



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 10/01/18

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.

(09/11/18 cs)(09/25/18)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 10/01/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600401

CASE NAME: CHRISTOPHER L COCKRELL SR

HEARING:

Hearing re Final Discharge

COUNSEL:

TYLER L COCKRELL (PET)...WILLIAM M NASSAR

CHRISTOPHER L COCKRELL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge by Christopher Cockrell

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

1. First and Final Account approved on 11/06/17.
2. Receipt filed 04/27/18 signed by Jody Zipp guardian/parent of Rubilee Boggs and Lucas Boggs. However, Order filed 11/06/17 [LFp. 6] indicates distribution to be paid directly to guardian, Mary Van Dyke. **JTD**
3. Receipt filed by attorney William Nassar for \$843.75 indicates amount represents costs for fees advanced; however, Order filed 11/06/17 indicates amount is for extra ordinary fees. **Need** corrected receipt.
4. Petitioner requested the amount of \$10,000 in reserves. **Need** informal accounting of expenditures or distribution from the reserves together with receipt for expenditure or distribution per Local Rule 20-911.
5. Ex Parte Petition for Final Discharge and Order filed 09/10/18

RECOMMENDATION:

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

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

CONSERVATORSHIP

DATE: 10/01/18 TIME: 8:30 DEPT: S35P

CASE#: CON PS1600066

CASE NAME: SUELLEN BURKE

HEARING:

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

COUNSEL:

JOSEPH FRANK STIFTER	(CP)...PRO/PER
SUELLEN BURKE	(CTP)...
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
DEAN BURKE	(PET)...AMY GOSTANIAN,
PAULA BURKE	(PET)...AMY GOSTANIAN,

Waiver of Court Fees and Costs filed by JOSEPH FRANK STIFTER is GRANTED

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

GENERAL INFORMATION

Conservatee passed away on 05/19/16

THIS CASE IS SET FOR HEARING ON First and Final account and petition for fees

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

1. Accounting period covers 04/11/16 – 05/04/17
2. **Need** separate accounting for the period subsequent to the date of death. Pr.C. §2620(b).
3. Assets on hand \$2,184.48 consisting of cash.
4. Public Guardian requests confirmation of fees taken in the amount of \$1,200 for the period of 04/11/16-09/30/16 per Court approved fee schedule. **JTD**
5. County Counsel requests confirmation of fees taken in the amount of \$400 for the period of 04/11/16 – 07/31/16 per Court approved fee schedule. **JTD**
6. Petitioner requests to allow remaining estate balance as payment to California Department of Health Services, Recovery Unit for services paid by Medi-Cal Program. **JTD**.
7. **Need** notice to court appointed attorney, Jennifer Daniel.

8. Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.
9. Proposed order: 12/07/17 indicates Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.

RECOMMENDATION:

Need to clear notes 2 & 7, then Court's discretion. If approved court to set hearing re filing receipts and final discharge for **10/01/19**.

(cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PUBLIC GUARDIAN

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS0700154

CASE NAME: MTR OF NANCY WINGATE

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

NANCY WINGATE

(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Fourth Accounting by PG approved on 10/03/16.
2. Proof of service that conservator need present fifth account filed; however, no accounting filed.
3. **Need** Fifth accounting or waiver of accounting beginning with date of 08/01/15.

RECOMMENDATION:

Inquire status of accounting.

(cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1200040

CASE NAME: JRAIRMON DORSEY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
JRIARMON DORSEY

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

GENERAL INFORMATION

Letters expire 02/16/19.

Continued from 03/28/16, 09/19/16, 03/27/17, 07/03/17 and 02/26/18 at request of counsel.

THIS CASE IS SET FOR HEARING on accounting review

The following issues and/or deficiencies in the papers are noted:

1. Ex Parte Order that Conservator need not present 3rd account by PG approved on 04/10/17.
2. **Need** 4th accounting or waiver of account beginning with date of 01/01/16.

RECOMMENDATION

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(dl/nb/ww/cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1300130

CASE NAME: (MF) MILDRED CONSTANCE LOYA

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MILDRED CONSTANCE LOYA	(CEP)...ROBERTA L. TAYLOR & ASSOC
RECONTRUST COMPANY	(PET)...MCCARTHY & HOLTHUS, LLP
MILDRED C LOYA	(RPI)...
TOWN OF APPLE VALLEY	
SANDRA L BENDON	
CAPITAL ONE BANK (USA), NA	

GENERAL INFORMATION

Continued from **03/20/17** at request of counsel.

Continued from 07/24/17.

Continue from 01/29/18 at request of counsel to file accounting

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 1st Account by PG approved on 03/23/15.
2. **Need** 2nd account by PG beginning with date of 07/08/13.

RECOMMENDATION:

Inquire status of accounting. When accounting is not filed as required, the court shall take actions as specified in Pr.C. §2620.2

(nb/ww/cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1400008

CASE NAME: Mary Helen Spurlock

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

MARY HELEN SPURLOCK

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire 02/24/19

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 second Account approved 09/22/17; account or waiver of account now due.
2. No accounting filed. **Need** same.

RECOMMENDATION:

Inquire status of accounting.

(cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600358

CASE NAME: MATTHEW KISER

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

MATTHEW KISER

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired: 01/13/18 -Conservatorship terminated.

THIS CASE SET FOR HEARING ON Accounting Review.

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

1. Public Guardian appointed conservator of the person and estate on 01/13/17, no bond.
2. Final Inventory and Appraisal filed 07/18/17.
3. **Need** 1st and final account beginning with 01/13/17.

RECOMMENDATION

Inquire status of accounting.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: CON PS1600375

CASE NAME: Mark Whitaker

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

MARK WHITAKER

(CPE)...COUNTY COUNSEL

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expire: 02/03/19

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Public Guardian appointed temporary conservator of the person and estate on 12/22/16 and general appointment on 02/03/17, no bond.
2. Final Inventory and Appraisal filed 04/04/18.
3. **Need** 1st Account beginning with 12/22/16.

RECOMMENDATION

Inquire status of accounting.

(cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS00090

CASE NAME: IN THE MATTER OF CRAIG ANDREW ROBERTS

HEARING: Accounting Review by ***

COUNSEL:

CRAIG ANDREW ROBERTS	(CEP)...JENNIFER M DANIEL
JENNIFER WENGER	(CPE)...JEFFREY T. VANDERVEEN
LAWRENCE A DEAN II	(SC/CPE)...HORSPOOL & HORSPOOL
CRAIG ROBERTS	(SC/CTP)...BORDEN LAW OFFICE
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
MELODIE Z SCOTT	(TP)...PRO/PER
U.S. BANK NATIONAL ASSOC	(MAURICE ABADIA)

GENERAL INFORMATION

Continue from 01/29/18 Court orders that Public Guardian file supplement re assets on hand by 4pm on 03/01/18.

THIS CASE IS SET FOR HEARING ON accounting review

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

1. Lawrence Dean, PPF resigned as conservator and PG was appointed as successor conservator on 07/27/15.
2. 8th and Final conservatorship accounting by Lawrence Dean, former conservator/PPF approved on 01/11/16.
3. **Need** supplement as directed by court on 01/29/18 re assets on hand.
4. **Need** 1st conservatorship accounting by PG, successor conservator of the person and estate.

