



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 10/17/18**

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

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

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

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

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

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

09/27/18lh; 10/12/18

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO San Bernardino District - Civil  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CIVIL**

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: CIV DS1800031

CASE NAME: THE PRUDENTIAL -V- FISHER ET AL

**SEE ALSO 2, 3, 6**

HEARING:

Hearing Re: TRIAL SETTING CONFERENCE

COUNSEL:

THE PRUDENTIAL INSURANCE (PLA)...BROWN LAW GROUP

CHRISTOPHER J FISHER (DEF)...

JAMAAL A FISHER

ESTATE OF CRYSTAL RENETTE (PRICE LAW FIRM, APC)

**XREF: PROPS1700163** *CRYSTAL RENETTE JAMES*

No notes—TSC—JTD

Superior Court of Calif, County of San Bernardino

Page: 2

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: CIV DS1800031

CASE NAME: THE PRUDENTIAL -V- FISHER ET AL

**SEE ALSO 1, 3, 6**

HEARING:

Hearing Re: CASE MANAGEMENT CONFERENCE

COUNSEL:

THE PRUDENTIAL INSURANCE (PLA)...BROWN LAW GROUP

CHRISTOPHER J FISHER (DEF)...

JAMAAL A FISHER

ESTATE OF CRYSTAL RENETTE (PRICE LAW FIRM, APC)

**XREF: PROPS1700163** *CRYSTAL RENETTE JAMES*

No notes—JTD

Superior Court of Calif, County of San Bernardino

Page: 3

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: CIV DS1800031

CASE NAME: THE PRUDENTIAL -V- FISHER ET AL

**SEE ALSO 1, 2, 6**

HEARING:

Hearing Re: POSSIBLE ENTRY OF DEFAULTS ON DEFENDENTS

COUNSEL:

THE PRUDENTIAL INSURANCE (PLA)...BROWN LAW GROUP

CHRISTOPHER J FISHER (DEF)...

JAMAAL A FISHER

ESTATE OF CRYSTAL RENETTE (PRICE LAW FIRM, APC)

**XREF: PROPS1700163** *CRYSTAL RENETTE JAMES*

No notes—JTD

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **TRUST**

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1100803

CASE NAME: THE G.D.B TRUST

HEARING:

THIRD Account and Report of DAVID YEAGER ALEXANDER and Petition  
for allowance of fees

COUNSEL:

ROBERT GODINEZ	(PET)...VICTOR P. SKVARNA
DAVID YEAGER ALEXANDER	(PET)...VICTOR P. SKVARNA
THE G.D.B TRUST	(TRU)...
DAVID STANYO	(STE)...JAMES J MENTAS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Third Account Current of Trustee of Special  
Needs Trust of Stacy Stanyo and Petition for Attorney's Fees

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

1. Accounting covers period: 06/01/16 to 06/30/18
2. Assets on hand: \$42,469.92, cash
3. Petitioner, as trustee, waives fees for this accounting period.
4. Attorney requests a flat fee of **\$1,500** for services rendered during this  
accounting period. Attorney stats his usual hourly rate is \$325/hour. Services  
are generally itemized. **JTD**
5. Petitioner requests that the next accounting be presented only upon request by  
a third party or upon further order of the court to avoid the costs associated with  
the accounting and to preserve the capital in the trust for the benefit of the  
beneficiary. However, as the SNT was created by Court Order on 6/12/13, an  
accounting is required per Pr. C. 1060; 2620 according to Rule of Court  
7.903(c)(6) which states that after the first accounting, accountings are required  
*"biennially unless otherwise ordered by the court to be more frequent."* **JTD**
6. Notice was given.
7. No proposed order submitted. Submit after hearing.

RECOMMENDATION

Court's discretion. If approved, set next accounting review for **08/28/19 (if one year) or 08/26/20 (if 2 years)**. Accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 5

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**PROBATE**

-----  
DATE: 10/17/18      TIME: 8:30      DEPT: S35P  
-----

CASE#: PRO PS1700031

CASE NAME: Raul Ponce Salcedo

HEARING:

Accounting Review

COUNSEL:

CHRISTINA SALCEDO                      (PET)...PRO/PER

RAUL PONCE SALCEDO                      (DEC)...

#### GENERAL INFORMATION

**Continued from 09/05/18. No appearance, nor has an accounting been filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Christina Salcedo,  
executor

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

1. Letters Testamentary with full authority issued to Christina Salcedo on 06/28/17.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting and status report.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 6

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1700163

CASE NAME: CRYSTAL RENETTE JAMES

**SEE ALSO 1, 2, 3**

HEARING:

Probate status report

COUNSEL:

VALARIE FRANCES WALTON (PET)...PRICE LAW FIRM, APC  
CRYSTAL RENETTE JAMES (DEC)...  
STATE OF CALIFORNIA FRANCISE TAX BOARD (TP )...PRO/PER

**XREF: CIVDS1800031** *THE PRUDENTIAL -V- FISHER ET AL*

#### GENERAL INFORMATION

**Continued from 08/01/18.**

THIS CASE IS SET FOR HEARING ON Status Report by Valarie Walton,  
Administrator/Sister

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

1. Estate is not in a condition to close due to consolidated civil action pending brought by Prudential Insurance Company to determine who funds belong to. See x-ref case and next matter 9A.
2. Petitioner requests an additional 12 months to close the estate.
3. Notice is complete.
4. No proposed order submitted. Submit after hearing.

#### RECOMMENDATION:

Court's discretion. If approved, set next hearing for Accounting Review for **08/14/19**. Any account to be filed 30 days' in advance of hearing. Note requirements of Local Rules.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 7

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1700942

CASE NAME: FRANK T. KOCSIS AND DORIS E. KOCSIS LIVING TRUST

HEARING:

Hearing Re: STATUS

COUNSEL:

FRANK T. KOCSIS & DORIS E. KOCSIS LIVING TRUST (TRU)...  
STEVE COURTIER (STE)...FULLERTON LEMANN SCHAEFER & DO  
CYNTHIA KOCSIS (ZUMBRUNN LAW CORPORATION)

No notes—status only—JTD

Future Hearings:

3/13/19 Readiness Calendar

3/13/19 Petition for Removal of Co-Trustee for Breach of Trust, etc

4/08/19 Court Trial (Day 1)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1800200

CASE NAME: MTR OF DOROTHY MARIE HOOVER

HEARING:

FIRST AND FINAL WAIVER OF Account and Report of STEPHEN KARL  
HOOVER and Petition for allowance of fees

COUNSEL:

STEPHEN KARL HOOVER (PET)...DENNIS M SANDOVAL  
DOROTHY MARIE HOOVER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account and Report of Administrator and Petition for its Settlement, for Allowance of Compensation and Final Distribution by Stephen Hoover

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

1. Assets on hand: \$156,366.73, cash
2. Petitioner waives statutory fees; however, requests reimbursement of \$1,650 for administrative expenses and appraisal of real property. Itemized. [Acct, 08/08/18, LFpg22]. **JTD**
3. Petitioner requests reimbursement to Katherine Dillon (daughter) for administrative expenses totaling \$4,084.75. Itemized. [Acct, 08/08/18, LFpg20]. **JTD**
4. Attorney Sandoval requests statutory fees of \$7,240 requested, less \$66 overpayment of advanced costs, totaling **\$7,174**. Calculated.
5. All heirs waive accounting.
6. Notice is complete.
7. ~Proposed order: 08/08/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/30/19**.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1800762

CASE NAME: Mtr of Anna Jenkins

HEARING:

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

COUNSEL:

MARILYN RODGERS (PET)...PRO/PER  
ANNA JENKINS (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Marilyn Rodgers, daughter/ sole heir

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

1. Petitioner is the sole heir and waives bond. Estimated assets valued at \$523,000 based on real property.
2. **Need** Proof of Publication.
3. ~Proposed Form Order: 08/13/18

#### RECOMMENDATION

Need to clear note #2 then Court's discretion. If approved, set Accounting/Status Review for **01/15/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 10

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1800802

CASE NAME: Mtr of Jerome Arlen Korsgaden

HEARING:  
Petition for Will and for Letters Testamentary

COUNSEL:

ROBERT KORSGADEN (PET)...JOELLE LEE A. NICHOL  
JEROME ARLEN KORSGADEN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA by Robert Korsgaden, Executor/Successor Trustee

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

1. Will waives bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Estimated assets valued at \$416,000. **JTD**
2. Petition is incomplete at item #3g as to appointment of personal representative; however, it appears petitioner is the alternate executor and consents to act.
3. The will names Mary Korsgaden as Executor. **Need** verified supplement clarifying if she is deceased, or declination to act.
4. ~Proposed Form Order: 08/22/18

RECOMMENDATION

RFA subject to note #3; Court's discretion re bond. If approved, set Accounting/Status Review for **01/15/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1800872

CASE NAME: MTR OF JACK W. HAYZELDEN

HEARING:

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

COUNSEL:

ROBERT C HAYZELDEN (PET)...JEFFREY D CAVIN  
JACK W HAYZELDEN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by Robert C Hayzelden, Executor/Trustee

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

1. Will waives bond. Estimated assets valued at \$400,000. **JTD**
2. 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**
3. ~Proposed Form Order: 09/07/18

RECOMMENDATION

RFA; Court's discretion re bond. If approved, set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: PRO PS1800881

CASE NAME: RICHARD L CHRISTENSEN

HEARING:

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

COUNSEL:

DAVID SHEPTAK (PET)...ROSE C ROSADO  
RICHARD L CHRISTENSEN (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by David Sheptak, brother

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

1. Sole heir, Andrew Christensen (son), waives bond. Estimated assets valued at \$225,658. **JTD**
2. **Need** Proof of Publication.
3. ~Proposed Form Order: 09/12/18

#### RECOMMENDATION

Need to clear note #2 then Court's discretion. If approved, set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S35P  
-----

CASE#: TRU PS1800012

CASE NAME: IN RE: MARIA V. SOTO REVOCABLE LIVING TRUST

**SEE ALSO 16, 17**

HEARING:

Hearing Re: REQUESTS TO THE COURT (FILED BY 8/29/18)

COUNSEL:

RUBEN NAVARRO (PET)...AVILES & ASSOCIATES  
MARIA V SOTO REVOCABLE LIVING TRUST (TRU)...  
NORMA VELOZ SOTO (PET/OBJ)...WILLIAM M NASSAR & ASSOC

Waiver of Court Fees and Costs filed by RUBEN NAVARRO is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Requests to the Court

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

1. Matter set on 07/25/18 at hearing on Petition for Order Requests Reimbursement of Trust, wherein, Court set matter as contested and made pre-trial orders. Court ordered personal appearance of Counsel/self-represented litigants required for readiness hearing. Court ordered William Nassar to file Proof of Service as to Moises Aviles by 4PM on 08/08/18. On Court's own motion, petition set for 08/02/18 to be heard on 10/17/18. Objections by Norma Soto to be in writing and served by 09/05/18. Court orders and request to Court to be filed and served by 4PM on 09/26/18.
2. **Objections by Ruben Navarro filed 09/05/18.**
3. **Response to Objections by Norma Soto filed 09/26/18.**
4. **Proof of Service as to Moises Aviles filed 09/26/18.**

RECOMMENDATION

None.

(lh)

Future Hearings:

3/06/19 Readiness Calendar  
4/02/19 Court Trial (Day 1)  
4/03/19 Court Trial (Day 2)  
4/04/19 Court Trial (Day 3)

Superior Court of Calif, County of San Bernardino

Page: 14

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S35P  
-----

CASE#: PRO PS1701121

CASE NAME: DERRICK J JACKSON

HEARING:

Petition for Order to Determine Title to Property and Order for  
Conveyance and etc

COUNSEL:

DERIC C JACKSON	(PET)...ROBERT P SIEVERS
MARSHA INEZ JACKSON	(PET)...ROBERT P SIEVERS
DERRICK J JACKSON	(DEC)...

Currently under review by legal research.

(LR)

Notice is complete.

(lh)

Future Hearing: 2/20/19 Accounting Review



Superior Court of Calif, County of San Bernardino

Page: 15

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S35P  
-----

CASE#: PRO PS1701272

CASE NAME: MTR OF BRUCE OGILVIE SR & OPAL LEILA OGILVIE R.T.

HEARING:

Motion Re: Ntc of motion to strike or tax costs Filed by  
Petitioner MICHAEL OGILVIE

COUNSEL:

MICHAEL OGILVIE	(PET)...SW SMYTH LLP
1998 MTR OF BRUCE OGILVIE SR & OPAL LEILA OGILVIE R.T. (TRU)...	
GREGORY L WIEBE	(RES)...DOONAN & DOONAN,
JANIS BRANDY MARTINDALE	(LAW OFFICE OF DOONAN & DOONAN)
RICHARD OGILVIE	(BENNETT KERNS, ESQ)

**XREF: TRUPS1800039** *1998 MTR OF BRUCE OGILVIE SR & OPAL LEILA OGILVIE R.T*

Currently under review by legal research.

