMENDATION:

Need to clear note #4 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/02/19**.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700771

CASE NAME: MTR OF ERNESTINE R BELLEZZA

HEARING:

First and Final Account and Report of THOMAS EUGENE MORAN and
Petition for allowance of fees

COUNSEL:

THOMAS EUGENE MORAN (PET)...PRICE LAW FIRM, APC
ERNESTINE R BELLEZZA (DEC)...

Waiver of Court Fees and Costs filed by THOMAS EUGENE MORAN is GRANTED
TOTAL FEES WAIVED TO DATE: \$567.00

GENERAL INFORMATION:

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

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

1. Assets on hand: \$21,064.64, cash, and vehicle valued at \$500.
2. Statutory fees of **\$9,510** requests by petitioner, as his in kind distribution of 2000 Ford Taurus as a \$500 credit and \$9,010 cash. Calculated. **JTD**
3. Statutory fees of **\$9,510** requested by attorney. Calculated.
4. Attorney was paid \$141.81 as reimbursement for costs. **Supp filed 09/12/18 includes itemization; however, \$28.17 is for postage which is not a reimbursable expense per Local Rule 20-909. JTD**
5. Attorney requests extraordinary fees of **\$365** for 2.30 hours at \$150/\$175 per hour for paralegal services. Itemized. [Acct, 7/24/18, LFpg22-23]. **JTD**
6. Petitioner requests reserve of \$500. **JTD**
7. Notice is complete.
8. ~Proposed order: 07/24/18 subject to note #4.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/02/19**.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800108

VACATED

CASE NAME: RONALD DAVE WEBER

SEE ALSO 9

HEARING:

Hearing Re: ACCOUNTING OF KENNETH BLICKENSTAFF (SP. ADMIN)

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...PRO/PER
NANCY L MARTIN	(PET/REC)...GREENBERG 7 BASS, LLP

XREF: CONPS1800017 MTR OF RONALD DAVE WEBER

Future Hearings: 10/11/18 Petition for Fees, Consultant & Attorney Fees.
11/06/18 Petition for Letters of Administration by *Bobbie Jo Weber*
11/06/18 Petition for Letters of Administration by *Sherri Kastilahn*

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800108

VACATED

CASE NAME: RONALD DAVE WEBER

SEE ALSO 8

HEARING:

Hearing Re: BIFURCATED ISSUES

COUNSEL:

KENNETH C BLICKENSTAFF	(PET)...JENNIFER M DANIEL
RONALD DAVE WEBER	(DEC)...
BOBBIE JO WEBER	(PET)...ZUMBRUNN LAW CORPORATION
JOSEPH MCCANN	(PET)...PRO/PER
SHERRI L KASTILAHN	(PET)...PRO/PER
NANCY L MARTIN	(PET/REC)...GREENBERG 7 BASS, LLP

XREF: CONPS1800017 MTR OF RONALD DAVE WEBER

Future Hearings: 10/11/18 Petition for Fees, Consultant & Attorney Fees.
11/06/18 Petition for Letters of Administration by *Bobbie Jo Weber*
11/06/18 Petition for Letters of Administration by *Sherri Kastilahn*

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800493

CASE NAME: Daisy P Soares

HEARING:

Hearing Re: Amended Petition for Letters of Admin. W/ limited IAEA

COUNSEL:

TIMOTHY L SOARES (PET)...PRO/PER
DAISY P SOARES (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd Amended Petition [filed 07/16/18] for Letters of Administration w/ Will Annexed, Limited Authority, by Timothy Soares, Administrator for Estate of Laurence Soares, Jr.

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

1. **Court granted 1st amended petition for letters of administration with will annexed, limited authority, on 07/24/18. No bond. Letters issued 07/24/18.**
2. It appears the only change in current 2nd amended petition is the estimated value of property now valued at \$55,000 from \$215,000.

RECOMMENDATION

Matter appears moot as Letters have issued.

(lh)

Future Hearing: 10/01/19 Accounting Review re Timothy Soares, Administrator

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800693

CASE NAME: MTR OF BERNICE J CAMPAGNA

HEARING:

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

COUNSEL:

JENNICE MAE BURRIS (PET)...GREGORY L ZUMBRUNN
BERNICE J CAMPAGNA (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with
Full Authority under IAEA by Jennice Mae Burris, Executor/daughter

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

1. Will waives bond. Estimated value of estate is \$279,000, based on real property
and \$4,000 in personal property. The court may for good cause require that a
bond be given, either before or after issuance of letters. (Prob. Code, §
8481(b)). **JTD**
2. ~Proposed Form Order: 07/25/18

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for
11/27/19. Any accounting to be filed 30 days in advance local rule 20-901. Note
requirements of local rule 20-908.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800710

CASE NAME: Mtr of Mary Reed

HEARING:

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

COUNSEL:

CHARLES REED (PET)...PRO/PER
MARY REED (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Charles Reed, son

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

1. All heirs waive bond. Estimated value of assets is \$200,000 based on 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)). **JTD**
2. Notice of Petition to Administer Estate with proof of service filed 08/22/18. However, notice is incomplete at item #5 regarding request for IAEA authority. Proof of Service is incomplete at item #4 as to date and place of mailing. **Need** proper notice and completed proof of service.
3. **Need** Proof of Publication.
4. ~Proposed Form Order: 07/30/18

RECOMMENDATION

Need to clear notes #2-3. If approved, set Accounting/Status Review for **11/27/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUSTS**

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: TRU PS1800131

CASE NAME: THE ROY TAYLOR COOK SEPARATE PROPERTY TRUST

HEARING:

Petition for Remove trustee for breach of trust, compel accounting etc

COUNSEL:

MARTHA DWYER (PET)...CALDWELL, KENNEDY & PORTER, A.

