



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 09/24/18**

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.

(09/05/18 cs)(09/18/18 cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **PROBATE**

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400561

CASE NAME: MTR OF THE RENE DE ROOS SPECIAL NEEDS TRUST

HEARING:

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

COUNSEL:

INLAND COUNTIES REG CNTR (PET)...LAYNE A BARTHOLOMEW  
THE RENE DE ROOS SPECIAL NEEDS TRUST (TRU)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Third Account Current of SNT; Petition for Fees; Request for Decrease in Bond; and Petition to Amend Trust to include "Medi-Caid" Language by Trustee, IRC ["Petitioner"].

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

1. Account period 03/01/16 to 02/28/18.
2. Assets on hand \$36,332.21 in cash held in a pooled investment fund.
3. Current bond is \$45,000. Petitioner requests bond be reduced by \$5,000 to \$40,000. Appears sufficient. **JTD.**
4. Petitioner requests ratification of \$2,000.00 in fees taken during this account period based on the approved 02/14/12 fee schedule [LF p.47].
5. Attorney requests fees of \$710.00 billed for attorney at \$250/hour for 1.6 hours' time and paralegal at \$100/hour for 3.1 hours' time. Itemized [LF, p. 41].
6. Petitioner requests the Court authorize Master Trust of California to continue taking an annual fee in quarterly payments, pursuant to its revised fee schedule dated June 13, 2017 [LF, p. 50].
7. Petitioner requests Court authority to amend the current trust language to include "Medi-Caid" Language as a new Article Nine of the trust [LF, p. 55].  
**JTD.**
8. Due to the low value of this trust, petitioner requests that the court order bi-annual accountings. **JTD.**
9. **Need** Notice of Hearing with proof of service.

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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. ~Proposed order: 07/26/118

**RECOMMENDATION:**

Court's discretion. If approved, set hearing re next Accounting Review for **04/22/19** (if one year) or **04/20/20** (if two years). Accounting to be filed 30 days in advance.

(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: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1400622

CASE NAME: Robert Joseph Vinson

HEARING:

Hearing Re: AMENDED ACCOUNT OF FREDERICK VINSON

COUNSEL:

JANNINA K. MALEK	(PET)...FULLERTON LEMANN SCHAEFER
ROBERT JOSEPH VINSON SR	(DEC)...
FREDERICK LAFATE VINSON	(PET)...PRO/PER
JANNINA K MALEK	(TP )...THOMAS W DOMINICK
SURETEC INSURANCE	(WOLKIN CURRAN LLP)

GENERAL INFORMATION:

Continued from **05/21/18**. Frederick Vinson is ordered to pay the bond premium by 4pm on May 29, 2018, and to file proof of payment of bond premium by 4pm on June 05, 2018.

**Continued from 07/09/18 at request of counsel and parties. Administrator to prepare supplement to clear notes.**

THIS CASE IS SET FOR HEARING ON [**Amended 04/16/18**] Second and Final Account, Petition for Fees and for Final Distribution by Frederick (Eric) Lafate Vinson III, son.

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

- 1 Accounting period: 03/07/14-12/31/17(**Supp. 06/19/18 indicates that the First accounting period is 03/07/14-05/06/16 and the Second accounting period is 05/07/16-12/31/17**). Therefore, it appears that the **Amended Second and Final includes the First accounting also**.
  - a. **Need Amended First and Current accounting filed and placed on calendar before Second and Final accounting can be heard.**
  - b. **It cannot be determined if either accounting balances due to the fact that they are not separate and the supplements filed are referring to completed separate previous notes from the First accounting which is not calendared as the amended Second and Final account seems to have taken its place.**

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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.

- 2 Assets on hand: 67,966.89; however, calculations are incorrect and amount appears to be **\$70,501.78**. Need corrected calculation via verified supplement. **(Supp. 05/11/18 indicates that the correct assets on hand are \$67,966.89 per the attached summary of account; however, schedule F is not attached) Need** verified supplement with schedule F- Assets on Hand at End of Accounting Period.
- 3 Petitioner requests **statutory fees of \$4,239.99 per supplement filed 05/11/18**. Calculated.
- 4 Petitioner requests extraordinary fees of \$3,567.00; however, several of the charges do not appear to qualify as extraordinary services. Itemized. [LF pgs. 24-25] **JTD**
  - a. Petitioner is requesting fees for “Travel to Court” on 14 occasions in the amount of \$996.00; however, per Local Rule 20-909, travel costs are not allowed unless petitioner is waiving statutory fees.
  - b. Petitioner is also requesting \$75.00 for 3 hours at \$25.00/hour for time spent on “Police reports.” [LF pg. 25] **JTD**
- 5 Petitioner requests reimbursement for advanced costs in the amount of \$1,281.41. **Need** itemization. **See also note 6a.**
6. Schedule C re disbursements has the following issues:
  - a. The 05/01/15 entry indicates that petitioner reimbursed himself \$1,144.50 then for \$465.00 on 06/03/16 without Court authorization. [LF pg. 17] **JTD**
  - b. On dates of 06/02/14 and 07/15/14 there are withdrawals of a greater amount by Robert Vinson Jr. which then a portion is distributed to Frederick for “services.” [LF pg. 15] **Need** clarification of distributions and services via verified supplement.
  - c. There are several overdraft fees charged in the amount of \$35.00 for each occurrence for a total of \$210.00. [LF pgs. 16-17] **JTD**
  - d. There are several disbursements to “SBJB Criminal”. **Need** clarification of disbursements via verified supplement.
7. Summary of Account [LF pg. 4] has the following issues:
  - a. Total Charges and Total Credits do not match.
  - b. Total of Corrected Final and Supplemental Inventory and Appraisals amount to a value of \$96,059.00 and not \$92,705.00.  
Need corrected Summary and affected schedules. **(Supp. 05/11/18 indicates that there is a discrepancy of \$275.38 in cash between the charge and credits and can be explained by use of cash listed in Inventory and Appraisal.)** Court may wish to require further explanation of the use of cash as indicated in the supplement as none was provided. **JTD**
8. Proposed distribution has the following issues:
  - a. It lists a division of the real property located at 3664 Dusty Mile Road; however, real property was sold on 06/19/17. [LF pg. 6]
  - b. It indicates that Claire Vinson, granddaughter and Tanya Johnson will receive “nothing”; however, the will indicates that Claire is to receive 5% and Tanya 10% from the sale of the real property. [Pet. 09/23/14 LF pg. 6]

- Need corrected distribution via verified supplement. **(Supp. 05/11/18 includes the proposed distribution which now include Claire and Tanya but should indicate that they receive proceeds from sale of the real property. Also, it has the same issue of the real property being listed.)** Property was sold and cannot be listed on the proposed distribution. **Need corrected proposed distribution via a verified supplement.**
9. Schedule E- Disbursement to Beneficiaries reflects early distribution by Robert Vinson Jr. to himself, Frederick, Dana and USC in the total amount of **\$1,438.70 per supplement filed 05/11/18**. These distributions appear to not have been approved by the Court. [Supp. 05/11/18 LF pg. 15] **JTD**
  10. Need bank statement in support of end date of accounting period per Local Rule 20-908. **(Supp. 05/11/18 indicates that the statement was sent for filing on 05/15/18; however, it has not been filed.)** **Need same.**
  11. Need copy of escrow closing statement(s) for sale of real property per Local Rule 20-910 as 3664 Dusty Mile Road was sold. **(Supp. 05/11/18 indicates that the statement was sent for filing on 05/15/18; however, it has not been filed.)** **Need same.**
  12. Petitioner indicates that money was not invested in an interest bearing account as it was placed in a blocked account. [LF pg. 5]
  13. Petitioner requests authority to withhold \$1,000.00 as a reserve for closing costs. **JTD**
  14. **Notice of Assignment filed by Suretec Insurance Company indicated that \$14,016.10 is due to them out of any statutory fees and/or distributions awarded to Frederick (Eric) Lafate Vinson and requests that Court order the payment. JTD**
  15. Notice given.
  16. **Supplement filed 05/11/18** indicates that petitioner is amending the accounting schedules to reflect an accounting period start date of 05/07/16 instead of 03/07/14. Does Court wish for a fully revised Amended accounting to be filed as the accounting period is being changed and that will drastically change the accounting and required notes? **Judge to decide.**
  17. **Stipulation for Entry of Order Approving First and Second Accounts and for Final Distribution of Estate filed 09/05/18. Does Court wish to ratify stipulation? ~Proposed Order 09/05/18.**
  18. Proposed Order: 06/19/18 however, Second and final account cannot be approved before the First and current account. **See note 1.**

RECOMMENDATION: **See note 17.**

**Note:** Court may wish to require a fully revised and separate amended **First and Current** accounting as the Amended Second and Final accounting cannot be heard until the First has been approved. **See note 1.** Need to clear notes 2, 5, 6, 8, 10 & 11 then Court's discretion re: remaining notes. If approved, Court to set hearing on filing of receipts and final discharge for **07/22/19.**

(ww/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601182

CASE NAME: JOHN M. VAN ZANDT REVOCABLE LIVING TRUST

HEARING: Hearing Re: STATUS RE LISTING PROPERTY

COUNSEL:

HEIDI HUTLEY (PET)...JOSEPH A WALKER  
JOHN A VANZANDT REVOCABLE LIVING TRUST (TRU)...  
WILLINE GAUDREAU (PET/RES)...BROWN WHITE & OSBORN  
STEVEN GARUDRAU  
ROBERT GAUDREAU  
KATHRYN GAUDREAU  
CAROL KILLEN  
BILL GAUDREAU  
STEPHANIE GAUDREAU  
SUN WEST MORTGAGE COMPANY INC (WOLFE & WYMAN LLP)  
JAY GAUDREAU

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON *Status re Listing of Property*

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

1. Matter set during Review Status Report from treating doctor, wherein, the Court ordered realtor, Ms. Stephanie Crowell, counsel for Heidi Hutley and counsel for Guadreau parties appear at the house at 2468 Highland Road, Upland, CA at 1:30pm on 08/31/18 for an inspection and inventory of the contents of the house.
2. The Court further ordered Ms. Crowell list the house no later than 08/20/18 and file and serve status report re the inspection of the house by 09/04/18, 4pm.
3. **Declaration of Stephen Lewis re status of sale of real property filed 09/11/18.**
4. **Declaration of Stephanie Crowell (realtor) filed 09/11/18.**

RECOMMENDATION:

Court's discretion.

(cs)

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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.

Future Hearings:

10/29/18 Hearing Re: OSC as to Why the Court Should Not Grant, Etc

01/15/19 Accounting Review

03/18 Readiness Calendar

03/18/19 Hearing Re: Verified 1<sup>st</sup> Amended Petition

03/18/19 Hearing Re: Petition for Lack of Capacity ,Undue Influence, Etc

03/18/19 Petition for Instructions & For Authority to Sell Real Property

04/15/19 Court Trial



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700230

CASE NAME: TREVELYN C PATTON

**SEE ALSO 5, 6**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 FOR FAILURE TO FILE

COUNSEL:

DONNA L PATTON

(PET)...PRO/PER

TREVELYN C PATTON

(DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC Re Sanctions of \$500 for failure to file and \$500 for failure to appear.

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

1. Matter set during accounting review hearing, wherein, Petitioner failed to appear and to file accounting.
2. Petitioner ordered to appear at hearing on 09/24/18.

RECOMMENDATION:

Court's discretion.

(cs)

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: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700230

CASE NAME: TREVELYN C PATTON

**SEE ALSO 4, 6**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$500 FOR FAILURE TO APPEAR

COUNSEL:

DONNA L PATTON (PET)...PRO/PER

TREVELYN C PATTON (DEC)...

Waiver of Court Fees and Costs filed by DONNA L PATTON is GRANTED

See note on matter previous matter # 4.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700230

CASE NAME: TREVELYN C PATTON

**SEE ALSO 4, 5**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DONNA L PATTON

(PET)...PRO/PER

TREVELYN C PATTON

(DEC)...

