



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 10/16/18**

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.

nb0924/1011

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: CIV DS1707848

CASE NAME: HERNANDEZ -V- HERNANDEZ

HEARING:

Order to Show Cause RE: STATUS OF DRUG TEST OF D.HERNANDEZ

COUNSEL:

DUGLAS HERNANDEZ (PLA)...LAW OFFICES OF JAMES S TERRELL  
MARIA E HERNANDEZ (DEF)...

**XREF: CONPS1700387** (Douglas Hernandez)

No notes – Status.  
(nb)

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Page: 1A ADD ON  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS0800010

CASE NAME: MARY MARGARET ROWE

HEARING:

Petition for CONFIRMATION OF SALE OF PARTNERSHIP INTEREST

COUNSEL:

ETHANAC ROADINVESTORS, A LIMIT	(TP )...DENNIS K HASTY
JOHN M BYLSMA	(PET)...ALLARD, SHELTON & O'CONNOR
JOHN M BYLSMA	(PET)...KEITH S WALKER
MARY MARGARET ROWE	(DEC)...

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

Currently under review by Legal Research.  
(LR)

Future hearing  
01/14/19 Accounting review

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

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DATE: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS0900502

CASE NAME: BRIAN HOLM

**VACATED**

HEARING:

HEARING RE: ORDER FOR WITHDRAWAL

COUNSEL:

AMBRIA HOLM

(MIN)...ROBERTA L TAYLOR

AMY K HOLM

(TP )...ZUMBRUNN LAW CORPORATION

ANNEMARIE HOLM

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

BRENDON HOLM

(MIN)...ROBERTA L TAYLOR

BRIAN HOLM

(DEC)...

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1300023

CASE NAME: DOLORES BUJANDA

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ALBERT BUJANDA	(PET)...KARIN E HORSPOL
DOLORES BUJANDA	(DEC)...
PETRA MCCONNELL	(PET)...KARIN E HORSPOL

GENERAL INFORMATION:

Continued from **02/20/18** to file accounting by 03/17/18.

**Continued from 04/17/18 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. Letters of Special Administration issued 01/28/13, no bond. Letters Testamentary issued 02/26/13 to Albert Bujanda and Petra McConnell, full authority, no bond.
2. Status Report Order entered 12/13/16; account now due.
3. No accounting or updated status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1601283

CASE NAME: CAROL JEANNE HARRISON

HEARING:

Waiver of First and Final Account and Report of ADAM TAGLE, JEFF NORMAN and Petition for allowance of fees filed.

COUNSEL:

ADAM TAGLE	(PET)...WILSON & WILSON
CAROL JEANNE HARRISON	(DEC)...
JEFF NORMAN	(PET)...WILSON & WILSON
STATE OF CALIFORNIA FRANCHISE (TP)...	PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Co-Administrators, Adam Tagle and Jeff Norman ["Petitioners"].

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

1. Petition alleges all heirs waive accounting. **Need** same.
2. Inventory and Appraisal Partial No. #1 filed on 09/29/17 indicates Attachment 2 contains "all" of the estate. Does Court wish to deem Partial No. 1 as the final Inventory and Appraisal? **JTD.**
3. Assets on Hand \$118,183.23 consisting of cash held in a blocked account.
4. Petitioners waive statutory compensation.
5. Attorney requests statutory fees of \$9,840.00. Calculated.
6. Petitioners request extraordinary fees of \$4,800.00 for services rendered in connection with the pending foreclosure and ultimate sale of real property. Billed at \$400/hour for 12 hours' time. **Need** itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
7. Attorney requests extraordinary fees of \$5,600.00 for services rendered in connection with the sale of real property. Billed at \$400/hour for 12 hours' attorney time. **Need** itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.
8. Attorney requests reimbursement of costs of \$4,655.57. Itemized [LF, p. 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.**

9. **Need** detailed schedule of gains per CRC Rule 7.550 via verified supplement.
10. **Need** verified supplement indicating if cash has been invested and maintained in an interest bearing account per Pr.C. §1064(a) (5).
11. Petitioner requests authority to withhold \$10,000 as a reserve for closing costs. **JTD.**
12. Petitioners request that payment be made from the blocked account to the FTB in the sum of \$475.96.
13. Petitioners request that funds in blocked account XXX8438 at Bank of America at Downey in LA County Reina branch to be released.
14. No proposed order. Submit Order after Hearing.

#### RECOMMENDATION

Need to clear notes 1, 6-7 & 9-10 then Court's discretion re: inventory and fees. If approved, set next hearing for receipts and final discharge for **10/29/19**.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1700333

CASE NAME: COLLEEN SUE HART

HEARING:

Accounting Review by \*\*\*

COUNSEL:

CHRISTINE BROWN                      (PET)...CRAIG M PARKER

COLLEEN SUE HART                      (DEC)...

**VACATE** – Status report filed and set for 11/27/18.

(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: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1701021

CASE NAME: MTR OF ANGELA MARIA SALTOS

HEARING:

First and final report of Adm on waiver Account and Report of  
MARIA B DE SALTOS and Petition for allowance of fees filed.

COUNSEL:

ANGELA MARIA SALTOS      (DEC)...

MARIA B DE SALTOS      (PET)...GEORGINA LEPE

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of  
Account and for Fees by Administrator Maria B. De Saltos ["Petitioner" - mother].

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

1. Accounting period 07/31/17 to 07/31/18.
2. Assets on Hand \$421,500.00 consisting of real and personal property.
3. Maria B. De Saltos waives statutory compensation.
4. Attorney Lepe requests statutory fees of \$11,430.00. Calculated.
5. Maria B. De Saltos requests reimbursement of costs of \$1,000. Itemized [LF, p. 5].
6. Attorney Lepe requests reimbursement of costs of \$21.00. Itemized [LF, p. 5].
7. Proposed Order 08/07/18 does not include findings re: creditors or taxes.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**10/29/19.**

(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800422

CASE NAME: MTR OF MARIA G CARRASCO

**SEE ALSO 8, 9, 10**

HEARING:

Hearing Re: OSC RE: SANCTIONS OF \$500.00 (CNSL FTC)

COUNSEL:

BERTHA SOTELO	(PET)...PRO/PER
DOMINGO V NAVARRETE	(PET)...ALAN DAVID IRWIN
MARIA G CARRASCO	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON OSC re Sanctions of \$500.00 on Counsel

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

1. Matter set at OSC hearing held on 08/28/18, wherein the Court informed counsel he could not appear on behalf of petitioner, Domingo Navarrete without a Substitution of Attorney on record; Counsel is not the attorney of record.
2. Matter placed on second call to allow counsel to file a Substitution of Attorney with the Clerks' Office.
3. Counsel informs the court he has prepared a document for limited scope representation. The Court denies counsel's limited scope of representation and orders matter set for OSC for Sanctions in the amount of \$500.00 on counsel for failing to address the court and simply leaving the courtroom.
4. Counsel is ordered to submit a declaration addressing the fact that he left the courtroom without an explanation.
5. Substitution of Attorney filed on 08/28/18.
6. Declaration of Alan D. Irwin filed 09/27/18.

RECOMMENDATION:

Court's discretion.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800422

CASE NAME: MTR OF MARIA G CARRASCO  
**SEE ALSO 7, 9, 10**

HEARING:

Hearing Re: OSC RE: DISMISSAL PETITION OF D.NAVARRETE (FTA)

COUNSEL:

BERTHA SOTELO	(PET)...PRO/PER
DOMINGO V NAVARRETE	(PET)...ALAN DAVID IRWIN
MARIA G CARRASCO	(DEC)...

GENERAL INFORMATION:

Matter set at **08/13/18** hearing due to non-appearance. Court notes petitioner Domingo V Navarrete has failed to appear at today's hearing and did not contact the court as to nonappearance. There being no appearance by Domingo V Navarrete, matter is specially set for order to show cause why the petition of Domingo V Navarrete should not be dismissed for failure to appear. Notice by Judicial Assistant.

**Continued from 08/28/18.**

THIS CASE SET FOR HEARING ON **OSC re Dismissal** on Petition for Probate of will for Letters of Administration W/WA and Limited Authority under IAEA by Domingo Navarrete, significant other.

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

1. All beneficiaries are adults and waive bond. The estate consists of \$200,000.00 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(c).
2. **Need** a copy of the original will filed as one is not attached to the petition.
3. **Need** receipt for "lodging" of original will.
4. Bertha Sotelo has priority to act under Pr.C. § 8461 as no executor is listed in the purported will. **Need** declination by Bertha.
5. Duties and liabilities is missing telephone number of petitioner. **Need** same.
6. **Need** Notice to Petition to Administer Estate and proof of service.
7. **Need** proof of publication

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.

8. ~Proposed Form Order: 05/02/18

RECOMMENDATION:  
Court's discretion  
(nb)

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

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: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800422

CASE NAME: MTR OF MARIA G CARRASCO

**SEE ALSO 7, 8, 10**

HEARING:

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

COUNSEL:

BERTHA SOTELO

(PET)...PRO/PER

DOMINGO V NAVARRETE

(PET)...ALAN DAVID IRWIN

MARIA G CARRASCO

(DEC)...

#### GENERAL INFORMATION

Continued from **06/18/18**. Bertha Sotelo has objections. Court sets deadline for filing of objection. Objections to be filed and served by 4pm on 07/16/18. If objections are not filed by the deadline indicated, they will be deemed waived.

Matter is continued for petitioner to clear notes and objector to file objections. The petitioner is ordered to be personally present at the next hearing.

**Continued from 08/28/18.**

#### THIS CASE SET FOR HEARING ON

Petition 1: Petition for Probate of will for Letters of Administration W/WA and Limited Authority under IAEA by Domingo Navarrete, significant other.

Petition 2: Petition for Probate of will for Letters of Administration and Full Authority under IAEA by Bertha Sotelo, daughter.

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

##### Petition 1:

1. All beneficiaries are adults and waive bond. The estate consists of \$200,000.00 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(c).
2. **Need** a copy of the original will filed as one is not attached to the petition.
3. **Need** receipt for "lodging" of original will.

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

4. Bertha Sotelo has priority to act under Pr.C. § 8461 as no executor is listed in the purported will. **Need** declination by Bertha.
5. Duties and liabilities is missing telephone number of petitioner. **Need** same.
6. **Need** Notice of Petition to Administer Estate and proof of service.
7. **Need** proof of publication
8. ~Proposed Form Order: 05/02/18

Petition 2:

9. Heirs waive bond. Estimated estate valued at \$250,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
10. **Need** proof of publication.

RECOMMENDATION:

Petitioner #2 has priority.

Need to clear notes then Court's discretion re bond. If approved, set Accounting Review for **12/23/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.  
(ww/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800422

CASE NAME: MTR OF MARIA G CARRASCO

**SEE ALSO 7, 8, 9**

HEARING:

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

COUNSEL:

BERTHA SOTELO

(PET)...PRO/PER

DOMINGO V NAVARRETE

(PET)...ALAN DAVID IRWIN

MARIA G CARRASCO

(DEC)...