THE ROY TAYLOR COOK SEPARATE P(DEC)...

GARY HEARTH (PET/TP)...FULLERTON LEMANN SCHAEFER & DO

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

Future Hearing: 10/22/18 First and Final Account & Report of Successor Trustee, Gary Hearth

Superior Court of Calif, County of San Bernardino

Page: 13A add-on

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

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600881

CASE NAME: THE JOHN RODRIGUES, JR. TRUST

SEE ALSO 13B

HEARING: FIRST Account and Report of JOHN ALVES and Petition for allowance of fees

COUNSEL:

ALAN ALVES (PET)...SLATER HERSEY & LIEBERMAN LLP
DOLORES PIMENTEL (PET)...SLATER HERSEY & LIEBERMAN LLP
HERCULANO ALVES (PET)...SLATER HERSEY & LIEBERMAN LLP
JOHN ALVES (PET/RES)...LAW OFFICES OF DOONAN & DOONAN
JOSEPH SIMAS (PET)...SLATER HERSEY & LIEBERMAN LLP

See notes on next matter #13B.

Future Hearings:

03/21/19 Readiness Calendar
04/22/19 Court Trial (Day 1)

Superior Court of Calif, County of San Bernardino
Page: 13B add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 09/19/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600881

CASE NAME: THE JOHN RODRIGUES, JR. TRUST
SEE ALSO 13A
Hearing Re: OSC RE: SANCTIONS (S. DOONAN FTA).

COUNSEL:
ALAN ALVES (PET)...SLATER HERSEY & LIEBERMAN LLP
DOLORES PIMENTEL (PET)...SLATER HERSEY & LIEBERMAN LLP
HERCULANO ALVES (PET)...SLATER HERSEY & LIEBERMAN LLP
JOHN ALVES (PET/RES)...LAW OFFICES OF DOONAN & DOONAN
JOSEPH SIMAS (PET)...SLATER HERSEY & LIEBERMAN LLP

GENERAL INFORMATION:

Continued from **01/09/18**. \$24.47 discrepancy deemed as de minimis. Supplement not required re note 5 re receipts. Written objections to be filed by 03/27/18, if not then objections will be waived permanently.

Continued from **05/31/18**. Matter not re-reviewed, nothing new filed.

Continued from 08/23/18. Court notes there are probate notes that still need to be cleared. There being no appearance by Mr. Doonan, Court orders matter be set for order to show cause why sanctions should not be imposed against Mr. Doonan for failing to appear at today's hearing.

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions/First Account Current**; Report of Administration and Petition for Fees by Successor Trustee, John Alves ["Petitioner"].

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

1. Accounting period 11/22/13 to 06/30/17.
2. Assets on Hand \$3,922,796.29 consisting of \$931,996.29 in cash and remaining in real property and Limited Partnership.
3. Petitioner has paid himself a total sum of \$8,692.58 in connection with the administration of the Trust per Article 9 of the Trust. Petitioner contends he is entitled to additional compensation for his services as Trustee and reserves his right to seek such compensation. Does Court wish to ratify compensation?

JTD.

4. Petition indicates Attorney's Fees have been previously paid and asks this Court to ratify, confirm and approve same. However, fees are not stated. **Need** same via verified supplement.
5. Disbursements – Schedule 3 [LF, pgs. 18-19] requires further clarification via verified supplement as to the following:
 - a. John H. Cloves;
 - b. Les Monroe;
 - c. P Jacobs;
 - d. Cromwell Weedon & Co;
 - e. John H Alves.
6. Question whether “Increase in values” and “Decreases in Value” should be reflected on gains and loss schedules?
7. Disbursements [LF, pgs. 29-31]] requires further clarification via verified supplement as to the following:
 - a. Doverspike and Ass;
 - b. Return Item Charges;
 - c. Deposited Item Retn.
8. **Need** full legal description and APN number for real property per Local Rule 20-610.
9. **Need** Notice of Hearing with proof of service to Attorney Sklater Hersey & Lieberman, LLP; partner who runs the business (the general partner) or the agent for service of process of JRJ Investments Limited Partnership.
10. **Objections filed by Herculano Alves, Alan Alves, Joesph Simas and Dolores Pimentel on 05/17/18.**
11. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion re OSC.

Need to clear notes; matter is contested. If approved, set next hearing for Accounting Review on **11/13/18, or later Tuesday calendar**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb/lh)

Future Hearings:

03/21/19 Readiness Calendar
04/22/19 Court Trial (Day 1)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800042

CASE NAME: XAVIER BONILLA

HEARING:

Hearing Re: AMENDED PETITION FOR APPT OF CONSERVATOR (LIMITED)

COUNSEL:

ESPERANZA BONILLA (PET)...PRO/PER
XAVIER BONILLA (CTP)...JEANNE E KENNEDY

GENERAL INFORMATION

Ex parte orders granted 02/26/18. Esperanza Bonilla appointed Temporary Conservator of the person only. Court amends both petitions for temporary and general conservatorship to be for person only as proposed conservatee does not have assets or real property.

Continued from 06/27/18. Counsel indicates report was filed on 05/16/18 and that proposed Conservatee is not an IRC client at this time.

THIS CASE SET FOR HEARING ON **Amended** [filed 05/21/18] Petition for Appointment of Limited Conservator person only by Esperanza Bonilla, mother

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Proposed conservatee is developmentally disabled. Report of Counsel Kennedy filed 05/16/18.
4. Proposed conservatee is developmentally disabled. **Need** IRC report. **Letter from IRC filed 09/11/18. JTD**
5. List of required contacts filed 02/09/18 and 05/21/18; however, missing Richard Bonilla (paternal grandfather). **Need** completed form.
6. **Need** Notice of Hearing and Proof of Service as to Inland Regional Center to include at least 30 days' notice.