Waiver of Court Fees and Costs filed by DONNA L PATTON is GRANTED

#### GENERAL INFORMATION

**Continued from 07/23/18 No appearance. Court sets OSC re Sanctions in the amount of \$500 for failure to file and the amount of \$500 for failure to appear. Court orders administrator be personally present at the next hearing on 09/24/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Donna Patton, daughter, on 06/19/17; full authority, no bond.
2. **Need** Final Inventory and Appraisal
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting and Final Inventory and Appraisal.

(ww/cs)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700383

CASE NAME: GEORGIA ALLEN

**SEE ALSO 8**

HEARING:

Petition for substituted judgment to create a special needs trust

COUNSEL:

BRIAN WEBER

(PET)...LAW OFFICES OF WILLIAM M NASSA

GEORGIA ALLEN

(DEC)...

**XREF: CONPS1300162** *DARIN J. WEBER*

Currently under review by Legal Research.

(LR)

(cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700383

CASE NAME: GEORGIA ALLEN

**SEE ALSO 7**

HEARING:

Report of waiver of Account and Report of BRIAN WEBER and  
Petition for allowance of fees filed.

COUNSEL:

BRIAN WEBER (PET)...LAW OFFICES OF WILLIAM M NASSA  
GEORGIA ALLEN (DEC)...

**XREF: CONPS1300162** *DARIN J. WEBER*

GENERAL INFORMATION:

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

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

1. Supplemental Inventory and Appraisal filed on 06/22/18 does not include amount at Section 1 nor include a Total. However, accounting does specify amount. **JTD.**
2. All heirs waive accounting.
3. Accounting period 02/08/17 to 06/30/18.
4. Assets on Hand \$441,486.95 consisting of \$407,434.09 in cash and remaining in personal property.
5. Statutory fees of \$11,829.74 requested. Calculated.
6. Attorney requests extraordinary fees of \$2,406.25 for services rendered in connection with the sale of real property. Billed at \$385/hour for a 6.25 hours' attorney time. Itemized [LF, pgs. 17-18]. **JTD.**
7. **Need** statement regarding family or affiliate relationship between the fiduciary and any agent hired by the fiduciary per Pr. C. §1064 (a) (4). **Need** verified supplement.
8. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C. §1064(a) (5).
9. **Need** proof of service to Notice of Proposed Action re: sale of real property.
10. Petition does not include statement regarding notice to Franchise Tax Board. However, notice was given and filed on 08/16/17.

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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.

11. Petitioner requests authority to withhold \$2,000 as a reserve for closing costs.
12. Proposed Order 07/27/18; does not include balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c). Also. does not include findings re: known creditors.

#### RECOMMENDATION

Need to clear notes 7-9 then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/07/19**.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

**SEE ALSO 10**

HEARING:

Hearing Re: FIRST & FINAL REPORT, PETITION, ETC

COUNSEL:

JAMES STEVEN JONES (PET)...LAW OFFICE OF SHERYL S HAYASHI  
REVOCABLE LIVING TRUST OF JAMES R JONES (TRU)...  
JASON JONES (OBJ)...BORDEN LAW OFFICE  
JUSTIN JONES (BORDEN LAW OFFICE)

GENERAL INFORMATION:

Continued from **10/24/17**. Court indicates that any future filings of counsel for Jason & Justin Jones are to be filed at least 5 court days prior to the hearing date- If not timely filed, court will not consider that filing; counsel for Jason & Justin Jones states that she understands this court order. Court orders that Stephanie Chao will not be permitted to make any future court call on this case.

Continued from **12/12/17**. Court trial requested. Pre-trial orders made.

**Continued from 06/11/18 to date of Readiness**

THIS CASE IS SET FOR HEARING ON **AMENDED** (09/14/17) First and Final Account and Petition for Fees by Trustee, James S. Jones ["Petitioner"].

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

1. This trust does not appear to have been court-supervised; a formal probate has not commenced; and trust indicates that upon the death of both trustors, the trustee shall distribute the entire trust estate, equally to the grandchildren [LF, p34]. **Supp. (09/14/17) indicates that an accounting was submitted as not all the beneficiaries of the Trust agree to the amounts to be disbursed.**
2. Accounting period 09/30/14 to 03/09/17.
3. Assets on Hand \$178,628.18 consisting of cash.
4. Petitioner requests ratification of fees paid in the sum of \$2,500.00.
5. Petitioner requests reimbursement of costs advanced of \$250.00. Itemized.

6. Attorney requests fees and costs of \$8,631.98. Billed at \$300/hour for 26.6 hours' attorney time and \$100/hour for 4.5 hours' paralegal time. Itemized [LF, pgs. 56-61]. JTD.
7. Distributions [LF, p11] reflect preliminary distributions totaling \$68,503.37.
8. Petitioner requests authority to withhold \$10,000 as a reserve. JTD.
9. Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.
10. Notice given.
11. **Objections filed 10/23/18 by Jason Jones and Justin Jones.**
12. **Reply to Objections filed 12/01/17. Need proof of service.**
13. Proposed Order 12/01/17 does not include case number and discharges Trustee upon filing of receipts instead of entry of final discharge order.

**RECOMMENDATION:**

Require notice then set for contested hearing. If approved, set next hearing for receipts and final discharge for **06/07/19**.

(nb/cs)

**Future Hearings:**

10/25/18 Court Trial (Day 1)

10/26/18 Court Trial (Day 2)



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PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

**SEE ALSO 9**

HEARING:

Readiness Calendar

COUNSEL:

JAMES STEVEN JONES (PET)...LAW OFFICE OF SHERYL S HAYASHI  
REVOCABLE LIVING TRUST OF JAMES R JONES (TRU)...  
JASON JONES (OBJ)...BORDEN LAW OFFICE  
JUSTIN JONES (BORDEN LAW OFFICE)

Future Hearings:

10/25/18 Court Trial (Day 1)

10/26/18 Court Trial (Day 2)

No notes – Readiness. JTD

(cs)

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800442

CASE NAME: John Charles Hummel

HEARING:

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

COUNSEL:

KIM CLARK (PET)...HEATHER C WELLBORN  
JOHN CHARLES HUMMEL (DEC)...

GENERAL INFORMATION:

**Continue from 06/18/18 continued at request of counsel to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Kim Clark, relation unknown

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

1. All heirs allegedly waive bond. Net value of the estate consists of \$26,928.08 of which \$2,553.65 is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Petitioner is not listed in section 8 of the petition and it cannot be determined what their relationship is to the decedent. **Need** verified supplement.
3. No Form Order Provided.

RECOMMENDATION

Need to clear note 2. Court's discretion re bond. If approved, set Accounting/Status Review on **12/02/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800553

CASE NAME: MTR OF GEORGE W SPELLMAN

**SEE ALSO 13**

HEARING:

Hearing Re: Amended Ptn for Letters of admin w/limited iaea

COUNSEL:

TINA M SPELLMAN                      (PET)...PRO/PER

GEORGE W SPELLMAN                (DEC)...

Waiver of Court Fees and Costs filed by TINA M SPELLMAN is GRANTED

See notes on next matter #13.

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800553

CASE NAME: MTR OF GEORGE W SPELLMAN

**SEE ALSO 12**

HEARING:

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

COUNSEL:

TINA M SPELLMAN (PET)...PRO/PER  
GEORGE W SPELLMAN (DEC)...

Waiver of Court Fees and Costs filed by TINA M SPELLMAN is GRANTED

GENERAL INFORMATION:

**Continued from 07/23/18 at request of petitioner to clear probate notes**

THIS CASE SET FOR HEARING ON [Amended filed 07/26/18] Petition for Letters of Administration with *Limited* Authority under IAEA by daughter Tina Spellman, [Administrator/Petitioner].

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

1. It appears petitioner is sole heir and waives bond. Net estate value \$416,058 with \$2,000 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).
2. **Need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication.
4. ~Proposed Form Order: 06/11/18

RECOMMENDATION

Need to clear notes 2-3. Court's discretion re bond. If approved, set Accounting/Status Review for **12/02/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

-----  
DATE: 09/24/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800820

CASE NAME: ELIZABETH LOUISE STEINSEIFER

HEARING:

Petition to determine succession to Real Property

COUNSEL:

MICHAEL GOENS (PET)...PRO/PER  
ELIZABETH LOUISE STEINSEIFER(DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real and Personal Property by Michael Goens (significant other) and Mark Steinseifer (son) Petitioners

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

1. Petitioners seek 50% interest, each; in decedent's 100% interest; in real and personal property per agreement.
2. The following Sections of petition are incomplete:
  - a. Item 9 (3)(4) re domestic partner;
  - b. Item (7)(8) re issue of predeceased child;
  - c. Item 9(b) re decedent survived by stepchild or foster child; and
  - d. Petition is not signed by Mark Steinseifer or dated at signature line.

**Need** verified supplement.

3. Attachment 8- Inventory and Appraisal is incomplete as follows:
  - a. At caption box re date of death;
  - b. At caption box re which Inventory and Appraisal;
  - c. Item 1 and 2 re appraisal value(s);
  - d. Item 4 re probate referee required;
  - e. Item 5 re property tax certificate;
  - f. Form is not signed by Mark Steinseifer nor dated at signature line by Michael Goens;
  - g. Bond Statement is incomplete;
  - h. Form is not signed or dated at bond statement by both Michael Goens and Mark Steinseifer;
  - i. Declaration of probate referee, page 2 is not complete;

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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.

- j. Missing attachment 2 and/or 1  
**Need** completed Inventory and Appraisal.
- 4. Attachment 11 does not include VIN number for Mobile Home. **Need** same.
- 5. Attachment 14 does not include name of Petitioner, Michael Goens.
- 6. **Need** Notice of hearing.
- 7. No Proposed form Order: Submit after hearing.

#### RECOMMENDATION

Need to clear note 2-6, then Court's discretion.

(cs)

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San Bernardino District

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CASE#: PRO PS1800753

CASE NAME: MERCY R WALTON

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

COUNSEL:

MAE CAROL LYNCH                      (PET)...JENNIFER M DANIEL  
MERCY R WALTON                      (DEC)...

#### GENERAL INFORMATION

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

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

1. Will waives bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside of California per and Pr.C. §8571. Court also has discretion to require bond either before, or after issuance of letters. per Pr.C. §8481(b). Does court wish to require bond of \$20,000, or alternatively, based on assets of \$25,000 in personal property.
2. This appears to be an ancillary probate; decedent was domiciled in Illinois.
3. Will is not self-proving (per Pr. C. §8220). However, Will has been admitted to Probate in the Circuit Court of the State of Illinois. Authenticated copies of the will and of the order directing Mae Carol Lynch to retain counsel to sell property located in California affixed to petition [LF, page 10-18].
4. Section 8 of petition is missing relationship of those listed. **Need** verified supplement providing relationship of Evanel Hunter, Jessie Ray, and Codie Butler.
5. Section 8 does not list Joyce Edmundsen who is mentioned in the Will. **Need** verified supplement.
6. Notice to Petition to Administer Estate and proof of service filed 08/10/18; however, item 5 re IAEA powers is not completed. **Need** corrected notice.
7. ~Proposed Form Order: 08/08/18

## RECOMMENDATION

Need to clear notes 4-6, Court's discretion re bond. If approved, set Accounting/Status Review for **12/02/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)



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CASE#: PRO PS1800811

CASE NAME: Mary Donson

HEARING: Spousal Property Petition hearing.

COUNSEL:

DANIEL J DONSON (PET)...LAW OFFICE OF MARY K JEFFERS  
MARY DONSON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Daniel Donson,  
spouse

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

1. Petitioner requests determination of property passing to the surviving spouse as community property. Specially, real property located at Redlands, CA and beneficial interest in the decedent's separate property as a result of an inheritance from the estate of Angelina Vecchione.
2. Petitioner attaches a copy of decedent's will giving interest to spouse. [LFp.6-16].
  1. Notice given.
  2. ~Proposed Form Order: 08/23/18

RECOMMENDATION:

Court's discretion.

