



Second/Final Check

Superior Court of California
County of San Bernardino
Probate Department

Probate Notes for Calendar Date: 10/23/18

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

Destruction of Filed Documents:

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

Contacting the Probate Examiners:

Probate Examiners' email address: ProbateNotes@sb-court.org

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

nb1001/1018

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PROBATE

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600171

CASE NAME: MTR OF JEROME NEWELL MARTIN

HEARING:

Probate status report filed.

COUNSEL:

JEROME NEWELL MARTIN

(DEC)...

RONALD J MARTIN

(PET)...CARL G EHMANN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Status Report by Administrator, Ronald J. Martin ["Petitioner"].

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

1. Petitioner alleges the estate is not in a condition to be closed as the real property, located in Big Bear City, has yet to be sold. Petitioner states the heirs have stated that they do not want to receive an interest in the vacant lot, but instead want to receive a distribution of cash from the sale of the Big Bear lot.
2. Petitioner requests an additional 12 months to close the estate.
3. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. § 10950. **This form of notice is mandatory.**
4. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Require proper notice then Court's discretion. If approved, set next hearing for Accounting Review for **06/11/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600173

CASE NAME: MTR OF CHARLES WETZEL

SEE ALSO 21, 22

HEARING:

Accounting Review by ***

COUNSEL:

ANNETTE WETZEL

(PET)...PRO/PER

CHARLES WETZEL

(DEC)...

GENERAL INFORMATION

Continued from **08/21/17**. Counsel for the Department of Aging and Adult Services received a subpoena for records in this case by attorney Tyler Brown on behalf of Annette Wetzel and needs additional time to comply with the subpoena.

Continued from **10/02/17** specially set at 10:00am.

Continued from **01/08/18**. Court notes that the appearance of County Counsel is not required for further hearings as documentation has already been turned over (that was subpoenaed). Court orders that administrator is to file before the next hearing date the final inventory & appraisal and the accounting.

Continued from **04/09/18**. Court orders Annette Wetzel to be personally present in court at 8:30am in department S35 on August 13, 2018; Court sets filing deadline for accounting for 4pm July 13, 2018 and orders that the clerk's office is to set the accounting for August 13, 2018 at 8:30am in department S35 if the accounting is filed by the deadline of 4pm July 13, 2018.

Continued from 08/13/18. Court notes request for dismissal was rejected on 07/27/18. Mrs. Wetzel requests matter be appointed to Public Guardian.

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 Annette Wetzel, spouse, on 06/13/16, full authority, and no bond.
2. Final Inventory and Appraisal filed 04/03/18.
3. **Need** accounting or status report.

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

RECOMMENDATION

Need to clear note 3. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

(ww/nb/ww/nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1600732

CASE NAME: MTR OF THERESA VERONICA STONE

HEARING:

Hearing re Final Discharge

COUNSEL:

LISA LAFFERTY

THERESA VERONICA STONE

(PET)...DENHERDER GRIER &

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Final Discharge

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

1. Order on Waiver of Account entered 12/18/17.
2. Receipts filed.
3. Informal account for reserves, per Local Rule 20-911, filed and affixed to proposed order received 09/27/18.
4. ~Ex-Parte Petition/Order for Final Discharge 09/27/18

RECOMMENDATION:

RFA.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1700862

CASE NAME: ROOSEVELT DAVID

HEARING:

Hearing Re: PETITION FOR LETTERS OF ADMINISTRATION

COUNSEL:

CHANNEL GLASPIE (PET)...PRO/PER
ROOSEVELT DAVID (DEC)...

GENERAL INFORMATION

Ex parte orders denied on **12/19/17**. Court authorizes the petitioner to make her appearances for court via court call. Court vacates the OSC re dismissal that is set for January 8, 2018 and resets the hearing on the petition for letters of administration to February 20, 2018 at 8:30am in department S35.

Continued from **02/20/18**. No appearance. Court orders that petitioner be personally present in court on 04/24/18. Notice by Judicial Assistant.

Continued from **04/24/18**. Court Call is permitted.

Continued from 07/17/18 at request of administrator.

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA by Channel Glaspie, daughter.

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

1. Petitioner is non-resident and court has discretion to require bond per Pr.C. §8571. Estate valued at \$282,000.00 of which \$2,000.00 is personal property.
2. Petitioner indicates all heirs waive bond; however, section 5(a) is incomplete at (1) or (2) re whether there is a spouse; (3) or (4) whether there is a registered domestic partner; section (7) or (8) whether there is issue of predeceased child. **Need** verified supplement clarifying.
3. Section 2(b) of Petition requests that petitioner be appointed executor; however, section 3(f) indicates decedent died intestate. Section 3(g) also indicates petitioner is a nominee of person entitled to letters; however, there is no attachment. **Need** verified supplement clarifying whether seeking Letters of Administration, or if there is a will and seeking Letters

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

Testamentary.

4. **Need** Notice to Petition to Administer Estate and proof of service.
5. ~Proposed Form Order: 08/29/17

RECOMMENDATION

Need to clear notes 2 - 4. Court's discretion re: bond. If approved, set Accounting/Status Review for **09/24/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(cs/nb)

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

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800181

CASE NAME: ROLANDO VITERBO ARAYA AKA ROLAND V. ARAYA ET AL

HEARING:

Report Sale and Petition for Order Confirming Sale of Real
Property.

COUNSEL:

ROLAND OCTAVIO ARAYA	(PET)...DAVID D. MORIEL
ROLANDO VITERBO ARAYA	(DEC)...
STATE OF CALIFORNIA FRANCHISE	(PRO/PER
SURETEC INSURANCE COMPANY	(TP)...

Address: 727 Apple Street, Wrightwood, CA 92397

Appraised Value: \$250,000.

Sale price: \$252,000.

First overbid: \$265,100.

Deposit: \$10,000. **Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 5% = \$12,600.

Additional bond: Current bond of \$6,000. Petitioners request proceeds to be deposited in a blocked account at American Business Bank in Los Angeles, CA. **JTD.**

Reason for Sale: Necessary to pay debts, expenses and taxes.

Exposure to Market: Listed in MLS; showings; and website listings.

Notice: Given, posted and published.

Future Hearing Dates: 06/10/19 Accounting Review.

No proposed order. Submit Order after Hearing.

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800752

CASE NAME: MILDRED J. JONES

HEARING:

Hearing Re: OSC RE DISMISSAL

COUNSEL:

MILDRED J JONES

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

GENERAL INFORMATION:

Continued from 09/18/18. Attorney George Theios informs the court that he is unsure if his client intends to go forward with the petition for letters of administration or not; court sets OSC re dismissal for date of October 23, 2018- counsel to inform the court at that date and time if the petitioner intends to Go forward with their petition, or not.

THIS CASE IS SET FOR HEARING ON **OSC re Dismissal** on Petition for Letters of Administration with full authority and w/WA under IAEA by nominee, Ruth Hendricks ["Petitioner"].

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

1. Will is not self-proving. **Need** Proof of Subscribing Witness.
2. Nomination of this petitioner affixed [LF, p14]. However, **need** declination to act by Marchelle Rene (Hughes) Moore.
3. Tanya Forbes named as Successor Executrix. **Need** Declination to Act by same.
4. Will waives bond. Estimated estate valued at \$125,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b).
5. Petitioner requests proceeds of sale to be deposited in a blocked account. **JTD.**
6. Notice does not include Gregory Hughes or Tanya Forbes. **Need** proper service.
7. ~Proposed Form Order/Letters 08/08/18.

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

RECOMMENDATION:

Need to clear notes 1-3 & 6 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/31/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800752

CASE NAME: MILDRED J. JONES

HEARING:

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

COUNSEL:

MILDRED J JONES

(DEC)...

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

See prior matter #6.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: PRO PS1800891

CASE NAME: Steven Mitchell Jeffries

HEARING:

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

COUNSEL:

JERRED JEFFRIES (PET)...GABRIELLE R RANSELL
STEVEN MITCHELL JEFFRIES (DEC)...

GENERAL INFORMATION:

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

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

1. Petition, Sections 2(d) (2) re bond; 3c re county; and 3h (3) or (4) are incomplete. **Need** verified supplement.
2. Estimated estate valued at \$118,000. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. § 8481(b). **JTD.**
3. **Need** proof of publication.
4. Notice filed on 10/05/18 is the wrong type of notice. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Order/Letters 09/13/18.

RECOMMENDATION:

Need to clear notes then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/31/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS04072

CASE NAME: VICTORIA QUENSENBERRY IRREVOCABLE SPECIAL NEEDS TRUST

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

DEPT. OF DEVELOPMENTAL SERVICE (TP)...PRO/PER

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

VICTORIA QUESENBERRY IRREV SPC (TRU)...

See next matter 9A.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 8:30 DEPT: S35P

CASE#: SPR SS04072

CASE NAME: VICTORIA QUENSENBERRY IRREVOCABLE SPECIAL NEEDS TRUST

HEARING:

Twelfth account current and report of trustee and petition for its settlement; petition for allowance of trustee's fees and attorneys' fees by Ruth L Hendricks.

COUNSEL:

DEPT. OF DEVELOPMENTAL SERVICE (TP)...PRO/PER

RUTH L HENRICKS

(PET)...HARTNELL LAW GROUP

VICTORIA QUESENBERRY IRREV SPC (TRU)...

GENERAL INFORMATION

Beneficiary died on 12/17/17.

THIS CASE IS SET FOR HEARING ON Twelfth Account Current and Petition for Fees by Trustee, Ruth L. Hendricks ["Petitioner"].

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

1. Accounting period 08/05/13 to 12/17/13 (pre-death).
12/18/13 to 08/12/18 (post-death)
2. Assets on hand \$79,961.26 consisting of cash.
3. Current bond of \$82,000. Insufficient. Suggest bond increase by \$6,000 for a new bond amount of \$88,000.00.
4. Compensation or fees are not requested.
5. Disbursements – Schedule C requires further clarification. **Need** verified supplement as to the following:
 - a. Larry D. Klein (Case Management);
 - b. Accounting Expense.
6. **Need** bank/financial statements per Local Rule 20-908.
7. Petitioner indicates that although the beneficiary died, the Trustee has yet been able to locate all of the heirs at law of the beneficiary. A search company has been engaged so it is likely that the trustee will be in a position to close within six (6) months.

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

8. Proposed Order 09/17/18 includes unspecified compensation and fees not included or prayed for in accounting.

RECOMMENDATION:

Need to clear notes 4-5 then Court's discretion. If approved, Court to set next hearing re Accounting Review for **04/16/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

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

DATE: 10/23/18 TIME: 8:35 DEPT: S35P

CASE#: TRU PS1800051

CASE NAME: FRANCYNE REED REVOCABLE TRUST

HEARING:

Petition for an order to confirm validity of trust; confirm trustee;& confirm assets to Trust

COUNSEL:

FRANCYNE REED REVOCABLE TRUST (TRU)...

JUDITH DAVIDS

(PET)...JAMES R STOUT

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1500232

CASE NAME: BENJAMIN LEE

HEARING:

Hearing Re: STATUS OF TRANSFER TO ORANGE COUNTY

COUNSEL:

BENJAMIN LEE

(PCE)...PRO/PER

SAMUEL LEE

(PCR)...DAVID PHILIPSON

SHARON LEE

(PCR)...DAVID PHILIPSON

No notes – Status.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600031

CASE NAME: BEVERLEY DAWN HEBERT

HEARING:

Second Acct Current Account and Report of NICOLE MARIE HEBERT
and Petition for allowance of fees filed.

COUNSEL:

BEVERLEY DAWN HEBERT (CEP)...JENNIFER DANIEL

NICOLE MARIE HEBERT (CPE)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Second Account Current and Petition for Fees
by Conservator of the Person and Estate, Nicole M. Hebert ["Petitioner"-
granddaughter].

