



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 10/25/18**

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.

Lc09/26-10/22

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: 10/25/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1500673

CASE NAME: Margaret L. Beauvais 2000 Revocable Trust

HEARING:

Second & Final Account and Report of RICHARD ALAN BEAUVAIS and  
Petition for allowance of fees filed.

COUNSEL:

ALAN R BEAUVAIS	(PET)...PRO/PER
MARGARET L. BEAUVAIS 2000 REVO	(RES)...
MARGARET L. BEAUVAIS 2000 REVO	(TRU)...
RICHARD ALAN BEAUVAIS	(PET)...CHARLES S ALTHOUSE

Request for Waiver of Court Fees and Costs filed by ALAN R BEAUVAIS is GRANTED  
Fee waiver amount due \$100.00 for filing on 05/02/17

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 2<sup>nd</sup> and Final Account and Report After Trial by  
Richard Beauvais.

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

1. Trustee files accounting to merely confirm accounting. It appears court closed case; however, as this is a trust matter, confirmation of final accounting shall use same case number. Ok.
2. Accounting period 07/01/15 – 06/30/18.
3. Assets on hand \$266,936.
4. Proposed Order: 08/16/18; however, need confirmation of distribution reflected in order as all orders must be complete in themselves.

RECOMMENDATION

RFA. No further hearings needed as trust is not court supervised.  
(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501015

CASE NAME: WILLIAM BERNARD OFNER

**SEE ALSO 3**

HEARING: Hearing Re: OSC RE SURCHARGE OF \$1,000.00 ON ADMINISTRATOR

COUNSEL:

DANIEL CAUSEY	(TP )...KENNETH L MORRIS
LINDA ATKINSON	(PET)...JEFFREY S. COHEN
WILLIAM BERNARD OFNER	(DEC)...

**XREF: CONPS1500051** (*William Ofner*)

GENERAL INFORMATION

Continued from 05/03/17 and 05/25/17; final account to be filed by 9/01/17.

Continued from 12/14/17. Counsel stated that his client is having trouble with the Signature Medallion Guarantee with CompuServe and Ameri-Trade. Property has been sold and money held in blocked account and GAL is this matter is still owed. Order withdrawing funds of \$61,091.25 filed.

**OSC set on 04/05/18 when there was no appearance by counsel or administrator.**

**Both parties to appear on 05/24/18. Sanctions of \$500 on both counsel and administrator and surcharge of \$1,000 on administrator.**

**Matter reset to this date.**

**OSC continued from 08/23/18. Status report filed 08/20/18 was untimely and incomplete.**

**THIS CASE SET FOR HEARING ON OSC re Sanctions of \$500 FTF/\$1,000**

**Surcharge/Accounting review/Status.**

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

1. Letters of Administration issued to Linda Atkinson, PPF, on 08/09/16; full authority, \$25,000 bond.

RECOMMENDATION

Court's discretion re OSC. Bonding company noticed.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1501015

CASE NAME: WILLIAM BERNARD OFNER

## SEE ALSO 2

HEARING: Hearing Re: Status Report

COUNSEL:

DANIEL CAUSEY

(TP )...KENNETH L MORRIS

LINDA ATKINSON

(PET)...JEFFREY S. COHEN

WILLIAM BERNARD OFNER

(DEC)...

**XREF: CONPS1500051** (*William Bernard Ofner*)

### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status Report and Petition for Preliminary distribution.

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

1. Letters of Administration issued to Linda Atkinson, PPF, on 08/09/16; full authority, \$25,000 bond.
2. Administrator seeks an additional 3 months to close the estate. Administrator alleges the estate needs to marshal additional securities; however, estate is ready to close otherwise.
3. Administrator seeks court approved preliminary distribution of \$125,000 to the sole heir. **NOTE:** there does not appear to be a full filing fee regarding this type of petition, but rather just status report fee. **Court may wish to require separate petition or collect proper filing fee. JTD**
4. Partial Inventory and Appraisal Inventory and Appraisal filed 08/22/18. However, indicates all of estate. Additionally, it states proceeds from sale of real property. However, sale occurred after date of death of **08/17/15**; therefore, the Inventory and Appraisal is incorrect. Inventory and Appraisal value is date of death value.  
**Corrected final filed; however;**
  - a. date of death is stated as a day premature **[08/16/15]**
  - b. **Need** corrected final Inventory and Appraisal with valuation of real property at date of death. There was property valued at over \$300,000, yet not listed on final filed 10/09/18.
  - c. **Need** bank statement to support attachment 1.

- d. **Need** signature by administrator on full value, not just cash assets. Court to see annotations in LF.
5. **Need** notice of hearing and proof of service per Pr. C. § 12201(b) advising the recipients of the right to petition for an account.
6. No proposed order. Submit after hearing.

#### RECOMMENDATION

Need to clear notes 3-5. If approved, set Accounting/Status Review for **01/03/19**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600873

CASE NAME: MTR OF WILLIAM LESTER COX

HEARING: FIRST AND FINAL Account and Report of MELODY AMBER  
COVERDELL and Petition for allowance of fees filed.

COUNSEL:

MELODY AMBER COVERDELL (PET)...GAUDY LAW, INC  
WILLIAM LESTER COX (DEC)...

GENERAL INFORMATION

**Continued from 07/19/18 and 09/27/18.**

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for  
Allowance of Fees by Melody Coverdell, daughter.