(cs)

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HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIPS**

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CASE#: CON PS1100132

CASE NAME: JOSE VICENTE GOVEA

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ANTONIO GOVEA

(CPE)...ANTONIO GOVEA.

JOSE VICENTE GOVEA

(CEP)...

**VACATED** – Per register of action 6<sup>th</sup> Account filed and set for 10/16/18.

(cs)

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CASE#: CON PS1600122

CASE NAME: MTR OF GINA F BLUE STONE

HEARING:

Hearing Re: DEMENTIA POWERS

COUNSEL:

REGINA HAMILTON	(CPE)...PRO/PER
GINA F BLUE STONE	(CEP)...JENNIFER M DANIEL
BRENDA SIMMS	(OBJ)...PRO/PER

Waiver of Court Fees and Costs filed by GINA F BLUE STONE is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON *Dementia Powers*

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

1. Matter set on the Court's own motion on 08/06/18 after review of Court Investigator Report filed 07/30/18.

RECOMMENDATION:

Court's discretion.

(cs)

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CASE#: CON PS1600162

CASE NAME: JORDAAN MICHAEL CLARKE

HEARING:

Hearing Re: TRANSFER TO OC COUNTY

COUNSEL:

SARI LOPEZ	(CP )...SUSAN A KATZEN
CHERI L. GREEN	(PET)...CHERI GREEN
JORDAAN MICHAEL CLARKE	(CEE)...MITCHELL I ROTH
RICHARD HUNTINGTON	(MUSCARELLA & ASSOCIATES)

**XREF: PROPS1601031** *MTR OF SHIRLEY ANN MCNELLY*

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Transfer to Orange County

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

1. Matter set on 08/06/18 after review of Court Investigator's report.

RECOMMENDATION:

Court's discretion.

(cs)

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CASE#: CON PS1800131

CASE NAME: MTR OF DAMIEN JOSEPH LIRA-CERDA

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
ANDREA C CERDA (CP )...CHARLES W TOURDOT  
CHRIS E CERDA (CP )...CHARLES W TOURDOT  
DAMIEN JOSEPH LIRA-CERDA (CTP)...J BENJAMIN SELTERS III

#### GENERAL INFORMATION

Continue from **06/11/18** at request of Court. Court sets OSC Re Dismissal. Court notes that if petitioners do not cooperate with the Court Investigator's investigation, the Court will dismiss the petition with prejudice. Matter continued for Court investigator to complete the report to the Court.

**Continued from 08/20/18, Attorney Benjamin Selters, III is appointed for Amien Lira-Cerda. OSC matter taken off calendar- hearing held .**

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Andrea and Chris Cerda, parents

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

1. **Note: Proposed conservatee will not be an adult until 02/28/19. Does Court wish to continue matter to 03/04/19? JTD**
2. No bond- person only
3. Petitioner seeks medical powers. Capacity Declaration filed 07/26/18; however section 1 is missing doctor's telephone number, and form is not dated at signature line on page 1 and 4. **Need corrected Capacity Declaration. JTD**
4. Proposed conservatee is developmentally disabled. **Report of court appointed counsel, Benjamin Selters, III filed 09/13/18..**
5. IRC report filed 08/16/18.
6. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority

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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.

to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee, authority to consent or withhold consent to marriage/domestic partnership, right to control social/sexual contacts, control decisions concerning education **JTD**.

7. Petitioner seeks civil rights not be limited without court order.
8. Certificate of Completion of the Conservatorship Training Class for Andrea filed 05/02/18 for Chris filed 05/04/18.
9. **Need** return of citation.
10. CI report filed 07/31/18
11. ~Proposed Form Order: 05/01/18

#### RECOMMENDATION

Need to clear note 9. **Court's discretion re note 1.** *If* approved, set hearing for Compliance Review for **04/29/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(ww/cs)

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CASE#: CON PS1800182

CASE NAME: HERMINIA ESPINOZA

HEARING:  
PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:  
OLIVIA HAMMACK (PET)...PRO/PER  
HERMINIA ESPINOZA (CEE)...

#### GENERAL INFORMATION

**Continue from 08/13/18 Referred to legal aid for legal assistance. Amended letter to reflect this county needed. Matter is placed on second call to allow petitioner to submit amended letter to the Court. Court reconvenes off the record. Court notes petitioner did not return for second call and/or submitted amended Letters.**

THIS CASE IS SET FOR HEARING ON Probate/Conservatorship Management Conference

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

1. Olivia Hammack, sister, was appointed conservator of the person & estate on 11/10/14 by the Superior Court of Riverside County.
2. Matter was transferred from Riverside County on 05/25/18 as the conservatee moved to Yucaipa, San Bernardino County.
3. Declaration in Support of Order Dispensing with accounting filed 01/31/18 in Riverside County; however, there does not appear to be an accounting period.
  - a. **Ex Parte Petition to Dispense with Accounting and Order filed covering period of 12/11/15-12/30/16. Period of accounting should coordinate with the end date of the previous accounting.**
  - b. **Need accounting review hearing to be set no sooner than 11/26/18.**

#### RECOMMENDATION:

Court's discretion. Suggest current accounting review set for 08/12/19 be vacated.  
(ww/cs)

Future hearing: 08/12/19 Accounting Review

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CASE#: CON PS1800231

CASE NAME: MTR OF GLENDA M LUCKHART

HEARING:

Petition for Appointment of Conservator

COUNSEL:

IRENE MARTINEZ (CP )...PRO/PER  
GLENDA M LUCKHART (CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by grandmother, Irene Martinez, Petitioner.

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

1. No Bond- Person only.
2. Petition is incomplete at the following sections:
  - a. Section 1g re medical powers. It is unclear whether medical powers are being requested.
  - b. Section 1K re dementia powers.
  - c. Section 1f re Due Diligence.
  - d. Section 9 re medical treatment; however, petitioner indicates Capacity Declaration will be filed before the hearing.  
**Need** verified supplement addressing these sections.
3. Confidential Supplemental Information is incomplete as to sections:
  - a. Item 5 re alternatives to conservatorship.
  - b. Item 6a(2) re social services provided/not provided.
  - c. Item 6b re knowledge re services received by proposed conservatee.  
**Need** verified supplement addressing these sections.
4. List of Required Contacts (Local form SB-12224) is missing Julia Luckhart and Glen Luckhart. **Need** complete form.
5. **Need** Capacity Declaration.
6. **Need** return of Citation.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **Need** notice of hearing and proof of service.

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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. Court to see Confidential Screening filed 08/02/18.
10. Court Investigator Notice of no report filed 08/28/18.
11. ~Proposed Form Order: 08/02/18

#### RECOMMENDATION

Need to clear notes 2-8. If approved, set hearing for Compliance Review for **04/29/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(cs)

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HONORABLE: STANFORD E. REICHERT

**PUBLIC GUARDIAN**

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DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON DS1000230

CASE NAME: STEPHEN RIDDLE

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
STEPHEN RIDDLE

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire on 09/14/19

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order that Conservator need not present 6<sup>th</sup> account approved on 10/30/17.
2. No accounting filed. **Need** same.

RECOMMENDATION:

Inquire status.

(cs)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
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CASE#: CON PS0600044

CASE NAME: MTR OF CAROL SANDOVAL

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

CAROL SANDOVAL

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 8/10/19.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Order that Conservator need not present 7<sup>th</sup> account approved on 10/06/17.
2. No accounting filed. **Need** same.

RECOMMENDATION:

Inquire status.

(cs)

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CASE#: CON PS0700104

CASE NAME: MICHAEL ALEJANDRE

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
MICHAEL ALEJANDRE

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 04/27/19

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Order that Conservator need not present 8<sup>th</sup> account approved on 10/06/17.
2. Proof of service that Conservator need not present 8<sup>th</sup> annual Account filed; however, no accounting filed. **Need** same.

RECOMMENDATION:

Inquire status.

(cs)

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DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS0700200

CASE NAME: BRADY STEPHEN MERTEL

HEARING:  
Accounting Review by \*\*\*

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
BRADY MERTEL (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION  
Letters expire 12/08/18

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-  
1. Order that Conservator need not present 6<sup>th</sup> account approved on 10/06/17.  
2. No accounting filed. **Need** same.

RECOMMENDATION:  
Inquire status.  
(cs)

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DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS0800273

CASE NAME: MEREDYTH RANSOM

HEARING:  
Accounting Review by \*\*\*

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MEREDYTH RANSOM (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 10/20/18

**Continued from 02/26/18 at request of counsel for file accounting.**

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Ex Parte Order that Conservator need not present 8<sup>th</sup> account by PG approved on 10/06/17 covering the period of 11/01/15-12/31/16.
2. Amended Ex Parte Order that Conservator need not present 8<sup>th</sup> account covering the period of 11/01/15-12/31/17 filed.
3. Amended Proposed Order that Conservator need not present 8<sup>th</sup> account filed 02/20/18 and 08/23/18; however, body of order references 7<sup>th</sup> annual account and fees requested are for the wrong account period. **Need** corrected Amended Proposed Order that Conservator need not present 8<sup>th</sup> Annual Account.

RECOMMENDATION:  
Inquire status of accounting.

(ww/cs)

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CASE#: CON PS1300070

CASE NAME: MTR OF ARLENE HOLMES

HEARING:

Accounting Review by PUBLIC GUARDIAN

COUNSEL:

CHARLES HOLMES	(CPE)...DONNA Y GORDON
ARLENE HOLMES	(CEP)...
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 03/30/15 Court approved the First account by Public Guardian; Second accounting now due.
2. No accounting filed. **Need** same.

RECOMMENDATION:

Inquire status.

(cs)

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CASE#: CON PS1600024

CASE NAME: BARBARA CALVERT

HEARING:

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

COUNSEL:

PUBLIC GUARDIAN  
PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL  
(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 03/16/19.

THIS CASE IS SET FOR HEARING ON Petition to Establish Irrevocable Burial Trust by Public Guardian ["Petitioner"].

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

- 1 Petitioner alleges the current assets on hand are \$22,654.63, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
- 2 Petitioner requests authority to deposit up to \$5,000 in an Irrevocable Burial Trust.
- 3 ~Proposed Form Order 07/24/18.

RECOMMENDATION:

Court's discretion.

(nb)

Future Hearing:

10/22/18 1<sup>st</sup> Account & Report



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CASE#: CON PS1700050

CASE NAME: MTR OF KATHERINE POWELL

HEARING:

Hearing Re: PETITION FOR PLACEMENT OUTSIDE PERSONAL RESIDENCE

COUNSEL:

PUBLIC GUARDIAN

(CE )...COUNTY COUNSEL

KATHERINE POWELL

(CTE)...MITCHELL I ROTH

**XREF: CONPS1700074** *MTR OF WILLARD POWELL*

**TRUPS1800128** *THE WILLARD D. POWELL AND K.LORRAINE POWELL TRUST*

#### GENERAL INFORMATION

Matter initially heard as an ex parte on 05/21/18. Hearing continued at request of counsel to be heard with related matter.

**Continued from 07/30/18 at request of counsel.**

THIS CASE SET FOR HEARING ON Petition for Placement Outside Personal Residence by petitioner, PG

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

1. PG was appointed as conservator of the person and estate on 04/06/18.
2. Petitioner indicates that the conservatee's spouse requires 24 hour care due to a significant decline in his health as a result of a heart attack.
3. The spouse's physician recommends placement at an assisted living facility with hospice services but petitioner indicates that the estates of the conservatee and her spouse do not have sufficient income to pay for such placement.
4. Petitioner requests that the Court find that it is no longer appropriate for the conservatee to reside in her personal residence/home. **JTD**
5. Petitioner further requests that the Court authorize the PG to place the conservatee in a facility appropriate for her needs and level of care. **JTD**
6. Notice was given as to the matter when it was heard on an ex parte basis. Does Court require new notice for this hearing date? **JTD**
7. Declaration by public guardian with attached Financial Needs worksheet filed 07/25/18.