RECOMMENDATION:

Inquire status of accounting.

(ww/cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SC SS01763

CASE NAME: MTR OF CAROLYN ELIZABETH ALLISON ET AL

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
CAROLYN ELIZABETH ALLISON (CEP)...NANCY J YOUNG

XREF: SLCSS01844 MTR OF CAROLYN ALLISON

GENERAL INFORMATION:

Continued from **02/22/16, 10/03/16 and 03/27/17.**

Continue from 02/26/16 at request of counsel to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. On 02/24/14 Court approved the 9th account; need 10th and final account, to include pre and post death account periods, beginning 08/07/13 to present.
2. **Conservatee died on 12/07/16.**

RECOMMENDATION:

Need accounting. When accounting is not filed as required, the court shall take actions as specified in Pr.C. §2620.2
(dl/lc/nb/cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS01149

CASE NAME: IN THE MATTER OF PEYTON SAUNDERS

HEARING:

Hearing re Final Discharge

COUNSEL:

PUBLIC GUARDIAN
PEYTON SAUNDERS

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

GENERAL INFORMATION:

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

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

1. Fifth and Final Account was approved on 09/25/17.
2. Receipt by Public Administrator filed.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS03140

CASE NAME: MTR RE KATHY DEWITSKY

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

KATHY DEWITSKY

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired: 07/17/17

Conservatee passed away on 02/26/17.

Continued from 05/15/17 and 02/26/18

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 8th Account by PG approved on 06/20/16.
2. **Need** 9th and Final Account including pre and post death account periods beginning with date of 04/01/16.

RECOMMENDATION:

Inquire status of accounting. When accounting is not filed as required, the court shall take actions as specified in Pr.C. §2620.2

(nb/ww/cs)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS4851

CASE NAME: IN THE MTTR OF LOUIS BATCHELOR

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

LOUIS BATCHELOR

(CEP)...HARTNELL LAW GROUP

GENERAL INFORMATION

Letters expired 12/16/17

Conservatee passed away on 05/21/17

Continued from 02/26/18 at request of Counsel to file accounting

THIS CASE SET FOR HEARING ON Accounting review.

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

1. On 11/28/17, Court approved **Amended** 30th account; 31st accounting now due.
2. **Need** 31st and Final Account including pre and post death account periods beginning with 11/01/15.

RECOMMENDATION

Inquire status.

(cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: SLC SS7269

CASE NAME: IN THE MATTER OF RONALD MORGAN

HEARING:

Accounting Review by ***

COUNSEL:

PUBLIC GUARDIAN
RONALD MORGAN

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

GENERAL INFORMATION:

Letters expired: 02/21/16

Continued from **02/01/16** and **09/19/16** at request of counsel.

Continued from **04/14/17**. Counsel indicated that conservatee passed away on 1/16/16.

Continued from 02/26/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Ex Parte Order that Conservator need not present 14th account by PG approved on 01/16/15.
2. **Need** 15th and final account including pre and post death account periods beginning with date of 11/21/14.

RECOMMENDATION:

Inquire status of accounting.

(dl/nb/ww/cs)

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

DATE: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: VC VS00535

CASE NAME: MATTER OF ETHEL LINCOLN BOOKER

HEARING:

Hearing re Final Discharge

COUNSEL:

STACY LEATRICE BOOKER (PET)...
ETHEL LINCOLN BOOKER (CPE)...PRO/PER
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

Continued from **02/03/14**. Counsel stated that Stacy Booker is still repaying the monies to the Public Guardian.

Continued from **02/08/16**. Counsel states that Stacy Booker is still repaying the monies to the Public Guardian.

Continued from 01/30/17 and 10/02/17

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order Settling Second and Final Account of former Conservator, Stacy Booker filed on 10/01/12.
2. Need Ex-Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Court's discretion. Need to set accounting review for Public Guardian.

(dl/nb/lh/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: 10/01/18 TIME: 10:00 DEPT: S35P

CASE#: VC VS353

CASE NAME: IN THE MTR OF COOKY JOY VICE

HEARING:

Accounting Review by ***

COUNSEL:

COOKY JOY VICE

(PLA/CEP)...PRO/PER

FRED CRAIG VICE

(PLA)...

PUBLIC GUARDIAN

(CPE)...COUNTY COUNSEL

JOY TIPPITT

(OBJ)...

GENERAL INFORMATION

Continued from **07/24/17**.

Continue from 03/12/18 at request of counsel to file accounting.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. 7th Account by PG approved on 08/31/15.
2. **Need** 8th account or waiver of account beginning with date of 11/27/14.

RECOMMENDATION:

Inquire status of accounting. When an accounting is not filed as required, the court shall take action as specified in Pr.C. §2620.2.

(nb/ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

CONSERVATORSHIP

DATE: 10/01/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800014

CASE NAME: BLAKE BRICKLEY

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of THOMAS M BRICKLEY

COUNSEL:

THOMAS M BRICKLEY

(CP)...MARK H MCGUIRE

BLAKE BRICKLEY

(CTP)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Thomas Brickley, appointed temporary conservator of the person on 01/24/18 and general appointment on 02/26/18, no bond.
2. **Need** Notification of Conservatee's rights per Pr.C.§1830(c).
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord (Local form SB-101120) with Pr.C.§2352.5.

RECOMMENDATION

Need to clear notes 2-4. Inquire Status

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS0700079

CASE NAME: JULIA ANN SCHWALBACH

HEARING:

Hearing re Final Discharge

COUNSEL:

DWAYNE SCHWALBACH	(PET)...THOMAS V PRATT
JULIA ANN SCHWALBACH	(DEC)...
JOHN SCHWALBACH	(PET/OBJ)...E JOAN NELMS
KELLY SCHWALBACH	(PET)...LAYNE A BARTHOLOMEW
BOND SERVICES OF CA	(PRO/PER)
BERNARD M BIDART	(PRO/PER)
PUI CHI TSANG	(MIRIAM L WU)

Waiver of Court Fees and Costs filed by KELLY SCHWALBACH is GRANTED

GENERAL INFORMATION

Continued from **02/24/15 and 04/28/15**. Counsel to submit exparte petition for final discharge order and declarations in lieu of receipts today in the clerks' office.

Continued from **06/16/15**. Counsel states a beneficiaries passed away prior to distribution.

Continued from **08/18/15**. Counsel is to find a desig079nated individual to accept funds for the deceased beneficiary.

Continued from **10/27/15** at request of counsel to file receipts and final discharge order

Continued from **12/08/15** on Court's motion.

Continued from **2/08/16** at request of counsel to file a petition to place funds with County Treasurer.

Continued from **04/11/16 and 06/06/16** at request of counsel to file a petition to place funds with county treasurer.

Continued from **08/15/16 and 10/17/16**. Counsel reports there is one beneficiary who will not sign a 13100 because he is not sure that what he would be signing is accurate. They further report he will sign as soon as the judge makes orders. The Court suggests that that beneficiary come to the next hearing so the Court can explain the procedure.

Continued from **12/20/16** at request of counsel to prepare declaration.