See prior matter #9.

(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800720

CASE NAME: ALBERT RAZO

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

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

GENERAL INFORMATION:

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

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

1. Decedent is survived by issue who have higher priority. **Need** Declination to Act and nomination of this petitioner by Daniel L. Razo; Diane P. Razo; and Dennis M. Razo.
2. Petitioner requests \$120,000 bond to be fixed. Appears sufficient. **JTD.**
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 09/14/18

RECOMMENDATION:

Need to clear notes 1 & 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800721

CASE NAME: Mtr of Sophie Razo

HEARING:

Petition for PROBATE LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

ALBERT ROZO JR	(PET)...BRIAN C MILES
GILBERT RAZO	(PET)...BRIAN C MILES
SOPHIE RAZO	(DEC)...

GENERAL INFORMATION:

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

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

1. Decedent is survived by issue who have higher priority. **Need** Declination to Act and nomination of this petitioner by Daniel L. Razo; Diane P. Razo; and Dennis M. Razo.
2. Petitioner requests \$120,000 bond to be fixed. Appears sufficient. **JTD.**
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 09/14/18

RECOMMENDATION:

Need to clear notes 1 & 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800830

CASE NAME: GEORGE KENNETH BENSON

HEARING:

Petition to determine succession to Real Property

COUNSEL:

GEORGE KENNETH BENSON (DEC)...  
KENNETH BENSON (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property (Estates \$150,000 or less) by George K. Benson and Nancy McDade ["Petitioner"- issues].

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

1. George K. Benson and Nancy McDade request a determination that decedent's real property, located in San Bernardino County, pass to petitioners without administration. Petitioners are decedent's children and equal beneficiaries in decedent's will. Petitioners attach a copy of decedent's will [LF, p. 4] showing that petitioners are beneficiaries who succeed to the property under decedent's will.
2. ~Proposed Form Order 08/28/18.

RECOMMENDATION:

Court's discretion.

(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: 10/16/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800882

CASE NAME: MTR OF KATHRYN LYNNE BRADFORD

HEARING:

Petition for Probate of Will with Full IAEA

COUNSEL:

KATHRYN LYNNE BRADFORD (DEC)...

STEVEN L BRADFORD (PET)...DENHERDER GRIER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA by step-son, Steven L. Bradford ["Petitioner"].

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

1. Steven L. Bradford is one of three named co-executors. However, petition indicates that other named executors, Wayne Wallace Wilks and John Massey, will not act because of on-going disputes regarding administration of the underlying trust estate.
2. Sections 5a (7) or (8) to petition re: predeceased issue; and sections 6 & 7 are incomplete. **Need** verified supplement.
3. Will waives bond. Estimated estate valued at \$475,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
4. **Need** proof of publication.
5. The will conditionally incorporates decedent's Trust. **Need** a certification of trust that meets the requirements in Pr.C. §18100.5 and additionally includes a list of Trust beneficiaries for notice purposes. Does Court also wish to require a copy of decedent's Trust? **JTD**
6. ~Proposed Form Order/Letters 09/10/18.

RECOMMENDATION:

Need to clear notes 2, 4-5 then Court's discretion re: bond. If approved, set next hearing for receipts and final discharge for **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18      TIME: 8:30      DEPT: S35P  
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CASE#: SPR SS06671

CASE NAME: EST OF BENETTA B REEVES CRAWFORD

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BENETTA CRAWFORD	(DEC)...
BENJAMIN REEVES	(PET)...JACK B OSBORN
RILEY CRAWFORD	(PET)...JUDITH L HUBERT

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Successor Administrator, Benjamin Reeves, son.

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

1. Letters of Successor Administration issued to son, Benjamin Reeves on 12/31/08, limited authority, no bond.
2. Amended Letters of Administration issued on 07/18/17, full authority, no bond.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

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DATE: 10/16/18 TIME: 8:35 DEPT: S35P  
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CASE#: PRO PS1600913

CASE NAME: BEN C LUNA REVOCABLE TRUST

HEARING:

Motion Re: motion for order compelling further response to form  
Interrogatories Filed by Petitioner THERESA BELTRAN, CAROLINE  
LUNA KRIEGER

COUNSEL:

BEN C LUNA REVOCABLE TRUST	(TRU)...
CAROLINE LUNA KRIEGER	(PET)...AARON F GARCIA
CAROLINE LUNA KRIEGER	(PET)...PRO/PER
REGINA MARIE LUNA	(ROSA MARQUEZ
ROBERT LUNA	(PET)...ROSA MARQUEZ
STELLA JAURIGUE	(OBJ)...ROSA MARQUEZ
STELLA JAURIGUE	(PET)...ROSA MARQUEZ
THERESA BELTRAN	(PET)...AARON F GARCIA
THERESA BELTRAN	(PET)...PRO/PER

Currently under review by Legal Research.  
(LR)

Hearing:

11/28/18 Readiness calendar

11/28/18 Petition for value and use of real property etc.

11/28/18 Petition for beneficiaries 1/ to remove etc.

12/19/18 Court Trial

12/20/18 Court Trial

12/21/18 Court Trial

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

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 10/16/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1100132

CASE NAME: JOSE VICENTE GOVEA

HEARING:

SIXTH Account and Report of ANTONIO GOVEA and Petition for allowance of fees filed.

COUNSEL:

ANTONIO GOVEA (CPE)...ANTONIO GOVEA.  
ANTONIO GOVEA (PET)...PRO/PER  
JOSE VICENTE GOVEA (CEP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Sixth Account Current and Petition for Fees by Conservator of the Person and Estate, by son, Antonio Govea ["Petitioner"].

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

1. Accounting period 07/01/16 to 06/29/18 (2 years).
2. Assets on hand \$567,835.39 consisting of \$167,835.39 in cash and the balance in real property.
3. Current bond of \$189,200. Antonio Govea requests bond be increased by \$48,600 for a total bond of \$237,800. However, Conservatee does not live in his residence. Suggest bond increase by \$488,800 for a total bond of \$678,000. **JTD.**
  - a. **Supp. (10/04/18)** Antonio Govea requests that the real property not be included in the bond as the real property cannot be sold without court confirmation of the sale as he was not granted any independent powers to sell the property and has no plans to sell the property because it produces a nice income for the conservatee. **JTD.**
4. Antonio Govea requests fees of \$2,400.00. Billed at \$50/hour for 2 hours per month for a total of 24 months. Generally described [LF, p. 5]. **JTD.**
5. Antonio Govea does not request compensation as attorney in this matter except for attendance at the 09/24/18 hearing including travel time. He will spend 3 hours at \$100/hour for a total of \$300.00. **JTD.**

6. Antonio Govea's attorney requests reimbursement for paralegal compensation of \$2,047.50. Billed at a \$105/hour for a total of 19.5 hours. Itemized [LF pgs. 30-31]. **JTD.**
7. Conservatee resides with his son, Juan Govea, who provides care, plus room & board and is paid \$1,500 per month, while conservatee's real property is currently receiving rental income. Petitioner requests Court to ratify monthly payments of \$1,500/month to Juan Govea. **JTD.**
8. Last CI report 08/27/18.
9. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion re: fees and bond. If approved, set hearing on the next Accounting Review for **09/03/19** (if one year) or **09/01/20** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino  
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CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18 TIME: 10:00 DEPT: S35P  
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CASE#: CON PS1300265

CASE NAME: MTR OF LUCINDA NOLEN

HEARING:

Twentieth Acct Account and Report of KERN COUNTY PUBLIC GUARDIAN  
and Petition for allowance of fees filed.

COUNSEL:

KERN COUNTY PUBLIC GUARDIAN	(CE )...KERN COUNTY COUNTY
KERN COUNTY PUBLIC GUARDIAN	(CPE)...KERN COUNTY COUNTY
LUCINDA NOLEN	(CEP)...
PUBLIC GUARDIAN	(CE )...COUNTY COUNSEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Twentieth Account Current and Petition for Fees by Conservator of the Estate, Kern County Public Guardian ["Petitioner"].

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

1. Accounting period 05/01/17 to 08/16/18.
2. Assets on Hand \$155,339.94 of which \$152,447.75 is cash and the remainder in a burial policy and personal property.
3. No current bond. Suggest bond of \$238,000 (includes recovery). **JTD.**
4. Kern County Public Guardian requests ratification for fees totaling \$4,875.00 that have been taken in monthly payments during the accounting period per their fee schedule. **JTD**
5. Kern County Public Guardian requests the Court authorize Kern County Public Guardian to continue the monthly payments based on the Kern County's current PG fee schedule. **JTD**
6. Kern County Counsel requests fees of \$1,978.40 billed for attorney time at \$171-187.00/hour for 6.2 hours and paralegal time at \$94-\$108.00/hour for 8 hours. Itemization filed separately in declaration filed 08/29/18. **JTD**
7. CI report filed 09/27/18.
8. Proposed Order 09/17/18 reflects information for the 19<sup>th</sup> account.



**RECOMMENDATION:**

Court's discretion. If approved, set for next Accounting Review on **10/21/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PA**

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DATE: 10/16/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1100292

CASE NAME: FAITH E BATER

HEARING:

First and Final Account and Report of SAN BERNARDINO COUNTY  
PUBLIC ADMINISTRATOR and Petition for allowance of fees filed.

COUNSEL:

FAITH E BATER

(DEC)...

SAN BERNARDINO COUNTY PUBLIC A

(PET)...CRAIG M PARKER

TIFFANY L COONEY

(PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Accounting period 02/20/11 to 05/31/18.
2. Assets on Hand -179.00. Estate is insolvent.
3. No fees or reimbursement is requested.
4. Personal property was donated during this administration. Does Court wish to  
require receipt? **JTD.**
5. The Estate is insolvent and there are no funds with which to pay any
6. Administrator Commissions or Attorney Fees or any of the Creditor's Claims  
filed.
7. Petitioner requests [in proposed order] that any other property of the estate not  
now known or hereafter discovered that may belong to the estate or in which the  
estate  
of the decedent may have any interest., shall be distributed as follows:
  - a. First, the sum of \$179.00 to the San Bernardino County Public Administrator  
to reimburse him for the Probate Referee's Fee to Patrick Wright as payment  
for his services in appraising the assets of this estate advanced from the  
funds of the San Bernardino County Public Administrator;
  - b. Second, any remaining funds alter the above payment shall be prorated  
between the two Creditors' who filed claims in this Estate, American

**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.**

Infosource, as agent for Bank of America in the amount of \$4,506.00 and TERRY DINGESS, in the amount of \$1,607.14.

- c. Third, any remaining funds after the amounts to the San Bernardino County Public Administrator, American Infosource, as agent for Bank of America, and Terry Dingess have been paid in full, shall be distributed as follows:
  - d. 50% to decedent's spouse, BRANT BATER, and deposited with the San Bernardino County Treasurer, in his name; and
  - e. 50% to decedent's daughter, TIFFANY L. COONEY, 1406 Jinette, San Clemente, CA 92673.
8. ~Proposed Order 08/07/18 includes relief not prayed for in the petition (see notes 7a-d).