8. **Declaration by Heidi Murphy, daughter filed 09/10/18 re place and care of conservatee.**
9. ~Proposed Order: 05/16/18 however, order reflects “Ex parte” and matter is no longer being heard as such. **JTD**

RECOMMENDATION

Court's discretion.

(ww/cs)

Future Hearings:

10/15/18 Conservatorship Compliance Review Hearing

01/28/19 Accounting Review

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CASE#: CON PS1800176

CASE NAME: MTR OF EARL BALE

HEARING: Petition for Appointment of Conservator

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
EARL BALE (CEP)...

GENERAL INFORMATION

PG appointed as temporary conservator of the person and estate on 06/25/18, no bond.

**Continued from 07/23/18 at request of counsel to interview his client and prepare report**

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of person and estate by PG

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

1. No bond - PG.
2. Petitioner seeks Pr. C. § 2590 powers to sell real or personal property of the estate and proceeds to be used for Conservatee's care and personal needs.
3. Petitioner seeks authority to deposit up to \$5,000.00 in an irrevocable burial trust and authority to abandon and/or donate personal property with value of \$300.00 or less; storage or a sale would be a burden on the estate.
4. Petitioner seeks medical and dementia powers. Capacity Declaration filed 05/29/18.
5. Petitioner requests dementia powers; Attorney Duane Booth appointed as counsel. Report of court appointed counsel filed 08/27/18.
6. County Counsel failed to date petition at signature line. [LF pg. 9] **JTD**
7. Confidential Supplemental Information form is incomplete as to section 6a or b as to estate management assistance.[LF pg. 5] **JTD**
8. Citation and proof of service filed 06/21/18; however, server's phone number is missing in section 4a. **JTD**.
9. Notice given.
10. CI report filed 07/19/18.
11. ~Proposed Order: 05/29/18

---

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.

**RECOMMENDATION:**

Need Report of Counsel and CI report then Court's discretion re remaining notes. If approved, set hearing for Compliance Review for **04/29/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **12/02/19**. Any accounting to be filed 30 days in advance.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS00529

CASE NAME: IN THE MATTER OF WILLIAM RHODES

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

WILLIAM RHODES

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 08/17/19

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present seventh Account approved 06/19/17; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)

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: 09/24/18      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS02773

CASE NAME: MATTER OF ELIZABETH BARELA

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
ELIZABETH BARELA

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 11/03/18

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present eleventh Account approved 10/30/17; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)

Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS02880

CASE NAME: MTR RE CLINTON ROWDEN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN  
CLINTON ROWDEN

(CPE)...COUNTY COUNSEL  
(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 05/18/19

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Tenth Account approved 10/06/17; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)

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: 09/24/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: SLC SS3263

CASE NAME: IN THE MATTER OF NORMAN RILEY

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

NORMAN FREDERICK RILEY

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Letters expire 12/30/18

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Twenty-Fourth Account approved 08/27/18; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)



Superior Court of Calif, County of San Bernardino

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS4511

CASE NAME: MTR OF JIMMY ROMERO

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
JIMMY ROMERO (CEP)...HARTNELL LAW GROUP

**GENERAL INFORMATION**

Letters expired 09/09/18. Trial set for 10/19/18.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fourth Account approved 10/06/17; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: SLC SS4693

CASE NAME: MTR RE PETER CABRAL  
HEARING: First Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
PETER CABRAL (CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Conservatorship terminated on 08/26/16

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

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

1. Accounting period 02/17/12 – 03/31/16.
2. Assets on hand \$81.39 consisting of cash
3. Public Guardian requests fees totaling \$4,261.00 pursuant to Court-approved fee schedule effective prior to 07/01/14 and schedule effective 07/01/14. For the period of 02/17/12 to 03/31/16, approving and confirming the sum of \$1,800 previously collected, and deferring the sum of \$2,461.00 until such time as the conservatorship estate has sufficient funds for such purpose. Generally itemized. JTD.
4. County Counsel request fees totaling \$2,161.00 pursuant to Court-approved fee schedule effective prior to 07/01/14 and schedule effective 07/01/14 For the period of 02/17/18 to 03/31/16, approving and confirming the sum of \$900.00 previously collected, and deferring the sum of \$1,261.00 until such time as the conservatorship estate has sufficient funds for such purpose. Generally itemized. JTD.
5. **Need** notice to Director of State Hospitals per Pr.C. §1461.
6. ~Proposed Order 12/15/17

RECOMMENDATION:

Need to clear note 5, then Court's discretion. If approved, set next hearing re Final Account as is now due for **11/26/18**. Accounting to be filed 30 days' in advance.  
(cs)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

**SEE ALSO 35B, 35C**

HEARING:

Hearing Re: ISSUE OF VEHICLE

COUNSEL:

AISHA L.J. DEBOSE	(CP )...
GWENDOLYN F BROWN	(CPE)...PRO/PER
DALILA DAVEEN DEBOSE	(CTE)...JENNIFER M DANIEL
LARRY G DEBOSE	(TP )...

**XREF: CIPDS1700092** *IN RE DALILA DAVEEN DEBOSE*

GENERAL INFORMATION:

**Continued from 08/27/18 at request of counsel. Need to obtain estimates for vehicle.**

THIS CASE SET FOR HEARING ON OSC Re Suspension of Powers and Removal

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

1. Matter set on 07/30/18 during issue of caregivers and vehicle hearing, wherein, Court made orders re caregiver issue.

RECOMMENDATION:

Court's discretion.

(cs)

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

-----  
DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE  
**SEE ALSO 35A, 35B**  
HEARING:Re: OSC RE SUSPENSION OF POWERS AND REMOVAL

COUNSEL:

AISHA L.J. DEBOSE (CP )...  
GWENDOLYN F BROWN (CPE)...PRO/PER  
DALILA DAVEEN DEBOSE (CTE)...JENNIFER M DANIEL  
LARRY G DEBOSE (TP )...

**XREF: CIPDS1700092** *IN RE DALILA DAVEEN DEBOSE*

**Continued from 08/27/18**

GENERAL INFORMATION:

Continued from **07/02/18**. Matter is continued to July 30, 2018. Court vacates hearing re social security benefits as counsel indicates that the issue re hours is as to in home support services. Court sets a hearing to address issue of in home support services and the wheelchair for July 30, 2018. Additionally, Court requires Inland Counties Regional Center's counsel to be present at next hearing. Ramona Verduzco to give notice to counsel for Inland Counties Regional Center. Court resets the hearing on the petition for attorney fees set for July 16, 2018 to July 30, 2018.

**Continued from 07/30/18 Court and counsel confer on the record. Continued at request of counsel to obtain estimates on vehicle.**

THIS CASE SET FOR HEARING ON OSC Re Suspension of Powers and Removal

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

1. Matter set on 06/18/18 during status of Health of the Conservatee hearing, wherein, Court sets an OSC re: suspension of powers and removal for inability to follow court order.
2. Declaration of Gwendolyn Brown filed 07/24/18 re suspension of powers and removal, caregivers, purchase of wheelchair and van.

RECOMMENDATION:

Court's discretion.

(cs/ww/cs)

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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: STANFORD E. REICHERT

-----  
DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: CON PS1500242

CASE NAME: DALILA DAVEEN DEBOSE

**SEE ALSO 35A, 35B**

HEARING: Re: IN HOME SUPPORT SERVICES & WHEELCHAIR

COUNSEL:

AISHA L.J. DEBOSE	(CP )...
GWENDOLYN F BROWN	(CPE)...PRO/PER
DALILA DAVEEN DEBOSE	(CTE)...JENNIFER M DANIEL
LARRY G DEBOSE	(TP )...

**XREF: CIPDS1700092** *IN RE DALILA DAVEEN DEBOSE*

GENERAL INFORMATION:

Continued from **07/30/18** Court made temporary orders re third shift caregiver. Counsel reports issue re the bed is not suitable or appropriate for Dalila Debose. Court set OSC for management representative from Kaiser to report to the Court as to the issue of scheduling an assessment re the bed. Counsel to give personal notice on management representative from Kaiser to be personally present on 08/27/18 at 10:00am to address issue. Additionally re the bed that has already been delivered to the home, it is to be retuned and cost to be refunded.

**Continued from 08/27/18 at request of Counsel. Waiting on results re wheelchair. Counsel Karin Horspool will verify status of ICU bed; Counsel further represent caregiver will be paid tomorrow for time worked.**

THIS CASE SET FOR HEARING ON IN HOME SUPPORT SERVICES & WHEELCHAIR

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

1. Matter set by Court on 07/02/18 at the hearing re: OSC re Suspension of Powers and Removal.
2. IRC's Counsel to be present.

RECOMMENDATION

Court's discretion.

(ww/cs)

Future Hearing: 12/17/18 Accounting Review

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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

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DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
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CASE#: SLC SS6564

CASE NAME: MTR OF BILLIE JEAN MORARIU

HEARING:

Accounting Review by \*\*\*

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

BILLIE JEANNE MORARIU

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 07/10/19

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present Fifth Account approved 10/06/17; account or waiver of account now due.
2. No accounting. Need same.

RECOMMENDATION:

(cs)

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HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/24/18 TIME: 10:00 DEPT: S35P  
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CASE#: SLC SS1151

CASE NAME: IN THE MATTER OF MARVIN LEWIS JONES

HEARING:

Petition for Authority to Establish an Irrevocable Burial Trust Pr.C. §2459

COUNSEL:

MARVIN LEWIS JONES (CEP)...HARTNELL LAW GROUP  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

#### GENERAL INFORMATION

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

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

1. Petitioner alleges the current assets on hand are \$7,885.61, that there are sufficient funds to provide for conservatee's ongoing care and to establish a burial trust, and that the eligibility criteria for Social Security Disability does not allow for the recipient's account exceed \$2,000.
2. Petitioner requests authority to deposit up to \$3,000.00 in an Irrevocable Burial Trust.
3. Notice given.
4. ~Proposed Order: 09/13/18

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**ELDER ABUSE**

-----  
DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: EAP PS1800123

CASE NAME: HARRINGTON VS GARNER

HEARING:

Hearing Re: Elder Abuse Restraining Order

COUNSEL:

DENISE HARRINGTON                      (PP)...PRO/PER

TAYLOR JORDAN GARBER                (RP)...

Proof of personal service as to Taylor Jordan Garner filed 09/07/18.  
(nb/cs)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUST**

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DATE: 09/24/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS1300192

CASE NAME: MATTHEW FLOREZ SPECIAL NEEDS TRUST

**VACATED**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

MATTHEW FLOREZ

(PET)...PRO/PER

MATTHEW FLOREZ S.N. TRUST

(TRU)...

RAQUEL FLOREZ

(PET)...JOHN F WEBER

**VACATED** – 4<sup>th</sup> and Final Accounting by Raquel Florez filed and set for 11/08/18.  
(cs)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT TRIAL

-----  
DATE: 09/24/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1500912

CASE NAME: LOUIA E REICHMUTH

**SEE ALSO 39, 40**

HEARING:

Hearing Re: COURT TRIAL ON LETTERS OF ADMIN/850 PETITION

COUNSEL:

JOSEPH REICHMUTH	(PET)...ANDERSON LEBLANCE
LOUIA E REICHMUTH	(DEC)...
JOSEPHINE HUNTER	(PET)...AL MARCHETTI

Waiver of Court Fees and Costs filed by JOSEPHINE HUNTER is GRANTED

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

No notes – Trial. JTD

(cs)

Future Hearings:

09/25/18 Court Trial (Day 2)

09/26/18 Court Trial (Day 3)

09/27/18 Court Trial (Day 4)

09/28/18 Court Trial (Day 5)

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HONORABLE: STANFORD E. REICHERT

-----  
DATE: 09/24/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1500912

CASE NAME: LOUIA E REICHMUTH

**SEE ALSO 38, 40**

HEARING:

Petition for LETTERS OF ADMINISTRATION

COUNSEL:

JOSEPH REICHMUTH	(PET)...ANDERSON LEBLANCE
LOUIA E REICHMUTH	(DEC)...
JOSEPHINE HUNTER	(PET)...AL MARCHETTI

Waiver of Court Fees and Costs filed by JOSEPHINE HUNTER is GRANTED

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

#### GENERAL INFORMATION

Continued from 11/12/15. Mr. Marchetti reported objection will be filed. Matter requested to be heard by Judge Vander Feer.