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

1. Assets on hand \$56,419.97 cash.
2. Executrix and counsel seek statutory fees of \$4,382.04 each. Ok.
3. Executrix seeks reimbursement of costs advanced of \$1,100. [06/07LFpg24]. **JTD**
4. Counsel seeks reimbursement of costs advanced of \$258.89. [06/07LFpg24]. **JTD**
5. Counsel seeks extraordinary compensation of \$4,300 for 11.5 hours at \$375 per hour [Acct. 06/07LFpg8]. *General Itemization* in supplement filed 09/26/18; page 3.
6. Executrix seeks extraordinary fees of \$2,000 for 80 hours at \$25 per hour. *General Itemization* in supplement filed 09/26/18; page 3.
7. Executrix seeks \$226.50 to be credited against daughter Mickey Cox aka Mickey Dahl as executrix paid for investigation to locate Mickey after accounting was filed. **JTD**
8. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion re fees. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600930

***Vacated***

CASE NAME: MTR OF TROY A BROWN

***SEE ALSO 5, 6***

HEARING:

Hearing Re: OSC RE WILL CONTEST FILED ON 6/27/18

COUNSEL:

ANNELISE PACHECO

(PET)...MARK W REGUS

JERRY BROWN

(PET)...ANDERSON & LEBLANC, A.P.L.C

TROY A BROWN

(DEC)...

Request for dismissal submitted by Counsel Regus for Annalise Pacheco on 09/27/18, approved and filed on 10/09/18.

(lc)

Future hearing:

10/31/18 Motion to transfer case

10/31/18 Petition for (amended) complaint for fraud

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1600930

CASE NAME: MTR OF TROY A BROWN

**SEE ALSO 4, 6**

HEARING:

Hearing Re: OSC RE DISMISSAL IF BRIEF NOT FILED BY 9/6/18

COUNSEL:

ANNELISE PACHECO	(PET)...MARK W REGUS
JERRY BROWN	(PET)...ANDERSON & LEBLANC, A.P.L.C
TROY A BROWN	(DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC Re Dismissal if Brief not filed by 09/06/18.

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

1. OSC set on 08/09/18. Brief of Annelise Pacheco to be filed by 09/06/18, response of Jerry Brown to be filed by 09/27/18. Reply by Annelise to be filed by 10/11/18. If Initial brief is not filed, Will Contest will be dismissed.
2. Request for dismissal submitted by Counsel Regus for Annalise Pacheco on 09/27/18, approved and filed on 10/09/18.

#### RECOMMENDATION

Court's discretion re OSC.

(lc)

Future hearing:

10/31/18 Motion to transfer case

10/31/18 Petition for (amended) complaint for fraud



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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1600930

CASE NAME: MTR OF TROY A BROWN

**SEE ALSO 4, 5**

HEARING: Accounting Review by \*\*\*

COUNSEL:

ANNELISE PACHECO

(PET)...MARK W REGUS

JERRY BROWN

(PET)...ANDERSON & LEBLANC, A.P.L.C

TROY A BROWN

(DEC)...

GENERAL INFORMATION

**Continued from 02/15/18 and 08/09/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration WWA issued to Jerry Brown, father, on 10/16/17; full authority, no bond.
2. Final Inventory and Appraisal filed 01/03/18.
3. **Need** accounting or status report.
4. **NOTE:** a will contest has been filed on **06/27/18** by Annalise Pacheco who appeared to have been noticed on 09/19/16 prior to admission of will. *If the proponent of a will has received notice of a petition for letters of administration, the proponent of the will may petition for probate of the will only within the later of either of the following time periods*
  - a. 120 days after determining the decedent to be intestate,
  - b. Sixty days after the proponent of the will first obtains knowledge of the will Pr.C.§8226.
  - c. Both periods appear to have lapsed; therefore, probate order appears to be conclusive per Pr.C. § 8007.

RECOMMENDATION

Inquire status of accounting.

(lc)

Future hearing:10/31/18 Motion to transfer case10/31/18 Petition for (amended) complaint for fraud

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1701182

CASE NAME: Theodore A Wright Jr

HEARING:

Petition for waiver of Account and Report of TAHIRA WRIGHT and  
Petition for allowance of fees filed.

COUNSEL:

TAHIRA WRIGHT

(PET)...MICHAEL C MADDUX

THEODORE A WRIGHT

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Tahira Wright, daughter.

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

1. Assets on hand \$78,035.15 in cash.
2. Both beneficiaries waive accounting.
3. Executor and counsel seek statutory fees of \$7,376.22 each. Ok
4. Counsel seeks extraordinary fees of \$2,700 for 8 hours at \$325 per hour re sale of real property. [LFpg6-7] and in supplement filed 10/11/18.
5. ~Proposed Order: 10/11/18.

RECOMMENDATION

Court's discretion. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18      TIME: 8:30      DEPT: S35P  
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CASE#: PRO PS1800081

CASE NAME: MTR OF MARLENE H BRACKETT

HEARING:

Waiver Of Account and Report of CHRISTINE E CAPPELLI and  
Petition for allowance of fees filed.

COUNSEL:

CHRISTINE E CAPPELLI                      (PET)...TONY DEGASPERIN  
MARLENE H BRACKETT                      (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Christine Cappelli, daughter.

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

1. Assets on hand \$399,979.20 in real and personal property.
2. Executor is sole beneficiary, waives accounting and statutory compensation.
3. Counsel seeks statutory fees of \$11,116.88. Ok.
4. Counsel seeks reimbursement of costs advanced of \$1,597.50, of which \$632.50 remains unpaid. [LFpg5-6].
5. Final and supplemental Inventory and Appraisals filed; however, **need** statements to support cash balances per local rule 20-908.
6. No proposed order. Submit after hearing.