Continued from **03/07/17 and 05/01/17**. Set for after distribution.

Continued from **07/17/17**. Mr. Flory to file and serve on Mr. Bartholomew a status report by 07/20/17. At next hearing if distribution has not occurred, written status report is to be filed.

Continued from **10/02/17** Counsel to provide Judgment from 2011 court trial.

Continued from **12/04/17** at request of counsel. Mr. Bartholomew just given documents needed for his review and possible filing with the court. Scott Schwalbach requests to be given notice and service in this matter. Counsel to confer and provide judgment from 2011 court trial if they have not already done so.

Continue from 02/26/18 The court tentatively denies petition for final discharge. Parties meet and confer re settlement this morning. 9:48 Parties report matter has resolved. John Schwalbach, III will be reimbursed for funeral expenses for Darrah Schwalbach. Kelly Schwalback will be reimbursed by personal check \$155.16. The court approves final discharge as agreed upon by the parties. Mr. Flory to prepare order for final discharge.

THIS CASE SET FOR HEARING ON Hearing re Final Discharge.

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

1. Final account/distribution approved on 02/25/14.
2. Amended Order authorizing distribution of share of estate approved 04/16/18.
3. **Need** receipts.
4. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Need to clear notes 3-4. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(cbr/vet/dl/dl/dl/nb/lh/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600127

CASE NAME: GWENDOLYN V MOSLEY

HEARING:

Hearing re Final Discharge

COUNSEL:

REGINALD D JONES	(PET)...ROMBOUD
GEWNDOLYN V MOSLEY	(DEC)...
SHASHAUNA SZCZECZOWICZ ESQ	(TP)...

Waiver of Court Fees and Costs filed by REGINALD D JONES is GRANTED

GENERAL INFORMATION

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 of Reginald D. Jones approved on 09/26/17.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION:

Inquire status.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1600207

CASE NAME: EDDIE HERNANDEZ

HEARING:

FIRST & FINAL Account and Report of KOREN MATTSON and Petition
for allowance of fees filed.

COUNSEL:

KOREN MATTSON	(PET)...PRO/PER
EDDIE HERNANDEZ	(DEC)...
USHER LAW GROUP	(TP)...PRO/PER

Waiver of Court Fees and Costs filed by KOREN MATTSON is GRANTED

GENERAL INFORMATION

Continued from **12/27/17** at request of Court for petition to terminate to be filed as this is a no asset estate. Notice to be filed.

Continued from **03/19/18**.

Continued from 06/11/18 at request of Court. Court orders Koren Mattson to be present at next hearing.

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Koren Mattson, Daughter/Administrator/Petitioner

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

1. **Need** Petition to Terminate Estate as directed by court on 12/27/17.
2. Assets on hand: \$0.
3. Current bond \$200,000
4. Notice of non-payment of bond premium filed by Suretec Insurance Company.
5. Petitioner alleges there is no property of any kind belonging to the estate and subject to administration. No assets were marshalled.
6. The initial petition for letters of administration filed 03/03/16 indicates estimated assets of \$920,000, consisting of real property and personal property. **(Supp. 12/13/17, Counsel learned all assets in the name of decedent were held as joint tenants with other family members.)**
7. Inventory and Appraisal has not been filed.
8. American Express submitted an approved creditor's claim in the amount of \$2,052.80; however claim remains unpaid due to lack of assets.

9. Notice was given.

10. No proposed order submitted.

RECOMMENDATION

Need to clear note 1, then Court's discretion. If approved, set hearing on final discharge for **10/21/19.**

(lh/cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1601019

CASE NAME: THE BOOGARD FAMILY TRUST

HEARING: Accounting Review by ***

COUNSEL:

TERRANCE GREGG MANNING
THE BOOGARD FAMILY TRUST
NATALIE BLICKENSTAFF

(PET)...CHARLES W RAYMOND
(TRU)...
(PET)...JENNIFER M DANIEL

GENERAL INFORMATION:

Nancy, Robert and Rochelle/Rachelle Corley suspended as trustees on 04/17/17. Continued from **07/31/17**. Attorney Jennifer Daniel represents she is currently working to record affidavit for the property in Oregon. Court finds: the **Court notes Nancy Corley, Robert and Rochelle Corley have been previously suspended as trustees**. Terrance **Gregg Manning is appointed as trustee**. Bond required \$150,000.00. Bond is to be posted within 30 days of today's The Court approves counsel's oral request to reserve \$20,000.00 for costs and fees. Attorney, Jennifer M. Daniel, to prepare order. Nancy Corley is ordered to appear at the next hearing.

Continued from **10/23/17** Citation issued for Nancy, Robert and Rochelle/Rachelle Corley. OSC Re Surcharge set.

Continued from **01/29/18**. The Court is informed that ROBERT CORLEY **passed away 10/23/17**. The Court is informed that CHARLES RAYMOND had a stroke and has not been able participate in this case. The Court orders CHARLES RAYMOND be present and next hearing if substitution of attorney is not filed. Ms. Daniel reports Natalie Blickenstaff's accounting will be filed this morning. The Court orders NANCY CORLEY and RACHELE CORLEY file an accounting for the time period NANCY AND ROBERT CORLEY were trustees. The Court orders TERRANCE MANNING send a copy of the paperwork supplied by NANCY and RACHELE CORLEY back to them so they can compile an accounting.

Continued from **04/09/18**. Possible settlement.

Continue from 07/19/18 Settlement agreement signed.

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

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

1. Nancy, Robert and Rochelle aka Rachelle Corley ordered to prepare an accounting on 04/17/17.

2. Settlement Agreement approved 07/09/18.
3. **Need** accounting.

RECOMMENDATION:
Court's discretion.

(nb/cs/ww/cs)

Future Hearing: 4/15/19 Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700168

CASE NAME: MTR OF ANNA S SANDERS

HEARING:

Report on waiver of Account and Report of STEPHEN A SANDERS and
Petition for allowance of fees filed.

COUNSEL:

STEPHEN A SANDERS (PET)...PRO/PER
ANNA S SANDERS (DEC)...

Waiver of Court Fees and Costs filed by STEPHEN A SANDERS is GRANTED

GENERAL INFORMATION:

Continued from 06/11/18 no appearance. Continued at request of Court. The Court orders Stephen Sanders to be present at the next hearing.

THIS CASE SET FOR HEARING ON Report on Waiver of Accounting and Petition for Final Distribution, by Stephen Sanders, son/executor

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

1. All heirs waived accounting.
2. Assets on Hand \$145,000 consisting of real property.
3. Petitioner reports accounting period as 04/19/17 to 03/19/18
4. Petitioner waives statutory compensation.
- 5. Notice given.**
6. No reserves are requested.
7. Proposed Order: 05/10/18 hearing date is incorrect. Accounting period does not match report, need statement re: sole/separate property of decedent.

RECOMMENDATION:

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **10/21/19**.

(cs/ww/cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700338

CASE NAME: MTR OF JOSE LUIS MACIAS

HEARING:

First And Final Account and Report of MARIA CARMEN AMENDARIZ and
Petition for allowance of fees filed.