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

1. Accounting period 06/01/17 to 05/31/18.
2. Assets on Hand \$734,351.76 consisting of \$38,203.00 in cash and remaining in securities.
3. Current bond of \$183,000. Petitioner requests bond be decreased by \$30,000 to \$153,000. Appears sufficient. **JTD.**
4. Nicole M. Hebert, granddaughter, does not request compensation for this accounting period.
5. Attorney Bartholomew requests fees of \$2,847.00 for services from 10/21/17 to 09/06/18. Billed at \$350/hour for 2.1 hours' attorney time and \$120/hour for 17.6 hours' paralegal time. Itemized [LF, pgs. 116-117]. **JTD.**
6. Court-Appointed Attorney Jennifer M. Daniel requests fee of \$6,272.50 for services through 10/23/18. Billed at \$325/hour for 19.3 hours attorney time [see supp. filed 09/27/18].
7. Proposed Order 09/10/18 does not include court-appointed attorney fees.

RECOMMENDATION:

Court's discretion. If approved, set hearing on the next Accounting Review for **07/30/19** (if one year) or **07/28/19** (if two years). Account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1600091

CASE NAME: John Paul Jacobs

HEARING:

Accounting Review by ***

COUNSEL:

JOHN PAUL JACOBS (CEP)...

PATRICIA JACOBS (CPE)...

GENERAL INFORMATION:

Continued from 09/04/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Estate, Patricia Jacobs.

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

1. Ex Parte Petition to Dispense with Accounting and Order entered 07/11/17 for period ending 06/28/17.
2. Waiver of account received and forwarded for processing.
3. ~Proposed Form Order 09/06/18.

RECOMMENDATION:

Set next Accounting Review for **06/25/19**.

(nb)

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800043

CASE NAME: MTR OF MILDRED K KUNIYOSHI

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of DIANE KUNIYOSHI LOO

COUNSEL:

DIANE KUNIYOSHI LOO (CPE)...LAYNE A BARTHOLOMEW
MILDRED K KUNIYOSHI (CEP)...SANDRA TURNER

GENERAL INFORMATION

Daughter, Diane Kuniyoshi Loo, appointed Conservator of the Person and Estate on
03/20/18, \$830,000 bond.

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

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

- 1 Notification of Conservatee's Rights filed.
- 2 Care Plan filed.
- 3 Determination of Conservatee's Appropriate Level of Care filed.
- 4 Final Inventory & Appraisal filed.
- 5 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:

None.

(nb)

Future Hearing:

05/28/19 Accounting Review.

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

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

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800143

CASE NAME: NOE BANUELOS

HEARING:
Petition for Appointment of Conservator

COUNSEL:
NOE BANUELOS (CEE)...CRAIG M PARKER
YESENIA HERNANDEZ (PET)...PRO/PER

GENERAL INFORMATION

Continued from **06/18/18**. The court does not require petitioner to file a corrected capacity declaration. The petitioner shows the court a screen shot on her cell phone of her certificate of completion of the conservatorship training class. The court finds it to be sufficient. Attorney Craig M. Parker is appointed for Noe Banuelos. next hearing set 08/27/18. Matter continued for court appointed counsel's report and IRC report. **Continued from 08/27/18 for parties to be present. Counsel submits report to the court.**

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

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

1. No bond- person only.
2. Petitioner seeks medical powers. Capacity Declaration filed 05/24/18.
3. Proposed conservatee is developmentally disabled. Report of court appointed counsel, Craig M. Parker, filed.
4. Proposed conservatee is developmentally disabled. IRC report filed.
5. Petitioners request Pr. C. § 2351.5 powers to secure habilitation or treatment, training, education, medical, psychological services, social/ vocational opportunities, authority to fix the residence/dwelling; authority to access confidential records/documents/reports & other info regarding the proposed conservatee, including those in the possession of the Regional Center, authority to control the right of conservatee to contract, authority to make & consent to medical decisions for the conservatee. **JTD**

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6. Petitioner seeks civil rights not be limited without court order. **JTD**
7. **Per minute order of 06/18/18** requirement of Certificate of Completion of the Conservatorship Training Class is satisfied.
8. Citation with proof of service filed 05/24/18.
9. Notice given.
10. CI report filed 06/13/18.
11. ~Proposed Form Order: 05/11/18

RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **05/28/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(ww/cs/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: CON PS1800282

CASE NAME: DIANA LYN DELRE

HEARING:

Petition for Appointment of Conservator

COUNSEL:

DIANA LYN DELRE

(CEP)...

GINA PETERS

(CPE)...PRO/PER

GENERAL INFORMATION

Daughter, Gina Peters, appointed Temporary Conservator of the person and estate on 09/18/18, \$20,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Conservatorship of person and estate by daughter, Gina Peters ["Petitioner"].

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

- 1 Out-of-state Petitioner requests bond be fixed at \$20,000. Insufficient. Estimated estate valued at \$357,500. Suggest bond of \$393,000 (includes recovery). **JTD.**
- 2 Petitioner seeks Pr. C. § 2590 powers to sell real and/or personal property, including conservatee's primary residence and proceeds to be used for Conservatee's care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **JTD**
- 3 Petitioner seeks medical powers. **Need** Medical Capacity declaration.
- 4 Court Investigator's Report filed.
- 5 **Need** return of Citation.
- 6 **Need** Certificate of Completion re Conservatorship Class.
- 7 **Need** Notice of Hearing and proof of service.

RECOMMENDATION:

Need to clear notes 3-7 then Court's discretion re: bond. If approved, set hearing for Compliance Review for **05/28/19** 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

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

of Conservatee's Appropriate Level of Care per Pr.C. §2352.5 (form GC-355); Care Plan per Pr.C. § 2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C. §2610; recordation of letters if applicable per Pr.C. §2313.

Set hearing re Accounting Review for **12/31/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.
(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02023

CASE NAME: MTR OF NANCY L. MANN

SEE ALSO 18

HEARING:

Petition for to Remove Trust from Court Supervision

COUNSEL:

DEBRA M STEVENS (CPE)...HARTNELL LAW GROUP

J.L. MERRITT (CPE)...BRYAN C. HARTNELL

NANCY L. MANN (CEP)...

RONALD KNOBLOCK (TP)...PRO/PER

Currently under review by Legal Research.

(LR)

Notice given.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 9:30 DEPT: S35P

CASE#: SC SS02023

CASE NAME: MTR OF NANCY L. MANN

SEE ALSO 17

HEARING:

Accounting Review by ***

COUNSEL:

DEBRA M STEVENS (CPE)...HARTNELL LAW GROUP

J.L. MERRITT (CPE)...BRYAN C. HARTNELL

NANCY L. MANN (CEP)...

RONALD KNOBLOCK (TP)...PRO/PER

GENERAL INFORMATION

Continued from 03/14/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Accounting Review re J.L. Merritt and Debra Stevens

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

1. Eighth Account Current of co-conservators/co-trustees, J.L. Merritt and Debra Stevens, approved on 11/30/16 for account period ending 01/10/16.
2. No accounting or status report of administration. **Need** same.

RECOMMENDATION

Inquire status.

(lh/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

PA

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1100251

CASE NAME: MTR OF CHARLES RAYMOND GROOM

HEARING:

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

COUNSEL:

CHARLES RAYMOND GROOM	(DEC)...
DEPARTMENT OF HEALTH CARE SERV	(TP)...PRO/PER
KEVIN C GROOM	(PET)...JOHN H LEJNIEKS
PUBLIC ADMINISTRATOR	(PET)...CRAIG M PARKER

GENERAL INFORMATION:

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

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

1. Public Administrator indicates partial inventory filed on 07/05/11 should have
been marked as the final inventory.
2. Accounting period 09/16/09 to 05/15/18.
3. Assets on Hand \$6,108.50 in cash.
4. Public Administrator requests compensation in the amount of \$472.57.
5. Attorney Craig M. Parker requests fees in the amount of \$472.57.
6. There are no funds on hand to make any distribution, after the payment of
requested fees and the balance of the funds to the Department of Health Care
Services in partial satisfaction of their Creditor's Claim filed in this Estate.
7. Public Administrator requests authority to withhold the sum of \$1,400.00 as a
reserve. **JTD.**

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge on
11/05/19.

(nb)

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

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

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1500172

CASE NAME: JOVAL D. CARRADINE

HEARING:

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

COUNSEL:

JONATHAN E SMITH (PET)...PRO/PER
JOVAL D CARRADINE (DEC)...
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by JONATHAN E SMITH is GRANTED
Fee waiver amount due \$465.00 for petition on 02/24/15

GENERAL INFORMATION:

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

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

1. Accounting period 07/13/13 to 07/08/18.
2. Assets on Hand \$24,415.53 in cash.
3. Public Administrator requests compensation in the amount of \$2,978.38.
4. Attorney Craig M. Parker requests fees in the amount of \$2,978.38.
5. Public Administrator requests authority to withhold the sum of \$1,499.99 as a reserve. **JTD.**
6. Question whether the Notice of Lien filed on 10/23/15 by CourtCall, LLC was resolved? **Need** verified supplement.
7. Public Administrator requests authority to deposit all funds belonging to JOVAL CARRADINE and DAVID CARRADINE, with the San Bernardino County Treasurer.
8. ~Proposed Order 09/17/18.

RECOMMENDATION:

Need to clear 6 then Court's discretion. If approved, set next hearing for receipts and
final discharge on **11/05/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600173

CASE NAME: MTR OF CHARLES WETZEL

SEE ALSO 2, 22

HEARING:

Hearing Re: Suspending Annette Wetzel's powers

COUNSEL:

ANNETTE WETZEL

(PET)...PRO/PER

CHARLES WETZEL

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Suspending Annette Wetzel's Powers.

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

1. Matter set at 08/13/18 hearing, wherein, Mrs. Wetzel requested matter to be appointed to Public Guardian.

RECOMMENDATION:

Court's discretion

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600173

CASE NAME: MTR OF CHARLES WETZEL

SEE ALSO 2, 21

HEARING:

Hearing Re: Possible referral to Public Administrator

COUNSEL:

ANNETTE WETZEL

(PET)...PRO/PER

CHARLES WETZEL

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Possible Referral to Public Administrator.

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

1. Matter set at 08/13/18 hearing, wherein, Mrs. Wetzel requested matter to be appointed to Public Guardian.

RECOMMENDATION:

Court's discretion

(nb)

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

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600436

CASE NAME: DELORES TANNER

HEARING:
Hearing Re: FUNDS TO LESLIE TANNER

COUNSEL:
DELORES TANNER (DEC)...
KURT ANDRA BENION (PET)...PRO/PER
LESLIE TANNER (MIN)...
PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

Request for Waiver of Court Fees and Costs filed by KURT ANDRA BENION is GRANTED

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Funds to Leslie Tanner.

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

1. Matter set on 09/25/18, wherein, the Court ordered that the funds to Leslie Tanner were to be held until further order of the court.

RECOMMENDATION:
Court's discretion.
(nb)

Future Hearing:
10/08/19 Final Discharge

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

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1600626

CASE NAME: MTR OF MICHAEL DAVID CUNNINGHAM

HEARING:
Accounting Review by ***

COUNSEL:
MARGARET LOUISE CUNNINGHAM (PET)...PRO/PER
MICHAEL DAVID CUNNINGHAM (DEC)...

GENERAL INFORMATION

Continued from 01/10/18. No appearance, nor has an account been filed.

Continued from 03/14/18. No appearance. Citation issued to Margaret Louise Cunningham who is cited and required to appear on 05/09/18.

Continued from 05/09/18. No appearance. Court notes that the Citation issued on 03/14/18 to Margaret Louise Cunningham has not been returned to Court. Petition is not present in Court today. Citation issued to Margaret Louise Cunningham who is cited and required to appear and show cause re failure to appear/failure to file accounting.