RECOMMENDATION

RFA subject to note 5. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 8:30 DEPT: S35P  
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CASE#: PRO PS1800761

CASE NAME: MTR OF KAREN N DISMORE

HEARING:

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

COUNSEL:

KAREN N DISMORE

(DEC)...

RENEE NORMAN

(PET)...THOMPSON & COLEGATE

#### GENERAL INFORMATION

**Continued from 09/20/18 to clear notes.**

THIS CASE SET FOR HEARING ON Petition for Probate, Letters Testamentary with Full Authority under IAEA Renee Norman, daughter/Trustee.

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

1. Petitioner alleges the decedent's name was inadvertently typed as Dismore, but is actually "Dinsmore". Court may wish to correct on the record.
2. Will waives bond; however, petitioner seeks bond of \$30,000. Net estate value is \$525,000; however, *section 3 is not clear* if property is income from real property or the value is of actual real property. **JTD**
3. Petition appears to be for an ancillary probate as decedent was domiciled in Washington. Exemplified copy of order admitting the will to probate in sister state per Pr.C. § 12521 filed 09/12/18.
4. Proof of publication filed 10/18/18; ***however, image not available in open access or LF at time of review on 10/22/18 am.***
5. ~Proposed Form Order: 08/13/18.

#### RECOMMENDATION

Need to clear note 4, 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)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT **CONSERVATORSHIP**

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DATE: 10/25/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1300009

CASE NAME: CALVIN NATHAN MEEKS JR

HEARING:

Order to Show Cause RE: WHY CASE SHOULD NOT BE TRANSFERRED TO  
FRESNO

COUNSEL:

CALVIN NATHAN MEEKS JR	(CTP)...
JAMES CROWLEY	(CP )...WIL R MULLINS ESQ
NAOMI CROWLEY	(CP )...WIL R MULLINS ESQ

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Why Case should not be Transferred to Fresno.

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

1. James and Naomi Crowley, sister and brother-in-law, appointed limited Conservators of person only on 04/24/13.
2. Conservatee has been residing at a board in care in Fresno since 2015.
3. **Need** post-move notice per CRC 7.1063(c) including to IRC.

#### RECOMMENDATION

Need to clear note 3. If approved, set hearing re proof of transfer for **12/20/18**.  
(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1300083

CASE NAME: JUNELL WEBER

HEARING:

Accounting Review/Final Discharge

COUNSEL:

DARLENE SHIMKUS	(TP )...PRO/PER
DEEANA WHEAT	(CPE)...CRAIG E WILSON
DEEANA WHEAT	(CPE)...FULLERTON LEMANN SCHAEFER & DO
JUNELL WEBER	(CEP)...PRO/PER
LYNELL WHEAT	(CPE)...FULLERTON LEMANN SCHAEFER & DO
LYNNELL WHEAT	(CPE)...CRAIG E WILSON

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final waiver of post-death account by Lynnell and Deanna Wheat, daughter/granddaughter, approved on 07/17/17 indicated zero assets.
2. It appears hearing should actually be for final discharge, not accounting review, as the post death waiver was approved close to the 7/25/17 hearing. However, conservator appears to have filed a subsequent formal waiver accounting to be heard on 11/14/18; also indicates 0 assets.
3. No property remained, no receipts needed.
4. **Need** Ex Parte Petition for Final Discharge and Order submitted on 10/10/18; however, proposed order date section 1 is incomplete.

RECOMMENDATION

Court to trail 11/14/18 hearing.

(lc)

Future hearing dates: 11/14/18 final Account

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
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CASE#: CON PS1400059

CASE NAME: Abigail Cabrales Guijarro

HEARING:

Order to Show Cause RE: WHY CASE SHOULD NOT BE TRANSFERRED TO  
LOS ANGELES

COUNSEL:

ABIGAIL CABRALES GUIJARRO (PCE)...

DIONICIA CABRALES (PCR)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re Why Case should not be Transferred to Los Angeles.

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

1. Dionicia Cabrales, mother, appointed limited Conservators of person only on 04/24/13.
2. Conservatee has been residing in El Monte.
3. **Need** post-move notice per CRC 7.1063(c) including to IRC.

RECOMMENDATION

Need to clear note 3. If approved, set hearing re proof of transfer for **12/20/18**.  
(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500123

CASE NAME: janet m hargett

HEARING: Petition for Settlement of First and Final Account and Report of  
LORETTA F MEADERS and Petition for allowance of fees filed.

COUNSEL:

BRYAN C HARTNELL

(BRYAN C. HARTNELL

DONNASUE SMITH ORTIZ

(PET)...DONNASUE ORTIZ

JANET MARIE HARGETT

(CEP)...DONNASUE ORTIZ

LORETTA F MEADERS

(CPE)...HARTNELL LAW GROUP

LORETTA MEADERS

(CPE)...CHANDLER LAW FIRM

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON 1<sup>st</sup> and Final Account and Petition for Allowance of  
Fees by Loretta Meaders, Cousin.

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

1. Conservatee passed away on 12/17/17.
2. Accounting period 05/27/15 – 08/02/18.
3. Assets on hand **\$97,828.60** as of 05/31/18 [lfpg10&27], yet other summary of account ends 08/02/18 and states **\$487,828.60** [lfpg36]. **See next note.**
4. There appears to be several summary of accounts: **Need** two separate pre-and post-death summary of accounts on mandatory judicial council forms GC-400/SUM/GC-400/405.
  - a. 05/27/15 – 05/31/18 [lfpg10]
  - b. Post-death 12/17/17 – 08/02/18 [lfpg33]
5. Conservator seeks fees of \$19,800 for an avg of 20 hours per month, totaling 660 hours at \$30 per hour. Conservator did not keep a detailed log. **JTD**
6. Counsel seeks fees of \$7,499.48, of which \$4,211 was prior unpaid fees and \$3,287.50 for 12.5 hours at \$125/275 per hour and costs of \$465. One hour at \$125 was for an accountant, not a paralegal. **JTD**
7. It appears some distributions were already made to estate. Question authority to transfer any assets [lfpg35]? **Need** verified supplement.
8. **Need** closing escrow statement per local rule 20-910 for Port Hueneme Property.
9. Disbursements indicate cash and real property disbursed to Chandler Law firm and Conservator [lfpg26]. However, it is not clear why cash and property was disbursed. **Need** verified supplement with further explanation.