Continued from **1/7/16, 3/3/16, 7/14/16 and 07/22/16**. Attorney Richard Anderson to file an 850 petition by 08/12/16. (Clerks' office to calendar it for 09/13/16). Opposition by Attorney Al Marcietti to be filed by 09/02/16.

Continued from **09/13/16** and **11/14/16** at request of counsel. Notice waived.

Continued from **02/27/17**.

Continued from **10/30/17**. Petitioner/Petitioner's Counsel not present.

Continued from **11/06/17**. Matter is set contested with one week time estimate.

**Continued from 08/27/18 Parties announce ready for trial.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with **limited** authority under IAEA by son.

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

1. Petitioner now requests limited authority. Only real property exists in estate; therefore, no bond is being sought.
2. **Objections filed by Josephine Hunter, daughter, filed 01/07/16.**
3. ~Proposed Form Order: 09/30/15.

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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.

## RECOMMENDATION

Matter is contested and set for trial. If approved, set Accounting/Status Review for **12/02/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/sa/nb/ww/cs)

### Future Hearings:

09/25/18 Court Trial (Day 2)

09/26/18 Court Trial (Day 3)

09/27/18 Court Trial (Day 4)

09/28/18 Court Trial (Day 5)

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-----  
DATE: 09/24/18 TIME: 1:30 DEPT: S35P  
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CASE#: PRO PS1500912

CASE NAME: LOUIA E REICHMUTH

**SEE ALSO 38, 40**

HEARING:

Petition for ORDER CONFIRMING ESTATE ASSETS

COUNSEL:

JOSEPH REICHMUTH	(PET)...ANDERSON LEBLANCE
LOUIA E REICHMUTH	(DEC)...
JOSEPHINE HUNTER	(PET)...AL MARCHETTI

Waiver of Court Fees and Costs filed by JOSEPHINE HUNTER is GRANTED

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

GENERAL INFORMATION:

Continued from **11/14/16** at request of counsel. Notice waived.

Continued from **02/27/17**.

Continued from **10/30/17**. All parties to be present.

Continued from **11/06/17**. Matter is set contested with one week time estimate.

**Continued from 08/27/18 Parties announce ready for trial.**

THIS CASE IS SET FOR HEARING ON Petition for Order Confirming Estate Assets [Pr. C. § 850 et seq.].

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

1. Proof of mailed service filed. However, need personal service per Pr.C. §851.
2. Petitioner, Joseph Reichmuth, is the son of Decedent. Decedent was survived by issue; Petitioner and Josephine Hunter ["Hunter"]. Petitioner alleges that a few days after Decedent's demise, Hunter produced a Quitclaim Deed [LF, p. 14] allegedly executed by the decedent, dated 04/30/10, three years before decedent's demise, but recorded four days after decedent's death.
3. Petitioner indicates he questioned the document and on 02/12/16, Petitioner was able to confirm that the deed was not in fact executed by his mother, but rather was clearly the handwriting of Hunter. Attached as Exhibit "A" [LF, pgs. 8-30] is a copy of the Report of the Forensic Handwriting Examination concluding

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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.

that “it is virtually certain, that, Hunter signed the name of decedent on the Quitclaim Deed,” [LF, p. 9].

4. Petitioner requests this Court confirm the real property located at 802 Woodlawn Street, Ontario, CA 91761, is an asset of the decedent; subject to probate administration; and deem that the transfer of the real property is void and of no force.
5. Petitioner further requests that the Court determine that the transfer of the real property was improper, voidable, and fraudulent and permit petitioner to recover all of his attorney’s fees and costs [not specified].
6. **Need** Notice of Hearing and proof of service.
7. **Objections by Josephine Reichmuth-Hunter, daughter, filed 09/13/16.**
8. ~Proposed Order 08/10/16.

RECOMMENDATION:

Matter is contested. Need proper service then Court’s discretion.

(nb/ww/cs)

Future Hearings:

09/25/18 Court Trial (Day 2)

09/26/18 Court Trial (Day 3)

09/27/18 Court Trial (Day 4)

09/28/18 Court Trial (Day 5)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 09/24/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO DS1000636

CASE NAME: MICHAEL WARREN WATKINS

HEARING:

Hearing re Final Discharge

COUNSEL:

KATHY WATKINS                      (PET)...BROWN WHITE & NEWHOUSE LLP  
MICHAEL WARREN WATKINS        (DEC)...  
AMERICAN CONTRACTORS INDEMNITY (TP )...PRO/PER  
STATE OF CALIFORNIA FRANCHISE TAX BOARD (PRO/PER)  
BERNARD M BIDART

#### GENERAL INFORMATION

**Continued from 03/12/18 and 06/25/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. First and Final Account approved on 03/06/17.
2. **Need** receipt by Kathy Watkins.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs/nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1401134

CASE NAME: Celia A Ramirez

HEARING: Hearing re Final Discharge

COUNSEL:

ERIC B RAMIREZ (PET)...LAW OFFICES OF LINDA ROBERTS-R  
CELIA A RAMIREZ (DEC)...  
ESTHER M DAVID (PET)...HARTNELL LAW GROUP

GENERAL INFORMATION

Continued from **05/14/18**. No appearance. Court orders counsel to be present at next hearing.

**Continued from 07/16/18 at request of counsel.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. The need for a final formal accounting is not required as the Court deemed the accounting shown at mediation as sufficient per minutes of 05/01/18 Accounting Review hearing.
2. A settlement was reached on 05/01/18 between the heirs.
3. Per Order on Mutual General Release and Settlement Agreement filed 05/01/18 a reserve of \$5,000.00 for taxes and unforeseen contingencies was allowed. **Need** informal accounting by Esther David of expenditures or distribution from the reserve of \$5,000, together with receipts of expenditures or distribution per Local Rule 20-911.
4. **Receipts by heirs filed by beneficiaries.**
5. **Receipt by Attorney Bryan Hartnell filed as to Esther David for reimbursement of fees of \$3,612.59; however, Settlement Agreement does indicate reimbursement of \$4,550.59.**
6. Ex Parte Petition for Final Discharge and Order forwarded to department for signature on 09/18/18.



RECOMMENDATION:  
Inquire status.  
(ww/nb/cs)

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

-----  
DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1500184

CASE NAME: MTR WILLIE C NORWOOD

HEARING:

Summary Account and Report of YVONNE DANTZLER and Petition for allowance of fees filed.

COUNSEL:

YVONNE DANTZLER (PET)...PRO/PER  
WILLIE C NORWOOD (DEC)...

**XREF: CIVDS1512928** *DANTZLER, ET AL.-V-WELLS, ET AL.*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Summary of Account and Report by Administrator, Yvonne Dantzler ["Petitioner"-daughter].

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

1. Accounting period 10/26/14 to 02/02/18.
2. Assets on Hand \$0.00.
3. Final Inventory & Appraisal filed 07/19/16 includes personal property that should be listed on Attachment 2 that must be appraised by the probate referee Pr. C. §8902. **Need** corrected inventory
4. This accounting does not appear to be a true and complete accounting and should be deemed in the nature of a status report. There is insufficient information and known defects that should preclude the Court from approving this accounting period. **Need** proper accounting that complies with Pr. C. §1060 et seq.

RECOMMENDATION:

Need a proper accounting to be set on a first check calendar no sooner than **11/05/18**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

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**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: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1600454

CASE NAME: MTR OF ALEJANDRA CASTILLO

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ELAINE ARIAS MONTES	(PET)...PRO/PER
ALEJANDRA CASTILLO	(DEC)...
DEUTSCHE BANK NATIONAL TRUST	(TP )...WRIGHT, FINLAY & ZAK

GENERAL INFORMATION:

Continued from **10/31/17** and **12/12/17**. No appearances. Citation issued as to Elaine Arias Montes who is cited and required to appear.

Continued from **01/30/18**. The Court orders the Administrator to file a status report by 02/19/18. Elaine Arias Montes is ordered to be present at next hearing.

Continued from **03/19/18**. Parties are working with an accountant to prepare the accounting.

Continued from **05/14/18**. Parties are to file an accounting forthwith. Clerks' office to set on calendar for 07/16/18.

**Continued from 07/16/18 at request of administrator.**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters of Administration issued to Elaine Montes, daughter, on 06/28/17, full authority, no bond.
2. Proof of personal service of citation filed 01/19/18; however section 2 as to documents served is blank but the service is always of a copy of the citation and the minute order. **JTD**
3. Partial Inventory and appraisal filed 11/03/16 reflecting "all" of estate. Court may wish to inquire if it is actually the Final Inventory and Appraisal? If so, **need** corrected final inventory and appraisal with section 5 as to property tax certificate completed and bank statements in support of date of death for Bank of America acct #s 5178 & 4809 per Local Rule 20-809.
4. **Need** accounting or status report.
5. Amended Proof of Personal Service of Citation on Elaine Montes filed 04/25/18.

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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.

**RECOMMENDATION:**

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(nb/ww/nb)

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DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800114

CASE NAME: CAROLYN ANN VALENCIA  
HEARING:  
Petition for ORDER TO RECOVER POSSESSION OF REAL PROPERTY  
BELONGING TO ESTATE

COUNSEL:  
TAREE HERRINGTON (PET)...FULLERTON LEMANN SCHAEFER & DO  
CAROLYN ANN VALENCIA (DEC)...

**XREF: PROPS1800728** MTR OF CAROLYN ANN VALENCIA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Order to Recover Possession of Real Property Belonging to the Estate by Executrix, Taree Herrington ["Petitioner"]. [Pr. C. §850(a)(2)(C), (D).]

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

1. Petitioner, as Executrix of the estate, alleges the estate has a claim in real property located at 1471 Alta Avenue, Upland, San Bernardino County ["Residence"]. The petitioner claims Decedent originally acquired title to the subject real property prior to her marriage to Manuel B. Valencia ["Manuel"] taking title as "Carolyn Harrington, an unmarried woman." On 02/06/198, during the marriage, Manuel executed a Grant Deed conveying any interest he had in the Residence to Decedent. On 10/15/10, 2 deeds to the Residence were recorded, (1) one by which Decedent deeded it to herself as a "married woman as her sole and separate property," and (2) one by which Manuel deeded any interest he had in the Residence to Decedent as "a married women as her sole and separate property." [LF, pgs. 8-14]. Based on the foregoing, Petitioner maintains the Residence consist of Decedent's sole and separate property and, therefore, is subject to administration in the Decedent's estate.
2. Under the terms of Decedent's Will dated 02/29/12, the assets of the Decedent's estate are to be distributed 34% to Manuel B. Valencia, 33% to Petitioner and 33% to David Catalina.
3. Petitioner alleges that Manuel presently occupies the Residence and claims some right, therein, with no compensation being paid to the estate for his use

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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.

- and occupancy. Petitioner claims the right to possession of the Residence by virtue that Manuel deeded any interest he may have had, therein, to Decedent in 2010 and was not on title to the Residence at the time of Decedent's death.
4. Petitioner requests, pursuant to Pr. C. §850(a)2(D), an order determining Petitioner's entitlement to recover possession to the Residence and directing Manuel to vacate and surrender possession of the Residence to Petitioner.
  5. Petitioner further requests compensatory damages against Manuel for the reasonable value of his use and occupancy of the Residence from the date of Decedent's death through the date of judgment, which value is believed to be at least \$1,500 per month, and that said damages be doubled per Pr. C. §859, due to Manuel's bad faith and wrongful withholding of possession of the Residence.
  6. Petitioner requests and order from this Court determining the Petitioner's entitlement to possession of the Residence; directing Manuel B. Valencia to vacate and surrender possession of the Residence within 5 days of the hearing in this matter; for an issuance by the clerk of this court for a writ of possession of the Residence as to Respondent, Manuel B. Valencia; for damages against Manuel B. Valencia in the sum of \$1,500 per month from the date of Decedent's death to the date of judgment or, if earlier, the date of possession of the Residence is surrendered to Petitioner, together with double damages per Pr. C. §859; and for costs, including attorneys' fees.
  7. ~Proposed Order 08/13/18.