COUNSEL:

MARIA CARMEN AMENDARIZ (PET)...KENNETH GAUGH
JOSE LUIS MACIAS (DEC)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of
Fees, by sister, Maria Armendariz, [Administrator/Petitioner]

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

1. Accounting period reported as 06/22/17-07/30/18; however, decedent's date of death was 11/22/16 and therefore accounting should start from date of death. **JTD**
2. Assets on Hand \$75,296.00 consisting of cash; however financial statement provided indicate a balance of \$75,296.38.
3. Financial statements support balance as of 06/12/18. However, Petitioner indicates accounting period goes through 07/30/18. Does court wish to require additional bank statements. **JTD**
4. Bond amount \$175,000.00.
5. Summary of Account indicates the amount of \$79,794.00 for Losses on Sale and Costs of Sale of Assets [LFp. 5]; however, Schedule of E "Losses on Sale and Costs of Sale" indicates \$79,794.70.
6. Petitioner and Attorney request statutory fees of \$5,200.00. Calculated.
7. Petitioner requests reimbursement of costs advanced of \$1,000.00 for payment of filing fee, publication and probate Referee fee. Itemized [LF p. 8].
8. Notice of non-payment of \$200.00 filed by probate referee, Patrick Wright.
9. **Need** receipt for payment of probate referee fees.
10. **Need** conformed copy of final Inventory and Appraisal.
11. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account. Pr.C.§ 1064(a)(5).

12. **Need** statement regarding notice to Franchise Tax Board or proof of service of the same Pr. C. § 9202(c)(1).
13. **Need** Notice of Hearing and proof of service.
14. No Proposed Order. Submit after hearing.

RECOMMENDATION

Need to clear notes 9-13, Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **10/21/19**.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1701280

CASE NAME: MTR OF CELIA C. MORA

HEARING:

First and Final Acct Account and Report of MIGUEL MARIO SALGADO
III and Petition for allowance of fees filed.

COUNSEL:

MIGUEL MARIO SALGADO III (PET)...PAUL HORN
CELIA C MORA (DEC)...
APPROVED INHERITANCE CASH (TP)...PRO/PER

Waiver of Court Fees and Costs filed by MIGUEL MARIO SALGADO III is GRANTED

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON First and Final Account and Petition for allowance of Fees, by grandson, Miguel Salgado, III [Administrator/Petitioner]

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

1. Assets on Hand \$52,046.72 consisting of cash
2. Petitioner indicates bond amount of \$165,000; however, bond amount is \$100,000.
3. Attorney and Petitioner request statutory fees of \$7,000.00. Calculated.
4. Attorney requests extraordinary fees of \$1,750.00 for services rendered in connection with the sale of real property. Billed at \$350/hour for a total of 5 hours' attorney time. Itemized [LF, p. 51]. JTD.
5. Supp. 09/11/18 indicates Esther Naomi Ballesteros was accidentally omitted in this matter. She is reported to be issue of predeceased child and entitled to distribution.
6. **Need** Notice to Esther Ballesteros.
7. No Proposed Order. Submit after hearing.

RECOMMENDATION:

Need to clear note 6, then Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **10/21/19**

(cs)

Superior Court of Calif, County of San Bernardino

Page: 8

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800458

CASE NAME: DIANE MARIE DILLON

SEE ALSO 9

HEARING:

Hearing Re: Guardian Ad Litem

COUNSEL:

NICOLE NICHOLSON (PET)...HARTNELL LAW GROUP
DIANE MARIE DILLON (DEC)...

Waiver of Court Fees and Costs filed by NICOLE NICHOLSON is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Guardian Ad Litem

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

1. Matter set on 06/28/18, wherein, Nicole Nicholson was appointed special administrator of the estate, \$55,000 bond.
2. Nicole Nicholson filed a petition seeking appointment as Guardian ad Litem, of minor, Jacob Cotton, [Petition filed 05/10/18].
3. Proposed Order Appointing GAL: 06/22/18.

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800458

CASE NAME: DIANE MARIE DILLON

SEE ALSO 8

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

COUNSEL:

NICOLE NICHOLSON (PET)...HARTNELL LAW GROUP
DIANE MARIE DILLON (DEC)...

GENERAL INFORMATION:

Nicole Nicholson appointed special administrator of the estate, \$55,000 bond.

Continued from 06/11/18 Substitution of attorney will be filed today. Petitioner is now pro per. Hearing continued at request of Court to clear probate notes

THIS CASE SET FOR HEARING ON Petition for Letters of Administration WWA with Full Authority under IAEA by Nicole Nicholson, daughter

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

1. Petitioner seeks \$55,000 bond. Net value of the estate consists of \$55,000.00 in real property. Bond appears adequate.
2. Proof of Holographic will filed 05/10/18.
3. **Court may wish to appoint a Guardian ad Litem or Guardian of the estate for minor heir, Nevaeh Moore. JTD**
4. Section 8 of petition fails to list all persons mentioned in the will. **Need** verified supplement as to Jeff, Nevaeh, Lea, Junior, and Carolyn. No last names were provided in the will.
5. **Need** Notice to Petition to Administer Estate and proof of service to Jeff, Nevaeh, Lea, Junior, and Carolyn who are mentioned in the will but not in section 8.
6. ~proposed form Order. 06/25/18

RECOMMENDATION:

Need to clear notes 4-5. Court's discretion re bond and appointment of GAL for Nevaeh. If approved, set Accounting/Status Review for **12/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww/cs)

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800459

CASE NAME: IRMA ORNELAS
HEARING: Spousal Property Petition hearing.

COUNSEL:

JOSEPH P SAUCEDA (PET)...PRO/PER
IRMA ORNELAS (DEC)...

GENERAL INFORMATION

Letters of special administrator issued to Joseph Saucedo with limited IAEA, no bond on 05/17/18.

At special hearing on **05/17/18** Special administrator may not possess money or property of the estate without further court order. Special administrator is authorized to work with the mortgage holder to bring home current.

Continued from 06/11/18 at request of Court to clear probate notes. The Court orders a copy of the current grant deed to be filed with the court.

THIS CASE SET FOR HEARING ON Spousal Property Petition by Joseph Saucedo, spouse

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

1. Petitioner requests a determination of real property passing to the surviving spouse as community property. Specifically, real property located in San Bernardino.
2. Petitioner does not set forth date of marriage, when property was acquired, or how purchased [separate/community funds]. **Need** verified supplement.
3. Section 8 as to whether there is a written agreement between the deceased spouse and surviving spouse is incomplete. **Need** verified supplement.
4. Section 9 to petition [LF, pg. 3] does not list the petitioner or include the relationships to the decedent of the listed persons. **Need** same via verified supplement.
5. **Need** copy of grant deed as directed by court on 06/11/18.
6. **Need** Notice of Hearing with proof of service to decedent's issues.
7. **Note: A general Petition for Letters of Administration has not been filed.**
8. ~Proposed Form Order: 05/10/18

RECOMMENDATION:

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

(ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800728

CASE NAME: MTR OF CAROLYN ANN VALENCIA

VACATED

HEARING:

Spousal Property Petition hearing.

COUNSEL:

MANUEL B VALENCIA

(PET)...ANDERSON LEBLANCE

CAROLYN ANN VALENCIA

(DEC)...