Continued from 06/27/18. No appearance. Court notes Margaret Louis Cunningham failed appear at today's hearing and failed to file accounting. Citation issued to Margaret Louise Cunningham who is cited and required to appear on 09/12/18.

Continued from 09/12/18. No appearance nor has an accounting been filed. Court refers matter to Public Administrator for investigation and possible appointment as Successor Administrator.

THIS CASE IS SET FOR HEARING ON Accounting Review re: Margaret Cunningham

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

1. Letter Testamentary issued to Margaret Louise Cunningham on 10/26/16 with full authority; no bond.
2. **Need** final Inventory and Appraisal with supporting financial statements per Local Rule 20-908.
3. No accounting or status report of administration. **Need same.**
4. Declaration of Non-Service of Citation filed 05/04/18 and 08/03/18. **Proof of Unsuccessful Service filed 08/03/18.**

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

RECOMMENDATION
Court's discretion
(lh/nb)

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Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700171

CASE NAME: ALETHEA JANICE PRENZLOW

HEARING:

Accounting Review by ***

COUNSEL:

ALETHEA JANICE PRENZLOW (DEC)...
PUBLIC ADMINISTRATOR (PET)...C/O PUBLIC ADMINISTRATOR

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Appointing Public Administrator Successor Trustee entered on 07/25/17, no bond.
2. **Need** copies of entire trust instrument(s) per Local Rule 20-1502.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700478

CASE NAME: MTR OF MATTHEW LALLY CASEY

HEARING:

Accounting Review by ***

COUNSEL:

DAVID J CASEY

(TP)...PRO/PER

MATTHEW LALLY CASEY

(DEC)...

PUBLIC ADMINISTRATOR

(PET)...CRAIG M PARKER

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 issued to Public Administrator on 08/15/17, full authority and no bond.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

DATE: 10/23/18 TIME: 10:00 DEPT: S35P

CASE#: PRO PS1700503

CASE NAME: MARION LOUISE HALL

HEARING:

Accounting Review by ***

COUNSEL:

MARION LOUISE HALL (DEC)...

PUBLIC ADMINISTRATOR (PET)...CRAIG M PARKER

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 W/WA issued to Public Administrator on 08/15/17, full authority and no bond.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO DS1000106

CASE NAME: MTR OF SIV LJUNGWE

HEARING:

Hearing Re: Status of second & final account by S. Dimeff

COUNSEL:

ALEX R BORDEN	(PET)...PRO/PER
ANDERS L LJUNGWE	(BURKLEY & BRANDLIN LLP
MARILYN KRIEBEL	(PET)...KEENEY WAITE & STEVENS
NPR FOUNDATION, SAN DIEGO STAT (TP)...	LUCE HOWARD HAMILTON &
SIV H LJUNGWE	(DEC)...
SUZANNE C. DIMEFF	(PET)...DIMEFF LAW OFFICE LLP
SUZANNE COWAN DIMEFF	(PET)...LAW OFFICE OF KIRK MILLER

GENERAL INFORMATION

Matter reset on 2/1/17, court noted that 2nd and Final Account filed by Suzanne Dimeff, matter is contested and set for 08/16/17. Status of account was set for this date. Continued from 03/30/17, 06/29/17 and 07/06/17. **Matter is contested** and set for trial.

Continued from **09/21/17**. Matter set for status to set mediation date.

Continued from **10/19/17 and 12/07/17**. Matter is contested. Notice waived.

Continued from **03/27/18** at request of counsel. Matter settled with former Trustee. NOPA to be submitted. Counsel for Marilyn Kriebel to give notice.

Continued from 05/29/18 and 08/21/18. Counsel states a settlement had been reached.

THIS CASE SET FOR HEARING ON Second Amended **(03/24/16)** First and Final Account by **prior administrator, Suzanne Cowan Dimeff:**

1. Accounting period 01/16/10 to 11/24/15 (5.10 years)
2. Zero assets on hand.
3. Partial No.1 and corrected I&As filed. **Need** Final Inventory and Appraisal.
4. Petitioner does not seek compensation.
5. Petitioner requests extraordinary fees of \$81,993.00 for years of work, and reimbursement of costs totaling \$41,872.46 including cost of legal counsel which her law firm advanced [LF, p. 41-49]. Billed at the lower rate of \$375

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

/hour for attorney time, \$65/hour for administrative support and reduced paralegal fees of \$75/hour. Itemized [LF, pgs. 29-40]. JTD.

6. Petitioner requests the total amount of compensation in the sum of \$123,865.46 to be a lien against Trust Assets. JTD.
7. Petitioner informs the Court that Successor Personal Representative, Alex Borden, was appointed Special Administrator by Ex Parte Application, without bond on 11/06/14, for the express purpose of substituting into Los Angeles Civil Action, Case Number YC069475, wherein, the petitioner estimates the value of decedent's one-half interest in these community property assets in exclusive control of the estranged spouse to be \$1,694,500.00. Petitioner indicates that on 06/26/15, with no Notice or explanation to this Court, Administrator Borden dismissed this Civil Action, without prejudice. Estranged spouse, Anders Ljungwe then transferred a \$1M annuity, titled in the name of the Ljunge Family Trust, and declared by Siv Ljungwe as having her one-half interest funded into her separate trust, and into his personal name. Does Court wish to set a Surcharge Hearing? JTD
8. Copy of the Siv Ljungwe Trust filed 06/24/10 and 07/06/15.
9. **Objections to First Accounting filed 6/1/15 by Alex Borden administrator, CTA to prior accounting. Supplement to Objections filed 8/19/15**
10. **Response to Objections filed 09/03/15 and 09/13/16 by Suzanne Dimeff.**
11. **Objections to 2nd Amended First Account filed 9/6/16 by Marilyn Kriebel.**
12. **Notice of lodgment in support of objections filed on 09/07/16.**
13. **Request for judicial notice filed 10/28/16 re San Diego Case and appeal.**
14. **Statement of issues filed 10/28/16.**
15. **Status Conference Report filed by Marilyn Kriebel.**

RECOMMENDATION:

Need to clear note 3. Matter is opposed. If approved, set hearing for receipts and final discharge for **11/07/19**.

(sa/lc/ww/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS0700214

CASE NAME: ** MF ** CINDA J RATLEY

HEARING:

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

COUNSEL:

ADVANCE INHERITANCE, LLC	(TP)...JAMES L LEESTMA
BOND SERVICES OF CALIFORNIA	()...
BURDETTE M GARVIN	()...
CATRINA RATLEY	(PET)...DIANE E ROBBINS
CATRINA RATLEY	(PET)...PRO/PER
CINDA J RATLEY	(DEC)...
CODY RATLEY	(PET)...TIMOTHY G MISHLER
DIANE E ROBBINS	(PET)...ROBBINS & HOLDAWAY
LAW OFFICE OF MILES & HATCHER	(MILES & HATCHER
RALPH L RATLEY	(PET)...ROBBINS & HOLDAWAY

GENERAL INFORMATION:

Ex Parte orders granted on 09/17/18. Diane E. Robbins appointed Special
Administrator on 09/17/18.

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

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

1. Petitioner is a nominee [LF, p. 7 to petition] of a person entitled to Letters.
2. Sole heir waives bond. Estimated estate valued at \$100,000. The Court may
for good cause require that a bond be given, either before or after issuance of
letters. Pr. C. §8481(b). **JTD**.
3. **Need** proof of publication as to this petitioner.
4. **Need** Notice of Petition to Administer Estate with proof of service.
5. ~Proposed Form Orders/Letters 09/12/18

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

RECOMMENDATION:

Need to clear notes 3-4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/31/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

Future Hearing:

05/15/19 Accounting Review (by Catrina Ratley)

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

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1300206

CASE NAME: MTR OF KENNETH P BURRES

HEARING:

Hearing Re: OSC FTA/FAILURE TO FILE AN ACCOUNTING

COUNSEL:

JEFFREY BURRES	(PET)...PHILIP K FIFE
KENNETH P BURRES	(DEC)...
PHILLIP K. FIFE	(PET)...PHILLIP K FIFE
STEVEN BURRES	(PET)...PRO/PER

GENERAL INFORMATION

Continued from **05/17/17, 08/02/17, 09/27/17, 12/14/17 and 01/25/18**. Jerry Morgan relieved as counsel for Steven Burres. No appearance by administrator on 01/25/18. Steven Burres ordered to appear and file an accounting or Pr.C. § 12251 petition.

Continued from 03/22/18, 05/10/18, 07/26/18 and 09/20/18. No appearances or accounting filed. Service of citation as to Steven Burres was unsuccessful. The Court orders Steven Burres and Public Administrator to personally be present at this hearing. Notice by Judicial Assistant.

THIS CASE SET FOR HEARING ON **OSC FTA/Failure to file Accounting** on Accounting review/Status.

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

1. Letters of **Successor** Administration issued to Steven Burres, brother, on 04/05/16; limited authority, bond issue deferred.
2. Final Inventory and Appraisal indicating \$0 assets.
3. **Need** accounting/status report or Pr.C. § 12251 petition.
4. Service of citation **unsuccessful. Need** proof of service of subsequent citation issued.

RECOMMENDATION

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

(lc/ww/lc/nb)

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

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1400624

CASE NAME: Lucretia May Medley

HEARING:

First and Final Account and Report of ELMER FRED GREEN jr and
Petition for allowance of fees filed.

COUNSEL:

ELMER FRED GREEN JR	(OBJ)...KYLE A PATRICK
ELMER FRED GREEN JR	(PET)...KYLE A PATRICK
ELMER FRED GREEN JR.	(PET)...RYAN GALLANT
LOUIS SCOTT YOUNG	(PET)...KEITH S WALKER
LUCRETIA MAY MEDLEY	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Executor, Elmer Fred Green Jr. ["Petitioner"].

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

1. Sole beneficiary waives accounting.
2. Accounting period covers 07/09/14 to 08/23/18.
3. Assets on Hand \$125,736.11 consisting of cash.
4. Elmer Fred Green, Jr. waives statutory compensation and extraordinary fees.
5. The Law Office of Kyle A. Patrick requests statutory fees of \$6,357.98.
Calculated.
6. The Law Office of Kyle A. Patrick requests extraordinary fees of \$35,800 for services rendered in connection with trust litigation and the sale of real property. Billed at \$175-\$300/hour for attorney time and \$50-\$125/hour for paralegal time totaling 194 hours. Itemized [see declaration filed on 08/31/18, LF, pgs. 12-19].
JTD.
7. Elmer Fred Green Jr., requests authority to withhold \$1,400.00 as a reserve for closing costs.
8. ~Proposed Order 08/31/18.

RECOMMENDATION

Court's discretion. If approved, set next hearing for final discharge for **11/05/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1501155

CASE NAME: THE GEORGE NEWMAN LIVING TRUST 2009

HEARING:

Hearing Re: PROOF OF DEPOSIT IN TO BLOCKED ACCOUNT

COUNSEL:

CHRISTINE LARSON	(PET)...LAYNE A BARTHOLOMEW
CHRISTINE LARSON, TRUSTEE	()...
JASON LARSON	(PET)...MICHAEL B HICKEN
JOSHUA LARSON	(MIN)...
MATTHEW LARSON	(MIN)... THE GEORGE NEWMAN LIVING
TRUST (TRU)...	

GENERAL INFORMATION:

Continued from 07/17/18 and 09/18/18 at request of counsel to file bond and blocked accounts.

THIS CASE IS SET FOR HEARING ON Proof of Deposit into Blocked Account.

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

1. Per Settlement Agreement and Order Thereon entered on 05/08/18, Trust assets will be placed into blocked accounts and that the total amount of assets subject to bond shall be no more than \$50,000.
2. **Need** proof of bond.
3. **Need** proof of blocked account.