10. It appears Conservator is also personal representative for estate of deceased conservatee. **Need** notice of related case for PROPS1800365.
11. **Need** financial statements to support Pacific Premier Bank's current balance per Pr. C. § 2620(c).
12. Proposed order submitted 09/14/18; however, notes shall be cleared prior to pre-approval of order.

#### RECOMMENDATION

Need to clear notes 4, 7-11. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

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DATE: 10/25/18 TIME: 9:30 DEPT: S35P  
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CASE#: CON PS1500332

CASE NAME: ANITA POIRIER

## SEE ALSO 14

HEARING: Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DIANE LEE GIEBNER

### COUNSEL:

ANITA POIRIER	(CEE)...DONNASUE ORTIZ
DIANE LEE GIEBNER	(CE )...GREGORY T ANNIGIAN
DIANE LEE GIEBNER	(CPE)...MARIVEL M ZIALCITA
GREGORY T ANNIGIAN	(PET)...GREGORY T ANNIGIAN
JOEL RYAN HOLT	(CP )...GREGORY T ANNIGIAN
JONI LOVEGROVE	(CP )...MARIVEL M ZIALCITA
JONI LOVEGROVE	(CPE)...MARIVEL M ZIALCITA

### GENERAL INFORMATION

Continued from 12/14/16, 01/11/17 and 03/29/17. "Jason" Holt has failed to comply with court orders. Bench warrant to issue at \$1,000,000.

**Continued from 07/19/17** Bench warrant of Jason Holt was recalled and he was ordered to appear at the next hearing. Substitution of Attorney for Diane Gieber and Joel Holt must be filed by July 26 or Marivel Zialcita will not be permitted to be the attorney of record.

**Continued from 08/23/17.** Oral report given by Donnasue Ortiz. Report of Court Investigator read and considered. Court finds Successor Conservatorship in the best interest of Anita Poirier. Diane Lee Giebner, Joni Lovegrove appointed Conservator of the person only (Successor). No bond is required. Court finds clear and convincing evidence that conservatee is incapable of communicating with or without reasonable accommodations. Court disqualifies conservatee from voting.

**Continued from 11/15/17 and 06/28/18. Inventory and Appraisal to be filed as supplemental amended.**

THIS CASE IS SET FOR HEARING ON Compliance Review.

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

1. Court appointed Joel Holt, grandson, as conservator of the **person**, and Diane Lee Giebner, daughter, as conservator **of the estate** on 5/11/16; \$225,100 bond. Additional bond of \$225,000 posted on 09/25/18.
2. Joni Lovegrove, granddaughter, **temporary successor conservator of the person** on 08/29/17 and general appointment of conservator of person only on 10/17/17.

3. Determination of Conservatee's Appropriate Level of Care and Care Plan filed.
4. Notification of Conservatee's rights filed 06/18/18.
5. Partial Inventory and Appraisal filed 07/25/16 and final Inventory and Appraisal filed 07/3/18.
6. Proof of Service of Inventory and Appraisal including instructions for objections filed 06/18/18 per Pr. C. §2610(a) However, **need** proof of service ***for all 1<sup>st</sup> degree relatives and for amended Inventory and Appraisal filed 07/03/18.***
7. Proof of recordation of letters filed 07/03/18

#### RECOMMENDATION

Need to clear note 6.

(lc/lh/lc/ww/lh/lc)

Future hearing dates: 11/20/18 1<sup>st</sup> Account Current by Joni Lovegrove and Diane Giebner

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1500332

***Vacated***

CASE NAME: ANITA POIRIER

**SEE ALSO 13**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

ANITA POIRIER	(CEE)...DONNASUE ORTIZ
DIANE LEE GIEBNER	(CE )...GREGORY T ANNIGIAN
DIANE LEE GIEBNER	(CPE)...MARIVEL M ZIALCITA
GREGORY T ANNIGIAN	(PET)...GREGORY T ANNIGIAN
JOEL RYAN HOLT	(CP )...GREGORY T ANNIGIAN
JONI LOVEGROVE	(CP )...MARIVEL M ZIALCITA
JONI LOVEGROVE	(CPE)...MARIVEL M ZIALCITA

(lc)

Future hearing dates: 11/20/18 1<sup>st</sup> Account Current by Joni Lovegrove and Diane Giebner

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18 TIME: 9:30 DEPT: S35P  
-----

CASE#: CON PS1600371

CASE NAME: MTR OF DARNEL FIDEL MEJIA

HEARING:

Hearing Re: PROOF OF BOND/BLOCKED ACCOUNT

COUNSEL:

DARNEL FIDEL MEJIA

(CEP)...WALTER T. MOORE

SYLVAN P MEJIA

(CPE)...MEGAN I BRAUN

GENERAL INFORMATION

**Continued from 07/26/18.**

THIS CASE SET FOR HEARING ON Proof of Bond/Blocked Account.