(LR)

Superior Court of Calif, County of San Bernardino

Page: 16

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S35P  
-----

CASE#: TRU PS1800012

CASE NAME: IN RE: MARIA V. SOTO REVOCABLE LIVING TRUST

**SEE ALSO 13, 17**

HEARING:

Hearing Re: PTN for order requiring reimbursement of, ETC by Norma Veloz Soto

COUNSEL:

RUBEN NAVARRO (PET)...AVILES & ASSOCIATES  
MARIA V SOTO REVOCABLE LIVING TRUST (TRU)...  
NORMA VELOZ SOTO (PET/OBJ)...WILLIAM M NASSAR & ASSOC

Waiver of Court Fees and Costs filed by RUBEN NAVARRO is GRANTED

Currently under review by legal research.

(LR)

Notice:

Need Notice of Hearing and Proof of Service as to Arlene Rodriguez, Richard Soto, Carmelo Soto, and Rosemary Soto.

Future Hearings:

3/06/19 Readiness Calendar  
4/02/19 Court Trial (Day 1)  
4/03/19 Court Trial (Day 2)  
4/04/19 Court Trial (Day 3)

---

**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

Page: 17

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S35P  
-----

CASE#: TRU PS1800012

CASE NAME: IN RE: MARIA V. SOTO REVOCABLE LIVING TRUST

**SEE ALSO 13, 16**

HEARING:

Petition for ORDER REQUIRING REIMBURSEMENT OF THE TRUST AND FOR  
REMOVAL OF TRUSTEE by Ruben Navarro

COUNSEL:

RUBEN NAVARRO (PET)...AVILES & ASSOCIATES  
MARIA V SOTO REVOCABLE LIVING TRUST (TRU)...  
NORMA VELOZ SOTO (PET/OBJ)...WILLIAM M NASSAR & ASSOC

Waiver of Court Fees and Costs filed by RUBEN NAVARRO is GRANTED

Currently under review by legal research.

(LR)

30 days' notice filed 06/28/18.

(lc)

Future Hearings:

3/06/19 Readiness Calendar

4/02/19 Court Trial (Day 1)

4/03/19 Court Trial (Day 2)

4/04/19 Court Trial (Day 3)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**CONSERVATORSHIPS**

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1200180  
CASE NAME: SEAN A SMOCK

HEARING:

SECOND Account and Report of D HERSHEL WILSON and Petition for allowance of fees

COUNSEL:

SHIRLEY A SMOCK	(CP )...PRO/PER
D HERSHEL WILSON	(PET)...SHAWN P PATTERSON
JENNIFER M DANIEL	(PET)...JENNIFER M DANIEL
SEAN A SMOCK	(CEE)...JENNIFER M DANIEL

**XREF: PROPS1800670** *MICHAEL JOSEF KRAIMER*

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Report of Administration by Trustee of SNT, D. Hershel Wilson

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

- 1 Accounting period: 06/01/17 to 07/31/18
- 2 Assets on Hand \$17,700.36, cash.
- 3 No current bond.
- 4 Petitioner requests compensation in the amount of **\$150.00**.
- 5 Attorney requests fees in the amount of \$750.00 for 3 hours' time. Generally described [Acct, 09/05/18, LF, pg7]. **Supp 10/11/18 with general itemization.**
- 6 Notice is complete.
- 7 ~Proposed Order: 09/05/18

RECOMMENDATION:

Court's discretion re fees. If approved, set next hearing for Accounting Review on **09/25/19** (if one year) or **09/23/20** (if two years).

(lh)

Superior Court of Calif, County of San Bernardino

Page: 19

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1500351

**VACATED**

CASE NAME: CLARENCE WHITE

HEARING:

Accounting Review

COUNSEL:

JUNE M KIMBERLING      (PET)...CALDWELL, KENNEDY & PORTER, A.

CLARENCE ELMO WHITE      (PET/CEE)...WALTER T. MOORE

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1700320

CASE NAME: MTR OF ROY O GONCE

**SEE ALSO 21**

HEARING:

Hearing Re: PETITION TO TERMINATE CONSERVATORSHIP

COUNSEL:

BECKY S BOMAN (CPE)...SUZANNE M GRAVES  
ROY O GONCE (CEP)...CRAIG M PARKER

GENERAL INFORMATION

On **06/26/18**, Court reset matter from 06/28/18 to 07/25/18.

**Continued from 07/25/18 to clear probate notes.**

THIS CASE SET FOR HEARING ON Petition to Terminate Conservatorship Pr.C. § 1861 by Becky Boman, daughter/conservator.

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

1. Becky Boman appointed conservator of person and estate on 10/17/17; \$20,000 bond with remainder in blocked account. Conservatee passed away on 12/20/17.
2. Conservator seeks termination of the basis that conservatee passed away and seeks transfer of assets to estate. Conservatorship terminates by operation of law; however, a final accounting must be filed post termination CRC §7.1052(c). Conservator **cannot transfer assets without a final account/distribution**. Assets on hand in blocked account appear to be approximately \$643,000.
3. Inventory and Appraisal and accounting recently filed.
4. **Need** notice of hearing and proof of service.
5. No proposed order. Submit after hearing.

RECOMMENDATION

Matter may be moot as conservatee is deceased and accounting has been filed.

(lc/lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1700320

CASE NAME: MTR OF ROY O GONCE

**SEE ALSO 20**

HEARING:

First and Final Account and Report of BECKY S BOMAN and Petition  
for allowance of fees

COUNSEL:

BECKY S BOMAN (CPE)...SUZANNE M GRAVES  
ROY O GONCE (CEP)...CRAIG M PARKER

GENERAL INFORMATION:

Becky S. Bowman was appointed temporary conservator on 08/29/17; general  
appointment on 10/17/17.

*Conservatee passed away 12/20/17.*

**Continued from 07/25/18.**

THIS CASE IS SET FOR HEARING ON First and Final Account and Report and  
Petition for Fees by Becky S. Bowman, conservator

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

1. Accounting period: Pre Death: 08/29/17 to 12/20/17;  
Post Death: 12/21/17 to 05/31/18
2. Assets on hand: \$699,354.19; \$659,554.19 in cash and remaining in  
personal and real property.
3. Beginning assets on hand [\$759,639.56] in supp filed 07/20/18 do not match  
total value of Corrected Final Inventory and Appraisal filed 09/14/18  
[\$1,123,349.56] per Pr. C. §1061. Need verified supplement.
  - a. **Supp filed 10/10/18** alleges the values reflected in the Corrected I&A  
filed 09/14/18 are the market values of assets, and the value of the  
beginning assets on hand is the carry value. **Need Amended  
Corrected I&A to contain carry value of assets.**
4. Need verified supplement clarifying disbursements:
  - a. Various credit card payments totaling over \$12,000. [Acct, 6/14/18,  
LFpg8-11]. **Supp 07/20/18**, conservatee had numerous credit cards  
with outstanding balances that needed to be paid.

- b. Various payments made to Conservator Becky Bowman totaling \$4,300 from 10/25/17 to 12/29/17. **Supp 07/20/18**, petitioner alleges Conservatee was an heir to his deceased son's estate, inheriting a home in Kentucky. The home was never transferred to Conservatee, but will now become a part of Conservatee's estate. Monthly mortgage payments of \$600 per month were paid to Becky Bowman to make payments.
  - i. **Need verified supplement clarifying title of Kentucky property. Are probate proceedings still pending? Include proof of probate and copy of mortgage receipts.**
    - 1. **Supp 10/10/18, the Conservatee was the sole heir to his deceased son's estate, who passed away in 2014. An ancillary probate will be opened in Kentucky to clear the son's name off title. Conservatee paid the mortgage on the home. Petitioner will submit a copy of the deed to Kentucky property, along with son's death certificate and supporting mortgage statements.**
- c. Steve's Service totaling \$8,170 on 01/03/18. **Supp filed 07/20/18:** there were emergency repairs made to the Conservatee's home including a broken sewer pipe and replacement of ducting and air conditioning, which contained asbestos. Receipt attached at LFpg31.
- 5. Attorney Suzanne requests approval of compensation totaling \$22,083.91, of which \$8,714.72 has already been paid without Court approval for 62.80 hours at \$375/\$325/\$150 per hour for attorney and paralegal time. Itemized. [Acct, 6/14/18, LFpgs55-56]. **JTD**
- 6. Notice was given. No objections as of review.
- 7. Proposed Order submitted 07/20/18 is missing assets on hand, including address and legal description of real property. Submit revised order after hearing.

**RECOMMENDATION:**

Need to clear notes #3 and 4b then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/30/19**.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 22

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800152

CASE NAME: NIKOLAY RUMENOV SHEITANOV

**SEE ALSO 23, 24**

HEARING:

Hearing Re: OSC RE DISMISSAL OF PETITION FOR CONSERVATOR

COUNSEL:

DEYANA N KOLEVA

(CP )...LARRY R GLAZER

NIKOLAY RUMENOV SHEITANOV

(CTP)...PRO/PER

#### GENERAL INFORMATION

Ex parte hearing taken off calendar due to non-appearance.

**Continued from 06/20/18** for Court Investigator interview and report. Court advised Counsel that Court Investigator will not travel to Chicago to interview Conservatee, and the interview needs to take place in San Bernardino County.

**Continued from 08/22/18. No appearance. Court sets OSC re sanctions of \$500 for failure to appear. Court orders petitioner to be personally present on October 17, 2018. Court continues hearing and sets OSC re dismissal. Court will dismiss petition if petitioner does not appear at next hearing.**

THIS CASE SET FOR HEARING ON **OSC re Sanctions for \$500/OSC re Dismissal**/Petition for Appointment of Conservator person only by Deyana Koleva, mother

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

1. Court to determine whether an LPS conservatorship is appropriate as proposed conservatee allegedly has Schizophrenia, anxiety disorder and depression. [Petition, 5/17/18, LFpg11]. **JTD**
2. Proposed conservatee has currently been residing in Illinois for the past three months. **JTD**
3. Petitioner requests orders under Pr. C. 1873; Pr. C. §2351-2358; however, no attachments provided specifying orders, facts, and reasons. **Supp 06/20/18** petitioner requests orders providing consent that Conservatee be seen and examined by medical personnel; provide temporary care and support; to change

---

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.

residence from current location to permanent residence in Fontana, CA; for authority and powers to Conservator to enforce Conservatee's rights to receive visitors; to return Conservatee to San Bernardino County, CA; to determine appropriate level of care; to give consent to medical non-surgical and non-invasive examination.

4. Petitioner seeks medical powers. **Need** Capacity Declaration.
5. **Need** Court Investigator report. **Report of No Report filed 06/08/18.**
6. Return of Citation with proof of service filed 06/20/18. **Need** proper personal service. Alternatively, service may be completed by certified mail and return of signed return receipt as proof of service per CCP §415.40; Pr. C. §1824.
7. Proof of Certificate of Completion of the Conservatorship Training Class filed 06/23/18.
8. ~Proposed Form Order: No order submitted

#### RECOMMENDATION

##### **Court's discretion re OSC.**

Need to clear notes #4-6. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

Superior Court of Calif, County of San Bernardino

Page: 23

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1800152

CASE NAME: NIKOLAY RUMENOV SHEITANOV

**SEE ALSO 22, 24**

HEARING:

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

COUNSEL:

DEYANA N KOLEVA

(CP )...LARRY R GLAZER

NIKOLAY RUMENOV SHEITANOV

(CTP)...PRO/PER

See notes on prior matter #22.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 24

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800152

CASE NAME: NIKOLAY RUMENOV SHEITANOV

**SEE ALSO 22, 23**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DEYANA N KOLEVA

NIKOLAY RUMENOV SHEITANOV

(CP )...LARRY R GLAZER

(CTP)...PRO/PER

See notes on prior matter #22.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800200

CASE NAME: Uchenna Chiagozie Okere Jr

HEARING:

Petition for Appointment of Conservator

COUNSEL:

GEORGENIA O OKERE (CP)...PRO/PER  
UCHENNA C OKERE (CP)...  
UCHENNA CHIAGOZIE OKERE Jr (CTP)...JENNIFER M DANIEL

GENERAL INFORMATION

**Continued from 08/08/18.** Court reviews Certificate of Completion of Conservatorship Training Course as to both petitioners and returns them to petitioner. Court clears note re notice of hearing on the record as well as return of Citation as proposed conservatee is present in Court. Attorney Jennifer M. Daniel is appointed for Uchenna A. Chiagozie Okere, Jr.

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Georgenia Okere and Uchenna Okere, parents

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

1. Petitioners seek orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 07/25/18.
4. CI Report filed 07/30/18.
5. Proposed conservatee is developmentally disabled. **Need** report of Counsel Jennifer M. Daniel.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. ~Proposed Form Order: 07/05/18

## RECOMMENDATION

Need to clear notes #5-6. If approved, set hearing for Compliance Review for **03/13/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800271

CASE NAME: JOYCE MCDONALD

HEARING:

Petition for Appointment of Conservator

COUNSEL:

SHARON ROSE	(CPE)...PRO/PER
JAMES ROSE	(CPE)...PRO/PER
JOYCE MCDONALD	(CEP)...MARK J. FLORY

#### GENERAL INFORMATION

Ex parte orders granted 09/10/18. Sharon Rose and James Rose appointed temporary conservators of the person and estate. Attorney Mark J Flory appointed Counsel for Joyce McDonald.