**RECOMMENDATION:**

Court's discretion. If approved, set next hearing for final discharge for **10/29/19**.

(nb)

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

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DATE: 10/16/18 TIME: 10:00 DEPT: S35P  
-----

CASE#: PRO PS1100635

CASE NAME: ROLAND W HALL, SR

HEARING:

Second and final Account and Report of LARRY D LEWELLYN and  
Petition for allowance of fees filed.

COUNSEL:

BANK OF AMERICA-CA9-702-03-93 (TP )...PRO/PER  
LARRY D LEWELLYN (PET)...LARRY D LEWELLYN, ESQ  
MILDRED I HALL (PET)...GEORGE HOLLOWAY  
ROLAND W HALL SR (DEC)...  
SAN BERNARDINO COUNTY PUBLIC A (SA )...CRAIG M PARKER

GENERAL INFORMATION:

**Continued from 07/17/18 at request of Larry D. Lewellyn to clear notes.**

THIS CASE IS SET FOR HEARING ON **s/b** First and Final Account and Petition for Fees by Practice Administrator, Larry D. Lewellyn ["Petitioner"].

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

1. **Need** final inventory and appraisal with supporting bank/financial statements to support date of death and closing balances per Local Rule 20-908.
2. Petition is not verified. **Need** same.
3. Petitioner indicates at no time did Petitioner marshal any assets as said assets were under the exclusive control of the decedent's surviving spouse, Mildred Hall. Petition alleges he only took over the handling of several probate cases that were pending at the time of decedent's death and not otherwise taken by other attorneys. However, review of purported accounting reflects the marshalling of assets.
4. Accounting period 07/27/11 to 03/13/18. **Incorrect.** Public Administrator was appointed Successor Administrator on 11/22/16. Letters issued on 12/08/16.
5. Assets on Hand \$10,160.61 consisting of cash.
6. Statutory fees deferred.
7. Extraordinary fees deferred.
8. Reimbursement of costs deferred.
9. Schedule C – Disbursements are not itemized. **Need** same.

**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. Petition indicates there are not creditors of the estate. However, creditors' claims by Bank of America on 09/19/11; Citibank on 10/06/11; GE Money Bank on 10/11/11; Citibank N.A. on 01/26/12; and Bank of America on 03/27/12. However, there are no allowances or rejection notices in the file regarding these claims. **Need** verified supplement confirming status of these claims.
11. Distribution purports to be made to the Administrator of Mildred Hall or via Pr. C. §13100. However, the Public Administrator has been appointed Successor Administrator.
12. **Need** Notice of Related Case as to deceased spouse, Mildred Hall.
13. Notice does not include Bank of America who requested special notice on 03/27/12. **Need** proper service.
14. Petitioner acknowledges this report will have to be supplemented.
15. 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. **JTD**
16. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need proper, complete accounting that complies with Pr. C. §1060 et seq. to be placed on a first check calendar no sooner than **12/04/18**.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

**SEE ALSO 19, 20**

HEARING:

Hearing Re: OSC RE SURCHARGE OF \$5,000.00 ON CARLA JACKSON

COUNSEL:

BILLY DON JACKSON	(PET)...PRO/PER
CARLA JACKSON	(OBJ)...PRO/PER
CARLA L JACKSON	(PET)...PRO/PER
DELLA MARIE LEWIS	(DEC)...
LARRY WAYNE JACKSON	(PRO/PER

#### GENERAL INFORMATION

Continued from **07/23/15**. Carla Jackson ordered to appear..

Continued from **09/03/15** and **12/3/15** for amended final I&A to be filed by 1/29/16.

On **3/2/16** Court set OSC for no appearance/filing. Attorney Inez Tinoco-Vaca checked in but was not present. Citation issued for Carla Jackson.

Continued from **5/4/16** Billy Jackson present. Carla Jackson was not served with citation and has not filed an accounting. Atty Inez Tinoco-Vaca is not present as ordered. Billy Jackson states that he has not heard from his attorney. Court orders Attorney Inez Tinoco-Vaca to be present. If non-appearance by counsel, court will report to the California State Bar.

Continued from **6/22/16** Ms. Tinoco-Vaca informs the court that her client is planning on filing a petition to become successor administrator and is going to be filing a substitution of attorney to represent himself for further matters.

Continued from **11/16/16**. Billy Jackson, son/special co-administrator, to file account. If Billy Jackson intends to file a petition to Remove Carla Jackson as administrator is to file petition prior to next hearing; 03/08/17. Citation issue to Carla Jackson.

Continued from **03/08/17**. Billy Jackson informed the court that half-sister of Carla Jackson, Carmita Robinson, is deceased. Carla's supervisor at Fontana Kaiser is Ella Mae Harris. Citation issued to Carla Jackson. Carla reportedly is a home care nurse.

**Continued from 05/24/17** Citation issued to Carla Jackson.

**Continued from 09/27/17**. No appearance. On Supplemental Petition for Probate for Billy Don Jackson Order to Show Cause hearing held. Court continues matter and re-issues Citation for Carla Jackson to personally appear at the next hearing. Citation

**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.**

issued to Carla Jackson who is cited and required to appear on 11/15/17 and show cause why sanctions shouldn't be imposed for FTA. Notice given by Judicial Assistant. **Continued from 11/15/17.** No appearance. Matter continued to 01/31/18. OSC Continued from 01/31/18 and imposed sanctions of \$500. Additional OSC re Sanctions now of \$1,500 as to Carla. Citation issued to Carla Jackson. **Continued from 04/05/18** and OSC set for \$5,000 sanctions and \$5,000 surcharge. Amounts will be imposed if Carla fails to appear on **9/06/18.**  
**Continued from 09/06/18.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions/Surcharge \$5,000** for FTA/FTF an accounting re Carla Jackson, granddaughter.

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

1. Letters of special administration issued to granddaughter **Carla Jackson** on 01/17/14, letters of special administration issued to Billy Jackson on 07/18/17, letters of general administration to **Carla Jackson** on 07/21/14 and letters of successor administration to **Billy Jackson** on 08/16/17.
2. Final Inventory and Appraisal filed. However, section 5 re property tax certificate is not complete. **Need** property tax certification.
3. **Need** accounting or status report.
4. Miscellaneous documents filed 3/29/16 by Billy Jackson special co-administrator.
5. Citation returned **unserved** for Carla Jackson on 12/28/16, 09/26/17 and 06/22/18. Citation reissued. Proof of service of citation indicates unserved. Kaiser allegedly does not have a *personal service option*.
6. Declaration by Billy D. Jackson, Sr. filed 09/20/18.

#### RECOMMENDATION

Court's discretion re OSC. Inquire status re accounting by Carla Jackson and additional citation.

(lc/sa/lc/ww/lh/lc/nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/16/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

**SEE ALSO 18, 20**

HEARING:

Hearing Re: OSC RE SANCTIONS OF \$5,000.00 ON CARLA JACKSON

COUNSEL:

BILLY DON JACKSON	(PET)...PRO/PER
CARLA JACKSON	(OBJ)...PRO/PER
CARLA L JACKSON	(PET)...PRO/PER
DELLA MARIE LEWIS	(DEC)...
LARRY WAYNE JACKSON	(PRO/PER

Request for Waiver of Court Fees and Costs filed by BILLY DON JACKSON is GRANTED

See notes on matter 18.

(lc/nb)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/16/18      TIME: 10:00      DEPT: S35P  
-----

CASE#: PRO PS1200861

CASE NAME: DELLA MARIE LEWIS

**SEE ALSO 18, 19**

HEARING:

Amended First Account and Report of BILLY DON JACKSON and  
Petition for allowance of fees filed.

COUNSEL:

BILLY DON JACKSON	(PET)...PRO/PER
CARLA JACKSON	(OBJ)...PRO/PER
CARLA L JACKSON	(PET)...PRO/PER
DELLA MARIE LEWIS	(DEC)...
LARRY WAYNE JACKSON	(PRO/PER

Request for Waiver of Court Fees and Costs filed by BILLY DON JACKSON is GRANTED

#### GENERAL INFORMATION

Continued from **04/05/18** for Billy Don Jackson to file supplement by 08/06/18.

**Continued from 09/06/18. The Court notes a supplemental to the 1st account was recently filed and further notes case # CIVDS 1811663 was dismissed. The Court refers this matter to the public administrator.**

THIS CASE SET FOR HEARING ON **Amended** [01/26/18]1<sup>st</sup> Account and Report by Billy Jackson, son.

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

1. **Supplement filed 08/06/18**; however, appears to address a lawsuit under CIVDS1811663 re Carla Jackson re wrongful death of decedent; which was heard in S31 for dismissal on 07/30/18. As Billy Don Jackson did not appear twice, matter was dismissed. Therefore, the supplement does not clear the accounting notes below.
2. Letters of successor administration to **Billy Jackson** on 08/16/17.
3. Real property appears to have been sold during the time prior administrator served.
4. Accounting period 08/16/17 – current.

**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.**

- a. **Need** accounting by prior administrator from date of death 03/26/12 and/or amend accounting to **begin at date of death**.
  - b. **Need** actual ending date of accounting.
5. Final Inventory and Appraisal [10/15/14] incomplete as to tax certificate.
  - a. **Need** corrected Inventory and Appraisal or tax certificate information re real property.
6. Final Inventory and Appraisal filed 05/23/17 does not include balances for bank account and life insurance.
  - a. **Need** corrected Inventory and Appraisal with supporting bank statements and caption to include date of death.
  - b. Final Inventory and Appraisal attached to accounting; however, is not filed separately and statements do not cover date of death [03/26/12].
7. Report is not verified per Pr.C. § 1021. **Need** verification.
8. There is merely a short report **without a summary of account or schedules**. petitioner must file a final report of administration per Cal Rules of Ct §7.550 Pr. C. § 1064 and Pr. C. §10954(c)(1)
9. **Need** notice of hearing and proof of service.
10. **Supplement filed 09/05/18 does not clear notes** but requests restitution from Larry Wayne Jackson to return \$14,065.00 as decedent's funeral expenses were \$11,935.00 not \$26,000 as misrepresented; return of \$15,430.63 from Carla L. Jackson paid to her from the sale proceeds of the home; claims the location of \$8,495.34 is unknown but more than likely was spent by Carla L. Jackson; and requests 2 judgments, one against Carla for \$23,925.97 and against Larry for \$14,065.00.
11. No proposed order. Submit after hearing.

RECOMMENDATION: Suggest petitioner seek legal advice.