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

1. Substituted Judgment approved on 05/03/18. Sylvan Mejia, paternal uncle, appointed Trustee, \$175,000 bond with \$350,000 in blocked account.
2. **Need** proof of blocked account.
3. **Need** \$175,000 bond.

RECOMMENDATION

Inquire status of order, bond and blocked account.

(lc)

Future hearing: 06/06/19 Accounting review

CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1700381

CASE NAME: MARCIE ARCOS

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIA ARCOS

COUNSEL:

MARCIE ARCOS

(CEE)...

MARIA ARCOS

(PET)...GISSELLE M AMINI

ROCIO AKERS TERCERO

(PET)...GISSELLE M AMINI

GENERAL INFORMATION

**Continued from 09/06/18. No appearance.**

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maria Arcos and Rocio Tercero, mother and sister appointed **limited** conservator of the person **and estate** on 02/01/18, no bond.
2. Notification of Conservatee's rights filed 03/20/18.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.
5. **Need** final Inventory & Appraisal per Pr.C.§2610.
6. **Need** proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
7. It appears estate powers were granted; however, *accounting review does not appear to have been set. **Court to inquire if estate powers are necessary as estate consists of only public benefits. If not, then court may wish to terminate estate powers and require amended order/letters.***

RECOMMENDATION

Need to clear notes 2-6. Set proof of order/amended letters for **11/29/18 or** accounting review for **03/21/19**.

(lc)

DATE: 10/25/18      TIME: 9:30      DEPT: S35P

CASE NAME: ANTHONY SEBASTIAN RAZO ARGOMANIZ

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARIA L ARGOMANIZ

ANTHONY SEBASTIAN RAZO ARGOMAN(CTP)...MITCHELL I ROTH  
MARIA L ARGOMANIZ (PET)...PRO/PER

THIS CASE SET FOR HEARING ON Compliance Review.

1. Maria Argomaniz, mother, appointed **limited** conservator of the person only on 03/22/18.
2. Notice of Conservatee's rights filed 04/02/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 filed 04/30/18; however, is not dated at signature line and sections 1 and 2 re date of appointment and residence is incomplete. **Need** completed dated form.
4. Care Plan filed 04/30/18.

Need to clear note 3.  
(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1700422

CASE NAME: APRIL LEE NONNEMAKER

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DEBORAH KAREN NONNEMAKER

COUNSEL:

APRIL LEE NONNEMAKER

(CTP)...PRO/PER

DEBORAH KAREN NONNEMAKER

(CP )...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Deborah Nonnemaker, mother, appointed **limited** conservator of the person only on 03/22/18.
2. Notice of conservatee's rights filed 03/28/18.
3. Determination of Conservatee's Appropriate Level of Care form GC-355 and Care Plan filed on 05/29/18.

RECOMMENDATION

None.

(lc)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S35P  
-----

CASE#: CON PS1800023

CASE NAME: LHAREE C. CAMBRONERO

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of MARICAR CAMBRONERO

COUNSEL:

LHAREE C. CAMBRONERO      (CTP)...SANDRA L TURNER  
MARICAR CAMBRONERO      (CP )...SHEELA A. STARK

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Compliance Review.

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

1. Maricar Cambronero, mother appointed **limited** conservator of the person only on 03/22/18.
2. Proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights filed 04/25/18; however, section 5 does not indicate copy of order served. **Need** completed proof of service.
3. **Need** Determination of Conservatee's Appropriate Level of Care form GC-355.
4. **Need** Care Plan in accord with Pr.C.§2352.5, local rule 20-1403.

RECOMMENDATION

Need to clear notes 2-4.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: STANFORD E. REICHERT

**MISC**

-----  
DATE: 10/25/18      TIME: 1:30      DEPT: S35P  
-----

CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

**SEE ALSO 21**

HEARING:

Hearing Re: COURT TRIAL (FIRST SESSION)

COUNSEL:

JAMES STEVEN JONES

(PET)... SHERYL S HAYASHI

JASON JONES

(OBJ)...BORDEN LAW OFFICE

JUSTIN JONES

(BORDEN LAW OFFICE

REVOCABLE LIVING TRUST OF JAME

(TRU)...

Trial – No notes – JTD \*

(lc)

Future hearing:10/26/18 Court Trial

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/25/18 TIME: 1:30 DEPT: S35P  
-----

CASE#: PRO PS1700510

CASE NAME: REVOCABLE LIVING TRUST OF JAMES R JONES

**SEE ALSO 20**

HEARING: Hearing Re: Hearing re: FRIST & FINAL REPORT, PETITION, ETC.

COUNSEL:

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

GENERAL INFORMATION:

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

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

**Continued from 06/11/18 and 09/24/18. Counsel ready for trial. Matter not re-reviewed as nothing new filed.**

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

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

1. This trust does not appear to have been court-supervised; a formal probate has not commenced; and trust indicates that upon the death of both trustors, the trustee shall distribute the entire trust estate, equally to the grandchildren [LF, p34]. **Supp. (09/14/17) indicates that an accounting was submitted as not all the beneficiaries of the Trust agree to the amounts to be disbursed.**
2. Accounting period 09/30/14 to 03/09/17.
3. Assets on Hand \$178,628.18 consisting of cash.
4. Petitioner requests ratification of fees paid in the sum of \$2,500.00.
5. Petitioner requests reimbursement of costs advanced of \$250.00. Itemized.
6. Attorney requests fees and costs of \$8,631.98. Billed at \$300/hour for 26.6 hours' attorney time and \$100/hour for 4.5 hours' paralegal time. Itemized [LF, pgs. 56-61]. JTD.
7. Distributions [LF, p11] reflect preliminary distributions totaling \$68,503.37.