**RECOMMENDATION:**

Court's discretion.

(nb)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800595

CASE NAME: MTR OF CONSTANCE GAYLYN LITTLE

**SEE ALSO 7**

HEARING:

Petition for REVOCATION OF WILL

COUNSEL:

SHAWN BARRY LITTLE (PET)...ZUMBRUNN LAW CORPORATION  
CONSTANCE GAYLYN LITTLE (DEC)...  
KEITH A LITTLE (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Revocation of Will by Keith A. Little ["Petitioner"].

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

1. Petition does not state the facts on which the claim is based and does not give specific code section of requested relief per Local Rule 20-601. **Need** same.
2. Petition is comprised of questions concerning the validity of interlineations and the Will. Question whether petitioner is contesting the will? **If so, need** objections and summons per Pr. C. §8250 et seq.
3. Petition is not verified under Pr. C. §1021. **Need** same.
4. **Need** Notice of Hearing with proof of service.

RECOMMENDATION:

Need to clear notes then Court's discretion.

(nb)

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-----  
DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800595

CASE NAME: MTR OF CONSTANCE GAYLYN LITTLE

**SEE ALSO 6**

HEARING:

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

COUNSEL:

SHAWN BARRY LITTLE (PET)...ZUMBRUNN LAW CORPORATION  
CONSTANCE GAYLYN LITTLE (DEC)...  
KEITH A LITTLE (PET)...PRO/PER

GENERAL INFORMATION

**Continued from 08/15/18. Keith Little has filed a petition to revoke the will, but does not object to Shawn Little being appointed as the special administrator to deal with the mortgage company. Shawn Barry Little is appointed personal representative: Special Administrator. No bond is required.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Shawn Little (Executor/Son)

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

1. Will waives bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. §857. Estimated estate assets are \$234,000. **JTD**
2. No written objections as of the review of this matter.
3. ~Proposed Form Order: 06/20/18

RECOMMENDATION

RFA; Court's discretion re bond. If approved, set Accounting Review for **12/04/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh/nb)



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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800785

CASE NAME: Douglas L Owens

HEARING:

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

COUNSEL:

LINDA S SHANLEY (PET)...CRAIG E WILSON  
DOUGLAS L OWENS (DEC)...

THIS CASE SET FOR HEARING ON: Petition for Probate, Letters Testamentary with Full Authority under IAEA by friend, Linda S. Shanley (Petitioner).

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

1. Will waives bond. Estimated estate valued at \$2,000, all of which is personal property. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. Section 3e is incomplete as to bond; however Will waives bond.
3. Section 6 is incomplete as to Decedents survivors. **Need** verified supplement.
4. **Need** proof of publication.
5. ~Proposed Form Order: 08/17/18.

RECOMMENDATION:

Need to clear note 3-4, then Court's discretion re: bond. If approved, set future hearing for Accounting/Status Review for **12/02/19**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of Local Rules.

(kd/cs)

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-----  
DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: SPR SS04872

CASE NAME: ESTATE OF LILLIAN E MICHIK

HEARING:

Accounting Review by \*\*\*

COUNSEL:

RICHARD MICHIK	(PET)...JEFFORD C DAVIS
LILLIAN E MICHIK	(DEC)...
ROBERT MICHIK	(TP )...SHORE & WURM

GENERAL INFORMATION:

Continued many times since **10/3/11**.

**Continued from 02/01/16** for Counsel to prepare and file a written Status Report and/or Accounting by the end of the month. Court is informed that the estate cannot be closed because counsel has been unable to sell the Salton Sea property which is the only asset remaining. Counsel for the petitioner has contacted the neighbors/adjacent owners to see if they would put the property up for auction or be willing to take the property.

**Continued from 03/30/16, 06/09/16, 08/18/1, 11/02/16 and 01/11/17** for a status report to be filed.

*Nothing new filed since 12/6/11.*

Continued from **3/22/17** at request of Counsel for sale of property to close.

Continued from **08/15/17 and 10/24/17** on court's motion for status of resolution.

Counsel report there is a potential buyer.

Continued from **01/23/18** at request of counsel.

Continued from **04/23/18**. Non-appearance by counsel nor has the accounting been filed. Court orders Attorney Davis to be present at the next hearing.

**Continued from 06/18/18 to file an accounting.**

THIS CASE IS SET FOR HEARING ON Accounting/Status Review.

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

1. Letters Testamentary issued 08/21/08 to Richard Michik, son, full authority, no bond.
2. On 10/28/10, Court deemed the accounting filed on 12/31/07 as a status report.

3. Copy of subpoenaed request filed on 05/09/16. However, it is unclear how the Chief Trial Counsel in Los Angeles is involved. Court to inquire.
4. Status report filed by counsel in the form of a declaration on **12/14/16**. **No fees paid**. Petitioner alleges the property is minimal and no one wants to purchase the property.
5. Ex parte letter appears to be filed to the Judge on 10/21/16 by Richard Michik.
6. **Need** Notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.

**RECOMMENDATION:**

Need notice and fees paid (note 4). Court's discretion. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(lc/sa/gls/lc/sa/lc/dl/sa/l/lhc/lh/nb/cs/ww/nb)

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DATE: 09/24/18 TIME: 8:30 DEPT: S36P  
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CASE#: TRU PS1800065

CASE NAME: MTR OF WING H LEE REVOCABLE LIVING TRUST

HEARING:  
Hearing Re: Dismissal After Settlement

COUNSEL:  
MALENE LEE (PET)...CHANDLER LAW FIRM  
THE REVOCABLE LIVING TRUST OF WING H LEE (TRU)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Dismissal after Settlement.

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

1. Notice of Settlement of Entire Case filed. **Need** Settlement.

RECOMMENDATION:  
Need settlement then Court's discretion.  
(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**CONSERVATORSHIPS**

-----  
DATE: 09/24/18      TIME: 9:30      DEPT: S36P  
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CASE#: CON DS1000025

CASE NAME: SYLVIA RITA ZAGHA

HEARING:

Fifth And Final Account and Report of MARCO ZAGHA and Petition  
for allowance of fees filed.

COUNSEL:

MARCO ZAGHA

(CPE)...KARIN E HORSPOOL

SYLVIA RITA ZAGHA

(CEP)...LENITA A SKORETZ

LENITA A SKORETZ

(PET)...PRO/PER

GENERAL INFORMATION:

Conservatee passed away on 04/01/18.

THIS CASE IS SET FOR HEARING ON Fifth and Final Account upon Waiver of  
Account and for Fees by Conservator of the Person and Estate, Marco Zagha  
[Petitioner"].

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

1. Accounting period 03/01/17 to 04/01/18.
2. Assets on Hand \$0.00.
3. Petitioner requests a waiver of accounting per Pr.C. §2628 and because all of  
the estate assets are held in the Conservatee's Trust.
4. Petitioner further alleges that on 01/03/12 the court dispensed the need for any  
further accountings in the conservatorship proceedings but further ordered that  
a copy of the most recent statement for the IRA be filed with this report.  
**Financial statement of IRA Account filed.**
5. Petitioner does not request statutory compensation.
6. Attorney requests fees of \$5,622.50. Billed at \$350-\$395/hour for 15.10 hours'  
attorney time Itemed [LF, pgs. 11-12]. **JTD.**
7. Petitioner requests reimbursement of costs of \$1,220.62. Itemized [LF, p.9].
8. Petitioner requests the IRA Account held at Painter, Smith & Amberg, no.  
XXXX2195 to be unblocked and Petitioner be authorized and directed to access  
the account.

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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. Petitioner requests authorization and direction to distribute the assets on hand after payment of final expenses of administration to the designated beneficiaries of the IRA
10. Discharge does not occur until entry of a final discharge order.
11. Proposed order 08/07/18. Discharge does not occur until entry of a final discharge order.

#### RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge on **10/07/19**.

(nb/cs)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS0600004

CASE NAME: MTR OF BRENDA TUJUANA BUTLER

HEARING:

Petition for Appointment of Successor Conservatorship of The Person

COUNSEL:

VEDA D. CALDWELL	(CP )...PRO/PER
BRENDA TUJUANA BUTLER	(CTP)...LENITA A SKORETZ
NIDIRAH STEPHENS	(SC )...PRO/PER

#### GENERAL INFORMATION

Continued from **03/19/18** Veda Caldwell needs to file a resignation. Attorney Lenita A. Skoretz is appointed for Brenda Tujuana Butler.

Continued from **05/07/18** at request of counsel to meet with her client.

**Continued from 07/09/18. Referred to Legal Aid for assistance.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Successor Conservator person only by Nidirah Stephens, [daughter/petitioner]

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

1. Veda Caldwell, sister, was appointed as conservator of the person only on 12/11/06, no bond.
2. No bond- Person only
3. **Need** resignation by current conservator, Veda Caldwell.
4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. **Need** return of Citation.
6. **Need** Certificate of Completion of the Conservatorship Training Class.
7. **Need** Notice of Hearing and proof of service.
8. **Need** CI report.
9. **Need** report of Lenita Skoretz court appointed attorney.
10. Proposed Form Order: 02/14/17; however indicates 2356.5 powers of placement that were not requested in petition.

## RECOMMENDATION

Need CI and Counsel's report and clear notes 3-7, then Court's discretion. If approved, set hearing for Compliance Review for **04/29/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5.  
(ww/cs/nb)



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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 14, 15, 15A, 28A**

HEARING:

Hearing Re: STATUS/ WORKERS COMPROMISE SETTLEMENT

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Waiver of Court Fees and Costs filed by MARIA ORENDAIN ISAIDO is GRANTED

Waiver of Court Fees and Costs filed by CARLOS ORENDAIN is GRANTED

No notes – Status.

(nb)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 13, 15, 15A, 28A**

HEARING:

Hearing Re: PTN FOR CONSERVATORSHIP OF THE PERSON AND ESTATE

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION:

Continued from **6/23/15**. Court Investigator notified that there are competing petitions and requests report to address both petitions.

Continued from **8/6/15** at request of counsel. Notice to be given by Krishna Malhotra.

Continued from **9/29/15**.

On 10/2/15 **Christina Taube-Erikson appointed temporary conservator of estate** and successor GAL in Worker's Compensation Appeals Board action.

Continued from **1/25/16** Court notes that there are several competing petitions. All temporary orders to remain in full force and effect.

Continued from **6/7/16** at request of counsel.

**Continued from 06/22/16. Court appoints Christina Erickson-Taube as temporary conservator of person;** counsel to submit for signature revised/amended order and letters showing temporary conservator of person and estate.

Continued from **10/25/16** pending outcome of motion to be relieved.

Continued from **12/06/16 and 12/12/16**. Matter is continued for Kenia Orendayn Isaldo to file an accounting. Accounting to be filed by 01-27-17. Notice to be given by Attorney Mitchell Roth.

Continued from **02/27/17**. Court orders that Kenia Orendayn Isaldo file her accounting prior to the next hearing. If the accounting has not been filed court will strike her petition and surcharge her for the full amount of the monies received for caregiver services. All temporary orders to remain in full force and effect until 04/24/17.

Continued from **04/24/17**. Court finds: All future payments from medical compensation are to be given to Christina Erickson-Taube. Mitchell Roth prepared order regarding

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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.

funds. Kenia Orendayn Isaldo and counsel Richard Moss are ordered to appear at the next hearing. Accounting is to be filed no later than 5-19-17. No account filed.