7. CI Report filed 03/21/18.
8. Return of Amended Citation filed 05/22/18.
9. Proof Certificate of Completion of the Conservatorship Training Class filed 05/11/18.
10. ~Proposed Form Order: 05/21/18

RECOMMENDATION

Need to clear notes #4-6 then Court's discretion. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800091

CASE NAME: MTR OF DANIEL SHIAO-TUNG YAO

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DAVID YAO (CPE)...LAY OFFICE OF VINCENT Y. LIN
SANDY YAO (CPE)...LAY OFFICE OF VINCENT Y. LIN
DANIEL SHIAO-TUNG YAO (CEP)...

GENERAL INFORMATION

Continued from **04/25/18**. No appearance. Petitioners made telephonic request for continuance. Notice given by Judicial Assistant.

Continued from 06/27/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by David and Sandy Yao, parents

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

1. Petitioner requests no bond but does not provide a legal basis for waiver in Attachment 1c. Suggested bond \$22,000 based on bond calculation. **JTD**
2. Petition, item #5(f) indicates proposed conservatee is not developmentally disabled; however, item #5(c) indicates he was diagnosed with moderate mental retardation which appears to fall within definition per Pr. C. §1420. [Petition, 3/21/18, LFpg6-7]. Court to determine whether a limited conservatorship is appropriate. **JTD**
3. Petitioner seeks medical powers; however, see Capacity Declaration filed 03/21/18; See Capacity Declaration regarding item #7, filed 03/21/18. **JTD**
4. CI Report filed 04/19/18.
5. **IRC Report filed 09/06/18.**
6. Petition, item #11, is missing Teresa Yao (sibling) and Hui Jung Yao (grandmother). **Need verified supplement**
7. **Need** return of Citation, if proposed Conservatee will not attend hearing.
8. Proof of completion of Conservatorship Training Class filed 05/03/18.

9. ~Proposed Form Order: 03/21/18

RECOMMENDATION

Need to clear notes #6-7. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the required documents and hearing re Accounting Review for **11/27/19**. Any accounting to be filed 30 days in advance.

(lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800183
CASE NAME: Carmen Rebeca Granados

HEARING:
Petition for Appointment of Conservator

COUNSEL:
SANTIAGO QUINTANA (CP)...PRO/PER
CARMEN REBECA GRANADOS (CTP)...

GENERAL INFORMATION

Continued from 07/25/18. Court dispenses with notice to Josie Quintana. Court notes it does not require a petition for limited conservatorship. Citation is not required as proposed Conservatee is present in Court this date. A verified supplement is not required as to relatives that reside in Mexico. *Court does not require appointed Counsel at this time.* Court directs that an Amended Petition will need to be filed if petitioner is requesting to add Josie Quintana as a proposed co-conservator no later than 08/22/18 to be set for 09/19/18. Case referred to Legal Aid for assistance. *Court does not require an IRC report on this case.*

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by Santiago Quintana, father

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

1. Petitioner seeks medical powers. **Capacity Declaration filed 08/29/18; physician's signatures are not dated. Does Court wish to deem date as of filing? JTD**
2. CI report filed 07/16/18.
3. Proof of Completion of Conservatorship Training Class filed.
4. ~Proposed Form Order: 06/18/18

RECOMMENDATION

Need to clear note #1 then Court's discretion. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the following: proof of service of Order with notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800223

CASE NAME: Jacob Munoz

HEARING:
Petition for Appointment of Conservator

COUNSEL:
CARMEN MUNOZ (CP)...
JACOB MUNOZ (CTP)...SANDY L. TURNER

GENERAL INFORMATION

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

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 07/31/18.
4. Proposed conservatee is developmentally disabled. **Need** appointment of Counsel for report.
5. Proposed conservatee is developmentally disabled. **Need** IRC report.
6. Return of Citation filed 09/07/18; however, only 13 days' given. **Need** proper service to include at least 15 days' notice if proposed Conservator will not attend hearing.
7. **Need** Notice of Hearing and Proof of Service.
8. Proof of Completion of the Conservatorship Training Class filed 09/10/18.
9. **CI Report filed 08/22/18.**
10. ~Proposed Form Order: 07/31/18

RECOMMENDATION

Need to clear notes #4-7. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (lh)

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

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

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02832

CASE NAME: MATTER OF JESSE W STEWART

HEARING:

Accounting Review

COUNSEL:

LAWRENCE A DEAN II	(CPE)...HORSPOOL & PARKER
JESSE A STEWART	(CEP)...
TARYN STEWART	(PET)...PRO/PER
JESSE W STEWART LIVING TRUST	(TRU)...
DONNA LEE STURGIL DIAZ	(PET)...DONNA LEE STURGILL DIAZ
STEVON STEWART	(OBJ)...AAEN LAW PARTNERS
ELEANOR GRIER	(AAEN LAW PARTNERS)
FELIX M MARTIN	(AAEN LAW PARTNERS)
MELODIE Z SCOTT	(PRO/PER)
BERNHARD AAEN	(BERNHARD A AAEN)

GENERAL INFORMATION

Continued from 06/12/17 and 07/10/17. Court requests that either the accounting or petition be filed by 4pm on 08/28/17.

Continued from 10/02/17 to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 9th **trust** Account by successor trustee Lawrence Dean II, PPF, approved on 05/27/15.
2. **Need** 10th **trust** account beginning with 01/01/15.