8. Petitioner requests authority to withhold \$10,000 as a reserve. JTD.
9. Petitioner requests discharge upon filing of receipts. However, discharge is not granted until entry of final discharge order.
10. Notice given.
11. **Objections filed 10/23/18 by Jason Jones and Justin Jones.**
12. **Reply to Objections filed 12/01/17. Need proof of service.**
13. Proposed Order 12/01/17 does not include case number and discharges Trustee upon filing of receipts instead of entry of final discharge order.

RECOMMENDATION:

Require notice then set for contested hearing. If approved, set next hearing for receipts and final discharge for **11/07/19**.

(nb/cs)

Future hearing: 10/26/18 Court Trial

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**Readiness Calendar**

-----  
DATE: 10/25/18      TIME: 8:29      DEPT: S36P  
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CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03

**SEE ALSO 2, 3, 4**

HEARING:

Petition for ORDER 1.DETERMINING THAT CERTAIN REAL PROPERTY  
IS AN ASSET OF THE REVOCABLE TRUST ETC.

COUNSEL:

ANTHONY SANDERS	(PET)...OLDMAN, COOLEY, SALLUS,
ELVIA SANDERS	(FULLERTON LEMANN SCHAEFER &
IN RE REVOCABLE TRUST OF SAMUE	(TRU)...
SAMUEL J. SANDERS JR.	(OBJ)...GIFFORD, DEARING &
SAMUEL J. SANDERS JR.	(PET)...GIFFORD, DEARING &
TREBIEN BELLOWS	(PET)...OLDMAN, COOLEY, SALLUS,

Currently under review by legal research.

Notice deemed sufficient.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 8:29 DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03

**SEE ALSO 1, 3, 4**

HEARING:

Petition for 1.SUSPENSION OF TRUSTEE SAMUEL SANDERS, JR:2.REMOV  
AL OF TRUSTEE; ETC

COUNSEL:

ANTHONY SANDERS	(PET)...OLDMAN, COOLEY, SALLUS,
ELVIA SANDERS	(FULLERTON LEMANN SCHAEFER &
IN RE REVOCABLE TRUST OF SAMUE	(TRU)...
SAMUEL J. SANDERS JR.	(OBJ)...GIFFORD, DEARING &
SAMUEL J. SANDERS JR.	(PET)...GIFFORD, DEARING &
TREBIEN BELLOWS	(PET)...OLDMAN, COOLEY, SALLUS,

Currently under review by legal research.

Notice deemed sufficient.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 8:29 DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03

**SEE ALSO 1, 2, 4**

HEARING: FIRST Account and Report of SAMUEL J. SANDERS JR. and Petition for allowance of fees filed.

COUNSEL:

ANTHONY SANDERS	(PET)...OLDMAN, COOLEY, SALLUS,
ELVIA SANDERS	(FULLERTON LEMANN SCHAEFER &
IN RE REVOCABLE TRUST OF SAMUE	(TRU)...
SAMUEL J. SANDERS JR.	(OBJ)...GIFFORD, DEARING &
SAMUEL J. SANDERS JR.	(PET)...GIFFORD, DEARING &
TREBIEN BELLOWS	(PET)...OLDMAN, COOLEY, SALLUS,

GENERAL INFORMATION

**Continued from 08/16/17 and 11/29/17** at request of Counsel due to ongoing discovery.  
**Continued from 03/21/18 and 06/13/18. Matter is contested and set for trial.**

THIS CASE SET FOR HEARING ON 1<sup>st</sup> Account Current by Samuel Sanders Jr Trustee.

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

1. Petitioner, Samuel Sanders Jr., acting trustee since the death of his father on 07/20/15.
2. Accounting period 07/20/15 – 03/31/17.
3. Assets on hand \$9,671.20 and account receivables of \$138,604.14.
4. Petitioner alleges Samuel Sr. passed away with debts in excess of \$190,000 of which was a Bank of America credit line and a Los Angeles Housing Dept. loan. Cash on hand consisted of \$1,212.92. The real property was valued at \$500,000.
5. Trustee allegedly purchased the real property for \$417,000, given his 1/5<sup>th</sup> share, and later transferred the funds to the beneficiaries. Petitioner reports that he owes Trust approximately \$113,000 to equalize payment.
6. Petitioner alleges some beneficiaries have refused to cooperate with distribution by not cashing checks and failing to return the W-9 forms.
7. **Objections filed on 06/15/18 by Anthony Sanders and Trebien Bellows.**
8. No proposed order. Submit after hearing.

RECOMMENDATION

Court's discretion. No future hearing dates as trust is not court supervised.

(lc/lh/lc)

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

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:29      DEPT: S36P  
-----

CASE#: PRO PS1700224

CASE NAME: IN RE REVOCABLE TRUST OF SAMUEL J SANDERS DATED 03

**SEE ALSO 1, 2, 3**

HEARING:

Readiness Calendar

COUNSEL:

ANTHONY SANDERS	(PET)...OLDMAN, COOLEY, SALLUS,
ELVIA SANDERS	(FULLERTON LEMANN SCHAEFER &
IN RE REVOCABLE TRUST OF SAMUE	(TRU)...
SAMUEL J. SANDERS JR.	(OBJ)...GIFFORD, DEARING &
SAMUEL J. SANDERS JR.	(PET)...GIFFORD, DEARING &
TREBIEN BELLOWS	(PET)...OLDMAN, COOLEY, SALLUS,

Readiness – No notes – JTD \*

(lc)



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

**PROBATE**

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS0800464

CASE NAME: THELMA E. LARKIN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BILLY GRAHAM EVANGELISTIC ASSO (TP )...