Need to clear notes 4-9. If approved, set Accounting/Status Review for **12/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/nb)

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

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DATE: 10/16/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1300856

CASE NAME: Ralph L Church

HEARING:

Accounting Review by \*\*\*

COUNSEL:

HAROLD ULRICH	(PET)...FUERZA LEGAL
HAROLD ULRICH	(PET)...PRO/PER
PAMELA HARRIS	(PET)...ROBERT J SPITZ
RALPH L CHURCH	(DEC)...
SAN BERNARDINO COUNTY PUBLIC A	(PET)...CRAIG M PARKER

**CCP170.6 filed as to Judge CYNTHIA LUDVIGSEN, case reassigned to Judge TARA REILLY for all purposes.**

GENERAL INFORMATION

Continued from **03/06/18**. Court orders Public Administrator to turn over documents to Mr. Spitz by 4pm April 3, 2018.

**Continued from 05/08/18 and 07/17/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Accounting Review by Successor Administrator, Public Administrator.

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

1. Order on Report of Status of Administration entered 02/28/17; accounting now due.
2. No accounting or updated status report.
3. Declaration by Craig M. Parker re: Pamela Harris' Agreement as to Assets Belonging to Estate filed 04/03/18 indicates Pamela Harris should turn over the guitars as she agreed; to be sold to pay costs of administration; and the balance turned over to the intestate heir of the decedent, Richard Church, the brother of the decedent, or his assigns.

RECOMMENDATION:

Inquire status.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 10:00 DEPT: S35P  
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CASE#: PRO PS1800843

CASE NAME: Donna A Dommie

**SEE ALSO 23**

HEARING:

Petition for Temporary Restraining order to Prevent Foreclosure

COUNSEL:

DONNA A DOMMIE (DEC)...  
SB COUNTY PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

GENERAL INFORMATION:

Public Administrator appointed Special Administrator on 09/11/18 with full authority, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Temporary Restraining Order to Prevent Foreclosure by Craig Parker, Attorney for San Bernardino County Public Administrator (Pr. C. §850; CCP § 527).

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

1. The principle asset of the estate is improved real property located at 169 E. 10<sup>th</sup> Street, San Bernardino, California (hereinafter the "Decedent's House").
2. The Reverse Mortgage Holder is owed approximately \$91,097.23 as of June 28, 2018, and the Quality Loan Service Corporation has recorded the Notice of Default and Election to Sell Under Deed of Trust [LF, pgs. 8-11]
3. Petition indicates that in order to allow Petitioner sufficient time to sell the real property and to close escrow, a restraining order preventing any foreclosure on the real property is necessary.
4. Petitioner prays for an order that Quality Loan Service Corporation, or its employees or assignees, are hereby temporarily restrained from completing a Trustee Sale until after January 1, 2019, so that the Public Administrator can sell the decedent's real property at private sale regarding the following improved real property, located at 169 E. 10th Street, San Bernardino, California 92410.
5. Proposed Order 08/30/18. Notice is not proper.  
Probate Code section 851 was amended [eff. Jan. 1, 2018] and contains a new subdivision (c) which requires the Notice of Hearing to include:

**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.**

- (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.

The Notice of Hearing filed does not comply with one of more of these mandatory requirements.

**RECOMMENDATION:**

Need proper notice then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/16/18      TIME: 10:00      DEPT: S35P  
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CASE#: PRO PS1800843

CASE NAME: Donna A Dommie

**SEE ALSO 22**

HEARING:

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

COUNSEL:

DONNA A DOMMIE

(DEC)...

SB COUNTY PUBLIC ADMINISTRAOR

(PET)...CRAIG M PARKER

GENERAL INFORMATION:

Public Administrator appointed Special Administrator on 09/11/18 with full authority, no bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Public Administrator ["Petitioner"].

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

1. No bond – exempt government agency.
2. Petitioner requests that, in accordance with Probate Code §1212 and Code of Civil Procedures §415.50, the Publication of the Notice of Petition to Administer Estate be deemed sufficient notice to any possible heirs of the decedent in order to proceed with the administration of this estate and that no further personal notice need be given.
3. ~Proposed Form Order/Letters 08/30/18.

RECOMMENDATION:

RFA, no bond. If approved, set future hearing for Accounting Review on **12/24/19**.

Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

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DATE: 10/16/18      TIME: 8:30      DEPT: S36P  
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CASE#: PRO PS1700544

CASE NAME: PEARL ELAINE ROGERS

HEARING:

Petition for Final Account and Report of MICHAEL ROGERS and  
Petition for allowance of fees filed.

COUNSEL:

MICHAEL ROGERS                      (PET)...PRO/PER

PEARL ELAINE ROGERS              (DEC)...

Request for Waiver of Court Fees and Costs filed by MICHAEL ROGERS is GRANTED

GENERAL INFORMATION:

**Continued from 09/11/18 to clear notes.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of  
Administration by son, Michael Rogers ["Petitioner"].

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

1. Sole heir, son, Michael Rogers, waives accounting
2. Accounting period 10/29/16 to 07/18/18.
3. Assets on Hand \$365,723.00 consisting of \$1,594.53 in cash and remaining in real and personal property.
4. Son, Michael Rogers, waives statutory compensation.
5. ~Proposed Form Order 09/28/18.

RECOMMENDATION

Court's discretion. If approved, set next hearing for receipts and final discharge for  
**09/24/19.**

(nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800156

CASE NAME: MTR OF JAMES JAY SCHAUER

HEARING:

FIRST AND FINAL Account and Report of STEVEN COPELAN and  
Petition for allowance of fees filed.

COUNSEL:

JAMES JAY SCHAUER (DEC)...  
STEVEN COPELAN (PET)...CRAIG M PARKER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees  
by Administrator w/WA, Steven Copelan ["Petitioner"].

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

1. Accounting period 01/02/18 to 08/14/18.
2. Assets on Hand \$242,446.27 consisting of \$227,946.27 in cash and remaining in personal property..
3. Petitioner requests statutory compensation in the lessor sum of \$2,000 and waives all commissions in excess of \$2,000. **JTD.**
4. Attorney requests statutory fee in the sum of \$8,254.55. Calculated.
5. Petitioner requests authorization to withhold the sum of \$1,450.00 as a reserve. **JTD.**
6. ~Proposed Order 08/28/18.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/29/19.**

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800315

CASE NAME: EULALIA F HERNANDEZ

HEARING:

Petition for Probate Letters of Administration W/No IAEA

COUNSEL:

EULALIA F HERNANDEZ	(DEC)...
GREGORIO HERNANDEZ	(PET)...RANDAL P HANNAH
JOSE HERNANDEZ	(OBJ)...TREVOR

#### GENERAL INFORMATION

Continued from **05/07/18** and **06/26/18**. Written objections to be filed by Attorney Trevor Martin on behalf of Jose Hernandez by August 1, 2018.

**Continued from 09/11/18 at request of counsel.**

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with **limited** authority under IAEA by Gregorio Hernandez, son [Petitioner].

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

1. Estate's value consists of \$350,000 in real property. Petitioner requests bond of \$5,000 which is less than the maximum required as petitioner is requesting limited authority. The court may for good cause require that a bond be given, either before or after issuance of letters. Prob. Code §8481(b). **JTD**
2. Proof of publication is filed, however, publication does not comply with Pr.C. §§ 8100, 8120. The publication shall contain specific statutory wording re: IAEA. Court could require amended publication, or alternatively, grant petition with no IAEA powers. **JTD**.
3. **Objections** filed by son, Jose Hernandez, on 07/26/18.
4. ~Proposed Form Order:

#### RECOMMENDATION

Court's discretion re bond and publication. If approved, set Accounting Review for **11/18/19**. Any account to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800724

CASE NAME: CATHERINE RAMIREZ

HEARING:

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

COUNSEL:

CATHERINE RAMIREZ

(DEC)...

OLIVIA PADILLA

(PET)...MATTHEW E SHEASBY

GENERAL INFORMATION:

**Continued from 09/04/18. Supplement needs to be reviewed.**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by grand-niece, Olivia Padilla ["Petitioner"].

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

1. Grand-niece, Olivia Padilla, requests bond be fixed at \$10,000. Estimated estate valued at \$0.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).

RECOMMENDATION:

Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800764

CASE NAME: MTR OF DEIN WANG

HEARING:

Hearing Re: Amended petition for probate of will

COUNSEL:

DEIN WANG (DEC)...  
SHUYUAN Z WANG (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Amended [08/30/18] Petition for Letters Testamentary with full authority under IAEA by named executrix, Shuyuan Z. Wang ["Petitioner" - spouse].

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

1. Will waives bond. Estimated estate valued at \$1,000,000.00. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. Notice filed on 10/03/18 is the wrong type of notice, **Need** Notice of Petition to Administer Estate with proof of service that reflects correct hearing date and includes the Consular Office of China per Pr. C. §8113. **Need** proper notice.
3. ~Proposed Form Order/Letters 08/30/18.

RECOMMENDATION:

Need to clear note 2 then Court's discretion re bond. If approved, set future hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

Clerk to correct spelling of first name to "Deing."

(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800855

CASE NAME: MTR OF JAMES WILEY

HEARING:

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

COUNSEL:  
JAMES WILEY (DEC)...  
SIMONE WILEY (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Daughter, Simone Wiley, requests no bond be fixed as she is the decedent's daughter; lived with him; and took care of decedent and his finances before he died. Estimated estate valued at \$160,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD**.
2. Section 8 to petition does not include issue, Vincent James or ages of those listed. **Need** verified supplement.
3. **Need** proof of publication.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. **Objections filed by daughter, Edonia C. Wiley. Need proof of service.**
6. ~Proposed Form Order/Letters 09/04/18

RECOMMENDATION: Matter is contested.

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S36P  
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CASE#: PRO PS1800884

CASE NAME: Stainton E Chambers

HEARING:

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

COUNSEL:

EMELINE BARNETT (PET)...THE LAW OFFICE OF RANDAL P HAN  
STANTON E CHAMBERS (DEC)...  
VERONICA BARNETT (PET)...THE LAW OFFICE OF RANDAL P HAN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full  
authority under IAEA by Veronica Barnett and Emeline Barnett-Sister ["Petitioners"].

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

1. Will waives bond. Estimated estate valued at \$141,000. The Court may for  
good cause require that a bond be given, either before or after issuance of  
letters. Pr. C. §8481(b). **JTD**.
2. Section 3g to petition is incomplete. **Need** verified supplement.
3. Section 8 to petition does not include Veronica Barnett. **Need** verified  
supplement.
4. **Need** proof of publication.
5. ~Proposed Form Order/Letters 09/12/18.

RECOMMENDATION:

Need to clear notes 2-4 then Court's discretion re: bond. If approved, set future  
hearing for Accounting Review on **12/24/19**. Any account to be filed 30 days in  
advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

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DATE: 10/16/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1800885

CASE NAME: PETER JOHN COLUNGA

HEARING:

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

COUNSEL:

FREDDIE COLUNGA                      (PET)...GUAY P WILSON

PETER JOHN COLUNGA                (DEC)...