RECOMMENDATION:

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

(nb/ww/lh)

Superior Court of Calif, County of San Bernardino
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CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1700230

CASE NAME: BEULAH MAE TOLLIVER

RESET FROM 9/18/18

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 **Need** return of Citation.
- 7 Notice of Hearing reflects incorrect hearing date. **Need** proper notice.
- 8 No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 6-7 then Court's discretion re: bond. If approved, set hearing for Compliance Review on **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); 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 **11/26/19**. 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
Page: 21 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: STANFORD E. REICHERT

DATE: 09/19/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800113

CASE NAME: Billie Jean Allen

HEARING:

Hearing Re: ISSUE OF PROPERTY BEING DEEDED BACK

COUNSEL:

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

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Issue of Property Being Deeded Back

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

1. Counsel and parties report to the Court they reached a partial settlement and requested to cite it on the record. It is later indicated Mariah Estes does not agree to partial agreement as cited onto the record.
2. Matter set hearing regarding issue of property being deeded back to Billie Jean Allen from Mariah Estes, then property to be listed for sale for the benefit of Billie Jean Allen.

RECOMMENDATION

Inquire status.

(lh)

Future Hearings:

10/10/18 Petition for Appointment of Conservator

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

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District - Civil
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CIVIL**

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: CIV DS1715025

CASE NAME: MUNCY-V-DOMINGUEZ

HEARING:

Hearing Re: STATUS OF SETTLEMENT

COUNSEL:

MANUELA R MUNCY	(PLA)...ELBERT W MUNCY
AUGUSTINE GRANADO	(PLA)...ELBERT W MUNCY
JOE GRANADO	(PLA)...ELBERT W MUNCY
BLANCA E PETTEGREW	(PLA)...ELBERT W MUNCY
ROSA M GRANADO DOMINGUEZ	(DEF)...
PARAMOUNT RESIDENTIAL MORTGAGE	
ESTATE OF CARMEN RAYA GRANADO	

Status only—JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

PROBATE

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1200864

CASE NAME: MTR OF EDWARD ANTHONY BYERS

HEARING:

Accounting Review

COUNSEL:

EDWARD R BYERS

EDWARD ANTHONY BYERS

TONJA DISHMON

(PET)...JOHN F WEBER

(DEC)...

(PET/TP)...ESTELLE & KENNEDY

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Edward Anthony Byers, Successor Administrator

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

1. Status Report approved on 03/14/18.
2. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1500386

VACATE

CASE NAME: OLIVE SADIE MITTELSDORF

HEARING:

Hearing Re: Accounting by April May (prior executor)

COUNSEL:

RICHARD SAYLES	(PET)...JAMES B CHURCH
OLIVE SADIE MITTELSDORF	(DEC)...
APRIL MAY	(PET)...PRO PER
SHAWNEE LOPEZ	(PET)...JESSICA N MARSHALL
RICHARD SAYLES	(PET)...JESSICA N MARSHALL
SURETEC INSURANCE CO	(TP)...

Waiver of Court Fees and Costs filed by SHAWNEE LOPEZ is GRANTED

XREF: CONPS1400294 *Olive S Mittelsdorf*

First and Final Account of April May filed 09/19/18.

Future Hearing: 10/17/18 First and Final Account by April May

7/24/19 Accounting Review re Successor Co-Administrators

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600534

CASE NAME: MTR OF DALE LITTLE

SEE ALSO 5

HEARING:

Hearing Re: Status/Order/Agreement reached with David Little

COUNSEL:

DAVID C LITTLE	(PET)...PRO/PER
DALE LITTLE	(DEC)...
CHRISTINA ERICKSON TAUBE	(PET)...SHERRI L KASTILAHN
CAROL RISENER	(PET)...WILLIAM M NASSAR
CRIAG M PARKER	(TP)...CRAIG M PARKER
TREVOR D MARTIN	(TREVOR D. MARTIN)
SURETEC INSURANCE	

GENERAL INFORMATION

Continued from 06/06/18. Ms. Kastilahn reports she just received full appraisal and needs additional time.

THIS CASE IS SET FOR HEARING ON Status/Order/Agreement reached with David Little

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

1. Matter set on 02/08/18 at hearing re Petition for Removal of Personal Representative, wherein, Court removed David C. Little as administrator and appointed Christina Erickson-Taube as successor administrator; \$350,000 bond. Counsel to submit order.

RECOMMENDATION

Court's discretion.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600534

CASE NAME: MTR OF DALE LITTLE

SEE ALSO 4

HEARING:

Accounting Review

COUNSEL:

DAVID C LITTLE	(PET)...PRO/PER
DALE LITTLE	(DEC)...
CHRISTINA ERICKSON TAUBE	(PET)...SHERRI L KASTILAHN
CAROL RISENER	(PET)...WILLIAM M NASSAR
CRIAG M PARKER	(TP)...CRAIG M PARKER
TREVOR D MARTIN	(TREVOR D. MARTIN)
SURETEC INSURANCE	

GENERAL INFORMATION

Continued from 12/14/17, 12/21/17 and 02/08/18.

Continued from 06/06/18. Ms. Kastilahn reports she just received the full appraisal and needs additional time.

THIS CASE SET FOR HEARING ON Accounting review/Status re David Little, administrator

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

1. Letters of Administration issued to David Little, son, on 08/15/16; **limited** authority, \$20,000 bond.
2. Partial/Final Inventory and Appraisal filed 03/21/17.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status of accounting.

(cs/lc/lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1601160

CASE NAME: JAY HOWARD GARDNER

HEARING:

Accounting Review

COUNSEL:

FRANCES GARDNER (PET)...NATALIE A ALVARADO
JAY HOWARD GARDNER (DEC)...

GENERAL INFORMATION

Continued from 04/11/18. No accounting or appearances. Petitioner and Counsel ordered to be present for next hearing.