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Sharon (daughter) and James Rose (son-in-law)

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

1. Petitioner seeks bond of \$344,219. However, as petitioner does not request Pr. C. §2590 powers regarding real property; suggested bond \$32,577.60 based on annual income. Bond re temporary conservators filed 09/10/18.
2. **CI Report filed 10/11/18.**
3. Petitioner seeks medical powers. **Need** Capacity Declaration.
4. Petitioner seeks dementia powers. **Need** report of Counsel Mark J. Flory.
5. **Need** Certificate of Completion of the Conservatorship Training Class.
6. **Need** return of Citation.
7. **Need** Notice of Hearing and Proof of Service to all relatives listed in Attachment #11 to petition.
8. ~Proposed Form Order: 08/31/18

#### RECOMMENDATION

Need to clear notes #3-7. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the required documents and hearing re Accounting Review for **01/08/20**. Any accounting to be filed 30 days in advance. (lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1800272

CASE NAME: Noreen R McGee

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

ROBERT E MCGEE (CPE)...HARTNELL LAW GROUP  
NOREEN R MCGEE (CEP)...

GENERAL INFORMATION

**Ex parte orders granted 09/06/18.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Robert E. McGee, son.

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

1. Petitioner requests Court waive bond as all assets are community property. Furthermore, conservatee's income consists solely of social security. Question need for estate powers? **Need** verified supplement.
2. Petitioner seeks medical powers; however, item #9 regarding medical treatment is incomplete. Also, Capacity Declaration filed 09/05/18 includes Dementia attachment; however, petitioner did not request dementia powers in petition, item #1k.
  - a. **Need** verified supplement clarifying requested powers.
  - b. **Need** appointment of counsel for report if requesting Dementia powers.
3. Petition is incomplete at item #11 as to list of relatives. **Need** verified supplement.
4. **Need** list of required contacts (Local form SB-12224).
5. **Need** Certificate of Completion of the Conservatorship Training Class.
6. **Need** return of Citation.
7. Notice of Hearing and Proof of Service; however, need to clear note #3 to verify completion.
8. **CI Report filed 10/02/18.**
9. ~Proposed Form Order: 09/04/18



## RECOMMENDATION

Need to clear notes #1-6. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the required documents and hearing re Accounting Review for **01/08/20**. Any accounting to be filed 30 days in advance.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 1

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO DS1000326

CASE NAME: NAFIZA NOOR SPECIAL NEEDS TRUST

HEARING:

Accounting Review

COUNSEL:

NAFIZA NOOR SPECIAL NEEDS TRUST (TRU)...

ABUL KALAM AZAD

(PET)...HORSPPOOL & HORSPPOOL

#### GENERAL INFORMATION

**Continued from 07/25/18.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Abul Kalam Azad,  
trustee

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

1. Fifth Account Current approved 03/21/18 for period ending 04/30/17.
2. **Need** 6<sup>th</sup> account current or status report.

#### RECOMMENDATION

Inquire status.

(lh)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400857

CASE NAME: Petra Amador Ramirez

HEARING:

FIRST AND FINAL Account and Report of ELAINE TAPIA and Petition for allowance of fees filed.

COUNSEL:

ELAINE TAPIA (PET)...SALLY ANNE COX  
PETRA AMADOR RAMIREZ (DEC)...  
RICHARD RAMIREZ (PET/OBJ)...PRO/PER  
DEPT OF HEALTH CARE SRVCS

Waiver of Court Fees and Costs filed by RICHARD RAMIREZ is GRANTED  
TOTAL FEES WAIVED TO DATE \$900.00

**XREF: CIVDS1610559** RICHARD RAMIREZ -V- ELAINE TAPIA  
**CIVDS1600795** TAPIA VS RAMIREZ

GENERAL INFORMATION:

**Continued from 08/22/18 to file supplement to clear notes.**

THIS CASE IS SET FOR HEARING ON Waiver on First and Final Account and Report; Petition for Fees and Final Distribution by Elaine Tapia, Administrator

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

1. Assets on hand: \$383,787.60, consisting of real property, right to receive \$90,373.25 from judgment dated 03/01/18, and \$3,414.25 cash.
2. A judgment was received against beneficiary, Richard Ramirez, for \$78,156.25 for unpaid rent, lost rent, legal fees, and costs of eviction, *plus legal fees of \$10,817*, totaling \$90,373.25.
3. Attorney requests statutory fees of **\$11,054**; fee base includes judgment for \$90,373.25, along with receipts re advanced fees of \$727.35.
4. Attorney also requests extraordinary fees of \$75,658.98 for representation in lawsuit for 275 hours at \$275 per hour. Declaration attached. [Acct, 06/29/18, LFpgs34-45].

- a. Need itemization of services including time expended and hourly rate per Local Rule 20-904. **See supp filed 10/11/18. JTD**
  - b. Question how attorney seeks to be paid as there are insufficient cash funds? **Need** verified supplement.
    - i. **Supplement filed 10/11/18** alleges the real property is currently in escrow and is set to close 10/16/18.
    - ii. **It does not appear the estate is in a condition to close. Need copy of escrow statement and proof of deposit of funds in a verified supplement per Local Rule 20-910.**
  - c. Schedule C Disbursements include fees paid to Attorney Sally Cox totaling \$4,750. Need further clarification regarding itemization of services and authority to receive payment without Court approval. **See supp filed 10/11/18, LFpg4. JTD**
5. Schedule C Disbursements include a reimbursement to beneficiary, Ruby Macias, for airfare totaling \$400. Need verified supplement clarifying how this is an administrative expense.
    - a. **Supp 10/11/18, LFpg5, Ruby advanced the estate \$325 for bond premium. Petitioner requests Ruby be reimbursed and treat the \$75 as an advancement toward distributive share. JTD**
  6. Petitioner waives statutory fees; however, requests approval of reimbursement for costs already paid regarding travel, repairs to property, meetings with contractor and police totaling \$312.12. Itemized in Supp 10/11/18, LFpg5-6. **JTD**
  7. **Need** bank/investment statement verifying ending balance per Local Rule 20-908.
  8. Request for Special Notice filed by DHS on 07/23/18.
  9. Proposed distribution seeks to withhold Richard Ramirez' distributive share and credit toward sums he owes under judgment until satisfaction of judgment. **JTD**
  10. Petitioner requests reserve of **\$3,000**. Note: if approved, need informal account for reserves per Local Rule 20-911 prior to filing ex parte petition for final discharge. **JTD**
  11. No proposed order submitted.

**RECOMMENDATION:**

Need to clear notes #4b and #7 then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge to include informal account re reserves for **11/06/19**.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500386

CASE NAME: OLIVE SADIE MITTELSDORF

HEARING:

First and Final Account and Report of APRIL MAY and Petition for allowance of fees

COUNSEL:

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

Waiver of Court Fees and Costs filed by SHAWNEE LOPEZ is GRANTED  
TOTAL FEES WAIVED TO DATE: \$465.00

**XREF: CONPS1400294** OLIVE S MITTELSDORF

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Executrix; Petition for Fees and Final Distribution, by April May

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

1. Assets on hand: \$262,501.11, consisting of cash and trailer valued at \$15,000
2. Statutory fees of \$8,260.74, each, requested by Attorney Booth and petitioner. Calculated.
3. Final Inventory and Appraisal filed 07/25/17; however, Attachment #1 erroneously includes US Bank account ending in x4176 valued at \$27,619.23 with a supporting statement ending in x9111 as of 08/19/16.
  - a. **Need corrected** Final Inventory and Appraisal to reflect proper date of death [4/11/15] value for US Bank Account ending in x4176 which appears to be **\$57,382.34** per confidential statement filed 09/16/15, LFpg9 in CONPS1400294.
  - b. **Need corrected** schedules based on corrected Final I&A.

4. Petitioner alleges American Funds IRA is still in possession and control of American Funds, who refused to deliver funds to Estate because petitioner was removed before marshalling asset. Petitioner, therefore, requests Court authorize and direct American Funds to deliver IRA funds to CB&T Cust IRA account x13951 to possession of April May as Trustee.
5. Petitioner requests Court direct US Bank to transfer residue of Decedent's US Bank Acct x7627 to US Bank Trust Account x7781.
6. Petitioner requests the 2006 RAGN Trailer to be distributed to Bruce Sayles as part of his final distribution which shall be reduced by \$15,000. **JTD**
7. *Petition for Attorney's Fees in the form of a Declaration of Joelle Lee A Nichol filed 09/12/18 requests payment of attorney's fees totaling \$3,844.91 regarding administration of Olive S. Mitteldorf Trust, reimbursement of \$119.91 for costs advanced, and percentage of statutory fees. Itemized. [See Declaration, 9/12/18, LF pg7-16]. **Petition for Attorney's Fees filed 09/12/18. Court may wish to trail to 09/12/18 to be heard with petition. JTD***
8. Request for Special Notice filed by Joelle Lee A Nichol on 06/27/18.
9. Notice of Hearing filed 08/31/18; however, need special notice to Joelle Lee A. Nichol to include copy of accounting. Also, need notice and proof of service as to named beneficiaries: Dannyette Sayles; Allison Schooler; Shawnee Lopez.
10. ~Proposed order: 08/30/18 subject to approval of fees

**RECOMMENDATION:**

Need to clear notes #3; #9, then Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/30/19**.

(lh)

Future Hearing: 7/24/19 Accounting Review

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500665

CASE NAME: JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST

HEARING:

SECOND Account and Report of JACQUELINE RUBIO and Petition for allowance of fees

COUNSEL:

JACQUELINE RUBIO (PET)...MARK J. ANDREW FLORY  
JONATHAN RODRIGUEZ SPECIAL NEEDS TRUST (TRU)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2nd Account Current and Petition for Allowance of Fees by Jacqueline Rubio, Trustee.

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

1. Establishment of SNT granted on 08/31/15; Jacqueline Rubio, mother, appointed Trustee \$440,000 bond. Bond was reduced to \$96,000 on 08/23/17.
2. Accounting period 04/01/17 to 03/31/18
3. Assets on hand \$64,339.58, cash
4. Attorney seeks fees of **\$4,879** for 20.30 hours at \$105/350 per hour for paralegal and attorney services, plus reimbursement of \$465 filing fee. Itemized [Acct. 08/30/18, LFpg 14-18].
5. Trustee waives compensation; however, requests reimbursement of purchases made for Conservatee totaling **\$2,988.47**. **Need** verified supplement with itemization.
6. **Need** statement re beneficiary and contingent beneficiaries per CRC. 7.902.
7. Notice is complete.
8. No propose order. Submit after hearing.

RECOMMENDATION

Need to clear notes #5-6. If approved, set Accounting/Status Review for **05/29/19** (if one year) **or 05/27/20** (if two years). Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 5

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1500845

**VACATE**

CASE NAME: MIGUEL MARTINEZ ORTIZ

HEARING:

Hearing re Final Discharge

COUNSEL:

GLORIA E. MARTINEZ (PET)...PRO/PER  
MIGUEL MARTINEZ ORTIZ (DEC)...

Order for discharge entered 10/03/18.

(lh)



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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600060

CASE NAME: MTR OF JEAN SUZANNE SCATES

HEARING:

Hearing re Final Discharge

COUNSEL:

SANDY DIEDERICH (PET)...PRO/PER  
JEAN SUZANNE SCATES (DEC)...

GENERAL INFORMATION

**Continued from 09/12/18. No appearance, nor required documents submitted.**

THIS CASE IS SET FOR HEARING ON Final Discharge re Sandy Diederich, Executor

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

1. **Need** receipts from beneficiaries, Douglas Scates, Karen Dakin, and Julie Scates.
2. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1600386

CASE NAME: MTR OF JACK J HALL

HEARING:

Accounting Review

COUNSEL:

JAYNEEN THORNTON (PET)...DIANA J CARLONI  
JACK J HALL (DEC)...

#### GENERAL INFORMATION

Continued from **08/15/17** and **09/12/17** to file a status report.

Continued from **11/14/17**. Counsel to file a partial #1 Inventory and Appraisal and an amended order showing limited powers.

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

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Final Partial #2 Inventory and Appraisal filed 09/27/16 is not dated at signature of probate referee, and is missing printed name on page 2. Also, caption indicates Partial #2; however, Partial #1 was not previously filed. **Need** completed form.
2. No accounting or status report of administration. **Need** same.

#### RECOMMENDATION

Inquire status.

(lh/nb/lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1601216

CASE NAME: MTR OF ANTONIA ROBLES MOLINA

HEARING:

Accounting Review

COUNSEL:

SALLY ACUNA-LOPEZ (PET)...ZACHARY R. HAGENBUCH  
ANTONIA ROBLES MOLINA (DEC)...

GENERAL INFORMATION

Continued from **05/02/18** at request of Counsel.

**Continued from 08/01/18.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Sally Acuna-Lopez

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

1. Letters of Administration issued to Sally Acuna-Lopez, daughter, on 02/22/17; full authority; no bond
2. **Need** accounting and/or status report.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1700496

CASE NAME: MARIANNE MARGARET EDMON

HEARING:  
Accounting Review

COUNSEL:

RICH EDMON (PET)...PRO/PER  
MARIANNE MARGARET EDMON (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 of Administration with full IAEA issued 08/10/17 to Rich Edmon;  
\$110,000 bond.
2. Final Inventory and Appraisal filed 02/13/18.
3. **Need** accounting and status report.