XREF: PROPS1800114 *CAROLYN ANN VALENCIA*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Manuel Valencia

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

1. Petitioner seeks court to determine and confirm his half of community property and determine that decedent's half transfers to petitioner without administration.
2. A petition for probate filed naming Taree Herington (executor) as personal representative of the estate of Carolyn Valencia. See X-Ref above.
3. Petitioner and decedent lived together since 04/77 and married 11/26/85. Subject real property was purchased in the name of the decedent, but community funds were used and real property has been considered as a community asset.
4. ~Proposed Form Order: 08/02/18

RECOMMENDATION:

Court's discretion.

(cs)

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800739

CASE NAME: Mtr of Demetra Panos

HEARING:

Petition for Will and for Letters of testamentary w/ full IAEA

COUNSEL:

ANDREAS PANOS (PET)...HORSPPOOL & HORSPPOOL
DEMETRA PANOS (DEC)...

GENERAL INFORMATION

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

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

1. Will waives bond. Net estate value \$224,000. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code, § 8481(b).
2. Notice to Petition to Administer Estate and proof of service filed; however, item 5 re IAEA is incomplete. **Need corrected Notice.**
3. ~Proposed Form Order: 08/03/18

RECOMMENDATION

RFA subject to notes 2, Court's discretion re bond. If approved, set Accounting/Status Review for **12/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs)

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800758

CASE NAME: MTR OF CARLOS ARANA

HEARING:

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

COUNSEL:

CALEB D ARANA	(PET)...PRO/PER
JOSUE P ARANA	(PET)...PRO/PER
CARLOS ARANA	(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with Full Authority under IAEA by Caleb and Josue Arana, sons

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

1. All heirs allegedly waive bond, however, **need** bond waivers on mandatory judicial council form DE-142/DE-111 (A-3d) by Maria, Ziola and Julio Arana. The estate consists of \$150,000.00 in real 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. **Need** Notice to Petition to Administer Estate and proof of service.
3. **Need** proof of publication
4. ~Proposed Form Order: 08/09/18

RECOMMENDATION

Need to clear notes 1-3. Court's discretion re bond. If approved, set Accounting/Status Review **12/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(ww)

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

DATE: 10/01/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800798

CASE NAME: MTR OF CHARLES LEWIS

HEARING: Petition to determine succession to Real Property

COUNSEL:

BRENDA SAMS (PET)...PRO/PER
CHARLES LEWIS (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Brenda Sams as Successor trustee of the Charles Lewis Trust of 2006

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

1. Petitioner seeks 100% interest, in decedent's 1/3 interest; in real property per the will.
2. Section 2 of petition re date of death is incomplete. **Need** verified supplement.
 - a. Death certificate filed indicating date of death as 12/30/13.
3. Section 8 requires the gross value of decedent's interest in real and personal property to be shown in the Inventory and Appraisal; however, there is no Inventory and Appraisal attached. **Need** same.
4. Section (5)(6) indicate there are no child of decedent; however, will identifies children. **Need** verified supplement.
5. Section 11 identifies personal property passing to petitioner; however, there is no description of said property. **Need** verified supplement.
6. Section 13 is unclear as to the specific interest claimed by petitioner in the real property. **Need** verified supplement.
7. Section 14 does not include the name of Brenda trustee of the trust, heirs of decedent and does not indicate the relationship, ages of those which are listed. **Need** corrected attachment 14.
8. Section 16 does not include the name of those interested in the trust of decedent. **Need** corrected attachment 16.
9. **Need** Notice of hearing and proof of service.
10. **No** Proposed Order: Submit after hearing.

RECOMMENDATION:

Need to clear note 2-9, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600019

CASE NAME: The Wade H Fordyce & Dorris G Fordyce Living Trust

SEE ALSO 16

HEARING:

OSC re: Dismissal

COUNSEL:

KELLY DEAN FORDYCE (PET)...RICHARD A LEPORE
WADE H FORDYCE AND DORRIS G FORDYCE LIVING TRUST (TRU)...
ROBIN LEE FORDYCE (RES)...HOWARD R HAWKINS

Waiver of Court Fees and Costs filed by KELLY DEAN FORDYCE is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON OSC re: Dismissal

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

1. Matter set on 06/11/18, wherein, parties did not appear. Court ordered that Robin Fordyce, Candyce Leffingwell and Roger Fordyce be given notice and a verified supplement explaining why Candyce Leffingwell has been omitted as beneficiary be filed.
2. **Need** notice of petition.
3. **Need** verified supplement re beneficiary's omission.

RECOMMENDATION:

Need to clear notes 2-3, then Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/01/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600019

CASE NAME: The Wade H Fordyce & Dorris G Fordyce Living Trust

SEE ALSO 15

HEARING:

Petition for removal of trustee and appointment of successor trustee

COUNSEL:

KELLY DEAN FORDYCE (PET)...RICHARD A LEPORE
WADE H FORDYCE AND DORRIS G FORDYCE LIVING TRUST (TRU)...
ROBIN LEE FORDYCE (RES)...HOWARD R HAWKINS

Waiver of Court Fees and Costs filed by KELLY DEAN FORDYCE is GRANTED

Currently under review by Legal Research.

(LR)

Notice:

Need 30 days' notice to Robin Fordyce, Candyce Leffingwell, and Roger Fordyce.

(ww/cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIPS

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1200289

CASE NAME: MTR OF JOEL ALEJANDRO GARCIA

HEARING:

Hearing Re: CONFIRMATION OF TRANSFER

COUNSEL:

ERIKA J ESTRADA

(CP)...PRO/PER

JOEL ALEJANDRO GARCIA

(CTP)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Confirmation of Transfer

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

1. Matter set on 06/04/18, wherein, Court ordered matter transferred to Riverside County.
2. **Need** status of transfer.

RECOMMENDATION:

Court to inquire.

(cs)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700157

CASE NAME: MARTINA CRUZ

SEE ALSO 19, 20

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DONNA KATHLEEN MORENO

COUNSEL:

DONNA KATHLEEN MORENO (PET)...PRO/PER
MARTINA CRUZ (CTE)...E. JOAN NELMS

XREF: CIFDS1700020 CRUZ VS BELTRAN
CIFDS1700021 CRUZ V CRUZ
CIFDS1700022 CRUZ V CRUZ

GENERAL INFORMATION:

Continued from 08/08/18 at request of Court to clear probate notes. Hearing set 08/23/18 is advanced and continued to 10/01/18 to be heard with other petition.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

- 1 Notification of Conservatee's Rights with proof of service and copy of the Order for Conservatorship, per Pr.C. §1830(c), filed 08/22/18; however, section 5 indicates order was filed 08/22/18 but Order was filed 01/16/18. **JTD**
- 2 Care Plan in accord with Pr.C. §2352.5 filed 08/22/18.
- 3 Determination of Conservatee's Appropriate Level of Care per Pr.C. § 2352.5 (form GC-355) filed 08/22/18.
- 4 **Need** final Inventory & Appraisal per Pr.C. §2610.
- 5 **Need** Proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
- 6 If the conservatorship estate holds interest in real property, need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

Need to clear note 4-5. Inquire status.
(lh/cs)