RECOMMENDATION:

Need to clear note 2-3.

(nb)

Future Hearing:

11/13/18 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600206

CASE NAME: JEAN BARBARA WALKER

HEARING:

Hearing re Final Discharge

COUNSEL:

JEAN BARBARA WALKER (DEC)...

RITA KUNZ (PET)...PRO/PER

VACATE – final discharge order entered 10/11/18.

(nb)

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

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1600756

CASE NAME: ROBERT EDWARD MILLER

HEARING:

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

COUNSEL:

ROBERT EDWARD MILLER	(DEC)...
ROBERT WILLIAM MILLER IV	(OBJ)...MITCHELL I ROTH
RYAN EDWARD MILLER	(PET)...FULLERTON LEMANN SCHAEFER
W.A.(SAM) HLAVATY	(PET)...THOMPSON & COLEGATE
WALTER & PISTOLE	()...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Special Administrator, W.A. Hlavaty ["Petitioner"-PFF].

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

1. Attachment 2 to Final Inventory and Appraisal filed on 09/04/18 is not appraised
by Probate Referee. **Need** complete inventory.
2. Accounting period 11/22/16 to 06/19/18.
3. Assets on Hand \$1,292,864.90 consisting of \$5,878.21 in cash and remaining in
real and personal property. Petition indicates W.A. Hlavaty has delivered all
known assets to the Administrator with Will Annexed, Ryan E. Miller.
4. Current bond of \$1,206,000.00.
5. W.A. Hlavaty requests compensation for ordinary services of \$35,307.75. Billed
at \$45-\$135/hour for 517.2 hours. Itemized [LF, pgs. 53-95]. **JTD.**
 - a. Question authority to be paid at hourly rates instead of per Pr. C. §10800?
Also, if there are two or more personal representatives, the personal
representative's compensation shall be apportioned among the personal
representatives by the court according to the services actually rendered by
each personal representative or as agreed to by the personal
representatives. Pr. C. §10805. **Need** verified supplement.

6. W.A. Hlavaty requests extraordinary fees of \$18,314.50 for services rendered in connection with the sale of real property. Billed at \$35-\$135/hour for a 310.70 hours' time. Itemized [LF, pgs. 96-111]. **JTD.**
7. Attorneys Thompson & Colegate, LLP, request fees and costs for ordinary services of \$23,392.00. Billed at \$150.80-365/hour for 64.7 hours' attorney time and \$150/hour for 27 hours' paralegal time. Itemized [LF, pgs. 118-133]. **JTD.**
 - a. Costs include faxes that are considered overhead and normally not allowed totaling \$28.50. Does Court wish to reduce fees by this amount? **JTD.**
 - b. Question authority to be paid at hourly rates instead of per Pr. C. §10814? Also, Attorney's compensation shall be apportioned among the attorneys by the court according to the services actually rendered by each attorney or as agreed by the attorneys. Pr. C. § 10814. **Need** verified supplement.
8. Attorneys Thompson & Colegate, LLP request extraordinary fees of \$12,760.50 for services rendered in connection with the sale of real property. Billed at \$290-\$350/hour for 43.10 hours' attorney time and \$150/hour for 5 hours' paralegal time. Itemized [LF, pgs. 136-145]. **JTD.**
9. ~Proposed Order 09/04/18.

RECOMMENDATION:

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700215

CASE NAME: TIMOTHY ALLEN LAWRENCE

VACATED

HEARING:

Probate status report filed.

COUNSEL:

KATHLEEN ELLEN LAWRENCE (PET)...LAW OFFICES OF PAUL S RABER

TIMOTHY ALLEN LAWRENCE (DEC)...

First and Final Account filed and set for 11/07/18.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700346

CASE NAME: MTR OF ABBAS ALI RAMAZAN

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

ABBAS ALI RAMAZAN (DEC)...

PATRICIA MARIE RAMAZAN (PET)...PRO/PER

Probate Status Report filed and set for 11/08/18.

(nb)

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

Superior Court of Calif, County of San Bernardino
Page: 8A ADD ON
CIVPRO San Bernardino District
PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1700785

CASE NAME: DOROTHY JANE GODDARD

HEARING:

Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

DEAN DILLON BROWN (PET)...HORSPPOOL & HORSPPOOL
DOROTHY JANE GODDARD (DEC)...
TIMATHENA NADINE GODDARD (OBJ)...PRO/PER

Address: 840 Pennsylvania Ave., Colton, CA 92324

Appraised Value: \$180,000. Re-appraisal, sections 3-4 incomplete.
Need verified supplement.

Sale price: \$170,000

First overbid: \$179,000

Deposit: \$10,000. **Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.**

Commission: 5% = \$8,500.

Additional bond: None. Proceeds from sale to be placed in blocked account per order entered 01/25/18.

Reason for Sale: Necessary to pay debts, devise and expenses.

Exposure to Market: Signage and listed in MLS and realtor's website.

Notice: Proof of publication filed 10/12/18 not available for review in LF; Notice to clerks posting is incomplete at the caption; and reflects incorrect hearing date.
Need proper notice.

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

~Proposed Form Orders 08/13/18.

Future Hearing:
04/03/19 Accounting Review.

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800874

CASE NAME: MTR OF MARILYN D CASTANEDA

SEE ALSO 10

HEARING:

Hearing Re: APPLICATION FOR PRELIMINARY INJUNCTION ETC

COUNSEL:

MARILYN D CASTANEDA (DEC)...

RUDY ALBA (PET)...PRO/PER

Request for Waiver of Court Fees and Costs filed by RUDY ALBA is GRANTED

Currently under review by Legal Research.

(LR)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: PRO PS1800874

CASE NAME: MTR OF MARILYN D CASTANEDA

SEE ALSO 9

HEARING:

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

COUNSEL:

MARILYN D CASTANEDA (DEC)..
RUDY ALBA (PET)...PRO/PER

GENERAL INFORMATION:

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

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

1. Petitioner is a nominee [LF, p. 8 to petition] of a person entitled to Letters.
2. Heir waives bond. **Need** Mandatory Waivers of Bond by Heir or Beneficiary, form DE-142/DE-111, by issues Karen D. Stewart and Kenneth L. Alvino.
3. Estimated estate valued at \$-20,193.70. The Court may for good cause require that a bond be given, either before or after issuance of letters. Pr. C. §8481(b).
4. **Need** Duties and Liabilities of Personal Representative form.
5. ~Proposed Form Order/Letters 09/11/18.

RECOMMENDATION:

Need to clear notes 2 & 4 then Court's discretion re: bond. If approved, set future hearing for Accounting Review on **12/31/18**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 12

HEARING:

Petition for LETTERS OF SUCCESSOR ADMINISTRATION

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION

Continued from 04/26/17, 07/25/17, 09/19/17, 12/19/17, 02/20/18, 04/24/18, 06/05/18, 08/14/18 and 09/18/18. Counsel shows a conformed copy of the proof of publication with verification. The courts copy does not have this - directs counsel to clerks' office to file copy with verification.

THIS CASE SET FOR HEARING ON Petition for Letters of **Successor** Administration with full authority under IAEA by Sandra Thomas Stell, great niece.

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

1. Letters of Administration with Will Annexed issued to Verna Grasso, paternal grandniece on 8/23/02, with funds held in blocked account in lieu of bond. Verna passed away on **12/29/16**.
2. As the will has already been admitted to probate, it appears to be a petition for successor administrator.
3. Petitioner requests bond of \$20,000; however, cash and real property appear to be valued at \$42,020. Court to require bond of \$42,020.
4. Notice to Petition to Administer Estate and proof of service filed 04/05/17. However, **need** Due Diligence Declarations as to heirs with unknown whereabouts.
5. Notice of Death of Administrator filed 04/05/17; **need** proof of service.
6. Proof of Publication filed 04/17/17 is not verified. **Need** conformed copy of the proof of publication with verification as directed by Court on 09/18/18..
7. ~Proposed Form Order: 03/07/17.

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

RECOMMENDATION

Need to clear notes 4-6 then Court's discretion re bond. If approved, set Accounting/Status Review for **01/02/20**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc/lh/nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 8:30 DEPT: S36P

CASE#: SPR SS04825

CASE NAME: ESTATE OF RUBY ANN NOLEN

SEE ALSO 11

HEARING:

SIXTH Account and Report of VERNA GRASSO and Petition for allowance of fees filed.

COUNSEL:

RUBY ANN NOLEN	(DEC)...
SANDRA THOMAS STELL	(PET)...C. L. FARRELL
VERNA GRASSO	(PET)...C.L. FARRELL

GENERAL INFORMATION:

Administrator Verna Grasso died on 12/29/16.

Continued from **07/25/17, 09/19/17, 12/19/17, 02/20/18, 04/24/18, 06/05/18** and **08/14/18** for counsel to file a supplement to clear notes.

Continued from 09/18/18. Note 5 is cleared on the record.

THIS CASE IS SET FOR HEARING ON Sixth and Final Account and Petition for Fees by Attorneys for Petitioner C.L. Farrell and as former Attorneys for the late Verna Grasso, Deceased Administrator.

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

1. Accounting period 10/12/15 to 02/28/17.
2. Assets on Hand \$45,260.36 consisting of \$40,255.40 in cash and remaining in a ½ interest in unimproved real property.
3. **See Supplemental filed 09/18/18 [LF, pgs. 31-52 for itemization of fees and costs].**
4. **Petitioner requests the Estate be authorized to abandon its undivided one-half (1/2) tenancy in common interest in the unimproved, vacant 206,038 square foot (4.73 acre) lot located in Newbery Springs, San Bernardino County, CA 92365 [APN 0515-082-06-0000], having a January 26, 2016 reappraised value of \$2,000.00, due to its demonstrated unmarketability, to conserve the Estate cash assets and to enable the Estate assets to be distributed to its heirs at law and for the Estate to be brought to a close.**

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

5. **All of the acts of VERNA GRASSO, taken as Administrator of the Will and the Decedent's Estate from October 12, 2015 to December 29, 2016,** inclusive, as reported in the within "Sixth and Final Account and Report of Deceased Administrator and Petition for its Settlement; Petition For: 1. Approval of Deceased Administrator's Prior Acts; 2. Allowance of Statutory and Extraordinary Commissions to Deceased Administrator and Her Attorneys and Reimbursement of Costs Advanced; 3. For Authority to Abandon Estate's Interest in Realty; and, 4. For Final Distribution," **be confirmed, ratified and approved.**
6. That statutory Administrator's fees be fixed and allowed under Probate Code §10800 in the sum of \$9,832.18 **in favor of Administrator VERNA GRASSO,** deceased, LESS credit for prior payments of Court ordered statutory fees of \$8,376.88, **for a balance due of \$1,455.30.**
7. That Petitioner C L FARRELL of the LAW OFFICES OF C L FARRELL, P.C. be authorized and directed to pay from Estate funds forthwith the sum of \$1,455.30 to the heirs of the Estate of VERNA GRASSO, Decedent, as Administrator of the Estate of RUBY ANN NOLEN, Decedent, as payment in full for statutory compensation for ordinary services rendered to the within Estate.
8. That statutory attorneys' fees be fixed and allowed under Probate Code §10800 in the sum of \$9,832.18 **in favor of the LAW OFFICES OF C L FARRELL,** P.C., LESS credit for prior payments of Court ordered statutory fees of \$8,376.88, **for a balance due of \$1,455.30.**
9. That Petitioner C L FARRELL of the LAW OFFICES OF C L FARRELL, P.C. be authorized and directed to pay from Estate funds forthwith the sum of \$1,455.30 to the LAW OFFICES OF C L FARRELL, P.C. as payment in full for statutory compensation for ordinary services rendered to the within Estate.
10. That extraordinary attorneys' fees be fixed and allowed in the sum of \$25,140.00 **in favor of the LAW OFFICES OF C L FARRELL,** P.C., LESS a combined one-time courtesy discount of \$8,640.00, for a combined **net total of \$16,500.00, for legal services** rendered to the Administrator and the within Estate from July 2, 2004 to May 27, 2010, inclusive.
11. That Petitioner C L FARRELL of the LAW OFFICES OF C L FARRELL, P.C. be authorized and directed to pay from Estate funds to the LAW OFFICES OF C L FARRELL, P.C. the combined net sum of \$16,500.00 as and for payment for extraordinary attorneys' fees for legal services rendered to the Administrator and the within Estate from July 2, 2004 to May 27, 2010, inclusive.
12. That additional **extraordinary attorney fees for legal services to be rendered by Attorney C L FARRELL and the LAW OFFICES OF C L FARRELL,** P.C. to the within Estate from and after August 14, 2018 be fixed and allowed **in the sum of \$3,500.00** to calculate the Final Distribution sums due each of the 58+ Nolen heirs and/or their successors in interest based upon their respective interests in the within Estate; to issue Final Distribution checks to the ,Nolen Heirs; to draft, mail and obtain Receipts from the Nolen Heirs for their respective Final Distributions; to confer with the Nolen Heirs by telephone and correspondence, as needed, about the Final Distributions and Receipts; to assemble Estate documents and data for the preparation of the Estate's 2018