Continued from **06/19/17 and 08/07/17 and 10/23/17** Maria Orendain withdraws per petition as to the estate. Petition for conservatorship by Kenia Orendayn Isaldo is withdrawn per agreement of counsel.

Continued from **12/04/17 01/29/18 and 03/13/18** matter to be set for trial calendar is set for 04/12/18. This hearing will trail the seam date

Continue from **04/23/18**. Temporary conservator, Christina Erickson-Taube to complete and file an accounting for the period of 10/02/15-04/30/18.

**Continued from 08/06/18 to be heard with other pending hearings. Notice given by Attorney Mitchell Roth.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship, of the person and estate, by **Christina Erickson-Taube** (PPF)/temporary conservator of the person

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

1. Petitioner requests bond, but does not state an amount. Current bond of \$100,000 posted as to the Temporary Conservatorship. Estimated estate value is \$38,222. Based on estate value and cost of recover, Court may wish to require bond of \$43,000.
2. Medical powers sought. Capacity Declaration filed 10/6/15. Updated Capacity Declaration filed 09/29/16. Capacity Declaration filed 11/14/16.
3. **Need** return of Citation.
4. CI report filed 07/28/16.
5. First and Final Account filed 07/06/18 and set for 09/24/18.
6. Consents to act filed 10/23/14 by mother, Ascencion Isaldo Diaz, and brother-in-law, Samuel Brambila; however, no petitions filed by them.
7. Report of LA court-appointed counsel filed 12/04/14. Report by Attorney Roth filed 8/6/15, 9/24/15 and 1/12/16. **Court to review supp. report by Attorney Roth filed 08/03/16.**
8. Notice of Status Conference re Worker's Compensation action filed 06/22/18 by attorney Roth.
9. ~Proposed order submitted: 05/09/16

RECOMMENDATION:

Need to clear not 3, then Court's discretion re bond. If approved, set hearing for Compliance Review for **04/30/19** 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 and Inventory & Appraisal with notice.

Set hearing re Accounting Review for **12/03/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(vet/lc/vet/abs/ds/nb/sa/nb/ww/nb/cs/nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 13, 14, 15A, 28A**

HEARING:

FIRST Account and Report of CHRISTINA ERICKSON-TAUBE and  
Petition for allowance of fees filed.

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

GENERAL INFORMATION

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

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

1. **Need** Final Inventory and Appraisal.
2. **Need** financial statements from date of appointment. Pr.C. §2620(c)(2)
3. Accounting period 10/01/15 – 04/30/18 (2years 7 months). However  
appointment was on 09/29/15. JTD
4. Assets on hand \$\$885.04 cash
5. Current bonds of \$100,000.00.
6. **Need** receipt for case management service by Rebecca Bolanos and Premier  
Financial Assistance Gp.
7. **Need** residential facility statements from Casa Colina per Pr.C. § 2620(c)(5)
8. Petitioner requests fees of \$20,232.80. Billed at \$125/hour. Itemized [LF p.22-  
42] **JTD**
  - a. **Need** declaration re fees to include total hours billed.
9. Attorney requests fees of \$23,512.50.00. Billed at \$375/hour for 62.70 hours'  
attorney. Itemized [LF, pgs. 43-]. JTD
10. Petitioner indicates a separate bank account was opened under conservator's  
name as conservatee does not have a social security number.

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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.

11. Notice given.

12. ~Proposed Order 07/06/18

**RECOMMENDATION:**

Need to clear notes 1 -2 & 6-8, then Court's discretion. If approved, set next hearing for Accounting Review for **07/29/18 (if one year) or 07/27/20 (if two years)**.

Accounting to be filed 30 days in advanced. Note requirements of local rule 20-908.  
(cs)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 13, 14, 15**

HEARING:

Petition for TO APPROVE COMPROMISE OF PENDING ACTION AND  
DISPOSITION OF PROCEEDS OF JUDGMENT ETC .

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Currently under review by Legal Research.

(LR)

(CS)

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San Bernardino District

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1600355

CASE NAME: MTR OF WESLEY IDOWU

HEARING:

Petition for Appointment of Conservator

COUNSEL:

WESLEY MONDAY-IDOWU

(CP)...JOSHUA M BASKIN

HARRIET IDOWU

(CP)...JOSHUA M BASKIN

WESLEY IDOWU

(CTP)...MITCHELL I ROTH

#### GENERAL INFORMATION

Ex parte orders entered on 12/19/16 appointing Wesley Monday-Idowu and Harriet Idowu temporary co-conservators of the person and estate. The temporary conservatorship of the estate is for limited scope of overseeing criminal proceedings. Counsel for petitioners to file an amendment to general petition. No bond is required. Continued from **01/23/17**. Temporary orders remain in full force and effect until 04/10/17.

Continued from **04/10/17**. The Court clears probate note #5 on the record. Counsel requests oral amendment to person only on the petition. The Court grants counsel's oral request to amend the petition for person only and not estate. Notice waived.

**Continued from 07/31/17** The temporary conservatee is still in custody and currently being housed at Patton State Hospital.

**Continued from 12/18/17**. Proposed conservatee is still being house at Patton on PC1368. Temporary letters to continue in full force and effect until 03/28/18. Notice waived.

**Continued from 03/28/18 to allow for criminal matter to proceed. All temporary orders and letters to remain in full force and effect. Notice waived.**

THIS CASE IS SET FOR HEARING ON **AMENDED** Petition for Appointment of Conservator of the **person only**, by Wesley Monday-Idowu and Harriet Idowu, parents

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

1. Proposed conservatee is incarcerated and was deemed mentally incompetent to assist in his defense, (petition 01/20/17, LF, pg.6). Conservatee had hearing on 01/13/17 for placement under County Mental Health. See x-ref matters.

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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.

2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Petitioner seeks orders relating to capacity under Pr. C. §1873 or 1901; however, **need** attachment 1e specifying orders, facts and reasons.
4. Report of No Report by Court Investigator filed 01/12/17. **Need** CI report.
5. **Confidential filing of Report by Pamian Ross and Desiree Montes on 04/02/18.**
6. Return of Citation and proof of mailed service filed 03/21/17.
7. Certificates of Completion of the Conservatorship Training Classes filed 03/02/17.
8. Report by Temporary GAL, Mitchell Roth, filed 01/11/17, 04/05/17 and **01/04/18.**
9. ~Proposed Form Order: 12/07/16

#### RECOMMENDATION

Need clear notes 2-4. If approved, set hearing for Compliance Review for **05/01/19** 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, and hearing re Accounting Review for **12/04/19**. Any accounting to be filed 30 days in advance.

(lh/nb/lh/nb/ww/lh/nb)



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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

**SEE ALSO 18**

HEARING:

Hearing Re: APPOINTMENT OF CONSERVATOR OF THE PERSON

COUNSEL:

LETICIA PEACOCK (CP )...MAREND M GARRETT  
MARIA FELIPA PEACOCK (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Temporary orders denied on 01/03/18. Walter Moore appointed as counsel for proposed conservatee.

Continued from **02/05/18**. Parties agree to advance 3/6 hearing to today and continue it to 03/19/18.

**Continued from 03/19/18, 05/14/18 and 07/16/18.**

THIS CASE SET FOR HEARING ON [**Amended 01/29/18**] Petition for Appointment of Conservator person only by Leticia Peacock, daughter

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

1. No bond- person only
2. Petitioner seeks medical powers. Capacity Declaration filed. However, section 3a does not indicate whether physician has at least 2 years experiencing dementia; section 5 indicates "no opinion"; and section 7 is incomplete. Further, capacity declaration indicates proposed conservatee was last seen about 6 months ago so it is difficult to give an accurate assessment of her current mental function. **Need** complete Capacity Declaration.
  - a. **Need** Dementia attachments GC-313 & GC-335A.
3. Petitioner indicates that proposed conservatee has dementia. **Need** Report of Counsel Walter Moore.
4. Petitioner indicates that proposed conservatee resides currently in **Florida**.
5. Section 3b(1) as to whether petition is or is not a creditor is incomplete. Court may wish to inquire; or in alternative, need verified supplement. **JTD**

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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.

6. Section 8 is conflicting as 8a indicates that proposed conservatee will attend the hearing and then in 8d that conservatee is out of state and will not attend. Court may wish to inquire; or in alternative, need verified supplement. **JTD**
7. Section 9 as to medical treatment is marked; however, 2355 powers are not requested in section 1g. **JTD**
8. Court to see Confidential Supplemental Information.
9. **Need** return of citation as to amended petition.
10. Certificate of Completion of the Conservatorship Training Class filed 03/19/18.
11. **Court to see** Notice of no report by CI filed on 01/23/18.
12. **Court to see** Notice of Lodgment re: Physician's report filed 01/29/18.
13. **Objection by Maria Perez, proposed conservatee to initial petition filed on 01/03/18; however, need proof of service.**
  - a. **Declaration by Ana Thomson in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
  - b. **Declaration by Michael Blaskey in support of objection by Maria Perez filed 01/03/18; however, need proof of service.**
14. No objections to the amended petition are in file for review.
15. Notice given.
16. ~Proposed Form Order: 12/27/17

#### RECOMMENDATION

Matter is contested. Need Report of Counsel and need to clear notes 2-3 & 9 and Court's discretion re remaining notes. If approved, set hearing for Compliance Review for **04/29/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(ww/nb)

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CASE#: CON PS1700465

CASE NAME: MTR OF MARIA FELIPA PEREZ

**SEE ALSO 17**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

LETICIA PEACOCK

(CP )...MAREND M GARRETT

MARIA FELIPA PEACOCK

(CTP)...WALTER T. MOORE

Waiver of Court Fees and Costs filed by MARIA FELIPA PEACOCK is GRANTED

See prior matter #17.

(nb)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 20, 21**

HEARING:

Petition for Appointment of Conservator of the Person and Estate

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...MARK J. ANDREW FLORY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

**X-REF: EAPSS 1800048; EAPSS 1800035**

GENERAL INFORMATION

Public Guardian appointed temporary conservator of the person and estate on 05/25/18, no bond. Walter Moore appointed Guardian ad Litem. Court suspends any power of attorneys held. Court orders Shantell Galvan, Davin Kelley, Al Jones, Catrina Dorsey, Ashley Dorsey, Parish Whalem and Victoria Gadzhiyeva to vacate the home of Casey Jones Jr by 07/13/18 5pm. Order to be submitted for signature. The parties agree to set all future petitions/hearings for 07/02/18. Casey Jones Jr is present in court - court will waive the return of citation for the general conservatorship.

Continued from **07/02/18**

Continued from **07/30/18** for attorney Flory to meet with his client.

**Continued from 08/20/18. Parties are working on a settlement.**

THIS CASE IS SET FOR HEARING ON

Petition #1: Petition for Appointment of Conservatorship of person and estate by **sons, Al Jones and Corlies Jones** ["Petitioners"].

Petition #2: Petition for Appointment of Conservatorship of person and estate by GAL, Walter T. Moore ["Petitioner"] as to Appointment of **Public Guardian**.

Petition #3: Petition for Appointment of Conservatorship of person and estate by daughter, **Shanta Jones-Ruffins** ["Petitioner"].

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

**Petition #1 by Al & Corlies Jones, sons:**

1. Petitioner, Al Navarro Jones is purportedly a co-attorney-in-fact. Does Court wish to require copy of Financial Power of Attorney? **JTD**.
2. Petitioners request no bond be required as the estate of the Conservatee is minimal and petitioners are the sons of the proposed conservatee. Estate valued at \$404,288.00. Suggest bond of \$445,000 (includes recovery). **JTD**
3. Section 11 to petition does not include issues, Kobe Jones, Tony Jones, Zolton Jones, Elaine Jones or sister, Susie Jones. **Need** verified supplement.
4. Petitioners seek 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**
5. Petitioners seek medical powers. Medical Capacity Declaration does not include attachment GC-313. **Need** same.
6. Petitioner requests dementia powers. Mark Flory appointed as counsel. **Need** report.
7. Citation and proof of service filed 05/31/18.
8. **Need** Order Appointing Court Investigator.
9. **Need** Certificates of Completion re Conservatorship Class.
10. CI report filed 06/22/18.
11. ~Proposed Form Letters 05/15/18.