Continued from 06/20/18 at request of Counsel to file status report/accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review re Frances Gardner, Administrator

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

1. Letters of Administration with full authority issued to Frances Gardner (daughter) on 02/01/17. No bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700314

CASE NAME: CHARLOTTE GOMEZ CASTRO

HEARING:

Accounting Review

COUNSEL:

CECILIA M CASTRO

(PET)...DENNIS L JENSEN

CHARLOTTE GOMEZ CASTRO

(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Cecilia Castro,
Executor

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

1. Letters Testamentary with full authority issued to Cecilia Castro (daughter) on 07/25/17; \$150,000 bond.
2. Final Inventory and Appraisal filed.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800045

CASE NAME: BRENDA A HANDY

HEARING:

Hearing Re: Petition for Authority to Enjoin Lienholder

COUNSEL:

LISA M HANDY (PET)...DARLYNN MORGAN
BRENDA A HANDY (DEC)...

Currently under review by legal research.

(LR)

Future Hearing: 5/01/19 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: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800146

CASE NAME: MTR OF DAISY CRUZ

VACATED

HEARING:

Motion Re: Demurrer to Will Contest Filed by Petitioner MARIA VARGAS

COUNSEL:

LUIS GODINA	(PET)...PRO/PER
DAISY CRUZ	(DEC)...
MARIA VARGAS	(OBJ)...

Currently under review by legal research.

(LR)

Waiver of Court Fees and Costs filed by LUIS GODINA is GRANTED

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800175

CASE NAME: MTR OF GREGORY SCOTT POUNDS

HEARING:

First and final Account and Report of WILLIAM POUNDS, LINDA POUNDS and Petition for allowance of fees

COUNSEL:

WILLIAM POUNDS	(PET)...EDWARD J MILLER
LINDA POUNDS	(PET)...EDWARD J MILLER
GREGORY SCOTT POUNDS	(DEC)...
KIRK N SOMMER	(TP)...CRAIG E WILSON
SHERYL L SOMMER	(CRAIG E WILSON)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of First and Final Account and Report; Petition for Fees and Final Distribution, by William Pounds and Linda Pounds, Co-Administrators.

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

1. Assets on hand: \$59,403.88 in cash and remaining in real property and vehicles.
2. Petitioners are sole heirs and waive final accounting and statutory fees.
3. Attorney requests statutory fees totaling **\$14,773.22**. Calculated.
4. Attorney requests extraordinary fees totaling **\$6,310.52** for 27 hours at \$345/\$250/\$150 for negotiating settlement agreement. Itemized. [Declaration 08/07/18 LFpg6-9]. **JTD**
5. Attorney requests reimbursement for advanced costs in the amount of **\$2,045.51** includes \$19.30 for photocopies which is not a reimbursable expense per Local Rule 20-909. Itemized. [Acct, 08/07/18, LFpgs 6-7]. **JTD**
6. Petitioners request reimbursement of **\$18,333.23** for advanced funds. Itemized. [Acct, 08/7/18, LFpgs4-6]. **JTD**
7. The creditor's claim of Kirk N. Sommer and Sheryl L. Sommer for \$100,256 will be satisfied by the assumption of the Promissory Note from Decedent to Creditors Kirk N. Sommer and Sheryl L. Sommer, former business partners of Decedent, in exchange for Decedent's 25,000 shares of stock in the

- corporation. Agreement for Purchase and Sale of Stock and Assumption of Promissory Note has been presented to this Court with Notice of Proposed Action filed 08/07/18. Petitioners request Court approval of agreement. **JTD**
8. Petitioners requests Court approval of Creditor's Claim by Freedom Road Financial for \$7,941.12 regarding car loan; petitioners allow balance of \$7,077.39 as the payments are current. **JTD**
 9. Notice is complete.
 10. Proposed order: 08/07/18 is missing addresses of heirs receiving real property. Submit revised proposed order after hearing.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/02/19**.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800750

CASE NAME: MTR OF LINDA LEE DAVIS

HEARING:

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

COUNSEL:

MONTA SUE ROWE (PET)...PRO/PER
LINDA LEE DAVIS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Monta Sue Rowe, sister

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

1. Petitioner requests bond to be determined at a later date when assets are determined. Estimated value of estate is \$348,000 based on personal and real property. **JTD.**
2. Decedent has issue who have higher priority. Nomination filed by decedent's sibling, Stormy Woods; however, need nomination from issue.
3. **Need** Notice of Petition to Administer Estate with proof of service.
4. **Need** Proof of Publication.
5. ~Proposed Form Order: 08/07/18

RECOMMENDATION

Need to clear notes #3-4 then Court's discretion re bond. If approved, set Accounting/Status Review for **11/27/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

DATE: 09/19/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800756

CASE NAME: Mtr of Yvonne Little

HEARING:

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

COUNSEL:

SEANNA LACKEY (PET)...PRO/PER
YVONNE LITTLE (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Seanna Lackey, daughter

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

1. Heirs waive bond. Estimated assets \$50,000 based on personal property. The court may for good cause require that a bond be given, either before or after issuance of letters. (Prob. Code, § 8481(b)). **JTD**
2. **Need** Notice of Petition to Administer Estate with proof of service.
3. **Need** Proof of Publication.
4. ~Proposed Form Order: 08/08/18

RECOMMENDATION

Need to clear notes #2-3 then Court's discretion re bond. If approved, set Accounting/Status Review for **11/27/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 8:35 DEPT: S36P

CASE#: TRU PS1800135

CASE NAME: JOHN COSOLO AND MARGARET COSOLO TRUST

HEARING:

Petition for ORDER CONFIRMING TRUST ASSETS AND DETERMINING
VALIDITY OF TRUST

COUNSEL:

WILLIAM ARTHUR HOUSTON (PET)...ROSE C ROSADO

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIPS

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000174

CASE NAME: RENEE DUSKO

HEARING:

Accounting Review

COUNSEL:

ELLEN M. PIACENTINI

(CPE)...