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

final income tax returns and payment of income taxes due, if any, and CPA fees; to draft, file, issue filing fees on, serve and appear on an "Ex Parte Petition For Authority to Deposit Funds with the San Bernardino County Treasurer" for Nolen Heirs whose whereabouts are unknown to Petitioner and for the unknown beneficiaries and/or heirs at law of deceased Nolen Heirs, for whom Petitioner is unable to distribute previous Court ordered Preliminary Distributions and/or Final Distributions.

13. That Petitioner C L FARRELL of the LAW OFFICES OF C L FARRELL, P.C. be authorized and directed to pay from Estate funds to the LAW OFFICES OF C L FARRELL, P.C. the sum of \$3,500.00 as and for additional extraordinary legal services to be rendered to the within Estate from and after from and after August 14, 2018.
14. **That Attorney C L FARRELL's expenditure of \$2,181.86** from funds held in Cost Retainer deposited in her law firm's unsegregated Attorney Client Trust Account for the benefit of the within Estate **for** payment of usual Court approved **reimbursable costs incurred** from November 26, 2001 to May 31, 2018, inclusive, as reported in the "Supplement to Sixth and Final Report of Administrator, etc." **be confirmed, ratified and authorized.**
15. That **cost advances** to the within Estate by the LAW OFFICES OF C L FARRELL, P.C., from November 26, 2001 to May 31, 2018, inclusive, **in the sum of \$3,259.15 for costs** of administration including filing fees, certified document, notice publications, courier services and service of pleadings on 58+ heirs at law, all as more particularly itemized on Exhibit "C" which is attached to the "Supplement to Sixth and Final Account, etc." and reimbursement to her of \$2,273.86 from Estate funds, leaving an unpaid costs advanced balance due her of \$985.29, **be confirmed, ratified and authorized.**
16. **That Petitioner C L FARRELL** of the LAW OFFICES OF C L FARRELL, P.C. **be authorized and directed to pay from Estate funds** to the LAW OFFICES OF C L FARRELL, P.C. forthwith **the sum of \$985.29** to the LAW OFFICES OF C L FARRELL, P.C. **as reimbursement of unpaid costs advanced** to the within Estate for period November 26, 2001 to May 31, 2018, inclusive.
17. **That Petitioner C L FARRELL** of the LAW OFFICES OF C L FARRELL, P.C. **be authorized and directed to retain from Estate funds the sum of \$1,499.00 as a reserve**, in the unsegregated LAW OFFICES OF C L FARRELL, P. C. IOLTA Attorney Client Trust Account at Chase Bank, Redlands Branch, Redlands, California, and to pay from said funds Estate closing costs including but not limited costs to be incurred for the preparation of the Estate's final Federal and California Fiduciary income tax returns prepared and distributing to the Estate heirs at law and/or their successors in interest IRS and FRB Form K -1s; payment of all Federal and California income taxes determined to be owed by the within Estate; filing fees to be incurred for an "Ex Parte Petition **For Authority to Deposit Funds with the San Bernardino County Treasurer**" for those Nolen Heirs whose whereabouts are unknown to Petitioner and the unknown heirs of deceased Nolen Heirs for whom Petitioner is unable to make the previously ordered Preliminary Distributions and/or the requested Final Distribution of Estate assets.

18. That after payment of Court ordered statutory administrator commissions and attorneys' fees and extraordinary attorney fees, reimbursement to the LAW OFFICES OF C L FARRELL, P.C. for loans advanced to the Estate, and, the withholding of cash reserves, **that Petitioner C L FARRELL of the LAW OFFICES OF C L FARRELL, P.C. be authorized and directed to distribute all remaining Estate assets to the Decedent's intestate heirs at law according to their respective interests therein as previously determined by Order of this Court, as amended, or if post deceased, to their successors in interest, all as set forth in Exhibit "F" which is attached to the "Sixth and Final Account, etc."** and made a part hereof by this reference.
19. That any and all after discovered property of the Decedent or the within Estate not now known or which is hereafter discovered, is to be distributed to the Decedent's intestate heirs at law according to their respective interests therein as previously determined by Order of this Court, as amended, or if post deceased, to their successors in interest, all as set forth in Exhibit "F" which is attached to the "Sixth and Final Account, etc."
20. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **CONSERVATORSHIP**

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON DS1000244

CASE NAME: JOSE RIGOBERTO SILVA

HEARING:

Hearing Re: CI REPORT

COUNSEL:

JOSE RIGOBERTO SILVA

(CTP)...MITCHELL I ROTH

RIGOBERTO SILVA

(CP)...PRO/PER

GENERAL INFORMATION:

Continued from **04/24/18**. Notice given by Attorney Mitchell Roth.

Continued from **05/29/18** to seek placement for the conservatee.

Continued from **07/24/18**. Counsel states that he is still working with

Inland Regional Center. Court orders Jose Silva and Ribgoberto Silva to be present at the next hearing.

Continued from 09/11/18. Parties not present. Notice given by Attorney Mitchell Roth.

THIS CASE IS SET FOR HEARING ON CI Report

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

1. Matter set on Courts motion upon receipt and review of CI Report filed 04/03/18.
2. Court re-appoints Attorney Mitchell I Roth as attorney for conservatee. Oral report given by Attorney Mitchell Roth on 05/29/18.
3. Notice by Judicial Assistant.

RECOMMENDATION:

Court's discretion.

(nb)

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

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400006

CASE NAME: Velma Preciado

SEE ALSO 14A

HEARING:

Petition for Termination of Conservatorship of Estate

COUNSEL:

DENIS DICKINSON	(CPE)...CRAIG M PARKER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
ROD PACHECO	(OBJ)...PRO/PER
RODRIC ANTHONY PACHECO	(PET)...PRO/PER
RODRIC ANTHONY PACHECO	(PET)...RONALD W ASK
VELMA PRECIADO	(CEP)...PRO/PER
VELMA PRECIADO	(PCE)...BRYAN C HARTNELL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Termination of Conservatorship of the Estate by Conservator of the Person and Estate, Denis Dickinson ["Petitioner"-grandson] Pr. C. §1861.

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

1. Petitioner indicates the conservatorship of the estate of the conservatee needs to be terminated as there are no assets left belonging to the Conservatee, and thus, no need for a Conservatorship of the Estate.
2. The Inventory and Appraisal previously filed in this matter, showing assets belonging to this Estate in the amount of \$175,025.50, have all been used to pay expenses of the Conservatee. After payment of her facility bill with the funds authorized to be withdrawn on January 9, 2018 in the amount of \$7,000.00, and the Attorney's fees and costs ordered by this Court pursuant to the Court Order dated April 17, 2018, there are no funds left and therefore, a Conservatorship of the Estate is no longer necessary.
3. The bond filed by the Conservator in the amount of \$24,000.00 was exonerated by this Court pursuant to the Order dated April 17, 2018.

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

4. Petitioner requests that the conservatorship of the estate of VELMA PRECIADO be terminated, that DENIS DICKINSON be discharged as Conservator of the Estate.
5. Proposed Order 09/10/18 prays for relief not requested in the petition.

RECOMMENDATION:

Court's discretion. If approved, need amended letters.

(nb)

Future Hearing:

01/29/19 Accounting Review.

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1400006

CASE NAME: Velma Preciado

SEE ALSO 14

HEARING:

Hearing Re: PLACEMENT OF CONSERVATEE

COUNSEL:

DENIS DICKINSON	(CPE)...CRAIG M PARKER
PUBLIC GUARDIAN	(PET)...COUNTY COUNSEL
ROD PACHECO	(OBJ)...PRO/PER
RODRIC ANTHONY PACHECO	(PET)...PRO/PER
RODRIC ANTHONY PACHECO	(PET)...RONALD W ASK
VELMA PRECIADO	(CEP)...PRO/PER
VELMA PRECIADO	(PCE)...BRYAN C HARTNELL

GENERAL INFORMATION

Continued from 09/20/18. The Court is informed Attorney Hartnell was unaware he was reappointed on 08/06/18. Matter reset.

THIS CASE SET FOR HEARING ON Placement of Conservatee.

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

1. Denis Dickinson, grandson, appointed successor Conservator of person and estate on 06/13/16, \$24,000 bond.
2. Matter set after review of Court Investigator memo filed 07/31/18. Bryan Hartnell reappointed counsel for conservatee.
3. Supplemental Report by Court-Appointed Counsel, George S. Theos, filed 10/11/18

RECOMMENDATION

Court's discretion

(lc/nb)

Future Hearing:

01/29/19 Accounting Review.

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

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

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500020

CASE NAME: JOSEPH G EVANS SR

HEARING:

Second and Final Account and Report of JOSEPH G EVANS JR and
Petition for allowance of fees filed.

COUNSEL:

JOSEPH G EVANS JR	(CPE)...LAYNE A BARTHOLOMEW
JOSEPH G EVANS SR	(CEP)...ROBERTA L TAYLOR
JOYCE WENDELL EVANS SANDIN	(CPE)...PRO/PER
MARY TURCOTTE EVANS	(OBJ)...PRO/PER
ROBERTA L TAYLOR	(PET)...ROBERTA L. TAYLOR &

GENERAL INFORMATION:

Conservatee passed away on 08/23/17.

THIS CASE IS SET FOR HEARING ON Second and Final Account; Petition for Fees; Petition to Abandon Valueless Property per Pr. C. §2465; and Petition to Terminate Conservatorship by Conservator of the Person and Estate, Joseph G. Evans, Jr. ["Petitioner"].

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

1. Accounting period 12/18/16 to 08/23/17 (pre-death) and 08/24/17 to 06/30/18 (post-death).
2. Assets on Hand \$57,288.00 consisting of \$13,288.00 held in Attorney Bartholomew's attorney client trust account and remaining in real property.
3. The total outstanding conservator fees and costs to Joseph G. Evans, Jr. and Joyce in the amount of \$29,732.24 remain outstanding as of the filing of this petition. Taking the disbursements made to petitioner and Joyce in the amount of \$11,838.76 made during this accounting period **leaves a balance owing** in the amount of **\$17,893.48**. There are insufficient assets to even pay the attorney fees approved and requested in this matter. Because of the insufficient assets currently on hand in the conservatorship estate, Joseph G. Evans, Jr. and Joyce W. Evans Sandin waive any unpaid conservator fees and costs still owing to them.
4. Joseph G. Evans, Jr. waives compensation and reimbursements.