Future Hearing: 3/13/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700157

CASE NAME: MARTINA CRUZ

SEE ALSO 18, 20

HEARING:

Hearing Re: ORDER TO DETERMINE INTEREST IN REAL PROPERTY

DONNA KATHLEEN MORENO
MARTINA CRUZ

COUNSEL:
(PET)...PRO/PER
(CTE)...E. JOAN NELMS

XREF: CIFDS1700020 *CRUZ VS BELTRAN*
CIFDS1700021 *CRUZ V CRUZ*
CIFDS1700022 *CRUZ V CRUZ*

Waiver of Court Fees and Costs filed by MARTINA CRUZ is GRANTED

GENERAL INFORMATION:

THIS CASE SET FOR HEARING On Order to Determine Interest in Real Property

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

1. Matter set on 08/08/18 during Compliance Review hearing to be heard with other petitions.
2. **Objection and Reply filed 09/20/18 by Louie P Cruz and Susan Diaz to Petition for Order Determining Interest in Real Property, etc.**

RECOMMENDATION:

Court's discretion.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700157

CASE NAME: MARTINA CRUZ

SEE ALSO 18, 19

HEARING:

Petition for to determine title & to confirm interest in Real Property

DONNA KATHLEEN MORENO

MARTINA CRUZ

COUNSEL:

(PET)...PRO/PER

(CTE)...E. JOAN NELMS

XREF: CIFDS1700020 *CRUZ VS BELTRAN*

CIFDS1700021 *CRUZ V CRUZ*

CIFDS1700022 *CRUZ V CRUZ*

Waiver of Court Fees and Costs filed by MARTINA CRUZ is GRANTED

Currently under review by Legal Research.

(LR)

Notice:

Notice given.

(CS)

Future Hearing: 3/13/19 Accounting Review

Superior Court of Calif, County of San Bernardino

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700417

CASE NAME: SERGIO JOSEPH DOWNTAIN

SEE ALSO 22

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SHEILA DOWNTAIN

COUNSEL:

SHEILA DOWNTAIN	(CP)...OLIVER M RILEY
KATHRYN FERGUSON	(CP)...OLIVER M RILEY
SERGIO JOSEPH DOWNTAIN	(CTP)...CRAIG M PARKER

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN,

XREF: CONPS1700413 *DECHAUNCEY DEREY DUNCANTELL TURNER DOWNTAIN*
CONPS1700418 *ALISON MICHELLE DOWNTAIN*

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sheila Downtain and Kathryn Ferguson, appointed co-conservators of the person on 03/26/18.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/29/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 03/29/18.
4. Care Plan filed 04/18/18

RECOMMENDATION:

None

(cs)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700418

CASE NAME: ALISON MICHELLE DOWNTAIN

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of SHEILA DOWNTAIN

COUNSEL:

SHEILA DOWNTAIN	(CP)...OLIVER M RILEY
ALISON MICHELLE DOWNTAIN	(CTP)...CRAIG M PARKER
KATHRYN FERGUSON	(CP)...OLIVER M RILEY

CCP170.6 filed as to Judge CYNTHIA A LUDVIGSEN

XREF: CONPS1700413 *DECHAUNCEY DEREY DUNCANTELL TURNER DOWNTAIN*
CONPS1700417 *SERGIO JOSEPH DOWNTAIN*

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Sheila Downtain and Kathryn Ferguson, appointed co-conservators of the person on 03/26/18.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 03/29/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 03/29/18; however, section 4 is incomplete. **Need** complete form.
4. Care Plan filed 04/18/18.

RECOMMENDATION:

Need to clear note 3.

(cs)

Superior Court of Calif, County of San Bernardino

Page: 23

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700448

CASE NAME: CALVIN DAMON FORD

SEE ALSO 24, 25

HEARING:

Petition for to Return Monies Depleted From the Conservatee's Estate

COUNSEL:

MAXINE E FORD	(CP)...HARTNELL LAW GROUP
GIORDON P FORD	(CE)...
CALVIN DAMON FORD	(CEP)...MITCHELL I ROTH
MATTHEW E SHEASBY	(PET)...SHEASBY, CHO AND MIDDLETON

Currently under review by Legal Research.
(LR)

Notice:

Notice of hearing filed 05/03/18; however, Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

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

Need proper notice.

(CS)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700448

CASE NAME: CALVIN DAMON FORD

SEE ALSO 23, 25

HEARING:

Petition for PAYMENT OF COURT APPOINTED ATTORNEYS' FEES

COUNSEL:

MAXINE E FORD	(CP)...HARTNELL LAW GROUP
GIORDON P FORD	(CE)...
CALVIN DAMON FORD	(CEP)...MITCHELL I ROTH
MATTHEW E SHEASBY	(PET)...SHEASBY, CHO AND MIDDLETON

GENERAL INFORMATION:

Continued from 08/20/18 at request of counsel to clear probate notes and to set with other hearings.

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Matthew Sheasby, Esq.

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

1. Petitioner, Matthew Sheasby, was appointed counsel on 12/13/17.
2. Petitioner requests fees of \$11,965:
 - a. Separately filed Declaration in support indicates 29.9 hours at \$360/425 per hour for attorney fees; however, the associate attorneys' name and qualifications were not provided. Does Court wish for a verified supplement? **JTD**
 - b. Itemization of fees are in the separately filed "Confidential invoices statements in support of petition for attorney fees".
3. Notice given.
4. Court to see Confidential Letter from Chuck Leeb received on 07/25/18.
5. **Objections by GAL Mitchell Roth filed 08/01/18.**
6. Proposed Order: 07/10/18,

RECOMMENDATION:

Matter is contested.

(ww/cs)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700448

CASE NAME: CALVIN DAMON FORD

SEE ALSO 23, 24

HEARING: Petition for Appointment of Conservator

COUNSEL:

MAXINE E FORD (CP)...HARTNELL LAW GROUP
GIORDON P FORD (CE)...
CALVIN DAMON FORD (CEP)...MITCHELL I ROTH
MATTHEW E SHEASBY (PET)...SHEASBY, CHO AND MIDDLETON

Waiver of Court Fees and Costs filed by CALVIN DAMON FORD is GRANTED

GENERAL INFORMATION

Mother, Maxine E. Ford, appointed temporary conservatorship of the person on 12/13/17; brother, Giordon P. Ford appointed temporary conservator of the estate on 12/13/17, \$20,000 bond. Amended order entered 12/15/17. Court appoints Mitchell I Roth as GAL. Temporary conservator(s) are ordered to have conservatee medically evaluated at Reche Canyon Rehabilitation Center today. Notice by Judicial Assistant.

Continued from **01/16/18**. GAL's report filed in the courtroom. Return of citation waived. Temporary conservators are ordered to return conservatee's wallet to him. All parties are ordered to meet and confer to discuss medical and business issues and to choose a doctor that will conduct a medical evaluation.

Continued from **03/27/18**. Court will appoint Dr. Leeb to prepare a 730 report if Dr. Bounds does not accept court appointment. Mitchell Roth to prepare Order. Court suspends temporary conservatorship of the estate, effective this date. Mr. Hartnell to notify the bonding company. Order to be filed. CALVIN FORD shall resume running his business.