D.M. DAVIS

RENEE DUSKO

(CEP/CEE)...SHERRI L KASTILAHN

FRED W. JACKSON JR.

(PRO/PER)

GENERAL INFORMATION

Continued from **12/12/17** due to nonappearance nor has accounting been filed. Notice given by Judicial Assistant.

Continued from **01/31/18**. Counsel to file a waiver along with the Edward Jones statements.

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

Continued from 06/06/18. Ms. Kastilahn reports all funds are in a blocked account at Edward Jones. Counsel also reports the attorney D.M. Davis is no longer on this case. Matter continued for Successor Trustee to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review re Fred Jackson, trustee

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

1. Order Settling Account by Successor Trustee, Fred Jackson, entered 01/14/16; second account now due beginning 10/01/15.
2. **Need** substitution of attorney as to D.M. Davis.
3. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb/lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS0900186

CASE NAME: RYAN GEIB

HEARING:
Petition for ATTORNEY'S FEES

COUNSEL:

DIRK GEIB	(CPE/CE)...LENITA A SKORETZ
RYAN GEIB	(CEP/CTE)...JACK B OSBORN
JACK B OSBORN	(PET)...BROWN WHITE & OSBORN LLP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Jack Osborn

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

1. Petitioner, Jack Osborne, was appointed Counsel for Ryan Geib on 03/03/11.
2. Petitioner requests fees of **\$22,047.50** for 99.10 hours, plus an additional **\$712.50** for anticipated 1.5 hours at \$350/\$125 per hour for attorney/paralegal services. Itemized. [Petition, 8/14/18, LFpgs9-27].
3. ~Proposed Order: 10/31/16.

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 11/05/18 Accounting Review

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1200054

CASE NAME: MTR OF ABRAHAM GOMEZ

HEARING:

Hearing Re: Concerns in CI Report

COUNSEL:

MILAGROS RUIZ

(CP)...PRO/PER

ABRAHAM GOMEZ

(CTP)...MITCHELL I ROTH

GENERAL INFORMATION

Continued from 06/06/18. Counsel reports the conservator is not cooperating with Ms. Kennedy and suggests the Court appoint a Guardian Ad Litem for Abraham Gomez. Court appoints Mitchell I. Roth as Guardian Ad Litem for Conservatee. Matter continued for GAL report.

Continued from 08/08/18. Attorney Jeanne Kennedy has a conflict on the matter. Court removed Jeanne Kennedy as Counsel for Abraham Gomez and appointed Sandy L. Turner.

THIS CASE IS SET FOR HEARING ON Concerns in CI Report

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

1. Matter set on 05/11/18 upon Court's review of memo by Court investigator filed 04/27/18. Court reappointed Jeanne E Kennedy and set for hearing.
2. **Need** report from Mitchell Roth (GAL).
3. **Report of Counsel Sandy L. Turner filed 09/06/18.**

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1300106
CASE NAME: MTR OF MARIGOLD MOFFITT

HEARING:
Petition for Order Surcharging Conservator and for Attorney's Fees

COUNSEL:

QUANSHAY MOFFITT	(CPE)...LENITA SKORETZ
MARIGOLD MOFFITT	(CEP/CEE)...JACK B. OSBORN
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY

GENERAL INFORMATION

Continued from 07/18/18. Quanshay Moffitt is relieving Attorney Lenita Skoretz.

THIS CASE IS SET FOR HEARING ON Petition for Order Surcharging Conservator and for Attorney Fees by Mark J. Flory, appointed Counsel for Marigold Moffitt

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

1. Quanshay Moffitt was appointed Conservator of the person and estate on 08/12/13. Petitioner alleges Quanshay Moffitt is also the Successor Trustee of the Marigold Moffitt Living Trust dated 06/17/97.
2. Petitioner alleges conservatee, Marigold Moffitt, passed away on 01/10/16.
3. Petitioner is owed \$15,270.50 for court approved attorney's fees per order entered 12/01/17, plus statutory interest accrued at 10% annum on any amount not satisfied. Statutory interest as of 06/13/18 is \$811.64, plus daily amount of \$4.18.
4. Petitioner has accrued 11 hours at \$350 per hour totaling \$2,674, and an additional 2 hours at \$350 per hour to prepare herein petition in an attempt to collect fees.
5. Petitioner requests Court surcharge Quanshay Moffitt \$20,191.14 for attorney's fees and due interest.
6. Current bond \$40,000 by Western Surety Company.
7. **Need** Notice of Hearing and proof of service as to bond company, Western Surety.
8. No proposed order submitted.

RECOMMENDATION

Need notice then Court's discretion.

(lh)

Future hearing date: 10/11/18 re Final Discharge of Quanshay Moffitt
Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600354

CASE NAME: MTR OF DARR MADDOX

SEE ALSO 19

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of MARK MADDOX

COUNSEL:

MARK MADDOX (CPE)...ESTEFAN M ENCARNACION
DARR MADDOX (CEP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from **10/05/17**. Notice to be given by Counsel Encarnacion.

Continued from **12/14/17**.

Continued from **03/14/18**. Counsel indicates attorney Encarnacion has been substituted for Mark Maddox. Attorney Daniel has been unable to contact Mark Maddox. Compliance documents have not been filed. Citation issued to Mark Maddox who is cited to appear on 05/16/18 and show cause why appointed counsel unable to contact Mr. Maddox. Notice to be given by Attorney Daniel.

Continued from **05/16/18**. Matter is continued. Attorney Jennifer Daniel to try to assist the conservator with filing the required documents.

Continued from 08/08/18. Notice to be given by Attorney Daniel.