**Petition #2 by PG:**

1. No bond – PG
2. Section 11 to petition does not include issues, Corlies Jones, Quarry Jones, Arnesia Jones, Casey Jones, Jr., III, Kobe Jones, Tony Jones, Zolton Jones, Elaine Jones or sister, Susie Jones. **Need** verified supplement.
3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration and attachment GC-335A. **Need** same.
12. Petitioner requests dementia powers. Mark Flory appointed as counsel. **Need** report.
4. **Need** Duties of Conservator.
5. **Need** Court Investigators Referral Report.
6. **Need** List of Required Contacts form.
7. **Need** Notification of Court of Conservatorship Address.
8. **Need** Confidential Conservator Screening form.
9. **Need** Order Appointing Court Investigator.
10. **Need** Notice of Hearing and proof of service
11. **Need** report of GAL Walter Moore.
12. CI report filed 06/22/18.
13. No proposed order/letters. Submit Order after Hearing.

**Petition #3 by Shanta Jones-Ruffins, daughter:**

1. Petitioner is purportedly a co-attorney-in-fact. Does Court wish to require copy of Financial Power of Attorney? **JTD.**
2. Petitioner requests bond be fixed at \$6,000. Estimated estate valued at \$26,268.96. Suggest bond of \$29,000 (includes recovery). **JTD.**
3. Petitioner seeks medical powers. **Need** Medical Capacity Declaration and attachment GC-335A. **Need** same.
4. Petitioner requests dementia powers; **Need** appointment of counsel and report by same.
5. Signature on Duties of Conservator differs from other documents. **Need** verified supplement.
6. Petitioner seeks medical powers. **Need** Medical Capacity Declaration with attachment GC-335A. .
7. Petitioner requests dementia powers. Mark Flory appointed as counsel. **Need** report.
8. Certificate of Completion re Conservatorship Class filed 06/07/18.
9. Notice of Hearing and proof of service filed 06/20/18.
10. Citation and proof of service filed 06/25/18.
11. CI report filed 06/22/18.
12. **Court to see Petitioner Shanta's objections to the Order after Hearing filed 07/13/18.**
13. ~Proposed Form Order 05/22/18

**RECOMMENDATION:**

Matter is contested. Need Report of counsel, GAL report, and notes to be cleared, then Court's discretion re: bond. If approved, set hearing for Compliance Review for **04/30/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **12/03/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/cs/nb)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 19, 21**

HEARING:

Petition for Appointment of Conservator of the Person and Estate

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...MARK J. ANDREW FLORY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

See notes on matter 19.  
(ww/cs/nb)

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CASE#: CON PS1800145

CASE NAME: Casey Jones Jr

**SEE ALSO 19, 20**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

AL NAVARRO JONES	(CPE)...KATHLEEN ALVARADO
CORLIES JONES	(CPE)...PRO/PER
CASEY JONES Jr	(CEP)...MARK J. ANDREW FLORY
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
WALTER MOORE	(PET)...WALTER T. MOORE
SHANTA JONES-RUFFINS	(PET)...CRYSTAL HAYES HILL

See notes on matter 19.

(ww/cs/nb)



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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800244

CASE NAME: Mtr of Robert H Bellhouse

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
DAVID BELLHOUSE (CPE)...RONALD W ASK  
KIMBERLY BELLHOUSE (CPE)...RONALD W ASK  
ROBERT H BELLHOUSE (CEP)...MITCHELL I ROTH

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON: Petition for Appointment of Conservator of Person and Estate by David Bellhouse (son) and Kimberly Bellhouse (daughter in law).

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

1. **Proposed conservatee passed away on 09/14/18.**
2. Petitioner seeks bond of \$182,049.60. Bond appears sufficient. **JTD.**
3. Nomination by Robert Bellhouse, proposed conservatee attached to petition [LF p.11].
4. The Court may wish to have a confidential copy of the Trust filed. **JTD.**
5. Petitioner seeks medical powers. **Need** Capacity Declaration.
6. List of required contacts filed 08/14/18 is missing Richard Tapia, brother. **Need** complete form.
7. **Need** return of citation.
8. **Need** Certificate(s) of Completion of the Conservatorship Training.
9. **Need** Notice of Hearing and proof of service to the U.S. Department of Veterans Affairs.
10. **Need** Oder appointing Court Investigator (Form GC-330).
11. Court to Review Report of No Report filed 08/30/18.
12. ~Proposed Form Order: 08/14/18.

RECOMMENDATION

Need to clear notes 5-10, then Courts discretion regarding additional notes. If approved, set hearing for Compliance Review for 04/29/19 for the filing of the following: proof of service of Order with Notification of Conservatee's rights per

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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.

Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

Set hearing re: Accounting Review for 12/02/19 any accounting to be filed 30 days in advance.

(kd/cs)

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DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1800246

CASE NAME: Mtr of Oran Franklin Jr

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
MICHELLE FERRENS (CPE)...PRO/PER  
EDQUANESHA DURHAM (CPE)...PRO/PER  
ORLAN FRANKLIN Jr (CEP)...

GENERAL INFORMATION:  
Proposed Conservatee passed away on 08/20/18.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Edquanesha Durham (daughter) and Michelle Ferrens (daughter).

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

1. Court to review Notice of No Report by Court Investigator.
1. Petitioner requests no bond as estate consists of social security benefits and petitioners will be the payees. JTD.
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. **Need** return of Citation
4. **Need** Certificate of Completion of the Conservatorship Training Class ;
5. Need notice of hearing and proof of service.
6. CI Notice of no Report filed 08/28/18.
7. ~Proposed Form Order: 08/15/18

RECOMMENDATION  
Court's discretion. Matters appears moot.  
(kd/cs)

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HONORABLE: JAMES MICHAEL WELCH

**ELDER ABUSE**

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DATE: 09/24/18      TIME: 9:30      DEPT: S36P  
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CASE#: EAP PS1800035

CASE NAME: JONES VS JONES

**SEE ALSO 25, 26, 27**

HEARING:

Hearing Re: Status

COUNSEL:

CASEY JONES JR

(PP )...PRO/PER

SHANTA JONES

(RP )...CRYSTAL HAYES HILL

**XREF: EAPS1800048**    *JONES VS JONES*

**EAPPS1800059**    *JONES V GALVAN*

**CIFDS1700119**    *JONES -VS- RUFFINS*

**CIFDS1700133**    *JONES VS JONES*

No notes – Status.

(nb)

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CASE#: EAP PS1800048

CASE NAME: JONES VS JONES  
**SEE ALSO 24, 26, 27**  
HEARING:  
Hearing Re: Status

COUNSEL:  
CASEY JONES (PP )...PRO/PER  
CORLIES JONES (RP )...  
AL NAVARRO JONES

**XREF: EAPPS1800035** JONES VS JONES  
**EAPPS1800059** JONES V GALVAN  
**CIFDS1700119** JONES -VS- RUFFINS  
**CIFDS1700133** JONES VS JONES

No notes – Status.  
(nb)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18      TIME: 9:30      DEPT: S36P  
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CASE#: EAP PS1800059

CASE NAME: JONES V GALVAN

**SEE ALSO 24, 26, 27**

HEARING:

Hearing Re: Status

COUNSEL:

CASEY JONES	(PP )...PRO/PER
AL JONES	(PET)...PRO/PER
SHAUNTELL GALVAN	(RP )...

**XREF: EAPPS1800035** JONES VS JONES

No notes – status.

(nb)

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HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18      TIME: 9:30      DEPT: S36P  
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CASE#: EAP PS1800069

CASE NAME: Jones vs Gadzhiyeva

**SEE ALSO 24, 25, 26**

HEARING:

Hearing Re: Status

COUNSEL:

SHANTA JONES-RUFFINS

(PET)...CRYSTAL HAYES HILL

CASEY JONES Jr

(PP )...CRYSTAL HAYES HILL

VIKTORIA GADZHIYEVA

(RP )...

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino  
Page: 28  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 09/24/18 TIME: 9:30 DEPT: S36P  
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CASE#: SC SS8140

CASE NAME: IN THE MATTER OF ROSE B ARCHER

HEARING:  
Hearing re Final Discharge

COUNSEL:  
ROSE B ARCHER (CEP)...NOREEN T FONTAINE  
KRISTIE DEL CASTILLO (CPE)...  
JEFFERY ARCHER (SC )...PRO/PER  
JENNIFER ARCHER (SC )...

Waiver of Court Fees and Costs filed by JENNIFER ARCHER is GRANTED  
Waiver of Court Fees and Costs filed by JEFFERY ARCHER is GRANTED

GENERAL INFORMATION:  
Conservatee passed away on 09/09/17.

THIS CASE IS SET FOR HEARING ON Final Discharge.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:  
1. Sixth Waiver on and Final Accounting approved on 10/02/17. **Need** Order.  
2. Notice by Judicial Assistant.

RECOMMENDATION:  
Need to clear note 1.  
(nb)



Superior Court of Calif, County of San Bernardino  
Page: 28A add-on  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

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DATE: 09/24/18 TIME: 9:35 DEPT: S36P  
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CASE#: CON PS1500086

CASE NAME: CARLOS ORENDAIN

**SEE ALSO 13, 14, 15, 15A**

HEARING:

Motion Re: app for order est irrevocable trust under substituted judgment Filed by  
Petitioner CARLOS ORENDAIN

COUNSEL:

MARIA ORENDAIN ISAIDO	(PCR)...PRO/PER
CARLOS ORENDAIN	(PCE)...MITCHELL I ROTH
CHRISTINA ERICKSON-TAUBE	(CE )...SHERRI L KASTILAHN
KENIA ORENDAYN ISALDO	(PET)...RICHARD M MOSS
ASCENCION ISALDO DIAZ	(TP )...PRO/PER
SAMUEL BRAMBILA	(PRO/PER)

Currently under review by Legal Research.  
(LR)

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH TRIAL

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DATE: 09/24/18 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 30, 31**

HEARING:

Hearing Re: COURT TRIAL

COUNSEL:

VINCENT EUGENE MURRAY

(PET)...THOMAS W DOMINICK

EVELYN JOYCE MURRAY

(DEC)...

KIMBERLI MURRAY

(TP /PET)...BRENT D GRIDER

No notes – Trial. JTD  
(nb)

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

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DATE: 09/24/18 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 29, 31**

HEARING:

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

COUNSEL:

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

GENERAL INFORMATION:

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

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

Continued from **02/15/18**.

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

**Continued from 05/02/18. Matter is contested. Court trial requested. Notice waived.**

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

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

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

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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.

6. ~Proposed Order 3/29/16.

**RECOMMENDATION**

Matter is opposed.

(ds/sa/lc/lh/nb)

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

-----  
DATE: 09/24/18 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1400136

CASE NAME: Evelyn Joyce Murray

**SEE ALSO 29, 30**

HEARING:

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

COUNSEL:

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

GENERAL INFORMATION

**Continued from 3/30/16, 5/16/16, 08/03/16, 10/19/16, 01/11/17, 03/22/17, 10/18/17, 02/15/18, and 03/14/18.** Parties agree to mediation. Court set mediation date for 05/02/18.

**Continued from 05/02/18. Matter is contested. Court trial requested.**

THIS CASE IS SET FOR HEARING ON 1<sup>st</sup> Account Current and Petition for Fees

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

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

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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. **Objections filed by Kimberly Murray on 03/09/16**
8. **Response to Objections filed 05/06/16 as “Supplement to First Account Current and Report of Administrator.”**
9. ~Proposed order: 2/16/16

RECOMMENDATION:

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

(sa/dl/sa/lc/lh/nb)