GENERAL INFORMATION:

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

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

1. Heirs waive bond. Estimated estate valued at \$125,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
2. **Need** proof of publication.
3. **Need** Notice of Petition to Administer Estate with proof of service.

RECOMMENDATION:

Need to clear notes 2-3 then Court's discretion re: bond. If approved, set future hearing for Accounting on **12/24/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 10/16/18 TIME: 9:30 DEPT: S36P  
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CASE#: CON PS1700405

CASE NAME: MTR OF JERRY DEAN PATTON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of CHRISTINA D PATTON

COUNSEL:

CHRISTINA D PATTON (CPE)...BROWN WHITE & OSBORNE, LLP  
CRYSTAL D PATTON (CPE)...BROWN WHITE & OSBORNE, LLP  
JERRY DEAN PATTON (CEP)...MARIVEL M ZIALCITA

GENERAL INFORMATION

Daughters, Christina D. Patton and Crystal D. Patton, appointed Conservator of the person on 03/13/18.

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal/Compliance Review

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

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

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800050

CASE NAME: MTR OF FELIZ ARGRIPIA CONTRERAS GOMEZ

HEARING:

Petition for Appointment of Conservator

COUNSEL:

CARLA GUADALUPE GOMEZ (CP)...PRO/PER  
FELIZ ARGRIPIA CONTRERAS GOME (CTP)...MITCHELL I ROTH  
MARY M GOMEZ (CP)...PRO/PER

#### GENERAL INFORMATION

Continued from **04/03/18** for notes to be cleared. Attorney Mitchell I. Roth appointed.

Continued from **05/22/18** for notes to be cleared. Notice given by Attorney Roth.

**Continued from 07/31/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of the person, by mother, Mary M. Gomez and sister, Carla G. Gomez ["Petitioners"].

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

1. No bond – person only.
2. Mother, Mary M. Gomez and sister, Carla G. Gomez seek medical powers. Capacity declaration filed on 07/24/18, Sections 4, 4a & 4b are incomplete. **Need** complete capacity declaration.
3. Proposed Conservatee is developmentally disabled. **Need** report by court-appointed counsel, Mitchell I Roth.
4. Court Investigator's Report filed.
5. Citation returned served.
6. **Need** Proof of Completion re Conservatorship Class by Mary M. Gomez.
7. Mother, Mary M. Gomez and sister, Carla G. Gomez request an Order Dispensing with notice as to father (unnamed); alleges he abandoned proposed conservatee at birth; and has never had any involvement in her life. **JTD.**
8. This petition is for general, and not limited, conservatorship. An IRC report is therefore optional per Pr.C. 1827.5(b). **IRC report filed.**
9. **Response to CI's Recommendation** by Carla G. Baca filed.
10. ~Proposed Form Order/Letters 02/27/18.

**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 to clear notes 2-3 & 6 then Court's discretion. If approved, set hearing for Compliance Review for **12/24/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**MISC**

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DATE: 10/16/18      TIME: 1:30      DEPT: S36P  
-----

CASE#: PRO PS1500025

CASE NAME: YOKE YING TAN

**SEE ALSO 12**

HEARING:

Hearing Re: MANDATORY SETTLEMENT CONFERENCE

COUNSEL:

JASON VIEGAS

(PET)...MITCHELL I ROTH

JONATHAN VIEGAS

(OBJ)...RICHARD W.S. PERSHING

YOKE YING TAN

(DEC)...

No notes – MSC.

(nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 1:30 DEPT: S36P  
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CASE#: PRO PS1500025

CASE NAME: YOKE YING TAN

**SEE ALSO 11**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

JASON VIEGAS	(PET)...MITCHELL I ROTH
JONATHEN VIEGAS	(OBJ)...RICHARD W.S. PERSHING
YOKE YING TAN	(DEC)...

GENERAL INFORMATION

**Continued from 06/20/18 and 09/05/18. Court orders Jason Viegas and Jonathen Viegas to personally be present at hearing.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Jason Viegas,  
Administrator

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

1. Letters of Administration with full authority issued to Jason Viegas (son) on 06/16/16 with \$218,000 bond.
2. Court approved (first) Status Report on 04/19/18.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status. Clerk to notice surety.  
(lh/nb)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: CIP DS1800077

CASE NAME: IN RE: MASON COLE HARGAN

HEARING:

Hearing Re: Pet. for Compromise of Disputed Claim (SB County)

COUNSEL:

MASON COLE HARGAN (MIN)...LAW OFFICES OF JACK H. ANTHONY  
MELVIN L FRIEDLAND (PET)...LAW OFFICES OF JACK H. ANTHONY

Request for Waiver of Court Fees and Costs filed by MELVIN L FRIEDLAND is GRANTED

**XREF: CIVDS1509947** (Mason B-v- County of San Bernardino)

Currently under review by Legal Research.  
(LR)

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO

**SEE ALSO 3, 20 *MOVED TO 9:30 SEE PG 28, 29, 30***

HEARING:

Hearing Re: Review & Approval of Special Needs Trust

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

Currently under review by Legal Research.  
(LR)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO

**SEE ALSO 2, 20 *MOVED TO 9:30 SEE PG 28, 29, 30***

HEARING:

OSC re: Dismissal

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

No notes – Judge to decide.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500909

CASE NAME: MTR OF JAMES CHEATHAM

HEARING:

First and final Account and Report of PUBLIC ADMINISTRATOR and  
Petition for allowance of fees filed.

COUNSEL:

JAMES CHEATHAM

(DEC)...

MICHAEL BRAGG

(PET)...PRO/PER

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by MICHAEL BRAGG is GRANTED

**Fee waiver amount due \$930.00**

**\$465.00 for petition for letters etc. on 01/28/15**

**\$465.00 for first and final on 01/22/18**

**Fee waiver amount due \$555.00 for PA**

**\$90.00 for ex parte petition on 12/20/16**

**\$465.00 for first and final accounting on 08/14/18**

**XREF: GARSS1500408** (Antonio Denai Crump)

GENERAL INFORMATION:

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

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

1. Accounting period 08/25/12 to 05/17/18.
2. Assets on Hand \$103,122.56 consisting of cash.
3. Statutory fees of \$7,640.77 requested. Calculated.
4. Petitioner requests extraordinary fees of \$480 for services rendered in  
connection with the sale of real property. Billed at \$60/hour for a total of 8  
hours' time. Generally described [LF, p. 23].
5. Petitioner requests authority to withhold \$4,000 as a reserve. **JTD.**
6. Fees previously waived. Does Court wish to readdress same? **JTD.**
7. ~Proposed Order 08/14/18.

**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: Trail to 11/27/18.

Court to rule on Michael Bragg's Accounting before addressing this matter.

Court's discretion. If approved, set next hearing for receipts and final discharge for **10/29/19**.

(nb)

Future Hearing:

11/27/18 First and final account (by Michael Bragg)

11/27/18 Hearing re: Accounting Review (Public Administrator) - **VACATE**



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1500939

CASE NAME: KENNETH DANIEL TURNEY

HEARING:

Accounting Review by \*\*\*

COUNSEL:

KENNETH DANIEL TURNEY (DEC)...

KEVIN A TURNEY (PET)...PRO/PER

#### GENERAL INFORMATION

Continued from **04/06/17**. No appearance. Kevin Turney to appear at next hearing if accounting and Inventory and Appraisal not filed.

Continued from **06/15/17**.

OSC set on **09/14/17 and 11/09/17** when there was no appearance. The Court will suspend letters of administration as to Kevin A Turney at next hearing and appoint the Public Administrator if accounting not filed. The Court orders the Public Administrator to appear at the next hearing. The Court cites Kevin A Turney to appear at next hearing. Should he fail to appear, a bench warrant may be issued for his arrest.

Citation issued to: KEVIN A TURNEY who is cited and required to appear on 02/06/18. Notice by Judicial Assistant.

Continued from **02/06/18** on courts motion. Petitioner had a death in the family and was in an accident and was unable to have accounting timely complete. Petitioner is working on it. The Court does not appoint Public Administrator at this time.

**Continued from 07/10/18 at request of court. New probate referee to be assigned in this matter, today.**

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 Kevin Turney, son, on 01/28/16; full authority, no bond.
2. **Need** final Inventory and Appraisal
3. **Need** accounting or status report.
4. Citation returned SERVED.

**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 to clear notes 2-3. 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/cs/lc/nb)

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

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1501187

CASE NAME: MTR OF MARY HELEN RAMIREZ

HEARING:

First and Final Account and Report of ROBERT RICK RAMIREZ and  
Petition for allowance of fees filed.

COUNSEL:

MARY HELEN RAMIREZ (DEC)...  
ROBERT RICK RAMIREZ (PET)...DIANE E ROBBINS  
SANDRA GONZALES (OBJ)...GAUDY LAW, INC

GENERAL INFORMATION:

Continued from **09/19/17** at request of counsel for objection to be filed/meet and confer.

Continued from **11/21/17** for an amended accounting to be filed, including monies that were conceded to state. Notice to be given by Ms. Robbins.

Continued from **04/03/18** at request of counsel. Waiting on funds from escheated estate and to address issues in objection.

**Continued from 07/17/18. The Court approves all requests with the exception of attorney's request for extraordinary fees in the amount of \$3,430. The extraordinary fees in the amount of \$3,430. The Court orders request be itemized. The Court also reserves on the issue of receivables in the amount of \$33,417.37 as objections have been filed on that issue. Notice waived.**

THIS CASE IS SET FOR HEARING ON First and Final Report and Petition for Fees by Administrator, Robert. E. Ramirez ["Petitioner"- son].

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

1. Accounting period 07/12/15 to 06/30/17.
2. Assets on Hand \$701,223.39 consisting of \$667,806.02 cash and remaining in receivables from Sandra Gonzales.
3. Statutory compensation of \$18,115.46 requested. Calculated.
4. Attorney requests extraordinary fees of \$3,430.00 for services rendered in connection with the sale of real property and unlawful detainer proceedings. Billed at \$350/hour for a total of 9.80 hours' attorney time. Generally described.

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.

**Need** itemization per CRC 7.702 indicating the specific amount requested for each category of service via verified supplement.

5. Petitioner requests reimbursement of costs advanced of \$12,816.73. Itemized [LF, pgs. 28-30].
6. Attorney requests reimbursement of costs advanced of \$2,744.00. Itemized [LF, p13].
7. Petitioner requests authority to withhold \$30,000 as a reserve for unpaid income taxes and bond premium. **JTD.**
8. Petitioner states receivables in the amount of \$33,417.37 are owed by daughter, Sandra Gonzales for unlawful detainer proceedings; unpaid rents; and removal of personal property. Petition indicates Sandra's distribution will be reduced by this amount.
9. **Objection to first and final account filed by Sandra Gonzales.**
10. Declaration filed on 10/10/18 indicates additional assets in the form of stock which have escheated to the State of California have been located and requests an additional 6 months, to 06/01/19, to allow for the collection of funds held by the State Controller's Office; to file any necessary taxes; and to file an amended accounting. **JTD.**
11. Proposed Order 06/30/17 reflects a different amount for cash on hand and does not include omnibus clause.