RECOMMENDATION

Inquire status.  
(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701194

CASE NAME: ESTATE OF ANDRE SPENARD

HEARING:

First and Final Account and Report of VALERIE SPENARD and  
Petition for allowance of fees

COUNSEL:

VALERIE SPENARD (PET)...JOELLE  
ANDRE SPENARD (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Waiver of Account and Report of Administrator; Petition for Fees, Reimbursements, and Final Distribution by Valerie Spenard, spouse

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

1. Assets on hand: \$52,805, consisting of real property, only.
2. Attorney requests statutory fees of \$2,112, plus advanced costs totaling \$1,441. Calculated and itemized. [Acct, 08/22/18, LFpg9]. Question how attorney seeks payment as there are no cash assets? Court to inquire.
3. Petitioner advanced \$1,000 of her personal funds towards costs and will pay \$441 from her funds to reimburse attorney.
4. Decedent died intestate and is survived by a spouse and two sisters. Both sisters have assigned their interest to petitioner/spouse. Assignments attached at LFpgs 30-33.
5. All heirs waive accounting.
6. **Need** statement regarding notice to California Department of Health Care Services or notice per Pr. C. § 9202(a). **Need** verified supplement.
7. **Need** statement regarding notice to California Victim and Compensation and Government Claims Board or notice per Pr. C. § 9202(b). **Need** verified supplement.
8. **Need** statement regarding notice to California Franchise Tax Board or notice per Pr. C. § 9202(c)(1).
9. **Need** withdrawal of claim by Oregon Department of Human Claims for \$68,177.33.

10. ~Proposed order: 08/22/18

**RECOMMENDATION:**

Need notice to California agencies then Court's discretion. If approved, Court to set hearing on filing of receipts and final discharge for **10/30/19**.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 11

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1701265

CASE NAME: MTR OF GARY LEE

HEARING:

Petition for order instructing the Personal Representative

COUNSEL:

ALITHIA VARGAS-FLORES	(PET)...SHEPPARD MULLIN RICHTER & HA
GARY LEE	(DEC)...
GLENN LEE	(TP )...LAW OFFICES OF ANDREA GEE
JOSEPH ROBERTSON	(THOMAS W DOMINICK)

Currently under review by legal research.

(LR)

Future Hearing: 4/12/19 Accounting Review

Superior Court of Calif, County of San Bernardino  
Page: 12  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800806

CASE NAME: MTR OF KATHLEEN MARIE CRUMLISH

HEARING:

Petition for PROBATE OF WILL AND FOR LETTERS TESTAMENTARY  
W/LIMITED IAEA

COUNSEL:

JAMES C CRUMLISH (PET)...STEPHEN E GRANT  
KATHLEEN MARIE CRUMLISH (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
**LIMITED** Authority under IAEA by James C. Crumlish,

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

1. Petitioner alleges will waives bond; however, will does not address bond.  
Petitioner requests limited authority and current assets are unknown. Does  
Court wish to waive bond, or alternatively require minimum \$20,000 bond?
2. 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**
3. ~Proposed Form Order: 08/22/18

RECOMMENDATION

Need to clear note #2 then Court's discretion re bond. If approved, set  
Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance  
local rule 20-901. Note requirements of local rule 20-908.

(lh)



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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800850

CASE NAME: MTR OF DENNIS BEDDOES

HEARING:

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

COUNSEL:

RICHARD BEDDOES (PET)...SCOTT FRIDLEY  
DENNIS BEDDOES (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate of Lost Will with Will  
Annexed, with full authority under IAEA, by Richard Beddoes, brother

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

1. Will waives bond; however, not as to petitioner, Richard Beddoes. Furthermore, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Suggested bond \$325,000 based on real property.
2. Declination of named Executor, Barbara Beddoes, attached. Petitioner further alleges Barbara Beddoes is the *ex-spouse* of Decedent and is therefore excluded under Pr. C. §6122. Also, alternate executors are deceased.
3. Declaration re: Lost Will is not filed. Petitioner alleges decedent's original Will dated 09/29/93 has been lost. **Need** declaration to overcome presumption in Pr. C. § 6124.
4. **Need** Notice of Petition to Administer Estate with proof of service as to Mardi Diann Johnston and Bret Ryan Johnston, named in will.
5. **Need** Duties and Liabilities.
6. ~Proposed Form Order: 09/04/18

RECOMMENDATION

Need to clear notes #3-5 then Court's discretion re bond. Court to set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800875

CASE NAME: MTR OF LILLICE ANDRESON

HEARING:

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

COUNSEL:

JANICE STOWERS (PET)...PECCORINI & PECCORINI  
LILLICE ANDRESON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by Janice Stowers, Executor/sole beneficiary

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

1. Will waives bond. Estimated assets \$770,000. The court may for good cause  
require that a bond be given, either before or after issuance of letters. (Prob.  
Code, § 8481(b)
2. **Need** proof of publication.
3. ~Proposed Form Order: 09/11/18

RECOMMENDATION

Need to clear note #2 then Court's discretion re bond. If approved, set  
Accounting/Status Review for **01/22/20**. Any accounting to be filed 30 days in advance  
local rule 20-901. Note requirements of local rule 20-908.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 15

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S36P  
-----

CASE#: PRO PS1601236

CASE NAME: THE FRANCISCO DE LA ROSA FAMILY IRREVOCABLE TRUST

HEARING:

Trial Setting Conference

COUNSEL:

RENATO A DE LA ROSA (PET)...THE LEGACY LAWYERS  
HERMAN A DE LA ROSA (PET)...THE LEGACY LAWYERS  
THE FRANCISCO DE LA ROSA FAMILY TRUST (TRU)...  
RENATO DANIEL DE LA ROSA JR (OBJ)...VEGA & RIVERA, LLP

No notes—TSC—JTD

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUST**

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S36P  
-----

CASE#: TRU PS1800054

CASE NAME: THE DANSBY SETTLEMENT TRUST

HEARING:

Hearing Re: OSC re Failure to File Accounting by Marian Dansby

COUNSEL:

MARVIN DANSBY	(PET)...K&M LAW GROUP
THE DANSBY SETTLEMENT TRUST	(TRU)...
COUNTY OF SAN BERNARDINO	(OBJ)...COUNTY COUNSEL

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON OSC re Failure to File Accounting by Marian Dansby

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

1. Matter set on 09/05/18, wherein, Court ordered an Order to be submitted appointing Marvin Dansby as Successor Trustee. Court ordered Citation issued to Marian Dansby to show cause why an accounting has not been filed.
2. **Need** Accounting by prior Trustee, Marian Dansby.
3. **Need** return of served Citation as to Marian Dansby.

#### RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 17

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

-----  
DATE: 10/17/18 TIME: 8:35 DEPT: S36P  
-----

CASE#: TRU PS1800074

CASE NAME: DAVIS FAMILY TRUST DATED OCTOBER 8, 2010

HEARING:

Petition for Require transfer of property to Successor Trustee  
and for atty's fees & costs & surcharge

COUNSEL:

DAVIS FAMILY TRUST (TRU)...  
ANGEL DAVIS (STE)...HARTNELL LAW GROUP  
MARVA DAVIS (PRO/PER)

Currently under review by legal research.

(LR)

NOTICE

Notice is complete.

(lh)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS0700246

CASE NAME: JASON RICHARD SAMPSON

HEARING:

Hearing Re: Successor Conservator Petition

COUNSEL:

MARY JEAN DUPONT	(CP )...PRO/PER
STEPHEN P DUPONT	(CP )...PRO/PER
JASON RICHARD SAMPSON	(CTP)...SHERRI L KASTILAHN
ANGELA REED	(CP )...PRO/PER

GENERAL INFORMATION

Mary and Stephen Dupont were appointed co-conservators of the person of Jason Richard Sampson on 03/19/08.

Stephen Dupont passed away, and Angela Reed was appointed as successor co - conservator of the person on 03/13/11.

Court accepted Mary Dupont's resignation on 06/04/14, and Angela Reed was appointed Successor Conservator of the person only.

**Continued from 09/12/18 to determine if a petition for successor conservatorship will be filed or not.**

THIS CASE IS SET FOR HEARING ON Successor Conservator Petition as to Jason Richard Sampson

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

1. Matter set on 05/31/18, wherein, Court read and considered Court Investigator Report filed 05/25/18; Court reappointed Counsel Sherri Kastilahn for Jason Richard Sampson and set hearing re successor conservatorship petition.
2. **Need** report of counsel Kastilahn.

RECOMMENDATION

Inquire status of successor petition.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS0900106

CASE NAME: CANDICE MAY SIMMERS

HEARING:

Hearing Re: Amended Ptn for Appt of Probate Conservator

COUNSEL:

GEORGE J SIMMERS	(CPE)...CALDWELL, KENNEDY & PORTER.
CANDICE MAY SIMMERS	(CEP/CTP)...
VIRGEL PAUL SIMMERS	(CP )...JEANNE E KENNEDY
MARY ANN SIMMERS	(CPE)...JEANNE E KENNEDY
SANDRA L. TURNER	(PET)...DAVID & TURNER
G. DAN JOHNSON	(PET)...CALDWELL, KENNEDY & PORTER
ALICE LANDAU JOHNSON	(CEE)...

GENERAL INFORMATION

George Simmers (father) was appointed Conservator of the person and estate on 06/17/09; Mary Ann Simmers (mother) was appointed Co-Conservator of the person and estate on 01/27/10.

Amended Letters, person only, issued 10/20/10 as to George Simmers and Mary Ann Simmers.

George Simmers passed away 03/20/16.

**Continued from 09/12/18. This is an ongoing conservatorship. Mary Ann Simmers will remain a conservator. Court will not require Court-appointed Counsel at this time. Referred to Court Investigator for report.**

THIS CASE SET FOR HEARING ON "Amended" Petition for Appointment of Conservator person only by Mary Ann Simmers, Conservator/mother

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

1. Petitioner, Mary Ann Simmers, requests appointment of herself and Virgel Paul Simmers (brother) as Co-Conservators of the person only. However, Order was already entered as to Mary Ann Simmers as conservator on 01/27/10. It appears this should be a Petition for Appointment of Co-Conservator, Virgel Paul Simmers, only.
2. Petitioner seeks medical powers. Capacity Declaration filed 08/08/18.
3. CI Report filed.

4. Proof of Completion of the Conservatorship Training Class filed.
5. Return of Citation filed 08/29/18.
6. ~Proposed Form Order: 08/08/18

#### RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5

(lh)

Future Hearings:

**10/24/18 Accounting Review - VACATE**

10/31/18 6<sup>th</sup> Account & Report of Mary Ann Simmers



Superior Court of Calif, County of San Bernardino

Page: 20

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1200292

CASE NAME: ANNIE LEE GRAHAM

HEARING:

Hearing re Final Discharge

COUNSEL:

WILLIE ALLEN GRAHAM	(CPE)...PRO/PER
ANNIE LEE GRAHAM	(CEP)...
WALTER T MOORE	(PET)...
JUDIE GRAHAM MORRISON	(CPE)...PRO/PER
JETHRO GRAHAM	(OBJ)...PRO/PER
CHARLENE HOOPER	(CHRISTOPHER NELSON)
HELEN LAMAR	(CHRISTOPHER NELSON)

#### GENERAL INFORMATION

**Continued from 03/28/18** for order on final accounting to be processed.

**Continued from 06/06/18.** No appearance. Continued at request of Court to re-submit Order for Final Discharge. Judie Graham Morrison is ordered to be personally present at next hearing. Notice given by Judicial Assistant.

**Continued from 08/08/18. Case is referred to Legal Aid for assistance. Court permits Judie Graham to appear via Court Call for next hearing.**

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Court approved final account of conservator Judie Morrison on 05/12/17. Court ordered funds remaining in the conservatorship to be disbursed to conservator as fees. Order entered 08/27/18.
2. Receipt filed by Judie Morrison.
3. **~Proposed Order:** 08/07/18

#### RECOMMENDATION

None.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

**SEE ALSO 22**

HEARING:

Hearing Re: Trust Accounting

COUNSEL:

ARTHUR CHARLES EWING	(CPE)...CHRISTINA FERRANTE
LETHA JOAN CANUP PHILLIPS	(CEP)...
MITCHELL I ROTH	(PET)...MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Trust Accounting Review re Arthur Ewing, Trustee

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

1. Court took jurisdiction over the Letha Canup Trust dated 2005 on 10/28/16. All proceeds ordered placed in a blocked account. Proof of blocked account filed 03/04/17.
2. Matter set on 08/15/18. Conservatee has passed away on 06/10/18. Mitchell I Roth was relieved as Counsel. Court reset accounting review regarding Trust.
3. **Need** trust accounting for period commencing 10/28/16.

RECOMMENDATION

Inquire status.

(lh)

Future Hearing: 8/28/19 Hearing Re: Final Discharge

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1600144

CASE NAME: MTR OF LETHA JOAN CANUP PHILLIPS

**SEE ALSO 21**

HEARING:

Petition for Approval and Payment of Attorney's fees

COUNSEL:

ARTHUR CHARLES EWING	(CPE)...	CHRISTINA FERRANTE
LETHA JOAN CANUP PHILLIPS	(CEP)...	
MITCHELL I ROTH	(PET)...	MITCHELL I ROTH

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Mitchell I. Roth

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

1. Petitioner, Mitchell I Roth, was appointed Counsel for Letha Phillips on 07/26/16.
2. Petitioner requests fees of \$15,450 for 41.20 hours at \$375 per hour for attorney services to be paid by Conservatee. Itemized. [Petition, 09/19/18, LFpg7-18].  
**JTD**
3. Notice is complete.
4. ~Proposed Order: 09/19/18

RECOMMENDATION

Court's discretion.