THELMA E. LARKIN (DEC)...

WILLIAM F STAPLETON (PET)...HARTNELL LAW GROUP

#### GENERAL INFORMATION

Continued from **02/22/18** and 05/03/18. Accounting prepared, not filed yet.

Continued from 06/21/18. Counsel stated client has moved to Florida and will be working on the accounting.

**Continued from 08/30/18. Additional time needed.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Testamentary issued to William Stapleton, stranger, on 05/04/09; full authority, no bond.
2. Previous status report approved on 02/14/17.
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1400404

CASE NAME: MTR OF RONALD HARVEY GREEN

HEARING:

Hearing re Final Discharge

COUNSEL:

BARBARA EISENBEISZ	(PET)...JAMES B CHURCH
EMILY S GREEN	(PET)...GUY A BOVEE
EMILY S GREEN	(PET)... RIPLEY & ASSOCI
EMILY S GREEN	(PET)...PRO/PER
MELVIN FRIEDLAND	(PET)...MELVIN L FRIEDLAND
RONALD HARVEY GREEN	(DEC)...

**XREF: CONPS1500259** (Brook Green)

GENERAL INFORMATION

Continued from 05/24/18. No appearance. Need corrected order.

Continued from **06/28/18. Court was advised the matter has been resolved in related SNT matter.** Counsel Church to make every effort to have Emily Green Present.  
**Continued from 08/30/18. No appearance. James Church to be present at next hearing.**

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Emily Green, spouse/conservator, approved on 05/18/17; order returned for corrections 06/22/17. **Need** corrected order.
2. Receipts filed.
3. **Need** Ex Parte Petition for Final Discharge and Order.

RECOMMENDATION

Inquire status of orders.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1500275

CASE NAME: MTR OF HAROLD LEE LOVE

HEARING:

Hearing re Final Discharge

COUNSEL:

ANGIE LOVE

(PET)...ROSE SPELLMAN

HAROLD LEE LOVE

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for Angie Love, daughter/sole heir, approved on 10/19/17. **Need** order.
2. Personal representative is sole heir, no receipt required.
3. **Need** Ex Parte Petition for Final Discharge and Order with recording information per Pr.C.§11753(b). Need to clear note 1 first.

RECOMMENDATION

Inquire status of distribution and discharge orders.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1500915

CASE NAME: EDWARD HARRY HAGBLOOM

HEARING:

Petition for enforce settlement agreement and court order

COUNSEL:

CINDI HAGBLOOM	(OBJ)...JAMES E NEWNHAM
CINDI HAGBLOOM	(PET)...JAMES E NEWNHAM
EDWARD HARRY HAGBLOOM	(DEC)...
ROBIN HAGBLOOM	(PET)...SHEILA J. BARTON

Currently under review by legal research.

Cynthia served notice on 09/12/18.

(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1501184

CASE NAME: MTR OF BARBARA L WHITTEN

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BARBARA L WHITTEN

(DEC)...

MONTE PRESCHER

(PET)...BANKS GARCIA & JANIS

#### GENERAL INFORMATION

**Continued from 04/05/18 and 07/19/18.**

THIS CASE SET FOR HEARING ON Accounting review/Status.

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

1. Letters of Administration issued to Monte Prescher, son on 01/26/17; full authority, no bond.
2. Final Inventory and Appraisal filed 08/24/17.
3. **Need** accounting or status report.

#### RECOMMENDATION

Inquire status of accounting.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1601214

CASE NAME: MTR OF RONALD CLIFFORD WADE

HEARING:

First & Final Account and Report of BRIAN WADE and Petition for allowance of fees filed.

COUNSEL:

BRIAN WADE

(PET)...PRO/PER

RONALD CLIFFORD WADE

(DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Account, Distribution and Petition for Allowance of Fees by Brian Wade, son.

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

1. Assets on hand: Real property.
2. Executor waives statutory compensation of \$6,157.
3. It appears executor made preliminary distribution to him from the rental income totaling \$25,696.58. [LFpg14-15]
  - a. **Need** verified supplement as to offset of distribution for other two beneficiaries.
  - b. A personal representative ***may only preliminary distribute personal property per Pr.C. § 10520; if it is*** pecuniary per terms of a will under \$10,000 and/or personal property under \$50,000. There is no specific bequest for cash amount stated in will, nor is there a Notice of Proposed action filed. However, the estate/creditors do not appear to have suffered harm.
4. **Need** notice of hearing and proof of service
5. Proposed order submitted 09/12/18; however, **need** to clear note 3 and 3 lines of content must appear above the judge's signature per local rule 20-614(d). Submit corrected order after hearing.

RECOMMENDATION

Need to clear notes 3-4. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1700055

CASE NAME: Grace Marie Palomera

HEARING:

Accounting Review by \*\*\*

COUNSEL:

GRACE MARIE PALOMERA      (DEC)...

GREGORY PALOMERA      (PET)...CHRIS SCARCELLA

GENERAL INFORMATION

**Continued from 06/14/18 and 08/16/18. Inventory and Appraisal with probate ref.**

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 Gregory Palomera, brother, on 04/06/17; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.

RECOMMENDATION

Need to clear notes 2-3.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1800265

CASE NAME: DOROTHY C LORENZEN

HEARING:

REPORT OF THE PERSONAL REP WAIVER OF FINAL Account and Report of  
MAUREEN SHEILA HELD and Petition for allowance of fees filed.

COUNSEL:

DOROTHY C LORENZEN

(DEC)...

MAUREEN SHEILA HELD

(PET)...HEDTKE LAW GROUP

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Maureen Held, daughter.