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

5. Joseph G. Evans, Jr. requests that the Court terminate the conservatorship.
6. Joseph G. Evans, Jr.'s attorney is still owed the balance in the amount of \$7,503.00 for attorney services to petitioner and the estate which were approved pursuant to Order on First Account filed with this court on October 18, 2017.
7. This court also approved fees to Roberta L. Taylor, attorney for the conservatee, in the amount of \$23,759.41 pursuant to the Order Allowing Attorney Fees filed with this court on April 18, 2017.
8. Attorney Walter Moore, who was the court appointed guardian ad litem for the Conservatee has filed fee petitions in this matter which were calendared for September 12, 2018; requesting fees in the amount \$3,640.00 and \$5,737.50, respectively. Order approving same entered on 09/12/18.
9. Attorney Layne A. Bartholomew requests fees of \$6,965.00. Billed at \$350/hour for 10.3 hours' attorney time and \$120/hour for 28 hours' paralegal time. Itemized [LF, pgs.56-60]. **JTD.**
10. Disbursements – Schedule 2C11 [LF, p. 46] reflects only partial payment for reclamation of Civil Service Pension. Question whether the balance of the reclamation has been paid? **Need** verified supplement.
11. Petitioner has paid In-Home Nursing Care totaling \$1,000, during this accounting period. **Need** verified declaration to verify dates of service, performance of services and that payment has been received per Local Rule 20-1406(c).
12. **Need** residential facility statements and/or written verification of rent per Pr.C. §2620(c)(5) for Rimrock Villa Convalescent Hospital, Oakmont of Fresno and Belmar Senior Living Facility..
13. Prior to the commencement of this conservatorship, the real property was in an extreme state of disrepair and was not habitable. Joseph G. Evans, Jr. has determined that this property is of little or no value. Given the title issues and value of this real property, petitioner requests authorization from this court, to abandon the property pursuant to Probate Code §2465. **JTD.**
14. ~Proposed Order 09/10/18.

RECOMMENDATION:

Need to clear notes then Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1500259

CASE NAME: BROOK GREEN

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

BARBARA EISENBEISZ	(PET)...JAMES B CHURCH
BARBARA EISENBEISZ	(PET)...PRO/PER
BROOK GREEN	(CEE)...
BROOK GREEN	(PCE)...MELVIN FRIEDLAND
SANDY TURNER	(PET)...

XREF: PROPS1400404 (Ronald Hervey Green)

Accounting filed and set for 11/14/18.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1700464

CASE NAME: MTR OF CHRISTINE HAMILTON

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of JAMES HAMILTON

COUNSEL:

CHRISTINE HAMILTON	(CTP)...JENNIFER M DANIEL
JAMES HAMILTON	(CPE)...CHRISTOPHER A POULOS
PAMELA HAMILTON	(CPE)...CHRISTOPHER A POULOS

GENERAL INFORMATION

Parents, James and Pamela Hamilton, appointed Limited Conservators of the person on 03/20/18.

THIS CASE IS SET FOR HEARING ON Compliance Review

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

1. Determination of Conservatee's Appropriate Level of Care filed.
2. **Need** proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's Rights per Pr.C. §1830(c).
3. **Need** Statement of Care Plan in accord with Pr.C. §2352.5.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800185

CASE NAME: Sergio Valdivia

HEARING:
Petition for Appointment of Conservator

COUNSEL:

AMPARO VALDIVIA	(CP)...
HERIBERTO VALDIVIA	(CP)...
SERGIO VALDIVIA	(CTP)...JANET LATOURETTE

GENERAL INFORMATION:

Continued from 07/24/18 and 09/18/18 to clear notes.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Sergio and Ampara Valdivia ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Report of court-appointed counsel, Janet La Tourelle, filed.
3. **Need** Medical 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. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.

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

7. Citation returned SERVED 07/02/18 [affixed to notice of hearing].
8. Confidential Conservator Screening Forms do not include driver's license numbers and #16 re: adverse interest is incomplete. **Need** verified supplement.
9. Court Investigator Report filed.
10. **Need** Inland Regional Center Report.
11. Certificates of Completion re Conservatorship Class filed.
12. Notice filed on 07/02/18 does not include Inland Regional Center. **Need** proper service.
13. ~Proposed Form Order/Letters 06/18/18.

RECOMMENDATION:

Need to clear notes. If approved, set hearing for Compliance Review for **05/28/19** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

DATE: 10/23/18 TIME: 9:30 DEPT: S36P

CASE#: CON PS1800254

CASE NAME: Betty Jean Pierce

HEARING:

PROBATE/CONSERVATORSHIP MANAGEMENT CONFERENCE

COUNSEL:

BETTY JEAN PIERCE

(CTP)...VICTORIA VELARDE

GLADYS PIERCE

(CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON CMC re Transfer-in from Los Angeles.

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

1. Daughter, Gladys Pierce, appointed Conservator of the Person on 09/18/08 in Los Angeles County.
2. **Need** amended letters.
3. Dementia powers formally granted. **Need** appointment of counsel and report by same.
4. Last CI Report filed 06/28/17. **Need** CI Report.
5. Last Capacity Declaration filed on 08/20/08. Does Court wish to require an updated Capacity Declaration? **JTD**.

RECOMMENDATION:

Need to clear notes then Court's discretion.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

MISC

DATE: 10/23/18 TIME: 1:30 DEPT: S36P

CASE#: CON PS1500272

CASE NAME: MTR OF CHELSEA STOYKOVICH

HEARING:

Hearing Re: Placement of Chelsea

COUNSEL:

CHELSEA STOYKOVICH (PCE)...MITCHELL I ROTH
MERLINA BURTON (PET)...PRO/PER
PUBLIC GUARDIAN (PET)...COUNTY COUNSEL

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Placement of Chelsea

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

1. Matter set at 09/12/18 hearing, wherein, the written report from Attorney Rose Rosado was received and the Court admonished David Stoykovich on the record.
2. Declaration by Linda Daniels filed.
3. Report by GAL, Rose C. Rosado, filed.
4. Declaration of Chanteil Guy, Public Guardian, filed.

RECOMMENDATION:

None.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

PROBATE

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1200299

CASE NAME: NELLY ASWAD

VACATED

HEARING:

Accounting Review by ***

COUNSEL:

NELLY ASWAD

(DEC)...

PARO ASTOURIAN

(PET)...ASTOURIAN & ASSOCIATES

RONEVA D DUNGER

(PET)...ROBERT W D'ANGELO

Probate Status Report filed and set for 11/13/18.

(nb)

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

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

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1501034

CASE NAME: MTR OF LARRY LUCIANO

HEARING:

First And Final Account and Report of ANGELA PHILLIPS and
Petition for allowance of fees filed.

COUNSEL:

ANGELA PHILLIPS	(PET)...PECCORINI & PECCORINI
CINDY HEAD	(PET)...STEPHEN E. COCKRIEL
GREGORY SILVER	(PET)...STEPHEN E. COCKRIEL
LARRY LUCIANO	(DEC)...
LARRY LUCIANO JR	(PET)...HORSPOOL & HORSPOOL
SHERI GULINO	(PET)...PRO/PER

Judge Ludvigsen recuses herself

X-REF: PROPS 1700808

GENERAL INFORMATION:

Continued from 07/03/18 at request of counsel. Counsel for Petitioner to give notice.

THIS CASE IS SET FOR HEARING ON **Amended** (09/10/18) First and Final Account and Petition for Fees by Administrator, Angela Phillips ["Petitioner"].

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

1. Accounting period 09/30/15 to **08/30/18**.
2. **Assets on Hand \$1,254,449.46 consisting of \$1,249,449.46 in cash** and remaining in personal property.
3. Petitioner requests statutory compensation of \$30,839.73 **less offsets of \$4,212.94 for a balance of \$26,626.79**. Calculated.
4. Attorney requests statutory fees of **\$30,839.73**. Calculated.
5. Attorney requests reduced extraordinary fees of \$11,000 (in lieu of \$21,309) for services rendered in connection with the defense of the Will Contest; and obtaining appointment of a special administrator. Billed at \$375-\$400/hour for a total of 54.96 hours' time. Itemized [LF, pgs. 25-30]. **JTD**.

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

6. Petitioner requests ratification of reimbursement of costs advanced of \$835.00. Itemized [LF, p. 49]. **JTD.**
7. Petitioner's husband used his separate property funds to bring the mortgage current on the Lake Arrowhead House; trash clean-up, removal and dump fee; truck rental, etc. **totaling \$31,338.86**, for which he was reimbursed. **Petitioner seeks Court ratification of such reimbursement paid on 06/26/18. JTD.**
8. Receipts – Schedule 2A and Disbursements – Schedule 3A include several unknown credit card activity; unknown paid checks; toll road cost and unknown Intuit Payroll payments **before** petitioner's appointment, totaling \$5,608.33. **Supp. (09/10/18) indicates Head was repeatedly requested to provide details of such expenses, but none were provided. Petitioner ultimately decided that the amount did not justify the likely expense of attempting to compel explanation of the expenditure and/or the recovery of the money.**
9. Petitioner has closed the Probate Checking Account and transferred the balance of that account into the Attorney Special Trust Account, wherein, petitioner's attorney paid the authorized fees, commissions and reimbursement from the Attorney Special Trust Account as suggested and consented to by Denise through her attorney.
10. The Will Contest was resolved by beneficiaries agreeing to pay Contestant and his sister jointly, \$35,000 and \$15,000, from their distribution from this estate. Petitioner proffers Pr.C. §10520(a) as authority for allowing preliminary distribution without leave of court. Petitioner intends to make equal preliminary distributions of \$40,000 to each of herself and Denise (beneficiary). Petitioner requests ratification upon proof of such payments. **JTD.**
11. Petitioner requests to distribute **the VW** to herself and to include in the final order of distribution a standard omnibus clause distributing any unknown assets to herself as the residual beneficiary. **JTD.**
12. Petitioner requests authorization to retain the sum of **\$20,147.94** in the Attorney Special Trust Account as a reserve. **JTD.**
13. No proposed order. Submit Order after Hearing.

RECOMMENDATION:

Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19.**

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700089

CASE NAME: RICHARD A NEWCOMER

HEARING:

Accounting Review by ***

COUNSEL:

RICHARD A NEWCOMER

(DEC)...

TERRA HAGEL

(PET)...BLAKE D THOMPSON

XREF: PROPS1700634 (Eleanor Rae Newcomer)

GENERAL INFORMATION:

Continued from 06/19/18 at request of counsel. Notice to be given by Mr. Thompson.

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Letters Testamentary issued to Terra Hagel on 05/09/17, full authority, and \$137,292 bond.
2. **Need** final inventory and appraisal.
3. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700208

CASE NAME: ROBERT RICHARD SALSBUARY SR

HEARING:

PETITION FOR FINAL Account and Report of MICHAEL SALSBUARY and
Petition for allowance of fees filed.

COUNSEL:

MICHAEL SALSBUARY (PET)...PRO/PER
ROBERT RICHARD SALSBUARY SR (DEC)...

GENERAL INFORMATION:

Continued from 09/04/18 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution upon Waiver of Account and for Fees by Administrator, Michael Salsbury ["Petitioner"-son].

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

1. Final Inventory and Appraisal filed on 10/30/17 does not include account numbers or reflect the amount stated in Attachment 1. **Need** corrected inventory with reconciliation via verified supplement.
2. Heirs waive accounting.
3. Accounting period 10/02/16 to 03/2018.
4. Assets on Hand \$304,300.00 consisting of \$17,017.77 in cash and remaining in real property.
5. Petitioner waives statutory compensation.
6. Petitioner does not request reimbursement for costs.
7. **Need** Notice of Hearing with proof of service.
8. Proposed Order 09/10/18 does not include findings re: Creditors; or whether all taxes have been paid.