(lh)

Future Hearing: 8/28/19 Hearing Re: Final Discharge

Superior Court of Calif, County of San Bernardino  
Page: 23  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1700354

CASE NAME: LUCILLE MADERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MELISSA ROSE ROJAS

COUNSEL:

MELISSA ROSE ROJAS (CP)...PRO/PER  
LUCILLE MADERO (CTP)...MITCHELL I ROTH

GENERAL INFORMATION

**Continued from 09/05/18. No appearance. Court orders Melissa Rojas to be personally present at next hearing. Notice given by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Compliance Review re Melissa Rojas,  
daughter

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

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

RECOMMENDATION:

Inquire status.

(lh)

Future Hearing: 2/06/19 Accounting Review

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800075

CASE NAME: ALFONSO J CARRASCO

HEARING:  
Accounting Review

COUNSEL:  
ILIANA CARRASCO GONZALEZ (PET)...PRO/PER  
ALFONSO J CARRASCO (CEE)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Accounting Review re Iliana Carrasco  
Gonzalez

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

1. Matter was transferred from Riverside County Superior Court on 05/09/18.
2. Declaration in Support of Order Dispensing with Account filed 07/14/17;  
however, no Order found in file. Also, no accounting period is indicated in  
Declaration. **Court to inquire.**
3. **Need** accounting or waiver.

#### RECOMMENDATION

Inquire status.  
(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800216

CASE NAME: Arturo Perez, Jr

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

ARTURO PEREZ (CP)...PRO/PER  
ROSA PEREZ (CP)...PRO/PER  
ARTURO PEREZ Jr (CTP)...DONNASUE ORTIZ

GENERAL INFORMATION:

Hearing held on 08/28/18 re petition for limited conservatorship [filed 7/18/18]. No appearance due to death in the family. Court continued to 10/17/18.

**Continued from 09/05/18.**

THIS CASE IS SET FOR HEARING ON **Amended** (07/30/18) Petition for Limited Conservatorship, person only, by parents, Arturo Perez and Rosa Perez ["Petitioner"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. **Need** report of Counsel Donnasue Ortiz.
3. Section 4 to Medical Capacity Declaration does not include proposed conservatee's name; Section 7a indicates proposed conservatee has capacity and Section 8 is blank. **Need** complete capacity declaration.
4. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social and vocational opportunities, authority to fix the residence/dwelling of the proposed limited conservatee; authority to access all confidential records, paper, documents, reports and other information regarding the proposed limited conservatee, including those in the possession of the Regional Center, authority to control the right of the proposed limited conservatee to contract, authority to make and consent to all medical decisions for the proposed limited conservatee.
5. Petitioner requests to limit civil and legal rights of proposed conservatee to consent or withhold consent to marriage of, or entrance into a registered domestic partnership by limited conservatorship; to exercise limited

conservatee's right to control his or her social and sexual contacts and relationships.

6. Citation returned served.
7. CI Report filed 08/16/18.
8. IRC Report filed 08/29/18.
9. **Need** Certificates of Completion re Conservatorship Class.
10. ~Proposed Form Order/Letters 07/18/18.

**RECOMMENDATION:**

Need to clear notes #2-3; #9. If approved, set hearing for Compliance Review for **05/22/19** 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/lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800234

CASE NAME: Mtr of Edna Ellen Ortloff

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
MONICA CHARLETT ORTLOFF (CPE)...CHRISTINA FERRANTE  
EDNA ELLEN ORTLOFF (CEP)...

#### GENERAL INFORMATION

**Continued from 09/05/18. Court appoints Attorney Rose Rosado as the Guardian Ad Litem for Edna Ortloff.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Monica Ortloff, daughter

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

1. Petitioner requests \$46,000 bond. Appears sufficient.
2. Petitioner seeks dementia powers.
  - a. **Need** appointment of Counsel for report.
  - b. **Need** Dementia Attachment form GC-313.
3. Petitioner seeks medical powers. **Need** Capacity Declaration, including Dementia Attachment form GC-335A.
4. **Need** GAL Report from Rose Rosado.
5. Return of Citation with Proof of Personal Service filed 09/06/18; however, only 9 days' notice was given. **Need** proper service to include at least 15 days.
6. Proof of Completion of the Conservatorship Training Class filed 08/27/18.
7. CI Report filed 08/28/18.
8. ~Proposed Form Order: 08/06/18

#### RECOMMENDATION

Need to clear notes #2-5. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the required documents and hearing re Accounting Review for **01/08/20**. Any accounting to be filed 30 days in advance.

(lh)



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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800285

CASE NAME: MTR OF JESSIE FRANCO RENDON

HEARING:

Petition for Appointment of Conservator

COUNSEL:

BLANCA DE LA ROSA (CP )...CKB VIENNA, LLP  
JESSIE FRANCO RENDON (CTP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Blanca De La Rosa, paternal aunt

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

1. **Proposed Conservatee will not reach age of majority until 01/17/19.**  
Petitioner seeks orders related to powers per Pr. C. §2351.5, **and** to limit civil rights to fix residence, access confidential records, limit right to contract, have exclusive authority to give consent or withhold consent to medical treatment, to make decisions regarding education, consent/withhold consent to marriage, and control social/sexual contacts. **JTD**
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
4. Proposed conservatee is developmentally disabled. **Need** IRC report.
5. Petition is incomplete at item #2 as to proposed conservatee's name, telephone number, and address. **Need** verified supplement.
6. **Need** Confidential Supplemental Information.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. **CI Report filed 10/09/18.**
9. Return of Citation filed 09/26/18.
10. ~Proposed Form Order: 09/12/18

## RECOMMENDATION

Need to clear notes #2-7. If approved, set hearing for Compliance Review for **05/22/18** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

Superior Court of Calif, County of San Bernardino  
Page: 28  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: VC VS00546

CASE NAME: MATTER OF ROBERT CLINTON ELLIOTT

HEARING:

Seventh Account and Report of THE GOOD SHEPHERD FUND and  
Petition for allowance of fees

COUNSEL:

ROBERT CLINTON ELLIOTT (CPE)...ANNETTE G DE BELLEFEUILLE  
THE GOOD SHEPHERD FUND (CPE)...ROBERTA L. TAYLOR & ASSOc

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 7<sup>th</sup> Account Current and Report of the Good Shepherd Fund (PPF) and Petition for Allowance of Fees, by Good Shepherd Fund through Nathan Schackenberg

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

1. Accounting covers period: 04/01/16 to 03/31/18
2. Assets on hand: \$5,758.12 in cash
3. Petitioner alleges conservator fees [\$4,613.31] and trustee fees [\$3,096.50] approved from 6<sup>th</sup> accounting were inadvertently paid twice—on 09/28/16 and 03/08/17. However, payments were never reimbursed. [Acct, 9/12/18, LFpg18].
4. Petitioner alleges Attorney Roberta Taylor was inadvertently overpaid \$4,955 on 03/08/17. Petitioner seeks to apply the duplicate payment received by Roberta L. Taylor to the amount for services incurred and costs advanced during this accounting period. Good Shepherd Fund seeks a refund in the amount of \$1,935.00.
  - a. **Need** verified supplement clarifying requested reimbursement.
5. Attorney Roberta Taylor provided services from 04/06/16 to 03/01/17 totaling **\$2,595** for 11 hours at \$120-280 per hour for attorney and paralegal services, plus \$465 filing fee. Itemized. [Acct, 09/12/18, LFpg35-35]. However, Attorney Taylor was given a duplicate payment of \$4,955 on 03/08/17 which was not reimbursed to estate. **Need** verified supplement as to why estate was not reimbursed, and include reconciliation of duplicate payment less current attorney fees owing to estate.

---

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

6. Petitioner requests fees of **\$5,814.17** for 72.42 hours at \$80-105 per hour for conservatorship services, and **\$3,386** for 38 hours at \$65-\$125 per hour for trustee services, totaling \$9,200.17, less overpayments made on 03/08/17 for a total of **\$1,490.36**. Itemized [LFpgs25-29].
7. Arch Angel requests attorney fees of **\$705** for 2.50 hours at \$75 per hour. Itemized [Acct, 09/12/18, LFpg42].
8. Current bond is \$20,000.
9. Investment statements are submitted for the entire pooled account (99 sub-accounts). It cannot be confirmed from the statements as to how this specific SNT fund balances with such statements other than petitioner's verified report. Does court wish to require a breakdown of what funds are held on behalf of this Trust? JTD
10. Petitioner alleges estate will be depleted prior to when next accounting is due and requests accounting be set out one year.
11. Proposed order submitted 09/12/18 doesn't include deduction of overpayment for conservator and trustee fees. Submit revised order after hearing.

#### RECOMMENDATION

Need to clear notes #4-5 then Court's discretion. If approved, set next accounting review for **05/29/19**. Accounting to be filed 30 days in advance.

(lh)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **MISC.**

-----  
DATE: 10/17/18 TIME: 1:30 DEPT: S36P  
-----

CASE#: PRO PS1700840

CASE NAME: THE DONALD MARSHALL TRUST DATED 4/28/03

**SEE ALSO 30**

HEARING:

Hearing Re: Settlement Conference

COUNSEL:

THE DONALD MARSHALL TRUST (TRU)...

RICHARD MARSHALL (PET)...JOHN D HARDY

JUDITH ANN MARSHALL (TEE)...GREGORY L ZUMBRUNN

GENERAL INFORMATION

Continued from **05/02/18** due to ongoing discovery.

**Continued from 09/05/18. A petition for 1<sup>st</sup> amended trust contest complaint is filed and set for 10/16/18. Parties agree to set it for 10/17/18 at 1:30pm. Notice is waived.**

THIS CASE IS SET FOR HEARING ON Status Conference

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

1. Matter set on 02/21/18. Court confirmed lots 91 and 92 in the 2001 Trust to be assets subsequent to the 2003 trust. Attorney Zumbrunn to submit proposed order.

RECOMMENDATION

Court's discretion.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 30

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/17/18      TIME: 1:35      DEPT: S36P  
-----

CASE#: PRO PS1700840

CASE NAME: THE DONALD MARSHALL TRUST DATED 4/28/03

**SEE ALSO 29**

HEARING:

Petition for first amended trust contest complaint

COUNSEL:

THE DONALD MARSHALL TRUST (TRU)...

RICHARD MARSHALL (PET)...JOHN D HARDY

JUDITH ANN MARSHALL (TEE)...GREGORY L ZUMBRUNN

Currently under review by legal research.

(LR)

CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY **PROBATE**

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS0700887

CASE NAME: LUIS ALBERTO SANCHEZ JR.

HEARING:

Hearing re Final Discharge

COUNSEL:

MARIA L. DOERZAPF (PET)...CHARLIE D BARB  
LUIS ALBERTO SANCHEZ JR (DEC)...

#### GENERAL INFORMATION

Continued from 12/22/16, 03/02/17 and 05/11/17. No appearances. Maria Doerzaph and/or counsel to appear at next hearing.

Continued from **07/13/17, 08/31/17, 11/20/17 and 02/01/18** to clear notes.

Continued from **04/19/18** waiting on recording information.

Continued from **07/18/18** at request of Counsel. Deed was rejected and final discharge to be filed. Notice to be given by Ms. Brewsasagh.

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Court may wish to allow counsel to file substitution of attorney for prior counsel Charlie Barb, Counsel's deceased father.
2. Final account/distribution approved for Maria Doerzaph on 12/17/15. Order approved on 11/14/17.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b). Rejected for corrections on 03/03/17 and 05/19/17. Petitioner requested a 60 day continuance on 10/25/17.
4. No receipt required, petitioner is sole heir.

#### RECOMMENDATION

Need to clear note 3.

(lc/lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1301069

CASE NAME: Eric G Jefferson

HEARING:  
Accounting Review

COUNSEL:

AUTUMN M DANIEL	(PET)...THOMAS W DOMINICK
ERIC G JEFFERSON	(DEC)...
MARY BAKER	(PET)...HORSPOOL & HORSPOOL

GENERAL INFORMATION

**Continued from 04/30/15, 07/30/15, 10/29/15, 1/28/16, 04/28/16, 09/01/16 and 01/11/17.** Oral report given by Counsel Dominick. Matter continued to determine whether or not to pursue judgment.

**Continued from 07/12/17** to file accounting or status report.

**Continued from 01/17/18.** Asset inventory specialist to be fired or close and distribute judgment. Court requests Counsel to file a written status report prior to next hearing.

**Continued from 07/18/18. Accounting to be filed.**

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 Autumn Daniel, friend, on 05/01/14, full authority no bond.
2. Final Inventory and Appraisal filed.
3. **Need** accounting or status report.