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Mark Maddox, spouse, appointed conservator of the person and estate on 03/02/17, no bond.
2. Determination of Conservatee's Appropriate Level of Care filed.
3. Care Plan filed.
4. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).

RECOMMENDATION

Inquire status.

(lc/lh)

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

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1600354

CASE NAME: MTR OF DARR MADDOX

SEE ALSO 18

HEARING:
Accounting Review

COUNSEL:

MARK MADDOX (CPE)...ESTEFAN M ENCARNACION
DARR MADDOX (CEP)...JENNIFER M DANIEL

GENERAL INFORMATION

Continued from 05/10/18. Counsel reports she has not heard from Mark Maddox. On 3/14/18, Court issued a Citation for appearance by Mark Maddox on 05/16/18. Citation has been served on Mr. Maddox. Court trails to 05/16/18.

Continued from 05/16/18.

Continued from 08/08/18. Notice to be given by Attorney Daniel.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Mark Maddox, spouse, appointed conservator of the person and estate on 03/02/17, no bond.
2. **Need** final Inventory & Appraisal per Pr.C.§2610.
3. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.

RECOMMENDATION

Need to clear notes 2-3.
(lc/lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700324

CASE NAME: MTR OF DAVID I ALVIDREZ JR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DAVID ALVIDREZ

COUNSEL:

DAVID ALVIDREZ SR	(CP)...PRO/PER
VIANNEY ALVIDREZ	(CP)...PRO/PER
DAVID I ALVIDREZ	(CTP)...CRAIG M PARKER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. David Alvidrez and Vianney Alvidrez as limited co-conservators of the person on 02/14/18.
2. Proof of service of conservatee's rights filed. However, section 5 re service of Order dated 02/14/18 is missing. **Need** proper service.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. Care Plan filed.

RECOMMENDATION

Inquire status.

(lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800174

CASE NAME: ERIC PAUL BAGANI

HEARING:
Petition for Appointment of Conservator

COUNSEL:
REENA G. BAGANI (CP)...PRO/PER
ERIC PAUL PAGANI (CTP)...MARK J. FLORY

GENERAL INFORMATION

Continued from 07/18/18. Reena G. Bagani appointed Temporary Conservator. Order to be submitted. Case referred to Legal Aid for assistance.

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

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

1. Proposed conservatee's civil rights not be limited without court order Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, control right to contract.
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Proposed conservatee is developmentally disabled. **Need** IRC report.
4. Proposed conservatee is developmentally disabled. **Report of Counsel Mark Flory filed 07/16/18.**
5. CI Report filed 07/16/18.
6. Return of Citation filed 06/27/18; however, proof of service is incomplete at item #2 as to person served. **Need same.**
7. **Need** notice of hearing and proof of service with at least 30 days' notice to Inland Regional Center.
8. Proof of Completion of the Conservatorship Training Class filed.
9. ~Proposed Form Order: 06/12/18

RECOMMENDATION

Need to clear notes 2-3; 6-7. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS00074

CASE NAME: CONSERVATORSHIP OF PAULA WILLIAMS

HEARING:

Hearing Re: Proof of Transfer

COUNSEL:

MAMIE WILLIAMS	(PET)...PRO/PER
PAULA WILLIAMS	(PCE)...
PUBLIC GUARDIAN	(PCR)...COUNTY COUNSEL
LINDA D WILLIAMS	(PET)...PRO/PER
RENAE WILLIAMS	(PET)...PRO/PER
PAUL WILLIAMS	(PET)...PRO/PER

GENERAL INFORMATION

**Continued from 07/25/18. Court orders case transferred to Riverside County.
Court waives transfer fees and requests Riverside County do the same.**

THIS CASE IS SET FOR HEARING ON Transfer to Riverside County

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

1. Matter set by Court upon request to transfer submitted 06/29/18.
2. **Need** post-move change of address.
3. **Return of certified mail receipt from Riverside Court filed 09/07/18.**
 - a. **Need** receipt of transfer from Riverside County Superior.

RECOMMENDATION

Need to clear notes.

(lh)

Superior Court of Calif, County of San Bernardino

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: RC RS424

CASE NAME: KENNETH ANDERSON AKA KENNETH DALE ANDERSON

HEARING:

Sixth Account and Report of LINDA MAXWELL and Petition for allowance of fees

COUNSEL:

BARBARA ANDERSON (PET)...PRO/PER
KENNETH DALE ANDERSON (PCE/CEP)...DONNASUE ORTIZ
LINDA MAXWELL (SC/CPE)...ELISABETH KEMPE-OLINGER
DONNASUE SMITH ORTIZ (PET)...DONNASUE ORTIZ
KENNETH DALE ANDERSON AND BARBARA ANDERSON TRUST (TRU)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 6th Account Current re Trust and Petition for Fees by Linda Maxwell, Trustee/PPF.

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

1. Account period covers 01/01/17 to 04/30/18
2. Assets on hand \$2,289,065.69 (estimated market value of \$2,977,108.23) consisting of \$1,659,664.23 in cash and the balance in 2 parcels of real property.
3. Barbara Pensick, care supervisor, received \$7,303.25 for 183 hours of service at \$40 per hour. Itemization and receipt filed separately on 08/10/18.
4. Petitioner requests fees of **\$7,137** for 60.4 hours at \$65/130 per hour as trustee and successor conservator. Itemized [Acct.08/1/018 LFpgs24-29].
5. Attorney requests fees of **\$4,314** for 14.7 hours at \$120/370 per hour for paralegal and attorney services. Itemized [Acct.05/18 LFpgs 30-32].
6. Bond is currently set at \$1,974,000. Petitioner requests bond increase by \$156,000 to **\$2,130,000**. Appears sufficient.
7. ~Proposed order: 08/10/18

RECOMMENDATION:

Court's discretion. If approved, set hearing re next Accounting Review for **07/03/19** (if one year) or **07/01/20** (if two years). Accounting to be filed 30 days in advance.