RECOMMENDATION: Matter is contested.

Need to clear note 4 then Court's discretion. If approved, set next hearing for Accounting Review for **06/01/19**.

(nb)

Future Hearing:

02/13/19 Receipt of settlement agreement

02/13/19 First and final accounting

02/13/19 Supplemental accounting

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1600748

CASE NAME: MTR OF BRADLEY H HANSSON

HEARING:

Petition for final distribution & First & Final Account and Report of ASHLEY MEYERS, CHERISE HANSSON and Petition for allowance of fees filed.

COUNSEL:

ASHLEY MEYERS	(PET)...ASHLEY MEYERS
BRADLEY H HANSSON	(DEC)...
CHERISE HANSSON	(PET)...ASHLEY MEYERS

GENERAL INFORMATION:

**Continued from 06/26/18 on courts motion. Notice by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Personal Representatives, Ashley Meyers and Cherise Hansson ["Petitioners"-daughters-sole heirs].

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

1. Heirs waive accounting.
2. Final Inventory and Appraisal filed on 04/06/18, Section 4 indicates no probate referee is required and does not include Attachment 1. **Need** corrected and complete inventory to include bank statements to support date of death and closing balances per Local Rule 20-908.
3. Accounting period 05/11/16 to 05/11/18.
4. Assets on Hand \$0.00.
5. Statutory compensation is not requested.
6. Attorney waives fees.
7. Caption's title is incorrect. **Need** verified supplement.
8. Paragraph 8 of petition re: Inventory and Appraisal, reflects incorrect value of estate. **Need** verified supplement.
9. Total Charges and Total Credits to Summary of Account do not match. **Need** verified supplement.
10. **Need** balance and description of the assets on hand, specifically noting the amount of cash included in said balance per Local Rule 20-614(c).

**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. **Need** detailed schedules of receipts and gains or losses on sale per CRC 7.550 via verified supplement.
12. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b).
13. **Need** statement regarding notice to Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
14. **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.
15. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Need to clear notes 2, 7-14 then Court's discretion. If approved, set next hearing for receipts and final discharge for **10/29/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601007

CASE NAME: MINNIE L COOLEY

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BRENDA MOORE (PET)...MICHAEL L KOSLOFF  
MINNIE L COOLEY (DEC)...

GENERAL INFORMATION:

Continued from **02/20/18** on courts motion. Notice given by Mr. Kosloff.

Continued from **04/17/18** on Courts motion. Need waiver of account.

**Continued from 07/17/18 at request of counsel. Will has been found. New petition may be filed.**

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 daughter, Brenda Moore on 01/11/17, full authority, and \$250,000 bond.
2. Waiver of Account filed by Brenda Moore. However, notwithstanding said waiver, petitioner **must file** a final report of administration per Pr. C. §1064 and Pr. C. §10954(c)(1). **Need** same.

RECOMMENDATION:

Inquire status. Clerk to notice surety.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1601168

CASE NAME: ROBERT V BANDURRAGA & ARMIDA M BANDURRAGA TRUST  
**SEE ALSO 10**

HEARING:  
Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

JAMES M BANDURRAGA (PET)...MICHAEL C MADDUX  
MARY IRENE LEON (OBJ)...BANKS GARCIA & JANIS  
ROBERT & ARMIDA BANDURRAGA REC (TRU)...

GENERAL INFORMATION:

Continued from **05/01/18** for written, fully executed settlement agreement to be filed.  
Listing agreement provided to Mr. Maddux this morning. Notice waived.

**Continued from 07/31/18 at request of counsel. Settlement agreement is out for signatures.**

THIS CASE IS SET FOR HEARING ON Receipt of Settlement.

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

1. Matter set at 02/27/18 hearing, wherein, the Court ordered that the settlement agreement beginning with the drafted will be ready within 10 days. Need same.
2. Notice waived.

RECOMMENDATION:

Court's discretion  
(nb)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1601168

CASE NAME: ROBERT V BANDURRAGA & ARMIDA M BANDURRAGA TRUST

**SEE ALSO 9**

HEARING:

Petition for ORDERS: REMOVING MARY IRENE LEON AS TRUSTEE ETC

COUNSEL:

JAMES M BANDURRAGA

(PET)...MICHAEL C MADDUX

MARY IRENE LEON

(OBJ)...BANKS GARCIA & JANIS

ROBERT & ARMIDA BANDURRAGA REC (TRU)...

Currently under review by Legal Research.

(LR)

Continued matter – notice not re-reviewed.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700167

CASE NAME: THERESA MARIE HILTON

HEARING:

WAIVER OF Account and Report of ALICIA CASTILLO-TRUJILLO and  
Petition for allowance of fees filed.

COUNSEL:

ALICIA CASTILLO-TRUJILLO (PET)...REX ALAN LOWE

THERESA MARIE HILTON (DEC)...

GENERAL INFORMATION:

**Continued from 07/10/18 at request of counsel. Amended inventory and appraisal to be filed. Amended waiver of accounting to be filed/notes to be cleared.**

THIS CASE IS SET FOR HEARING ON **Amended** (09/20/18) Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Alicia Castillo-Trujillo ["Petitioner"-daughter].

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

1. Heirs waive accounting.
2. Assets on Hand \$131,027.80 in cash.
3. Petitioner waives statutory compensation and reimbursement for costs.
4. Attorney requests statutory fees of \$20,251.77. Calculated.
5. Attorney requests reimbursement of costs of \$1,295.69. Itemized.
6. Petitioner indicates the real property of the estate was distributed by oral agreement by the heirs, providing for an equalizing payment by Jennifer Morales to Petitioner, pursuant to the full authority under IAEA granted by this court and the Notice of Proposed Action. Agreement for Preliminary Distribution of Estate Residence filed 09/20/18 in the form of declarations by heirs.
7. Proposed Form Order 06/22/18; hearing date is incorrect, Cash assets on hand and statutory fees are incorrect; does not specify or identify the distribution of the real property as per agreement of heirs; does not include address of party receiving real property; and discharge does not occur until entry of a final discharge order.

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

RECOMMENDATION: VACATE 11/08/18 hearing.  
Court's discretion. If approved, set next hearing for receipts and final discharge for **10/29/19**.  
(nb)

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700218

CASE NAME: MTR OF BEATRICE ROSEKAMP

**SEE ALSO 13**

HEARING:

Hearing Re: Amended First and Final Acct

COUNSEL:

BEATRICE ROSEKAMP

(DEC)...

LIZABETH GOODIE

(PET)...THOMAS W DOMINICK

**X-REF: CONPS 0600008**

GENERAL INFORMATION:

**Continued from 08/29/18 at request of counsel.**

THIS CASE IS SET FOR HEARING ON **Amended** (08/17/18) First and Final Account and Report; Petition for Fees and Final Distribution by Lizabeth Goodie, Administrator

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

1. Accounting period 01/23/16 to 05/29/18.
2. Assets on hand: \$157,945.61, cash
3. Statutory fees of **\$7,151.40**, each, requested by petitioner and attorney. Calculated.
4. Attorney requests extraordinary fees of \$1,245.00 for services rendered in connection with elder abuse. Billed at \$250-\$325/hour for a total of 4.80 hours' attorney time. Itemized [LF, pgs. 21-22]. **JTD**.
5. Attorney requests reimbursement for advanced costs in the amount of **\$810** for bond premium. Itemized. **JTD**
6. Petitioner requests reimbursement of advanced costs of **\$1,800.50** for bond premiums, publication, and filing fee. [Acct, 07/23/18, LFpg7]. **JTD**
7. Petitioner alleges prior to Decedent's death, Decedent was a victim of identity theft by her daughter, Lu Ann Speakmann, in which \$150,000 was taken from Decedent's personal property. Matter was referred to "APS" and San Bernardino District Attorney for prosecution. Petitioner requests that Ms. Speakman's distributive share (less than \$28,000) be completely offset by the amount of damage caused by her intentional actions as petitioner believes Ms. Speakman is unemployed and judgment proof. See Exhibit B

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.

list of forged checks and surcharge calculation. [Acct, 7/23/18, LFpg20-30].  
**JTD**

8. Petitioner requests reserve of **\$1,499** for any potential liabilities. **JTD**
9. Notice is complete.
10. ~Proposed order: 08/31/18

**RECOMMENDATION:**

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **11/06/19**.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700218

CASE NAME: MTR OF BEATRICE ROSEKAMP

**SEE ALSO 12**

HEARING:

Petition for first and final Account and Report of LIZABETH  
GOODIE and Petition for allowance of fees filed.

COUNSEL:

BEATRICE ROSEKAMP

(DEC)...

LIZABETH GOODIE

(PET)...THOMAS W DOMINICK

See prior matter #12.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1700487

CASE NAME: PAUL A. NILSEN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GARRY NILSEN

(PET)...JOSEPHINE A. RICH

PAUL A NILSEN

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Garry Nilsen, full authority, \$20,000 bond.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status. Clerk to notice surety.

(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700498

CASE NAME: Darcy Garcia

HEARING:

Accounting Review by \*\*\*

COUNSEL:

DARCY GARCIA	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP )...PRO/PER
JULIO C SALMERON	(PET)... REIKO J HICKS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Julio C. Salmeron, full authority, \$75,000 bond.
2. Bond filed on 09/06/17 reflects Letters of "Administrator" instead of Letters Testamentary. **Need** proper bond,
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status. Clerk to notice surety.

(nb)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701068

CASE NAME: ESTATE OF SHIRLEY MAE ZUPA

**SEE ALSO 21**

HEARING:

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

COUNSEL:

BONNIE JOHNSON (PET)...ZACHARY R HAGENBUCH  
SHIRLEY MAE ZUPA (DEC)...

#### GENERAL INFORMATION

Continued from **02/22/18**. Bond required \$75,000.00.

Continued from **05/07/18**. Attorney recently retained and need to clear probate notes.

**Continued from 08/06/18 at request of counsel. Notice to be given by Mr. Hagenbuch.**

THIS CASE SET FOR HEARING ON Petition for Probate of **Will**, Letters Testamentary with Full Authority under IAEA by Bonnie Johnson, granddaughter.

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

1. Will and all heirs waive bond. Net estate value is \$330,000 of which \$170,000 in personal property. Bond of \$75,000.00 will be required per 02/22/18 minutes. **Supp. (08/29/18) requests no bond be required per Decedent's Will, Codicil, Trust and Amendments to Trust. JTD.**
2. Codicil is not witnessed. Codicil does not comply with Pr.C. § 6110(c)(1) as it is not witnessed. In order that the will be admitted, **need** a verified supplement showing that the will is valid per Pr.C. § 6110(c)(2). **Supp (08/29/18) indicates the Codicil only pertains to the Successor Executors which is also laid out in the Amendment to the Trust, dated 10/04/13. JTD.**
3. Declination to act by named successor co-trustee/co-executor Stefanie Burke filed 06/11/18.
4. Declination to act by named co-executor (prior to codicil) Karla Cocks filed 07/09/18.
5. ~Proposed Form Order: 10/25/17.