RECOMMENDATION

Inquire status.  
(lc/lh)



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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400768

CASE NAME: (MF)ANTONIA LUNA REVOCABLE TRUST DATE 9/8/09

**SEE ALSO 4**

HEARING:

Hearing Re: STATUS FOR FINAL ACCOUNTING/PLAN FOR DISTRIBUTION

COUNSEL:

LUIS ESTRADA	(PET)...PRO/PER
ANTONIA LUNA REVOCABLE TRUST	TRU)...
STEVEN PLAISTIED	(PET)...PRO/PER
VICTOR M HERNANDEZ	(PLA)...WILLIAM M GARRETT, JR
OFELIA PARAMO	(PLA)...WILLIAM M GARRETT, JR
VICTOR HERNANDEZ	(OBJ)...BANKS GARCIA & JANIS
LOUIS HERNANDEZ	
ALL UNKNOWN OCCUPANTS	

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

Request for Waiver of Court Fees and Costs filed by LOUIS HERNANDEZ, LUIS ESTRADA, OFELIA PARAMO & STEVEN PLAISTIED is GRANTED

Status—no notes—JTD

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400768

CASE NAME: (MF)ANTONIA LUNA REVOCABLE TRUST DATE 9/8/09

**SEE ALSO 3**

HEARING:

Hearing Re: REQUEST TO RELEASE FUNDS & FINALIZE THE MATTER

COUNSEL:

LUIS ESTRADA	(PET)...PRO/PER
ANTONIA LUNA REVOCABLE TRUST	TRU)...
STEVEN PLAISTIED	(PET)...PRO/PER
VICTOR M HERNANDEZ	(PLA)...WILLIAM M GARRETT, JR
OFELIA PARAMO	(PLA)...WILLIAM M GARRETT, JR
VICTOR HERNANDEZ	(OBJ)...BANKS GARCIA & JANIS
LOUIS HERNANDEZ	
ALL UNKNOWN OCCUPANTS	

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

GENERAL INFORMATION:

Continued from **11/21/17**.

Continued from **02/07/18**. Court finds current objections filed were untimely as they were filed after the 180-day cut-off. Court orders proof, receipts filed under penalty of perjury that monies requested to be reimbursed were paid. Parties advised that if they have been living in the Trust's real property, rent would need to be paid. Rent may be taken out of proceeds to which they are entitled. Court ordered a breakdown of work done for Trust to be filed by 03/29/18 in order for Court to consider ordering trustee fees. Declaration to be filed under penalty of perjury. Court requested Mr. Garcia file his attorney fee bill with the Court.

Continued from **04/18/18**. Court orders attorney fees approved in full. Court orders trust pay Mr. Plaistied for electrical work in the amount of \$3,654.65. Court will not grant any reimbursements as requested paperwork has not been filed. Court is not awarding any trustee fees. There is no requirement of rent. A stipulation and order for plan distribution may be submitted.

**Continued from 07/18/18. Accounting not balancing need to be revised and tax issues need to be resolved. Mr. Plaistied reports he has been paid. Some distribution may occur prior to next hearing. Notice to be given by Mr. Garcia.**

THIS CASE IS SET FOR HEARING ON Request to Release Funds & Finalize Matter

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

1. Matte set at Ex Parte Hearing held on 10/17/17 hearing, wherein, petition was denied with the exception of the request for reimbursement of the costs to obtain the permits and work done to the residence as long as the petitioner provides counsel with valid proof of permits and receipts for the work done on the residence. Court will allow legitimate written objections by counsel if necessary.
2. Declaration by Stephen Plaistied, electrician hired to complete necessary electrical repairs filed 11/17/17.
3. Declaration in support of trustee fees and reimbursement filed 3/29/18. Reimbursements are itemized at LFpg7-51. JTD
4. Declaration of attorney services of Damian Garcia filed 3/29/18 requesting \$25,169. **Need** verified supplement with itemization of services.

RECOMMENDATION:

Inquire status of attorney invoice.

(nb/lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1400929

CASE NAME: John Navarro Leon

HEARING:

Hearing re Final Discharge

COUNSEL:

MAXIMINO DOMINGUEZ LEON (PET)...MICHAEL C. MADDUX  
JOHN NAVARRO LEON (DEC)...  
DEPT OF CHILD SUPPORT SVCS (TP )...PRO/PER  
COUNTY OF SAN DIEGO'S DEPT OF CHILD SUPPORT  
THE COUNTY OF SB DEPT OF CHILD SUPPORT (MARC A JENSEN-ELDRED)

GENERAL INFORMATION

**Continued from 07/18/18. No appearance. Matter continued for parties to be present. Maximino Leon and/or Counsel to be present if final discharge is not filed.**

THIS CASE IS SET FOR HEARING ON Final Discharge re Maximino Dominguez Leon

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

1. **Need** receipts from San Bernardino County Child Support Services and San Diego County Child Support Services.
2. Ex Parte Petition for Final Discharge and Order submitted 07/24/18 was returned by Court on 07/25/18. **Need same.**

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1601209  
CASE NAME: DAVID SCOTT WILLIAMS

HEARING:  
First and final Account and Report of RALPH WILLIAMS and  
Petition for allowance of fees

COUNSEL:

RALPH WILLIAMS	(PET)...JOHN F WEBER
DAVID SCOTT WILLIAMS	(DEC)...
WILLIAMS MINORS	(MIN)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Report of Administration; Petition for Fees; Termination of Trust; Final Distribution by Ralph Williams, Executor/Father

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

1. Assets on hand: \$44,014.03, cash and furniture
2. Statutory fees of \$5,330.47, each, requested by petitioner and Attorney Weber. Calculated.
3. Attorney requests extraordinary fees of \$630 for sale of real property. Itemized. [Acct, 08/17/18, LFpg20].
4. Petitioner alleges the testamentary trust created in decedent's will dated 04/12/13 is uneconomical to administer. After payment of all fees, the balance on hand will be less than \$32,258.09. Petitioner proposes equal distribution,  $\frac{1}{4}$  each, to issue. As to minor beneficiaries, Mackenzie Williams (17) and Madison Williams (15): each of their shares are to be placed in a custodial account in the name of Ralph Williams under Uniform Transfer to Minor Act until they reach age 18. **JTD**
5. Notice was given.
6. ~Proposed order: 08/17/18

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing of receipts and final discharge for **10/30/19**.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

**SEE ALSO 8**

HEARING:

Hearing Re: PTN FOR LETTERS OF ADMINIS W/FULL IAEA BY S DAVIS

COUNSEL:

DIANE YOUNG DAVIS (PET)...REIKO H HICKS  
JEROME DAVIS (DEC)...  
SHAUN JEROME DAVIS (PET)...PRO/PER  
JEANETTE DAVIS (OBJ)...PRO/PER  
JASMINE ELISE VERRETTE  
STATE OF CALIFORNIA FRANCHISE TAX BOARD

GENERAL INFORMATION

Continued from **08/21/17**. Objection and competing petition filed.

Continued from **10/30/17** at request of court for competing petitions to be heard together.

Continued from **12/19/17** on court's motion for verification of response to be filed.

Continued from **05/29/18**. Matter set for mediation.

**Continued from 07/18/18. Matter did not settle in mediation. Parties are urged to speak with Counsel.**

THIS CASE SET FOR HEARING ON

- Petition for Letters of Administration with Full Authority under IAEA by Diane Young Davis, spouse
- Petition for Letters of Administration with Full Authority under IAEA by Jerome Davis, son

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

Petition by Diana Young, spouse

1. Bond in the amount of \$350,473 is being requested. Ok.
2. **Objection by Shaun Davis, son, filed 08/16/17.**
3. **Response by Diane Young Davis filed 10/12/17. Need verification by same.**
4. **Objection by Jeanette Davis, daughter, filed 10/25/17.**
5. **Objection by Jasmine Verrette, daughter, filed 10/27/17.**

6. ~Proposed Form Order: 05/24/17

Petition by Jerome Davis, son

7. Petitioner requests bond to be determined by Court.
8. It appears Diana Young, spouse/competing petitioner, has priority of appointment per Pr. Code §8461. JTD
9. **Objection by Diane Young, spouse, filed 10/12/17.**
10. No proposed Order submitted by Jerome Davis.

RECOMMENDATION

Matter is contested.

If approved, Court to set Accounting Review Hearing on **01/08/20**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

(lh/nb/lh)

Superior Court of Calif, County of San Bernardino

Page: 8

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700517

CASE NAME: JEROME DAVIS

**SEE ALSO 7**

HEARING:

Petition for LETTERS OF ADMINISTRATION W/FULL IAEA

COUNSEL:

DIANE YOUNG DAVIS	(PET)...REIKO H HICKS
JEROME DAVIS	(DEC)...
SHAUN JEROME DAVIS	(PET)...PRO/PER
JEANETTE DAVIS	(OBJ)...PRO/PER
JASMINE ELISE VERRETTE	
STATE OF CALIFORNIA FRANCHISE TAX BOARD	

See notes on prior matter #7.

(lh)



Superior Court of Calif, County of San Bernardino

Page: 9

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1701027

CASE NAME: Mtr of the William Dominik Santoro Revocable Trust

HEARING:

Report and Account of Second Successor Trustee Account and Report of  
THOMAS HENRY COLEMAN and Petition for allowance of fees

COUNSEL:

YURI PEREZ (PET)...MONICA E AMBOSS  
THE WILLIAM DOMINIK SANTORO REVOCABLE TRUST (TRU)...  
THOMAS HENRY COLEMAN (STE)...PRO/PER

Currently under review by examiner.

(lh)

///

Future Hearings:

01/09/19 Hearing Re: Final Accounting (Larry Hughes)  
01/09/19 Hearing Re: Surcharge  
01/09/19 OSC: Citation as to Larry Hughes/Failure to Comply  
01/09/19 Hearing Re: Accounting (Successor Trustee Thomas H Coleman)

Superior Court of Calif, County of San Bernardino

Page: 10

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800577

CASE NAME: MTR OF PATRICK SCOTT SANTOS

HEARING:

Hearing Re: Permanent Injunction/Restraining Order

COUNSEL:

LORENA ELISA SANTOS	(PET)...PAUL HORN LAW GROUP
PATRICK SCOTT SANTOS	(DEC)...
MICHAEL DAVID STANNARD	(PET)...PRO/PER
MINOR CHILDREN	(MIN)...JENNIFER M DANIEL

Currently under review by legal research.

(LR)

Future Hearing: 11/08/18 Accounting Review

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800788

CASE NAME: CLARA SUE RUTZ

HEARING:

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

COUNSEL:

ALAN RUTZ (PET)...JOHN F WEBER  
CLARA SUE RUTZ (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with  
Full Authority under IAEA by Alan Rutz, executor/son

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

1. Will waives bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Does court wish to require minimum bond of \$20,000 or alternatively based on real property assets of \$280,000. **JTD**
2. ~Proposed Form Order: 08/17/18

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800789

CASE NAME: Mtr of Gerald Entine

HEARING:

Petition for probate of will and for letters of testamentary w/full IAEA

COUNSEL:

STEVEN ENTINE (PET)...SAMUEL D SHAPIRO  
GERALD ENTINE (DEC)...

GENERAL INFORMATION

Ex parte orders granted 08/27/18. Steven Entine is appointed Special Administrator with no powers. No bond required.

THIS CASE SET FOR HEARING ON Petition for **Ancillary** Probate, Letters Testamentary with Full Authority under IAEA by Steven Entine (executor/co-trustee)

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

1. Will waives bond. However, petitioner is a non-resident and the court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Does court wish to require minimum bond of \$20,000 or alternatively based on real property assets of \$275,000? **JTD**
2. ~Proposed Form Order: 09/13/18

RECOMMENDATION

RFA, Court's discretion re bond. If approved, set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lh)

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

-----  
DATE: 10/17/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1800818

CASE NAME: Mtr of Cleo Thompson

HEARING:

Petition for Will and For Letters of Admin (ANCILLARY)w/ full IAEA

COUNSEL:

CHARLES T BATTLE (PET)...WILLIAM K SWEENEY  
CLEON THOMPSON (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for **Ancillary** Probate of Will with will Annexed, with Full Authority under IAEA, by Charles T. Battle, nominee

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

1. Will waives bond; however, not as to petitioner. Petitioner is a non-resident and Court may require bond if the proposed personal representative resides outside California per and Pr. C. § 8571. Court also has discretion to require bond per Pr. C. § 8481(b). Estimated assets valued at \$250,000 based on real property.  
**JTD**
2. Decedent was domiciled in Oklahoma. This appears to be an ancillary proceeding. **Need** exemplified copy of order/letters from Oklahoma probate, case number PB-2016-288
3. 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
4. **Need** Notice of Petition to Administer Estate and proof of service as to Ricki Jones, Richard Jones, Pennie Thompson, Shana Mays, and Crystal Thompson, the surviving issue of Sharon Thompson (predeceased daughter).
5. ~Proposed order: 08/24/18.

RECOMMENDATION

Need to clear notes #2-4 then Court's discretion. If approved, set Accounting/Status Review for **01/08/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908. (lh)

Superior Court of Calif, County of San Bernardino

Page: 14

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**TRUST**

-----  
DATE: 10/17/18      TIME: 8:35      DEPT: S37P  
-----

CASE#: TRU PS1800139

CASE NAME: THE GUY ST.CLAIR & PATRICIA A. ST.CLAIR FAMILY TRU

HEARING:

Hearing Re: STATUS OF MEDIATION

COUNSEL:

SUZANNE ST.CLAIR

(PET)...C.TRACY KAYSER

THE GUY E. ST.CLAIR & PATRICIA A ST CLAIR FAMILY TRUST (TRU)...