CALVIN FORD is ordered to prepare weekly reports regarding the business operations, as well as monthly bank statements, and provide copies of the report to all counsel. No vehicles are to be sold without further order of the Court. MARVETTE LIGGINS may assist Mr. Ford with day to day operations of the business. Notice waived

Continued from **05/08/18** at request of Court to review doctor's report and clear probate notes.

Continued from 06/04/18 The Court authorizes Dr. Leeb be paid from the \$2,500 in Mr. Harntell's trust account. Mr. Sheasby reserves right to object to payments of Dr. Leeb's fees from the trust account instead of by Petitioner. Ms. Liggins reports they did not meet with Dr. Leeb last week because they were unsure who was to pay Dr. Leeb's bill. The Court orders Calvin Ford to meet with Dr. Leeb regardless of who is

to pay the bill. The Court verifies the Dr. Leeb's scope of work is to determine Calvin Ford's capacity to make medical and placement decision and his ability to provide for the necessities of life unassisted and to determine whether he is susceptible to undue influence. Mr. Roth to prepare order that will be submitted to counsel for approval as to form and content.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by mother, Maxine E. Ford and son, Giordon P. Ford ["Petitioners"].

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

1. Current temporary bond in the amount of \$20,000 fixed. However, estimated value of the estate is "unknown." **JTD.**
2. Petitioner seeks medical powers. Capacity Declaration filed on 03/20/18 has the following deficiencies:
 - a. Section 2 does not include physician's phone number;
 - b. Section 8 indicates 4 pages are attached; however, there are no attachments. **Need** completed Capacity Declaration.
3. Report by GAL, Mitchell I Roth filed 01/16/18.
4. **730 Evaluation by Dr. Leeb filed 05/08/18.**
5. Letter from Dr. Leeb filed 07/25/18 re payment requested.
6. Certificates of Completion re: Conservatorship Class filed 01/08/18.
7. Court-ordered evaluation filed 12/14/17.
8. Court to see document entitled "VA Paperwork" filed 03/12/18.
9. Petitioner requests an Order authorizing the general Conservator of the Estate the authority to operate the business known as "Sabbath R. Trucking."
10. Notice of Hearing filed on 02/22/18 does not include Veteran's Administration. **Need** proper service.
11. Court Investigator's Report filed 01/12/18.
12. Order suspending temporary conservatorship filed 04/24/18.
13. No proposed order/letters. Submit Order after Hearing.

RECOMMENDATION:

Need to clear notes 2 & 10, then Court's discretion re: bond. If approved, set hearing for Compliance Review for **05/06/19** 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; and recordation of letters if applicable per Pr.C.§2313.

Set hearing re: Accounting Review for **12/09/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/cs)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800229

CASE NAME: Mtr of Maria Elena Enriquez

HEARING:

Petition for Appointment of Conservator

COUNSEL:

SONIA DORAME (CPE)...ENRIQUE PEREZ
MARIA ELENA ENRIQUEZ (CEP)...

GENERAL INFORMATION:

Sonia Dorame appointed temporary conservator of the person and estate on 08/09/18

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by niece, Sonia Dorame, Petitioner.

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

1. Petitioner seeks bond of \$200,000. Suggest \$220,000 (includes 10% recovery.)
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 Pr. C. §1873 re authorize conservatee to enter into transactions or type of transaction as may be appropriate. Pr.C. § 1901 to determine whether the conservatee has the capacity to enter into valid marriage. JTD
4. Petitioner seeks powers and duties under section 2351-2358 to have care, custody, and control, charge of education, and the authority to authorize all medical and dental treatment including psychiatric and psychological treatment. etc.
5. Petitioner seeks medical powers. **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.
9. **Need** Notification of Court of Conservatorship Address (Local form SB-14522).
10. CI report filed 09/13/18.
11. No proposed form Order: Submit after hearing.

RECOMMENDATION:

Need to clear notes 5-9. Court's discretion re bond. If approved, set hearing for Compliance Review for **05/06/19** for the filing of the following: proof of service of Order

with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **12/09/19**. Any accounting to be filed 30 days in advance.

(cs)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800237

CASE NAME: MTR OF NANCY LEE WHYBREW

HEARING: Petition for Appointment of Conservator

COUNSEL:

DONALD M SHATER (CPE)...PRO/PER
NANCY LEE WHYBREW (CEP)...

GENERAL INFORMATION:

Donald Shater is appointed temporary conservator of the person and estate on 08/14/18, bond \$25,000.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person and estate by Donald Shater, Petitioner.

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

1. Petitioner requests to waive bond as they are retired and do not have a lot of money. Estate consists of personal property in the amount of 134,170.00. Suggest bond of 148,000.00.JTD
2. Attached is a copy of powers of attorney appointing proposed guardian as power of attorney.
3. Petitioner is seeking 1873 or 1901 powers; however, there is no attachment 1d specifying orders requested. **Need** attachment 1d.
4. Petitioner seeks medical powers. Capacity Declaration filed 08/14/18; however, item 1 is missing a telephone number; section 4 is incomplete; section 5b (1)-(4) are incomplete; section 7b is missing declarant's initials. Affixed Attachment 335A is incomplete as to item 9(a)(5) and 9(b)(5). **Need** complete Capacity Declaration and Attachment 335A.
5. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
6. Petition is incomplete as to section 3(c) re who proposed conservator is; item 3f re due diligence; and item 5 f re whether developmentally disabled. **Need** verified supplement.
7. **Need** List of Required Contacts (Local form SB-12224).
8. **Need** return of Citation.

9. **Certificate of Completion of the Conservatorship Training Class filed 09/18/18.**

10. **Need** notice of hearing and proof of service.

11. **Need** Court Investigator Referral Report (Local form SB-360).

12. CI report filed 08/30/18.

13. ~Proposed Form Order: Not Submitted

RECOMMENDATION

Need to clear notes 3-8 & 10-11, then Court's discretion re bond. If approved, set hearing for Compliance Review for **05/06/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); Care Plan per Pr.C.§2352.5; Inventory and Appraisal, and Proof of service of I & A Instructions for Objection per Pr.C. §2610; and recordation of letters, if applicable, per Pr.C. § 2313.

Set hearing re Accounting Review for **12/09/19**. Any accounting to be filed 30 days in advance.

(cs)

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

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800259

CASE NAME: Mtr of Martha Terrazas

HEARING: Petition for Appointment of Conservator

COUNSEL:

MARIA L TERRAZAS (CP)...PRO/PER
MARTHA TERRAZAS (CTP)...

GENERAL INFORMATION:

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator, of the person only, by daughter, Maria Terrazas, Petitioner.