RECOMMENDATION:

Need to clear notes 1 & 7 then Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19**.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700457

CASE NAME: MTR OF VIOLA ARAMBULA

SEE ALSO 6, 7

HEARING:

Hearing Re: CONFIRMATION OF SALE

COUNSEL:

IRENE LOPEZ

(PET)...MITCHELL I ROTH

THOMAS ARAMBULA

(OBJ)... DOONAN & DOONAN

THOMAS ARAMBULA

(PET)... DOONAN & DOONAN

VIOLA ARAMBULA

(DEC)...

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700457

CASE NAME: MTR OF VIOLA ARAMBULA

SEE ALSO 5, 7

HEARING:

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

COUNSEL:

IRENE LOPEZ

(PET)...MITCHELL I ROTH

THOMAS ARAMBULA

(OBJ)... DOONAN & DOONAN

THOMAS ARAMBULA

(PET)... DOONAN & DOONAN

VIOLA ARAMBULA

(DEC)...

GENERAL INFORMATION:

Continued from **07/31/17**. Counsel for Thomas Arambula is to file written objections on or before 9-25-17.

Continued from **10/23/17**. Court extends the time for Mr. Doonan to file and serve his objections by 12/08/17.

Continued from **01/29/18**. The Court notes that the objection is essentially a will contest and orders summons be served.

Continued from **04/09/18**. Counsel agree that the Objection of Thomas Arambula is basically a will contest. Court will continue this matter for time for Mr. Doonan to file his objection as a petition. Mr. Doonan to file and serve the petition within 30 days of today's date.

Continued from **07/09/18**. Counsel requests matter to be trailed one day as he needs to attend an emergency hearing in LA. Notice to be given by Mr. Roth.

Continued from 07/10/18. The Court appoints IRENE LOPEZ as special Administrator for the sole purpose of listing and selling the real property. The listing agent and the sale price of the home must be approved by all five siblings. The net proceeds from the sale of the home are to be held in Mr. Roth's trust account pending further order of the Court. No bond is required. Mr. Roth to prepare orders and letters.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full authority under IAEA, by Irene Lopez, daughter/executor

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

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

1. Will waives bond and petitioner is sole beneficiary and waives bond. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b).
2. **Objections filed 12/08/17 by Thomas Arambula (son of decedent).
Summons issued on 03/19/18.**
3. **Proof of service of summons by Thomas Arambula, son, as to Irene Lopez filed on 04/23/18.**
4. **Response by Irene Lopez to Objection by Thomas Arambule filed.**
5. ~Proposed Form Order 05/12/17.

RECOMMENDATION:

Contested matter.

Court's discretion re bond If approved, set future hearing for Accounting Review on **12/31/19**. Any account to be filed 30 days in advance of hearing. Note requirements of Local Rules.

(nb/ww/cs/ww/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1700457

CASE NAME: MTR OF VIOLA ARAMBULA

SEE ALSO 5, 6

HEARING:

Petition for contesting the last will of Viola Arambula

COUNSEL:

IRENE LOPEZ

(PET)...MITCHELL I ROTH

THOMAS ARAMBULA

(OBJ)... DOONAN & DOONAN

THOMAS ARAMBULA

(PET)... DOONAN & DOONAN

VIOLA ARAMBULA

(DEC)...

Currently under review by Legal Research.

(LR)

(ww/nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: PRO PS1800139

CASE NAME: John W McCormick

HEARING:

first and final Account and Report of JENNY LYNN DEAN and
Petition for allowance of fees filed.

COUNSEL:

JENNY LYNN DEAN (PET)...ELISABETH KEMPE-OLINGER
JOHN W MCCORMICK (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Fees
by Executrix, Jenny Lynn Dean ["Petitioner"].

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

1. Accounting period 01/28/18 to 08/15/18.
2. Assets on Hand \$58,739.33 consisting of cash held in attorney/client trust account.
3. Statutory fees of \$7,393.26 requested. Calculated.
4. Attorney requests extraordinary fees of \$1,802.00 for services rendered in connection with the sale of real property. Billed at \$340/hour for a total of 5.3 hours' attorney time. Itemized [LF, pgs. 16-18]. **JTD.**
5. Jenny Lynn Dean requests authority to withhold the sum of \$2,500.00 until income tax returns have been prepared and filed and for supplemental taxes due. **JTD.**
6. **Need** proof of service to supplement filed on 10/16/18.
7. ~Proposed Order 10/16/18

RECOMMENDATION:

Need to clear note 6 then Court's discretion. If approved, set next hearing for receipts
and final discharge for **11/05/19**.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS04008

CASE NAME: ESTATE OF BOBBY P. MAC LACHLAN

HEARING:

Accounting Review by ***

COUNSEL:

BOBBY P MACLACHLAN (DEC)...

DOROTHY N KINSEY (PET)...J. DAVID HORSPOOL

DOROTHY N KINSEY (TEE)...HORSPOOL & HORSPOOL

XREF: SPRSS57143 (Donnell Frank Maclachlan Trust)

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling 16th Account entered 06/19/18; 17th account now due starting 01/01/17.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:30 DEPT: S37P

CASE#: SPR SS57143

CASE NAME: MTTR OF DONNELL FRANK MACLACHLAN TRUST

HEARING:

Accounting Review by ***

COUNSEL:

BOBBY P. MAC LACHLAN	(CEP)...ROBERT C CHANDLER
DONNELL FRANK MACLACHLAN	(DEC)...
DONNELL FRANK MACLACHLAN TESTA	(TRU)...
DOROTHY KINSEY	(CPE)...HORSPOOL & HORSPOOL
DOROTHY KINSEY	(STE)...HORSPOOL & HORSPOOL

XREF: SPRSS04008 (Bobby P Mac Lachlan)

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. Order Settling 27th Account entered 07/03/18; 28th account now due starting 01/01/17.
2. No accounting or status report. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:35 DEPT: S37P

CASE#: PRO PS1600889

CASE NAME: JOHN I GOOD JR TRUST

HEARING:

Hearing Re: verified first amended pet to 1)determine title

COUNSEL:

CLAUDETTE M STURTEVANT

(OBJ)...JERRY T MORGAN

DAVID M STERN

(RONALD A STONE

JOHN I GOOD JR TRUST

(TRU)...

MOUNTAINS COMUNITY HOSPITAL FO (PET)...FULLERTON LEMANN

Currently under review by Legal Research.

(LR)

Future Hearing:

12/05/18 Hearing re: Verified petition to determine title etc.

12/05/18 Trial setting conference

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800158

CASE NAME: ELIJAH JIMENEZ-ROMERO SPECIAL NEEDS TRUST

HEARING:

Petition for (Petition) to Establish and Fund a Special Needs
Trust for Elijah Jimenez-Ramos

COUNSEL:

ELIJAH JIMENEZ-ROMERO SPECIAL

(TRU)...

MARCY BAYSINGER

(PET)...DENNIS M SANDOVAL

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 8:35 DEPT: S37P

CASE#: TRU PS1800170

CASE NAME: The Shari Oelrich Special Needs Trust

HEARING:

Petition for est and fund a special needs trust for Shari Oelrich; Request for payment of atty's fees

COUNSEL:

HOLLY BELL

(PET)...DENNIS M SANDOVAL

JAMES BELL

(PET)...DENNIS M SANDOVAL

THE SHARI OELRICH SPECIAL NEED

(TRU)...

Currently under review by Legal Research.
(LR)

Notice given.
(nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

CONSERVATORSHIP

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON DS1000339

CASE NAME: MTR OF BRIAN Z YAUCHI

HEARING:

Hearing Re: STATUS REPORT ON CONSERVATEE'S HEALTH

COUNSEL:

BRIAN Z YAUCHI	(CEP)...MITCHELL I ROTH
CONSERVATORSHIP ESTATE OF BRIAN Z YAUCHI	(LAYNE A BARTHOLOMEW
COUNTY OF SAN BERNARDINO	(PET)...COUNTY COUNSEL
DONNASUE SMITH ORTIZ	(PET)...
GLORIA Z YAUCHI	(CE)...LAYNE A BARTHOLOMEW
GLORIA Z YAUCHI	(CPE)...LAYNE A BARTHOLOMEW
LIBERTY MUTUAL INSURANCE COMPANY	(TP)...PRO/PER
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
RYO YAUCHI	(CE)...LAYNE A BARTHOLOMEW
RYO YAUCHI	(CPE)...LAYNE A BARTHOLOMEW

No notes – Status.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1400069

CASE NAME: SANTIAGO DE LA TORRE, JR

HEARING:

Petition for Order Allowing Voting by Conservatee

COUNSEL:

MATTHEW SHEASBY	(PET)...PRO/PER
SANTIAGO DE LA TORRE, JR	(CEE)...MATTHEW E SHEASBY
VERONICA ESPINOZA DE LA TORRE	(CP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Order Allowing Voting by Conservatee by Attorneys for Proposed Conservatee, Matthew Sheasby ["Petitioner"].

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

1. Counsel brings this Petition on behalf of the conservatee in support of the Petition to reclaim voting rights per Investigator's report filed 09/04/18 alleging that the Conservatee is verbal and capable of voting.
2. Petitioner prays that the conservatee's voting rights be restored forthwith.
3. ~Proposed Order 09/11/18.

RECOMMENDATION:

Court's discretion.

(nb)

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1600090

CASE NAME: NAJLA FORD

HEARING:

Second And Final Account and Report of NATALIE BLICKENSTAFF and
Petition for allowance of fees filed.

COUNSEL:

CHARLES NAJJAR	(PET)...MARC B HANKIN
ISABELLA PLACENTIA	(PRO/PER
JACOB NIXA	(PRO/PER
TINA MARIE NIXA	(JEREMIAH RAXTER
JOHN MOIO	(CPE)...MARC B HANKIN
JOHN MOIO	(PET)...MITCHELL I ROTH
JORDAN NIXA	(PRO/PER
MARC B HANKIN	(PET)...LAW OFFICES OF MARC B HANKIN
MITCHELL I ROTH	(PET)...MITCHELL I ROTH
NAJLA FORD	(CEP)...MITCHELL I ROTH
NAJLA FORD	(CEP)...PRO/PER
NAJLA FORD	(PET)...SANDY L. TURNER
NATALIE BLICKENSTAFF	(CE)...JENNIFER M DANIEL
NATALIE BLICKENSTAFF	(CPE)...JENNIFER M DANIEL
SANDY TURNER	(PET)...SANDY L. TURNER
TINA NIXA	(JEREMIAH RAXTER
TINAMARIA A NIXA	(CP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

GENERAL INFORMATION:

Conservatee passed away on 10/08/16.

THIS CASE IS SET FOR HEARING ON Second and Final Account and Petition for Fees by Conservator of the Person and Estate, Natalie Blickenstaff ["Petitioner"-PPF].

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

1. First Account approved and order signed on 12/19/17 per minute order. **Need** copy of conformed order.

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

2. Accounting period 07/01/17 to 07/31/18.
3. Assets on Hand 157,147.16 consisting of cash.
4. Natalie Blickenstaff requests compensation of \$2,429.50. Billed at \$95-\$125/hour for 20.3 hours' time. Itemized [LF, pgs. 16-19]. **JTD.**
5. Attorney Jennifer Daniel requests fees of \$5,330.00. Billed at \$325 /hour for 16.4 hours' attorney time. Itemized [LF, pgs. 21-24]. **JTD.**
6. The Conservatee is now deceased. Ms. Ford was not married and did not have children. Ms. Ford had one brother, Charles Najjar, who survived her. Natalie Blickenstaff proposes to distribute the remainder of the estate to Mr. Najjar. Petitioner requests that the court waive the necessity of an Affidavit pursuant to Probate Code §13100 by Mr. Najjar, given that he was the named beneficiary of the account which was closed by court order and has been marshaled into the conservatorship estate. Mr. Najjar is well- known to this court as the sole heir of this estate. An affidavit is not necessary as this has been on record before the court throughout the proceedings and, given his fragile state of health, it would be extremely burdensome on Mr. Najjar to have to execute such an affidavit. **JTD.**
7. Natalie Blickenstaff requests the Conservatorship of the Estate of Najla Ford be terminated. **JTD.**
8. Proposed Order 09/04/18 discharges Natalie Blickenstaff and exonerates bond upon filing of receipts instead of upon entry of a final discharge order.