SHARON L AVERY

(OBJ)...STONE & SALLUS, LLP

No notes—status only—JTD

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## CONSERVATORSHIPS

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON DS1000180

CASE NAME: LUISA PEPILASCOV

### HEARING:

Second Account and Report of RAQUEL PEPILASCOV and Petition for allowance of fees

### COUNSEL:

CHARLES CORNETT	(PET)...EDWARD G. OPERINI
EDWARD B FISCHER	(PET)...EDWARD B FISCHER &
LEIA CHASE	(CPE)...CHO, SHEASBY, CHUNG &
LEIA CHASE	(CPE)...PRO/PER
LINDA MAXWELL	(CE )...MAUREEN MURATORE
LINDA MAXWELL	(CPE)...MAUREEN MURATORE
LISA LEHAR	(PRO/PER
LUISA PEPILASCOV	(CEP)...MITCHELL I ROTH
LUISA PEPILASCOV	(PRO/PER
MARCOS PEPILASCOV	(CPE)...EDWARD B FISCHER &
MITCHELL I ROTH	(PET)...
RAQUEL PEPILASCOV	(CPE)...EDWARD B FISCHER &
US SPECIALTY INSURANCE COMPANY	(TP )...PRO/PER

**XREF: PRODS1000524** SIMON PEPILASCOV & LUISA PEPILASCO

### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2<sup>nd</sup> Account Current of Successor Conservator; Petition for Fees and Settlement by Raquel Pepilascov

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

1. Account period covers 4/1/16 to 03/31/18
2. Assets on hand \$222,447.46 consisting of \$25,992.21 in cash and the balance in a vehicle and securities.
3. **Need** supporting bank statement or letter verifying ending balance of accounting period regarding Wells Fargo checking account x4012 per Pr. C. §2620(c)(2).
4. Bond is currently set at \$75,000 and appears sufficient.

5. Pursuant to prior order entered 04/25/13, petitioner has taken fees of \$400/month for conservator and caregiver services. Petitioner requests to continue these payments until termination of the conservatorship. **JTD**
6. Attorney Fischel requests fees of **\$6,691.50** billed for attorney at \$375/hour and paralegal at \$135/hour. Itemized [Acct, 08/28/18, LF p.79-81]. **JTD**
7. Attorney Fischel requests reimbursement of **\$497.00**, which includes filing fee, recording fee, and \$11 in copy fees. However, costs for copies are not reimbursable expenses per Local Rule 20-1406(d). Suggest Court reduce to \$486. **JTD**
8. ~Proposed Order: 08/28/18 subject to approval of fees/reimbursements.

**RECOMMENDATION:**

Court's discretion. If approved, set next Accounting Review for **05/29/19** (if one year) or **05/27/20** (if two years). Accounting to be filed 30 days in advance.

(lh)



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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS0700078

CASE NAME: MTR OF BRANDON JOEL WIJNHAMER

HEARING:

Hearing Re: STATUS OF ARIZONA GUARDIANSHIP

COUNSEL:

JAMES WIJNHAMER (CP )...DIXIE J ALLISON  
SHELLEY WIJNHAMER (CP )...DIXIE J ALLISON  
BRANDON JOEL WIJNHAMER (CTP)...DIANA CARLONI NOURSE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status of Arizona Guardianship

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

1. Matter set on 06/27/18, wherein, petitioner reported a request for guardianship in Arizona was filed 05/31/18 and hearing was set for 08/10/18. Order of Arizona Guardianship to be filed.
2. **Need proof of guardianship in Arizona.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 17

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS0900118

**VACATED**

CASE NAME: CHARLES D. KNOPF

HEARING:

Accounting Review

COUNSEL:

THERESA BROWN  
CHARLES D. KNOPF  
BETTY ASHBAKER  
BETTY ASHBAKER

(CPE)...JOSEPHINE A. RICH  
(PCR/CEP)...  
(CPE)...HORSPOOL & HORSPOOL  
(CPE)...JOSEPHINE A RICH

10<sup>th</sup> Accounting filed 09/26/18.

Future hearing date: 11/05/18 – 10<sup>th</sup> Account Current

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600023

CASE NAME: MTR OF BETTY J ELLIS

**SEE ALSO 19**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of ASIRRA ELLIS-SUGUITAN

COUNSEL:

ASIRRA ELLIS-SUGUITAN (CPE)...SHENIECE J SMITH  
BETTY J ELLIS (CPE)...WALTER T. MOORE

GENERAL INFORMATION

Continued from **02/07/18 and 02/14/18** for Counsel and Conservator to be present.  
Continued from **04/18/18** for compliance documents. Asirra Ellis-Suguitan is ordered to  
appear at next hearing. Attorney Moore may assist petitioner in filing required  
documents, or petitioner may be referred to Legal Aid.

**Continued from 07/18/18. Case referred to Legal Aid for legal assistance.**

**Petitioner reports she may retain Counsel to assist in preparation of documents.**

THIS CASE IS SET FOR HEARING ON Compliance Review/Accounting Review

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

1. Asirra Ellis-Suguitan, daughter, was appointed Conservator of the person and estate on 08/31/17, \$60,000 bond.
2. Determination of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355) filed 01/19/18.
3. **Need** Notification of Conservatee's rights per Pr. C. §1830(c).
4. **Need** Care Plan in accord with Pr. C. §2352.5.
5. **Need** final Inventory and Appraisal per Pr. C. §2610.
6. **Need** proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.
7. (If real property is owned) Need proof of recordation of letters in each county where the real property is located or where conservatee has security interest in real property per Pr. C. §2323.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600023

CASE NAME: MTR OF BETTY J ELLIS

**SEE ALSO 18**

HEARING:

Accounting Review

COUNSEL:

ASIRRA ELLIS-SUGUITAN (CPE)...SHENIECE J SMITH  
BETTY J ELLIS (CPE)...WALTER T. MOORE

GENERAL INFORMATION

On **07/19/16**, Court appointed Asirra Ellis-Suguitan as temporary conservator of the person and estate, letters issued on 03/03/17.

On **08/31/17**, Court appointed Asirra Ellis-Suguitan as conservator of the person and estate with \$60,000 bond; first accounting to be from date of issuance of temporary letters to 08/31/17. Inventory and Appraisal to be filed as to temporary conservatorship.

Continued from **11/29/17** at request of Counsel to clear probate notes. Notice to be given by Mr. Moore.

Continued from **02/14/18**. Counsel to be present.

Continued from **04/25/18 to clear probate notes.**

**Continued from 07/25/18 at request of Counsel for petitioner to be present/substitution of attorney to be filed, and for I&A and accounting to be filed. Notice given by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON Accounting Review re Asirra Ellis-Seguitan

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

1. **Need** Inventory and Appraisal.
2. **Need** first account current for period 03/03/17 to 08/31/17.

RECOMMENDATION

Inquire status.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600051  
CASE NAME: ANDREW B HUBBARD  
HEARING:  
Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JOSEPH HUBBARD

COUNSEL:

JOSEPH HUBBARD	(PCR)...MATTHEW J SINGER
MARIA MINDA HUBBARD	(PCR)...MATTHEW J SINGER
ANDREW B HUBBARD	(CEE)...PRO/PER

GENERAL INFORMATION

Continued from **01/18/17** and **04/05/17**. No appearance at last hearing. Conservators ordered to appear.

Continued from **06/07/17**. Counsel reports that Joseph Hubbard, Conservator/father, has passed away.

Continued from **08/09/17** and **09/27/17**.

Continued from **11/22/17** to clear probate notes.

Continued from **02/07/18** at request of Court; Joseph and Maria Hubbard and/or Counsel ordered to be present at next hearing.

Continued from **04/18/18**. No appearance; Court set OSC re dismissal. Joseph Hubbard and Maria Hubbard and Counsel to be present at next hearing.

**Continued from 07/18/18.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Joseph & Maria Hubbard, parents, appointed conservator of the person only on 09/14/16. **Need** amended letters as to Maria only.
2. Notification of Conservatee's rights per Pr.C.§1830(c) filed 12/08/17. Need proof of service as to Shakira Hubbard, sister and John Chamberlain, brother. **Notice of Conservatee's Rights filed 10/12/18 not in LF at time of review.**
3. Determination of Conservatee's Appropriate Level of Care form GC-355 is not signed, and attachment 3b is not included as alleged. **Need** same.
  - a. **Determination of Conservatee's Care filed 10/12/18 not in LF at time of review.**
4. **Need** Care Plan in accord with Pr.C.§2352.5.

## RECOMMENDATION

Court's discretion re OSC. Need to clear notes 1-4.  
(lc/ww/lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600068

CASE NAME: IZACK PAUL MONTANO

**SEE ALSO 22**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of JESSICA MONTANO

COUNSEL:

JESSICA MONTANO (CPE)...FRANK O TETLEY  
IZACK PAUL MONTANO (CEP)...WALTER T. MOORE

GENERAL INFORMATION

Order appointing Jessica Montano conservator of the person and estate entered  
12/13/16, no bond.

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

Continued from **09/05/17 and 11/13/17** at request of court. Notice waived.

Continued from **01/09/18** at request of Counsel to clear probate notes. Court notes this  
case was transferred from Riverside County since the lawsuit is here. Case will be kept  
in SB County.

Continued from **04/11/18**.

**Continued from 07/18/18.**

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

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

1. Amended Notification of Conservatee's Rights filed 01/09/18.
2. Determination of Conservatee's Appropriate Level of Care filed.
3. **Need** Statement of Care Plan in accord with Pr.C. §2352.5.
4. If the conservatorship estate holds interest in real property, need proof of  
recording of letters in each county where the real property is located or where  
conservatee has security interest in real property per Pr.C. §2313.

RECOMMENDATION:

When documents are not filed as ordered, court may set a hearing in accord with Pr.C.  
§2655.

(nb/cs/nb/lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600068

CASE NAME: IZACK PAUL MONTANO

**SEE ALSO 21**

HEARING:

Accounting Review

COUNSEL:

JESSICA MONTANO

(CPE)...FRANK O TETLEY

IZACK PAUL MONTANO

(CEP)...WALTER T. MOORE

GENERAL INFORMATION

**Continued from 08/30/18** to clear probate notes.

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Jessica Montano, mother, appointed temporary Conservator in Riverside County on 11/25/15, person and estate, and general in San Bernardino on 12/13/16, person and estate.
2. Final Inventory and Appraisal filed 11/09/17 and 10/11/18; however, is incomplete as to signature, amounts for Civil Judgment **CIVDS1603992** (*Montano v Omnitrans*), temporary appointment date is incorrect etc.
  - a. **Need** completed Inventory and Appraisal.
3. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C. §2610.
4. **Need** accounting.

RECOMMENDATION

Need to clear notes 2-4. Court may wish to trail compliance review hearing.  
(lc/lh)



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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

**SEE ALSO 24**

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of THOMAS BEFERT

COUNSEL:

THOMAS BEFERT	(PET)...HARTNELL LAW GROUP
MARIE J HUMPHREY	(PET/CEP)...HARTNELL LAW GROUP
JOYCE ELLEN GOBBEL	(CEP)...CRAIG M PARKER

GENERAL INFORMATION

Continued from **03/14/18** at request of Counsel to clear probate notes.

**Continued from 05/30/18 to clear probate notes.**

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Thomas Befert and Marie Humphrey appointed co-conservators of the person and estate of Joyce Ellen Gobbel on 08/09/17; no bond is required.
2. Notification of Conservatee's Rights filed 08/21/17.
3. Determination of Conservatee's Appropriate Level of Care filed.
4. **Need** Care Plan in accord with Pr. C. §2352.5.
5. Final Inventory and Appraisal filed; however, **need** proof of service Inventory and Appraisal including Instructions for Objections per Pr. C. §2610.
6. **Need accounting.**

RECOMMENDATION

Inquire status. When and Inventory and Appraisal, and other documents are not filed as required, Court may set a hearing in accord with Pr. C. §§2614.5, 8505; 2655.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 24

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1600119

CASE NAME: JOYCE ELLEN GOBBEL

**SEE ALSO 23**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

THOMAS BEFERT	(PET)...HARTNELL LAW GROUP
MARIE J HUMPHREY	(PET/CEP)...HARTNELL LAW GROUP
JOYCE ELLEN GOBBEL	(CEP)...CRAIG M PARKER

Waiver of Court Fees and Costs filed by JOYCE ELLEN GOBBEL is GRANTED

See notes on prior matter #23.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

**SEE ALSO 26**

HEARING:

Hearing Re: STATUS OF TEMPORARY CO-CONSERVATORSHIP

COUNSEL:

PAMELA L BARWICK (PET)...HARTNELL LAW GROUP  
DENNIS BARWICK (PET)...MATTHEW SHEASBY  
DEREK J BARWICK (CEE/CTE)...CANDICE A GARCIA-RODRIGO

Waiver of Court Fees and Costs filed by DEREK J BARWICK is GRANTED

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Status of Temporary Co-Conservatorship

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

1. Matter set on 04/16/18, wherein, by agreement, petitioners were ordered temporary co-conservators of the person and estate. Either co-conservator may execute or authorize any emergency or non-emergency medical procedure, or other medical decisions related to health, education or welfare of conservatee with verbal consent of other co-conservator confirmed by text or email prior to any action being taken. If co-conservators disagree, they are to consult with a mediator prior to returning to Court. Conservatee shall reside as currently arranged. Parents will have equal custody of conservatee. See reporter transcript for details. Ms. Garcia-Rodrigo to prepare order and letters. Status hearing set for 10/17/18.
2. **Need Temporary Letters issued.**

RECOMMENDATION

Inquire status.