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

1. No Bond- Person only.
2. Petitioner seeks dementia powers. **Need** appointment of counsel for report.
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. Section 4(b) of Petition re whether proposed conservatee is receiving VA benefits is incomplete. **Need** verified supplement.
5. Attachment 3f(1) (2) indicate proposed conservator does not have an address of three relatives. **Need** Due Diligence Declaration(s).
6. **Need** List of Required Contacts (Local form SB-12224).
7. **Need** return of Citation.
8. **Need** Certificate of Completion of the Conservatorship Training Class.
9. **Need** Court Investigator Referral Report (Local form SB-360).
10. Notice of hearing and proof of service filed 09/20/18; however Notice is missing department number. **JTD**
 - a. **Need** notice and proof of service to Martha Terrazas and Terresa Terrazas.
11. **Need** Court Investigator report.
12. ~Proposed Form Order: Not Submitted

RECOMMENDATION

Need to clear notes 3-10, then Court's discretion. If approved, set hearing for Compliance Review for **05/06/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(CS)

Superior Court of Calif, County of San Bernardino

Page: 28A add-on

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

ELDER ABUSE

DATE: 10/01/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800127

CASE NAME: NEWSOM VS TRAMMELL

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

LUCILLE A NEWSOM (PP)...PRO/PER

BRIAN LEE TRAMMELL (RP)...

Proof of service filed 09/20/18 on respondent, Brian Trammell.

(cs)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

TRIAL

DATE: 10/01/18 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: ***MF MTR OF JAMES ODELL ROBINSON***

SEE ALSO 30, 31

HEARING:

Court Trial set for PETITION FOR APPOINTMENT OF ADMINISTRATOR of
EVELYN L ROBINSON

COUNSEL:

EVELYN L ROBINSON	(PET)...CHRISTOPHER B JOHNSON
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC
GERALDINE SIMMONS	(PET/OBJ)...MARA C ALLARD

Waiver of Court Fees and Costs filed by EVELYN L ROBINSON is GRANTED

XREF: PROPS1700759 *LILY MAE ROBINSON*

No notes – Trial. JTD

(cs)

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

DATE: 10/01/18 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: ***MF MTR OF JAMES ODELL ROBINSON***

SEE ALSO 29, 30

HEARING:

Hearing Re: PTN FOR LTRS OF ADMINISTRATION (EVELYN ROBINSON)

COUNSEL:

EVELYN L ROBINSON	(PET)...CHRISTOPHER B JOHNSON
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC
GERALDINE SIMMONS	(PET/OBJ)...MARA C ALLARD

Waiver of Court Fees and Costs filed by EVELYN L ROBINSON is GRANTED

XREF: PROPS1700759 *LILY MAE ROBINSON*

GENERAL INFORMATION

Continued from 04/05/17. Case Consolidated with PROPS17000150; PROPS1700079 master file. Copy of will to be filed by any party. Mr. Smith advised court that Lily Mae Robinson was never divorced from decedent. Kathy and Evelyn Robinson deny that is the case and are advised to file divorce decree. Bond of \$165,000 will be ordered.

Continued from 06/07/17. Petitioner confirmed this petition to be withdrawn. Petition by Kathy Robinson dismissed. Amended petition to be served on all parties. If objections are the same as to the original petition, objector to file a declaration stating they are the same. If they are different, new objections to be filed.

Continued from **08/30/17** and **10/11/17** (no appearances).

Continued from **12/12/17**. Oral reports given by counsel (both sides)

Continued from **03/06/18**. Trial requested.

Continued from **06/14/18**. Matter set for court trial.

Continued from 07/23/18 and 07/25/18 Court trial in progress.

THIS CASE SET FOR HEARING ON

- Petition 1- **Amended** Petition [filed 03/28/17] for Letters of Administration with full authority under IAEA by Evelyn & Kathy Robinson, daughter.
- Petition 2 - Petition for Letters of Administration with full authority under IAEA by Geraldine Simmons, alleged daughter, for Sam Hlavaty.

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

Petitioner 1 - Evelyn Robinson daughter

1. Petitioners seeks bond of \$200,000. Ok.
2. Consents to appointment filed by 5 heirs on 06/09/17.
3. **Objections filed by Geraldine Simmons, alleged daughter on 03/24/17.**
4. **Kathy Robinson withdraws and revokes request to be co-petitioner and nominates Evelyn Robinson filed on 06/02/17.**
5. Amended proposed form order not submitted.

Petitioner 2 – Geraldine Simmons, alleged daughter, for Sam Hlavaty

PROPS1700150

6. Petitioners seek bond of \$320,000. Ok.
7. Petitioner Hlavaty is nominated by Lily Robinson, Cecelia Banks and Karen Abrames.
8. Proof of publication reflects 06/15/17 hearing [which was original date, which court vacated and reset]. It appears re-publication would not be required per Pr.C. § 1205. JTD
9. Petition indicates 2 unknown children. **Need** due diligence. **Supp. (02/22/18)** alleges per Pr. C. §§6401(b)(3), 6402, Decedent's separate property passes 1/3rd to the estate of his wife Lily Mae Robinson and the balance passes equally to Decedents children thorough his estate. Petition indicates Geraldine Simmons was informed that Decedent had 2 unknown children and does not know their names of locations.
10. **Objections filed by Evelyn Robinson, daughter, on 03/05/18.**
11. ~Proposed Form Order: 03/20/17

RECOMMENDATION

Need to clear note 9; matter is contested. If approved, set Accounting/Status Review for **12/09/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/lc/lh/ww/lc/lh/ww/nb/ww/cs)

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

DATE: 10/01/18 TIME: 1:30 DEPT: S37P

CASE#: PRO PS1700079

CASE NAME: ***MF MTR OF JAMES ODELL ROBINSON***

SEE ALSO 29, 30

HEARING:

Spousal Property Petition hearing.

COUNSEL:

EVELYN L ROBINSON	(PET)...CHRISTOPHER B JOHNSON
JAMES ODELL ROBINSON	(DEC)...
KATHY ROBINSON	(PET)...GAUDY LAW, INC
GERALDINE SIMMONS	(PET/OBJ)...MARA C ALLARD

Waiver of Court Fees and Costs filed by EVELYN L ROBINSON is GRANTED

XREF: PROPS1700759 *LILY MAE ROBINSON*

GENERAL INFORMATION:

Continued from **10/24/17**. Notice to be given by Mr. Johnson.

Continued from **12/12/17** for counsel to file a supplement with deeds attached.

Continued from **03/06/18**.

Continued from **06/14/18**. Matter set for court trial.

Continued from 07/23/18 and 07/25/18 Court trial in progress.

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Petitioner, Geraldine Simmons (daughter), proposed Personal Representative of spouse, Lily Mae Robinson.

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

1. Petitioner requests confirmation of property passing to the surviving spouse as community property. Specifically, six parcels of improved and unimproved real properties in San Bernardino County. Petition indicates parties were married on 11/14/56 but does not set forth facts sufficient to establish a community property interest in the California real properties. **Supp. (02/22/18) states Decedent acquired real property as his separate property, after he left Lily Mae, and pursuant to Pr. C. §§6401(b)(3), 6402, the separate property passes 1/3rd to the estate of his wife Lily Mae Robinson and the balance passes equally to Decedents children thorough his estate. Petition indicates Geraldine Simmons was informed that Decedent had 2 unknown children and does not know their names of locations.**

2. Need copies of vesting documents as directed by Court on 12/12/17. **Copies of Deeds affixed to supplement filed on 02/22/18.**
3. **Objection filed by Evelyn Robinson, daughter, on 03/05/18.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Matter is contested.

(nb/ww/cs)