RECOMMENDATION:

Need to clear note 1 then Court's discretion. If approved, set next hearing for receipts and final discharge for **11/05/19.**

(nb)

Future Hearing:

12/24/18 Final Discharge

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1700318

CASE NAME: KATYA IXCEL VALLEJO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of ROSA M VALLEJO

COUNSEL:

KATYA IXCEL VALLEJO

(CTP)...SANDY L. TURNER

ROSA M VALLEJO

(PET)...PRO/PER

GENERAL INFORMATION

Mother, Rosa M. Vallejo, appointed Limited Conservator of the person, only.

THIS CASE IS SET FOR HEARING ON /Compliance Review

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

1. Notification of Conservatee's Rights; Care Plan; including a Determination of Conservatee's Appropriate Level of Care filed.

RECOMMENDATION:

None.

(nb)

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800163

CASE NAME: PABLO MARTINEZ

SEE ALSO 20

HEARING:

Hearing Re: PETITION FOR APPOINTMENT OF CONSERVATOR

COUNSEL:

ANGEL MARTINEZ	(PET)...PRO/PER
BEVERLY MARTINEZ	(PET)...PRO/PER
PABLO MARTINEZ	(CEE)...CANDICE A. GARCIA-RODRIGO
PERFECTA MARTINEZ	(PET)...PRO/PER
MITCHELL I ROTH	(GAL)

XREF: EAPPS1800067 (Martinez vs Martinez)

GENERAL INFORMATION

Beverly and Angel Martinez, daughter and grandchild appointed temporary conservators on 06/11/18, person and estate no bond. Beverly to ensure Social Security payments are returned to spouse. Mitchell Roth appointed GAL.

Beverly and Angel Martinez suspended as temporary conservators of the person and estate on 07/12/18.

Perfecta Martinez appointed temporary conservator of the person and estate on 07/12/18, no bond. The Court orders Beverly and Angel Martinez to turn over any and all bank accounts, to return any monies taken from any and all bank accounts, to turn over all bank records to Perfecta Martinez by 3pm today, 7/12/18. If they were made payee of any accounts or benefits they are to notify the appropriate person that they are no longer a payee on behalf of Pablo Martinez by 3pm today, 7/12/18. The Court vacated its previous order

blocking/freezing the bank accounts of Pablo Martinez. Perfecta Martinez is ordered to notify the hospital immediately that she is now the temporary conservator of the person and estate of Pablo Martinez. The case is referred to Legal Aid for legal assistance.

Continued from 07/31/18 on Courts motion. Other orders made. Attorney Candice Garcia-Rodrigo is appointed for Pablo Martinez.

THIS CASE SET FOR HEARING ON

Petition #1: Petition for Appointment of Conservator person and estate **by Beverly and Angel Martinez**, daughter and grandchild

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

Petition #2: Petition for Appointment of Conservator of the person **by spouse, Perfecta Martinez** ["Petitioner"].

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

Petition 1:

1. Petitioners seek bond TBD as assets are not yet known.
2. Petitioners allege an equivalent petition has been filed in another jurisdiction, including court of Indian Tribe Pr.C. § 2031(b). Court to inquire as no Tribe has been stated.
3. Petitioners seek medical powers. **Need** Capacity Declaration.
4. Petitioners seek dementia powers. Report by court-appointed counsel, Attorney Candice Garcia-Rodrigo, filed..
5. Report of GAL Mitchell Roth filed.
6. **Need** notice of hearing and proof of service on issues. Sonia, William Dianna; grandchildren, Gwen, Aaron, Chloe, Zoe, Ezekiel, Ricki, Diego, Emmie; and siblings, Efrain, Sonia, and Inocencia.
7. Citation filed on 10/16/18 reflects incorrect hearing date. **Need** proper notice.
8. Certificates of Completion of the Conservatorship Training Class filed.
9. Court Investigator Special Report filed 07/11/18. CI Report filed 07/24/18.
10. Declarations filed on 06/08/18 by Beverly and Sonia Urquizu in support of conservatorship with allegations of lack of care by spouse Perfecta.
11. Declaration filed by petitioners re: Dr. Craig calls and Perfecta visits filed 07/11/18.
12. Declarations in support of petitioners filed 10/16/18.
13. ~Proposed Form Order: 06/01/18.

Petition 2:

14. No bond – person only.
15. Petitioner seeks medical powers. Medical Capacity Declaration filed 06/11/18.
16. Petitioner requests dementia powers; Report by court-appointed counsel, Attorney Candice Garcia-Rodrigo, filed.
17. Court Investigator's Report filed 07/24/18
18. Citation returned served..
19. Proof of service affixed to notice filed on 08/03/18 is incomplete at section 4a and not dated or signed as to IRC and CI. **Need** proper service.
20. Proof of Completion re Conservatorship filed.
21. Declarations and character references filed by petitioner on 06/11/18; Medical Information filed 06/18/18; declaration re bank account filed 06/19/18; declaration re Social Security Representative Payee filed 06/21/18; and declaration with allegations of negligence while at Angel Martinez home filed 06/25/18.
22. Declarations regarding removal of conservatee from hospital on 06/19/18; re: social security on 06/21/18; and Beverly's behavior filed 07/16/18. No proofs of service.

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

23. Declaration by Beverly Martinez, Zonia Rodriguez and Christina Delgado filed 08/16/18, 09/04/18, 09/26/18 and 10/04/18.
24. Declaration by Perfecta Martinez re: residences since August 2013.
25. **Objections** filed in the form of a declaration (in counterparts) on 09/04/18 by Beverly Martinez. **Need** proof of service.
26. ~Proposed Form Order 06/11/18

RECOMMENDATION

Need to clear notes 3 & 6, 7, 19 & 25. If approved, set hearing for Compliance Review for **05/30/19** for the filing of the required documents and hearing re Accounting Review for **01/02/20**. Any accounting to be filed 30 days' in advance.

(lc/nb)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800163

CASE NAME: PABLO MARTINEZ

SEE ALSO 19

HEARING:

Petition for APPOINTING CONSERVATOR OF THE PERSON

COUNSEL:

ANGEL MARTINEZ	(PET)...PRO/PER
BEVERLY MARTINEZ	(PET)...PRO/PER
PABLO MARTINEZ	(CEE)...CANDICE A. GARCIA-RODRIGO
PERFECTA MARTINEZ	(PET)...PRO/PER

XREF: EAPPS1800067 (Martinez vs Martinez)

See prior matter #19.

(nb)

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PROBATE/CONSERVATORSHIP CALENDAR
HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800167

CASE NAME: Luis Horacio Medina

HEARING:
Petition for Appointment of Conservator

COUNSEL:
HORACIO MEDINA (CP)...PRO/PER
LUIS HORACIO MEDINA (CTP)...SANDY L. TURNER
MARICELA TRUJILLO (CP)...PRO/PER

GENERAL INFORMATION:
Continued from 07/17/18 at request of IRC.

THIS CASE IS SET FOR HEARING ON Petition for Limited Conservatorship, person only, by parents, Horacio Medina and Maricela Trujillo ["Petitioners"].

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

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Report by court-appointed counsel, Sandy Turner, filed.
3. Medical Capacity Declaration filed.
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. Proposed limited conservatee's civil and legal rights are not to be limited without a court order.
6. Citation returned served.
7. Court Investigator Report filed.
8. Certificates of Completion filed.
9. **Need** Inland Regional Center Report.
10. ~Proposed Form Order/Letters 06/06/18.

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

RECOMMENDATION:

Need to clear note 8 then Court's discretion. If approved, set hearing for Compliance Review for **05/28/19** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr.C.§1830(c); including a Determination of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: CON PS1800267

CASE NAME: Mtr of Scott Michael Higgins

HEARING:
Petition for Appointment of Conservator

COUNSEL:
CHERI CAMPBELL (CP)...PRO/PER
SCOTT MICHAEL HIGGINS (CTP)...

GENERAL INFORMATION

Mother, Cheri Campbell, appointed temporary conservator of the person on 09/05/18.

THIS CASE IS SET FOR HEARING ON Petition for appointment of Conservatorship of person by mother, Cheri Campbell ["Petitioner"].

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

1. No bond – person only.
2. Section 1 to petition does not specify the powers requested. **Need** verified supplement.
3. Petitioner seeks medical powers. Medical Capacity Declaration affixed to supplemental declaration filed on 09/05/18. However, the capacity declaration is signed by a social worker. **Need** complete capacity declaration, signed by a California licensed physician or psychologist, to be filed separately.
 - a. Capacity declaration [LD, p. 6] indicates conservatee is currently detained under WIC 5150.
4. **Need** Notification to Court of Address on Conservatorship form.
5. **Need** return of Citation.
6. Court Investigator's Report filed.
7. Certificate of Completion filed.
8. ~Proposed Form Order/Letters 08/29/18.

RECOMMENDATION:

Need to clear notes 2-5 then Court's discretion. If approved, set hearing for Compliance Review for **05/28/19** 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

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

of Conservatee's Appropriate Level of Care per Pr.C.§2352.5 (form GC-355); and Care Plan per Pr.C.§2352.5.

(nb)

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

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: SC SS03070

CASE NAME: MTR RE PRECIOUS E HOWARD

HEARING:

Accounting Review by ***

COUNSEL:

CAROLANN WILLIAMS	(CPE)...HORSPPOOL & HORSPPOOL
CHARTARIA HOWARD	(CPE)...PRO/PER
DEZERRY HOWARD	(CPE)...PRO/PER
PRECIOUS E HOWARD	(CEP)...
PRECIOUS HOWARD	(PET)...WALTER T. MOORE

GENERAL INFORMATION:

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

THIS CASE IS SET FOR HEARING ON Accounting Review by Conservator of the Person and Estate, Carolann Williams.

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

1. Order Settling Fifth Account entered 07/12/16; sixth account now due.
2. No accounting or waiver of account. **Need** same.

RECOMMENDATION:

Inquire status.

(nb)

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800136

CASE NAME: MIRANDA V FLUDD

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

VAN ANTONIO FLUDD (RP)...
YVONNE MIRANDA (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Declaration of Diligence and Proof of Unsuccessful Service as to Van Antonio Ford
filed.
(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800137

CASE NAME: MIRANDA V FLUDD

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

SHARON ANN FLUDD (RP)...PRO/PER

YVONNE MIRANDA (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need Notice of Hearing with proof of personal service to restrained person, Sharon Ann Fludd.

(nb)

Superior Court of Calif, County of San Bernardino

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

DATE: 10/23/18 TIME: 9:30 DEPT: S37P

CASE#: EAP PS1800138

CASE NAME: BERMUDEZ VS BERMUDEZ

HEARING:

Hearing Re: ELDER ABUSE RESTRAINING ORDER

COUNSEL:

ROBERTO BERMUDEZ JR (RP)...PRO/PER

ROBERTO BERMUDEZ SR (PP)...PRO/PER

EX PARTE HEARING REGARDING ELDER OR DEPENDENT ADULT ABUSE

Need Notice of Hearing with proof of personal service to restrained person, Roberto Bermudez, Jr.

(nb)