(lh)

Superior Court of Calif, County of San Bernardino  
Page: 26  
CIVPRO San Bernardino District  
PROBATE/CONSERVATORSHIP CALENDAR  
HONORABLE: TARA REILLY

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1700169

CASE NAME: DEREK J. BARWICK

**SEE ALSO 25**

HEARING:

Hearing Re: PETITION FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

PAMELA L BARWICK	(PET)...HARTNELL LAW GROUP
DENNIS BARWICK	(PET)...MATTHEW SHEASBY
DEREK J BARWICK	(CEE/CTE)...CANDICE A GARCIA-RODRIGO

GENERAL INFORMATION

Pamela Barwick appointed temporary conservator on 05/11/17.

Continued from **06/20/17**. Father requesting to be co-conservator. Father advised to file a petition or speak with Counsel and have an amended petition filed. Court does not require an IRC report and will allow Counsel to decide which type of conservatorship requested.

**Continued from 08/08/17**. Father's competing petition filed. Referred to Court Investigator. The Court requests IRC provide a supplemental report regarding father's request for conservatorship. The Court deems competing petitions to be objections to the other petition. The Court recommends parents use OurFamilyWizard to exchange information regarding proposed conservatee. Matter continued to trail competing petition.

**Continued from 09/12/17 and 10/18/17**. Mediation was unsuccessful.

**Continued from 12/06/17** to clear probate notes. Court notes and accepts the report of appointed Counsel, Candice Garcia-Rodrigo, for petitioner 2 as the information need for petition 2 was included in the report filed 07/24/17 for petition 1.

Continued from **02/14/18**. Court cleared all notes on competing petition.

**Continued from 03/29/18** at request of Court. Matter set for trial – estimated 2 days.

**Continued from 04/16/18 at request of Counsel due to trial period on temporary conservatorship.**

THIS CASE SET FOR HEARING ON

Petition - 1: Petition for Appointment of Conservator person and estate by **Pamela Barwick (mother)**

Petition - 2: Petition for Appointment of Conservator person and estate by **Dennis Barwick (father)**

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

**Petitioner 1- Pamela Barwick; mother:**

1. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers.
2. Proposed conservatee is developmentally disabled. It appears a petition for Limited Conservatorship may be appropriate.
3. Report of appointed counsel Candice Garcia-Rodrigo, filed 07/24/17.
4. Court Investigator report filed 01/31/18.
5. IRC report filed 06/15/17 07/20/17.
6. Petitioner seeks medical powers. Capacity Declaration filed 05/05/17.
7. Certificate of Completion of the Conservatorship Training Class filed 06/01/17.
8. Return of Citation filed 05/25/17.
9. ~Proposed Form Order: 05/05/17
10. **Objection filed by Dennis Barwick on 07/31/17.**
11. **Court deems competing petition by father as Objection.**

**Petitioner 2 -Dennis Barwick; father:**

12. Petitioner requests no bond as proposed conservatee has no assets or income. Question need for estate powers? Court to inquire.
13. Proposed conservatee is developmentally disabled. Report of Counsel Garcia-Rodrigo filed 07/24/17
14. Petitioner requests medical powers. Capacity Declaration filed by Pamela. Court cleared on record.
15. CI Report of No Report filed 09/12/17. Special CI Report filed 01/31/18.
16. Proof of Completion re Conservatorship Class filed 02/01/18.
17. IRC Report filed 08/31/17.
18. ~Proposed Form Order/Letters 08/07/17.
19. **Court deems competing petition by mother as Objection.**

RECOMMENDATION:

Matter is contested. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the required documents and hearing re Accounting Review for **01/08/20**. Any accounting to be filed 30 days in advance of review date. Note requirements of Local Rules 20.901 and 20.908.

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

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1800068

CASE NAME: Margaret Scott Smith (Master File).

HEARING:  
Petition for Attorney Fees

COUNSEL:

KIM MOORE	(CPE)...FULLERTON LEMANN SCHAEFER & DO
MARGARET SCOTT SMITH	(CEP/CTP)...SHERRI L KASTILAHN
TIMOTHY J SMITH	(CP )...MARK J. ANDREW FLORY
SHERI KASTILAHN	(CEP)...SHERRI L KASTILAHN
ROSE C ROSADO	(TP )...ROSE C ROSADO

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Attorney's Fees by Sherri Kastilahn

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

1. Petitioner, Sherri Kastilahn, was appointed Counsel for Margaret Scott Smith on 03/19/18.
2. Petitioner requests fees of \$12,375 for 33 hours at \$375 for attorney services. Itemized. [Petition, 09/19/18, LFpgs4-9]. **JTD**
3. **Need** Notice of Hearing and Proof of Service as to Rose Rosado, Mark McGuire, Mark J. Flory.
4. ~Proposed Order: 10/31/16.

RECOMMENDATION

Need notice then Court's discretion.

(lh)

Future Hearings:

- 11/13/18 Hearing Re: Accounting Review (Kim Moore)
- 11/13/18 Hearing Re: Accounting Review (Timothy Smith)
- 11/13/18 Hearing Re: Accounting Review (Larry Hoover)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1800279  
CASE NAME: Shuker Austin Flowers

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
LATRIECE D WHITAKER (CP)...PRO/PER  
SHUKER AUSTIN FLOWERS (CTP)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person only by LAtriece Whitaker, mother

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

1. Petitioner seeks medical powers. Capacity Declaration filed 09/27/18.
2. Petitioner indicates proposed conservatee is not developmentally disabled; however, it appears IRC services have been provided. [Supplemental Info, 9/11/18]. Court to determine whether a limited conservatorship is appropriate.
  - a. Court may wish to appoint counsel and require report for proposed conservatee per Pr.C. §1470. **JTD**
  - b. An IRC would be optional per Pr. C. §1827.5(b). **JTD**
3. CI Report filed 09/27/18.
4. Request to Excuse Notice filed 09/27/18 as to to John L. Stinnett (maternal grandfather), Henry Flowers (father), and Sandra Cook (paternal grandmother). **JTD**
5. Return of Citation filed.
6. Proof of Completion of the Conservatorship Training Class filed.
7. ~Proposed Form Order: 09/27/18

#### RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5  
(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: CON PS1800280

CASE NAME: Israel Uriarte

HEARING:  
Petition for Appointment of Conservator

COUNSEL:

MARIA DEL CARMEN URIARTE	(CP )...PRO/PER
MIGUEL URIARTE	(CP )...PRO/PER
ISRAEL URIARTE	(CTP)...WALTER T. MOORE

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Limited Conservator person only by Maria De Carmen Uriarte, Miguel Uriarte

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

1. Petitioner seeks orders related to powers per Pr. C. §2351.5 to fix residence, access confidential records, limit right to contract. **JTD**
2. Proposed conservatee's civil rights not be limited without court order.
3. Petitioner seeks medical powers. Capacity Declaration filed 09/28/18.
4. **CI Report filed 10/10/18.**
5. Proposed conservatee is developmentally disabled. **Need** appointment of counsel for report.
6. Proposed conservatee is developmentally disabled. **Need** IRC report.
7. **Need** Certificate of Completion of the Conservatorship Training Class.
8. Petition is incomplete ate item #11 list of relatives regarding siblings, Mercedes Uriarte, Maricela Uriarte, and Crystal Uriarte.
  - a. **Need** verified supplement to include siblings. Also, need clarification as to who is Elizabeth Uriarte, Arnulfo (sp?) Uriarte, Eriberto Uriarte, and Miguel Uriarte Jr?
9. **Need** Notice of Hearing and Proof of Service as to all relatives within the second degree.
10. Notice of Hearing and proof of service filed 09/27/18 as to Inland Regional Center; however, **need** at least 30 days' notice.



11. Return of Citation filed 09/27/18.
12. ~Proposed Form Order: 09/11/18

#### RECOMMENDATION

Need to clear notes #5-10. If approved, set hearing for Compliance Review for **05/22/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: RC RS00256

CASE NAME: ANGELA JENNER

**SEE ALSO 31**

HEARING:

Hearing Re: OSC RE SANCTIONS FOR FAILURE TO APPEAR

COUNSEL:

GARY JENNER	(PET)...PRO/PER
TAMAR LAFLEUR	(PET)...PRO/PER
ANGELA JENNER	(PCE/CEP)...FULLERTON LEMANN SCHAEFER &
VICKY A MATTHES	(CPE)...J. DAVID HORSPOOL
ANGELA JENNER	(CEP)...ANNETTE G DEBELLEFEUILLE
VERLENE CAMERON	(SC/CPE)...JOHN D MICKUS
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G. DE BELLEFEUILLE
PUBLIC GUARDIAN	(CPE/TP)...COUNTY COUNSEL
BOND SERVICES OF CALIFORNIA	(PRO/PER)
AMERICAN CONTRACTORS INDEMNITY	(LANAK & HANNA)

GENERAL INFORMATION

**Continued from 04/18/18.** Attorney John Mickus was unable to be present this date. Hearing continued at request of Court. Verlene Cameron ordered to appear at next hearing. Court sets OSC re Sanctions for failure to appear. Notice given by Judicial Assistant.

**Continued from 07/18/18. No appearance. Court sanctions Verlene Cameron \$1,000 for failure to appear twice. Sanctions will be stayed if Valerie Cameron appears at next hearing. Court will sanction John Mickus at next hearing, if he fails to appear again. Court orders Verline Cameron and John Mickus to be present at next hearing. Notice given by Judicial Assistant.**

THIS CASE IS SET FOR HEARING ON **OSC re Sanctions for FTP/Fourth Account** Current and Petition for Fees by Verlene Cameron, PPF

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

1. Account period covers 11/1/15 to 10/31/17
2. Assets on hand **\$515,857.60** consisting of cash and burial trusts.
3. Conservatee's father passed away in July, 2017. Petitioner alleges she interviewed family members and determined an appropriate amount for

conservatee to pay for her share of services at request of conservatee. Conservatee's total contribution share of funeral expenses to Forest Lawn was \$8,860.00. Need verified supplement addressing the following:

- a. Prior 3<sup>rd</sup> accounting indicates conservatee purchased a burial plot for her father on 1/30/14 for \$3,105 [Acct, 2/1/16, LFpg3; 11]. Question if burial plot purchase was considered in determination of conservatee's allocated share, or if conservatee was ever reimbursed?
  - i. **Supp filed 06/25/18.** The only family member with any assets is conservatee. Conservatee's brother is in prison and her sister is a widow with limited income. Conservatee wanted to ensure a proper burial. The amount of \$8,860 was compromised. **JTD**
  - ii. Burial plot was sought in Second Account approved on 12/23/13; however, approval was not included in Order entered 02/06/14. **JTD**
4. Petitioner requests fees of **\$4,437.50** billed at \$125/hour for 35.5 hours. Itemized. [Acct, 2/2/18, LF p.28-31]. **JTD**
5. Attorney requests fees of **\$2,905** billed for attorney at \$350/hour and paralegal at \$105/hour for 9.7 hours. Itemized [Acct, 2/2/18 LFp.33-34]. **JTD**
6. Bond is currently set at \$511,000 and petitioner requests bond increased by \$91,000 for a total bond of \$668,000. Appears adequate. **JTD**
7. Notice is complete.
8. No proposed order.

**RECOMMENDATION:**

Court's discretion. If approved, set hearing re next Accounting Review for **01/16/19** (if one year) or **01/15/20** (if two years). Accounting to be filed 30 days in advance.

(lh)

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

-----  
DATE: 10/17/18 TIME: 9:30 DEPT: S37P  
-----

CASE#: RC RS00256

CASE NAME: ANGELA JENNER

**SEE ALSO 30**

HEARING:

Fourth Current Account and Report of VERLENE CAMERON and  
Petition for allowance of fees filed.

COUNSEL:

GARY JENNER	(PET)...PRO/PER
TAMAR LAFLEUR	(PET)...PRO/PER
ANGELA JENNER	(PCE/CEP)...FULLERTON LEMANN SCHAEFER &
VICKY A MATTHES	(CPE)...J. DAVID HORSPOOL
ANGELA JENNER	(CEP)...ANNETTE G DEBELLEFEUILLE
VERLENE CAMERON	(SC/CPE)...JOHN D MICKUS
ANNETTE G DEBELLEFEUILLE	(PET)...ANNETTE G. DE BELLEFEUILLE
PUBLIC GUARDIAN	(CPE/TP)...COUNTY COUNSEL
BOND SERVICES OF CALIFORNIA	(PRO/PER)
AMERICAN CONTRACTORS INDEMNITY	(LANAK & HANNA)

See notes on prior matter #30.

(lh)

Superior Court of Calif, County of San Bernardino

Page: 32

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**ELDER ABUSE**

-----  
DATE: 10/17/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: EAP PS1800135

CASE NAME: ZUNIGA VS ZUNIGA

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

LIZETHE ZUNIGA

(PP)...PRO/PER

RAMON ZUNIGA

(RP)

Notice

Need proof of service of Notice of Hearing. Proof of Service of Temporary Restraining Order.