(lh)

Future Hearing: 1/29/19 Accounting Review re conservatorship

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

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

DATE: 09/19/18 TIME: 9:30 DEPT: S36P

CASE#: VC VS234

CASE NAME: IN THE MATTER OF JULIANNE KEIDEL

HEARING:

Petition for Appointment of Conservator

COUNSEL:

JULIANNE KEIDEL (PLA)...
MARK KEIDEL (CP)...PRO/PER
JEAN ROODE (CP)...PRO/PER

GENERAL INFORMATION

Margaret Keidel (mother) and Maripat Dykes (sister) were appointed Limited Co-Conservators of the *person only* of Julianne Keidel on 09/28/87.

Margaret Keidel passed away on 11/04/03.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator **person and estate** by Marke Kiedel and Jean Roode, siblings

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

1. It does not appear there is a current vacancy. **Need** proper petition for removal per Pr. C. §2651 or signed resignation of Maripat Dykes.
2. CI Biennial Report last filed 03/22/18.
3. Petitioners seek waiver of bond. Proposed Conservatee's sole assets consist of public benefits. Question need for estate powers? **JTD**
4. Petitioners seek additional orders under Pr. C. Sections 1873, 2351-2358, and 2590. No reasons or specified powers requested in attachment. Court to inquire.
5. As proposed conservatee is developmentally disabled and this is not a petition for Limited Conservatorship an IRC report is therefore optional per Pr. C. § 1827.5(b). **JTD**
6. Petitioner seeks medical powers. Capacity Declaration filed 08/10/18.
7. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
8. Petition, item #11, is missing Maripat Dykes (conservator/sister). Need verified supplement.
9. List of Miscellaneous Contacts filed 08/10/18 is missing Maripate Dykes (conservator/sister). **Need** completed form.

10. **Need** Court Investigator report.
11. **Need** Certificate of Completion of the Conservatorship Training Class.
12. **Need** Notice of Hearing and Proof of Service as to Maripat Dykes (C
13. **Need** return of Citation.
14. ~Proposed Form Order: 08/10/18

RECOMMENDATION

There is no current vacancy. Need to clear note #1.

Need to clear notes #7-13 then Court's discretion. If approved, set hearing for Compliance Review for **04/24/19** for the filing of the required documents and hearing re Accounting Review for **11/27/19**. Any accounting to be filed 30 days in advance.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 09/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS0900167

CASE NAME: MARK JORDAN ELKINS

HEARING:

Hearing Re: ACCOUNTING REVIEW (MR. SHOGREN)

COUNSEL:

KERINE E ELKINS	(CPE)...NOREEN T FONTAINE
MARK JORDAN ELKINS	(CEP)...MARK J. ANDREW FLORY
MARK J ELKINS	(CTE)...JAMES B CHURCH
CALIFORNIA DEPT OF STATE HOSPITALS	(PET)...PRO/PER
MARK J ANDREW FLORY	(PET)...MARK J. ANDREW FLORY
MARK JORDAN ELKINS S.N. TRUST	(TRU)...
DENNIS SHOGREN	(CEP)...JAMES B CHURCH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review of Dennis Shogren,
Successor Conservator

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

1. Matter set on 06/26/18 for fourth and final accounting to be completed. Court ordered Dennis Shogren to offer any assistance he can to complete the fourth and final accounting.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 10/09/18 4th & Final Account; Etc of Kerine E Elkins

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

DATE: 09/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700147

CASE NAME: ROBERT JOHNSON

SEE ALSO 3

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of BOBBIE ROBERTSON

COUNSEL:

BOBBIE ROBERTSON (PET)...PRO/PER
ROBERT JOHNSON (CEE)...WALTER T. MOORE

GENERAL INFORMATION

Hearing re bond setting continued from 05/31/18. Estate value not yet determined.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Bobbie Robertson (daughter) appointed Conservator of the person and estate on 03/08/18; bond TBD. Inquire status of estate to determine bond.
- 2 Letters issued on 05/25/18 without Conservator's affirmation/signature dated on page 2. Clerk's office notified.
- 3 Proof of Service of Notification of Conservatee's Rights filed.
- 4 Determination of Conservatee's Appropriate Level of Care and Care Plan filed 09/12/18. **Forms are not dated at signature. Does Court wish to deem date of signatures as of date of filing? JTD**
- 5 **Need** final Inventory & Appraisal per Pr.C. §2610.
- 6 **Need** Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
- 7 If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

Inquire status.

(lh)

Future Hearing: 4/24/18 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 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: TARA REILLY

DATE: 09/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700147

CASE NAME: ROBERT JOHNSON

SEE ALSO 2

HEARING:

Hearing Re: SETTING OF BOND

COUNSEL:

BOBBIE ROBERTSON (PET)...PRO/PER
ROBERT JOHNSON (CEE)...WALTER T. MOORE

Waiver of Court Fees and Costs filed by ROBERT JOHNSON is GRANTED

See notes on prior matter #2.

(lh)

Future Hearing: 4/24/18 Accounting Review

Superior Court of Calif, County of San Bernardino
Page: 4 add-on
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 09/19/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600177

CASE NAME: ARNETTA BROOKS

HEARING:
Hearing Re: STATUS OF MEDIATION

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

COUNSEL:
ALESIA SONYA DIGGS (PET)...PRO/PER
ARNETTA BROOKS (CEP)...MITCHELL I ROTH

No notes—mediation—JTD

Future Hearing: 10/15/18 Accounting Review