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

Court's discretion. If approved, set Accounting/Status Review for **12/26/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/ww/nb)

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

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800058

CASE NAME: DAVID L ADAMS

HEARING:

Petition for AUTHORIZE AND INSTRUCT THE ADMINISTRATOR REGARDING  
THE FAMILY RESIDENCE AND APPROVE ETC

COUNSEL:

DAVID L ADAMS	(DEC)...
MINOR BENEFICIARIES	(GAL)...JENNIFER DANIEL
REBEKAH K ADAMS	(PET)...STEVE ALDACO

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Authorize and Instruct the Administrator Regarding the Family Residence and Approve and Confirm Acts of the Administrator in Transferring Membership Interest of Yucaipa Auto Collision, LLC by Administrator, Rebekah K. Adams ["Petitioner"].

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

1. Administrator, Rebekah K. Adams, is in doubt about the course of action to be taken regarding the valuation and characterization of the family residence, located at 11441 Devon Court, Yucaipa, CA 92399 because the property was originally in the name of the decedent, David L. Adams, as his separate property, and was recently refinanced with community property funds. Administrator, Rebekah K. Adams, believes the best course of action would be to characterize the family residence as Rebekah K. Adams separate property, or, alternatively, value the community property interest via a Moore/Marsden calculation and adjust the value on the Inventory and Appraisal. Suggest Court require a copy of vesting and loan documents. **JTD.**
2. Administrator, Rebekah K. Adams, requests that the Court instructs and direct her to amend the Inventory and Appraisal, previously submitted, and resubmit same to the Court with the adjusted characterization of the family residence and/or adjusted value of same.
3. Administrator, Rebekah K. Adams, requests that the court approve and confirm the following action that the petitioner has taken regarding the transfer of membership interest in Yucaipa Auto Collision, LLC, directly to Rebekah K.

**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.**

Adams, as a result of a triggering event under the terms of the Operating Agreement and sale of same to Doug Goethe. Does Court wish to require a copy of the Operating Agreement? **JTD.**

4. Administrator, Rebekah K. Adams, prays that this Court authorize and instruct petitioner to re-title the family residence, located at 11441 Devon Court, Yucaipa, CA 92399 as her separate property and/or amend the Inventory and Appraisal, previously submitted, to properly reflect the amount attributable to the Estate. **JTD.**
5. Administrator, Rebekah K. Adams, also prays that the Court approve and confirm the following acts of the petitioner regarding the transfer of membership interest in Yucaipa Auto Collision, LLC directly, to Rebekah K. Adams as a result of the triggering event, the death of David L. Adams, and sale of same to Doug Goethe. **JTD.**
6. No proposed order. Submit Order after Hearing.

**RECOMMENDATION:**

Court's discretion

(nb)

Future Hearing:

04/30/19 Accounting Review.

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800249

CASE NAME: DAVID LEE SATTERWHITE

HEARING:  
Spousal Property Petition hearing.

COUNSEL:  
DAVID LEE SATTERWHITE (DEC)...  
LINDA FAYE SATTERWHITE (PET)...PRO/PER

GENERAL INFORMATION:

Continued from **04/17/18** on Court's motion. Petitioner to file a verified supplement explaining when petitioner and decedent were married, how the property interest was acquired and where the funds came from, how the mortgage was paid. Also, need Notice of Hearing with proof of service.

**Continued from 07/17/18 on courts motion. Verification of declaration to be filed and the deed with the original purchase date to be filed.**

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Linda Satterwhite ["Petitioner"].

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

1. Spouse, Linda Satterwhite, alleges her name was removed off title when Decedent took out a reverse mortgage because she was not yet 62 years of age to qualify. Copy of Grant Deed affixed [LF, p. 5]. Petitioner states in order to continue the reverse mortgage, the deed must be transferred back into her name.
2. Spouse, Linda Satterwhite, requests confirmation of property passing to the surviving spouse as community property. Specifically, real property located San Bernardino. However, petitioner does not set forth facts sufficient to establish a community property interest in the California real property.
  - a. Unverified declaration affixed to notice filed on 07/09/18 [LF, p. 4] indicates the money used to purchase the home were mutual funds from petitioner and decedent. A copy of a Certificate of Marriage indicates parties were married on 04/16/83.

3. Decedent died intestate with 2 issues who would also share a two-thirds distribution in the estate per Pr.C. §6401 if the real and personal property is separate property of decedent.
4. **Declaration filed on 10/09/18 includes verification [LF, p. 4] and assignment with the original purchase date.**
5. ~Proposed Form Order 03/14/18.

RECOMMENDATION:  
Court's discretion  
(nb)

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

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DATE: 10/16/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1800770

CASE NAME: MTR OF GILBERT LAVORIN

HEARING:  
Spousal Property Petition hearing.

COUNSEL:  
ALICE N LAVORIN (PET)...MARY E MULLIN  
GILBERT LAVORIN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Alice N. Lavorin ["Petitioner"].

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

1. Spouse, Alice N. Lavorin, requests a determination of separate property passing to her, as the surviving spouse of decedent. Specifically, real property at Chino, CA in San Bernardino County. .
2. Alice N. Lavorin and Gilbert Lavorin, deceased, got married on September 18, 1965. The property was purchased in May 2005, when the couple had over 40 years' of marriage. Petitioner was a stay-at-home mother and because of financing purposes, the decedent took title as a married man as his sole and separate property. The funds used to buy the subject real property were community property funds that were acquired during their almost 40 years of marriage.
3. Decedent's only issue, Gilbert P. Lavorin, has executed an assignment of Interest for his 50% interest in decedent's real property in favor of petitioner.
4. ~Proposed Form Order 08/03/18.

RECOMMENDATION:

Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District - Civil

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **TRUSTS AND MOTIONS**

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DATE: 10/16/18 TIME: 8:35 DEPT: S37P  
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CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO

**SEE ALSO 2, 3 *MOVED TO 9:30 SEE PG 29, 30, 31***

HEARING:

Motion Re: FOR DETERMINATION OF GOOD FAITH SETTLEMENTS Filed by  
Petitioner COUNTY OF SAN BERNARDINO

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

Currently under review by Legal Research.  
(LR)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 8:35      DEPT: S37P  
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CASE#: PRO PS1701068

CASE NAME: ESTATE OF SHIRLEY MAE ZUPA

**SEE ALSO 16**

HEARING:

Petition for (verified) to confirm:(1)existence and validity of trust

COUNSEL:

BONNIE JOHNSON

(PET)...ZACHARY R HAGENBUCH

SHIRLEY MAE ZUPA

(DEC)...

Currently under review by Legal Research.  
(LR)

Continued matter – notice not re-reviewed.  
(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 8:35 DEPT: S37P  
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CASE#: PRO PS1800099

CASE NAME: EUGENE PHILLIPS AKA EUGENE PHILLIPS JR.

HEARING:

Petition for an order to confirm assets to revocable trust and/  
or to determine title to real property

COUNSEL:

DIANE LEE HUNTSMAN	(PET)...MAATAFALE LAW GROUP
ELIE GOOCH	(PET)...ARON C MOVROYDIS
EMANY ROSIA GREEN	(PET)...PAUL HORN
EUGENE PHILLIPS	(DEC)...

Request for Waiver of Court Fees and Costs filed by ELIE GOOCH is GRANTED

Currently under review by Legal Research.  
(LR)

Notice:

Notice filed on 06/20/18 does not include grandson, Gary Huntsman. **Need** proper service.  
(nb)

Future Hearing:  
05/22/19 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **CONSERVATORSHIP**

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS0800266

CASE NAME: KYLE AVERY TILTON

HEARING:

Third Account and Report of W.A. (SAM) HLAVATY and Petition for allowance of fees filed.

COUNSEL:

BRYAN C HARTNELL	(PET)...HARTNELL LAW GROUP
CHRISTINA ERICKSON-TAUBE	(SC )...PRO/PER
JENNIFER L HAAS	(PCR)...
JUDY TILTON	(CE )... J. DAVID HORSPOOL
JUDY TILTON	(CPE)... J. DAVID HORSPOOL
KENNETH F JENKINS	(CE )...PRO/PER
KYLE AVERY TILTON	(CEP)...MARTINA KANG RAVICZ
KYLE AVERY TILTON	(CEP)...PRO/PER
MELODIE Z SCOTT	(CPE)...HORSPOOL & HORSPOOL
MELODIE Z SCOTT	(PET)...PRO/PER
NEVIN OLIPHANT	(SC )...J. DAVID HORSPOOL
PACIFIC WESTERN BANK, A CALIFO	(FABOZZI & MILLER
W.A. (SAM) HLAVATY	(SC )...
WELLS FARGO BANK, TRUSTEE	(PET)...JENNIFER M DANIEL
W.A. (SAM) HLAVATY	(CE )...THOMPSON & COLEGATE
W.A. (SAM) HLAVATY	(CPE)...THOMPSON & COLEGATE

**XREF: PROPS0900847** (Kyle Tilton settlement trust)

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current and Petition for Fees by PPF, W.A. Hlavaty ["Petitioner"].

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

1. Accounting period 08/01/17 to 07/31/18.
2. Assets on Hand \$53,563.54, consisting of \$49,063.54 in cash and remaining in personal property.
3. Current bond of \$311,000. Appears sufficient.

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

4. Per Order of this Court on 07/08/16, petitioner was authorized to receive a fee of \$1,000/month for trustee services; however, Petitioner has elected to defer these fees and has not taken any fees for services rendered during this accounting period. Petitioner requests continued authority to pay himself a monthly fee not to exceed \$1,000 pursuant to Order of this Court on 07/08/16.
5. Petitioner requests fees of \$23,314.05. Billed at varying rates not exceeding \$125/hour for 222.9 hours' time. Itemized [LF, pgs. 46-82] **JTD**
6. Attorney requests fees of \$22,691.00. Billed at \$265-\$350/hour for 90.7 hours' attorney time and \$150/hour for 3.1 hours' paralegal time. Itemized [LF, pgs. 86-96]. **JTD.**
7. Attorney requests reimbursement of costs advanced of \$636.42. Itemized [LF, pgs. 96-97].
8. Petitioner has not used the Mandatory Summary of Account (GC-400/405). Court may wish to direct petitioner to use the mandatory form on future accountings.
9. Disbursements – Schedule C [LF, p. 26] includes a “Good Faith” down payment for pending purchase of 210 Orchid Court to Citibank in the sum of \$37,900.00. **Need** copy of purchase agreement.
10. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c) (5).
11. Notice given.
12. ~Proposed Order 08/24/18.

**RECOMMENDATION:**

Need to clear notes 9-10 then Court's discretion re: fees and bond. If approved, set hearing on the next Accounting Review for **09/24/19** (if one year) or **09/22/20** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1100080

CASE NAME: CECELIA ANN MATTHESIUS

HEARING:

Petition for to fix residence outside the state of California

COUNSEL:

ANN E STAUB	(APP)...BANDY & BANDY
ANN E STAUB	(APP)...ROBERT J SPITZ
ANN E STAUB	(CPE)...BANDY & BANDY
ANN E. STAUB	(CPE)...ROBERT J SPITZ
ANNE E STAUB	(CPE)...THOMAS E BANDY
CECELIA ANN MATTHESIUS	(CEP)...DONNASUE ORTIZ
CECELIA ANN MATTHESIUS	(CEP)...PRO/PER
CECILIA ANN MATHESIUS	(CP )...PRO/PER
DONNASUE SMITH ORTIZ	(PET)...DONNASUE ORTIZ
PAULA EADE	(OBJ)...PRO/PER
PAULA EADE	(SC )...PRO/PER
US SPECIALITY INSURANCE COMPAN	(PRO/PER

GENERAL INFORMATION

**Continued from 10/10/18 on courts motion. Written report received by Walter Moore. Oral report given by Donnasue Ortiz. Counsel Walter Moore to prepare written report re Status of matter in Court of Appeals.**

THIS CASE IS SET FOR HEARING ON Petition to Fix Residence Outside the State of California by Conservator, Ann Staub (daughter)

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

1. Ann E. Staub (daughter) was appointed Conservator of the person and estate of Cecelia Matthesius on 06/07/11.
2. Petitioner, Ann E. Staub, requests the Court authorize the residence for Conservatee to be fixed outside the State of California to Florida. Petitioner owns a home in Florida and came out to California in 2011 to care for Conservatee despite Conservatee's home being both hazardous and inconvenient. Conservatee has enjoyed visits to Florida in the past and does not

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object to moving to Florida. Conservator's home in Florida is more comfortable as a one-story. Conservatee has no other friends or family in California that would prevent the move from being in Conservatee's best interest.

3. Petitioner alleges the expected duration of the out-of-state move is more than 4 months and the Conservatorship of the person and estate will be commenced in the place of the new residence. If approved, suggest Court order petitioner to serve and file Post-Move Notice of Change of Minor's Residence (mandatory) with proof of mailed service within 30 days of the date of any change.
4. Notice of Hearing with proof of mailed service filed 09/24/18; however, notice has incorrect Court address. **Need** proper notice with correct address.
5. **Need** report by Attorney Walter Moore as directed by court on 10/10/18.
6. ~Proposed Form Order: 08/21/18

#### RECOMMENDATION

Need to clear notes 4-5 then Court's discretion. If approved, suggest Court set status re proof of Conservatorship in Florida for **01/16/19**.

(lh/nb)

Future hearing

01/07/19 Accounting review

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

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: CON PS1800269

CASE NAME: Rebecca Lynn Applegate

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

DIANA L APPLGATE (CP)...PRO/PER  
REBECCA LYNN APPLGATE (CTP)...SANDRA TURNER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person, only, by maternal grandmother, Diana L. Applegate ["Petitioner"].

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

- 1 No bond – person only.
- 2 Maternal grandmother, Diana L. Applegate, seeks medical powers. **Need** Medical Capacity declaration.
- 3 Report by court appointed counsel, Sandra Turner, filed.
- 4 Court Investigator's Report filed.
- 5 **Need** return of Citation.
- 6 **Need** Certificate of Completion re Conservatorship Class.
- 7 **Need** Notice of Hearing and proof of service.
- 8 ~Proposed Form Order/Letters 08/31/18.

RECOMMENDATION:

Need to clear notes 2, 5-7 then Court's discretion. If approved, set hearing for Compliance Review for **05/21/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C. §1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355); and Care Plan per Pr. C. §2352.5.

(nb)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1800270

CASE NAME: HAIDEE BONILLA

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

HAIDEE BONILLA

(CTP)...

HORTENCIA BONILLA

(PET)...PRO/PER

GENERAL INFORMATION:

Hortencia Bonilla appointed Limited Conservator of the Person on 12/10/07 in LA County.

THIS CASE IS SET FOR HEARING ON CMC re Transfer In from Los Angeles County.

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

1. **Need** amended letters.
2. Conservatee is developmentally disabled. **Need** appointment of counsel and report by same.
3. Last CI Report by LA County on 06/13/17. **Need** CI Report.
4. **Need** Inland Regional Center Report.
5. **Need** to file Post-Move Notice of Change of Address per Pr.C. §2352 and CRC 7.1013(c).
6. Medical Capacity Declaration is not included. Does Court wish to require an updated capacity declaration? **JTD**.

RECOMMENDATION:

Need to clear notes.

(nb)

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



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18      TIME: 9:30      DEPT: S37P  
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CASE#: SC SS03098

CASE NAME: MTR RE ERNESTINE ROMERO

HEARING:

Accounting Review by \*\*\*

COUNSEL:

EDWARD T ROMERO                      (CPE)...SKOUSEN & SKOUSEN

ERNESTINE ROMERO                    (CEP)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Estate, Edward T. Romero. .

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 11/03/15 for period ending 07/31/15.
2. No accounting or waiver of account. **Need** same beginning 08/01/15.
3. Post-Move Notice of Change of Residence of Conservatee filed on 05/19/16 indicates Conservatee moved to West Hollywood on 04/20/16. **Suggest transfer** to Los Angeles County. If so, Court to set control date.

RECOMMENDATION:

Inquire status then Court's discretion re: transfer.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS7258

CASE NAME: IN THE MATTER OF JIMMY LEE HOLLEY

## SEE ALSO 27A

### HEARING:

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

### COUNSEL:

CHRISTINA ERICKSON-TAUBE	(CPE)...SHERRI L KASTILAHN
JIMMY LEE HOLLEY	(CEP)...LENITA A SKORETZ
LENITA A SKORETZ	(PET)...LENITA A SKORETZ
MELODIE Z SCOTT	(CPE)...MICHAEL J. G ILL
MELODIE Z SCOTT	(TP )...PRO/PER

### GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Ninth Account Current and Petition for Fees  
by Successor Conservator of the Person and Estate, Christina Erickson-Taube  
[“Petitioner”-PPF].

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

1. Accounting period 07/01/17 to 06/30/18.
2. Assets on Hand \$4,166.64 consisting of \$566.64 in cash and remaining in personal property.
3. Current bond of \$66,000. Appears sufficient.
4. Petitioner requests compensation of \$6,704.74. Billed at \$75 - \$125/hour. Itemized [LF, pgs. 19-26]. **Need** verified supplement that includes total hours' worked.
5. Attorney requests fees of \$4,275.00. Billed at \$375/hour for 11.40 hours' attorney time. Itemized [LF, pgs. 27-28]. **JTD.**
6. Petitioner and counsel have been receiving monthly payments on previously ordered Conservator and attorney fees due to the limited cash on hand. Petitioner and counsel agree to receive monthly payments on the fees awarded in this account. **Need** verified supplement that includes previous balances and balances now due to petitioner and counsel.

**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. Petition indicates the family law matter has been resolved with \$500.00 per month being paid. The former spouses' attorney receives \$320.00 per month and \$180.00 a month to former spouse, Jenice Holley. Disbursements include these payments.
8. During the accounting period, petitioner paid to Lance Riley and Aimee Armenta for case management fees of \$7,854.16. **Need** verified declaration for acknowledgment of receipt of fees per Local Rule 20-1406(c).
9. ~Proposed Order 09/05/18.

**RECOMMENDATION:**

Need to clear notes 4, 6 & 8 then Court's discretion re: fees. If approved, set hearing on the next Accounting Review for **08/27/19** (if one year) or **08/25/20** (if two years). Account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: SC SS7258

CASE NAME: IN THE MATTER OF JIMMY LEE HOLLEY

## SEE ALSO 27

HEARING:

Hearing Re: POSSIBLE CHANGE OF PLACEMENT

COUNSEL:

CHRISTINA ERICKSON-TAUBE	(CPE)...SHERRI L KASTILAHN
JIMMY LEE HOLLEY	(CEP)...LENITA A SKORETZ
LENITA A SKORETZ	(PET)...LENITA A SKORETZ
MELODIE Z SCOTT	(CPE)...MICHAEL J. G ILL
MELODIE Z SCOTT	(TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Possible Change of Placement.

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

1. Matter set at Ex Parte Hearing held on 10/10/18, wherein, the Court ordered: Mr. Holley Sr. is to remain in the State of California and not be removed from the facility (except for Dr. appointments, hospital care or other emergency basis) without a court order
2. Court re-appoints Attorney Lenita Skoretz as court-appointed attorney for Jimmey Lee Holley, Sr. **Need** report by court-appointed counsel, Lenita Skoretz.

RECOMMENDATION:

Need to clear note 2 then Court's discretion.

(nb)

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HONORABLE: TARA REILLY

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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO

**SEE ALSO 29, 30**

HEARING:

Hearing Re: Review & Approval of Special Needs Trust

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

Currently under review by Legal Research.  
(LR)

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

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PROBATE/CONSERVATORSHIP CALENDAR  
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DATE: 10/16/18 TIME: 9:30 DEPT: S37P  
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CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO

**SEE ALSO 28, 30**

HEARING:

OSC re: Dismissal

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

No notes – Judge to decide.

(nb)

Superior Court of Calif, County of San Bernardino  
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CASE#: CIV DS1509947

CASE NAME: MASON B. -V COUNTY OF SAN BERNARDINO  
**SEE ALSO 28, 29**

HEARING:

Motion Re: FOR DETERMINATION OF GOOD FAITH SETTLEMENTS Filed by  
Petitioner COUNTY OF SAN BERNARDINO

COUNSEL:

ANTHONY EDWARDS	(PRO/PER
COUNTY OF SAN BERNARDINO	(DEF)...SMITH LAW OFFICES, APC
GREATER HOPE FOUNDATION FOR CH	(BOONE BRIDGES MUELLER
MANUELA EDWARDS	(PRO/PER
MASON B	(M/P)...JACK H ANTHONY
MELVIN L FRIEDLAND	(PET)...JACK H ANTHONY

Request for Waiver of Court Fees and Costs filed by MASON B is GRANTED

**XREF: CIPDS1000077** (Mason Cole Hargan)

Currently under review by Legal Research.  
(LR)

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

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DATE: 10/16/18 TIME: 11:00 DEPT: S37P  
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CASE#: PRO PS1800419

CASE NAME: BRIAN WAYNE DAVIS

HEARING:

Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

BRIAN WAYNE DAVIS (DEC)...  
BRIDGET D. GREGOIRE (PET)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Proof of Blocked Account

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

1. Matter set at 07/10/18 hearing, wherein, the Court ordered that the net proceeds from sale to be placed in a blocked account.
2. **Need** proof of blocked account.

RECOMMENDATION:

Need to clear note 2.

(nb)