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

1. Assets on hand \$380,000 in real property.
2. All beneficiaries waive accounting.
3. Executor waives statutory compensation.
4. Counsel seeks statutory fees of \$10,600. Ok.
5. No Proposed Order submitted. Submit order after hearing.

RECOMMENDATION

RFA. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)



CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S36P  
-----

CASE#: PRO PS1800495

CASE NAME: MTR OF JEFFREY ALAN BISHOP

**SEE ALSO 14, 14A**

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

COUNSEL:

JEFFREY ALAN BISHOP

(DEC)...

JUDY A EVANS

(PET)...BARBARA L. BEARD ATTORNEY AT

SCOTT KEVIN BISHOP

(PET)...PRO/PER

GENERAL INFORMATION

Continued from 06/28/18 due to client's inability to appear.

**Continued from 08/30/18 to file will contest. Declarations may be filed in lieu of testimony and proceed with trial on declarations at next hearing.**

THIS CASE SET FOR HEARING ON

- Petition 1 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by **Judy Evans, friend**.
- Petition 2 - Petition for Probate, Letters Testamentary with Full Authority under IAEA by **Scott Bishop, brother**

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

**Petitioner 1 Judy Evans, friend/named executor**

1. Caption is incomplete as to IAEA powers; however, section 2c indicates full authority sought. Court to clarify.
2. Court to clarify petitioner is permanent US resident as section 3h is not fully completed.
3. Court to clarify that Melissa Bishop named in will is also Melissa Brogdon listed in section 8 of petition.
4. Will waives bond. Net estate value is \$294,818 in personal property. **JTD**
5. **Note** Will was executed 3 days prior to death.
6. ~Proposed Form Order: 06/08/18.

**Petitioner 2 – Scott Bishop, brother**

7. Petitioner appears to be a Petition for Letters of Administration with Will Annexed as petitioner is not a named executor. Does court wish to require an amended petition or deem as administration WWA? **JTD**

8. Notice to Petition to Administer Estate and proof of service filed 08/30/18; however, notice was insufficient as was 2 days' notice. Does court wish to deem as sufficient as notice is over 50 days? **JTD**
9. Petitioner states beneficiaries waive bond. Net estate value is \$131,734 of which \$53,000 is personal property. Court for good cause could require bond per Pr.C. § 8481(b).
  - a. **Need** bond waivers for beneficiaries Mark Bishop, Benjamin and Christine Buckley.
10. **Need** proof of publication
11. Original will was lodged by named executor Judy Evans.
12. Melissa Bragdon, sister, also signed the petition. Court to inquire why there are two signatures on petition; however, one petitioner. Melissa appears to be a possible remainderman beneficiary if she is also Melissa Bishop.
13. **Note** Will was executed 3 days prior to death.
14. **Proof of service of objections filed by Judy Evans; however, objections have not been filed at time of review on 08/27/18.**
15. **Thirteen Declarations filed on 09/19/18 in support of petitioner Scott Bishop.**
16. **Objections filed on 08/30/18 by Judy Evans, other petitioner. Need** proof of service of objections.
17. ~Proposed Form Order: 06/28/18.

#### RECOMMENDATION

Need to clear notes 9-10 & 16, Court's discretion re bond. Matter is contested. Petitioner 1 has higher priority as named executor. 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)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1800495

CASE NAME: MTR OF JEFFREY ALAN BISHOP

**SEE ALSO 13, 14A**

HEARING:

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

COUNSEL:

JEFFREY ALAN BISHOP

(DEC)...

JUDY A EVANS

(PET)...BARBARA L. BEARD ATTORNEY AT

SCOTT KEVIN BISHOP

(PET)...PRO/PER

See notes on matter 13.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1800495

CASE NAME: MTR OF JEFFREY ALAN BISHOP

**SEE ALSO 13, 14**

HEARING:

Petition for NOTICE OF CONTEST OF WILL PETITION JUDY EVANS

COUNSEL:

JEFFREY ALAN BISHOP

(DEC)...

JUDY A EVANS

(PET)...BARBARA L. BEARD ATTORNEY AT

SCOTT KEVIN BISHOP

(PET)...PRO/PER

Currently under review by legal research.

**Need** summons and proof of service. Will Contest and summons must be served in the manner required in a civil action generally. Pr.C. §\_§8250; CCP §§412.10–417.40.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S36P  
-----

CASE#: PRO PS1800886

CASE NAME: MTR OF MANUELA TRIANA HERNANDEZ

HEARING:

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

COUNSEL:

ELIAS PAZ HERNANDEA III      (PET)...MICHAEL C MADDUX  
MANUELA TRIANA HERNANDEZ      (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Letters of Administration with full  
authority under IAEA by Elias Paz Hernandez III, grandson.

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

1. All heirs waive bond. Net estate value is \$209,183 in real property. Son Elias Jr assigned his interest in real property to petitioner Elias III.
2. Section 5a(7) indicates issue of pre-deceased child; however, none stated in section 8. Court to clarify.
3. ~Proposed Form Order: 09/13/18.

RECOMMENDATION

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)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH **TRUSTS AND MOTIONS**

-----  
DATE: 10/25/18      TIME: 8:35      DEPT: S36P  
-----

CASE#: TRU PS1800175

CASE NAME: THE JAMES EALY REVOCABLE TRUST

HEARING:

Petition for Order Removing Co-Trustees For Breach Of Fiduciary  
Duty; Accounting And Surcharge

COUNSEL:

RACHEL EALY WILLIAMS

(PET)...AMY L GOSTANIAN

THE JAMES E EALY ROVOCABLE TRU      (TRU)...PRO/PER

Currently under review by legal research.

30 days' notice filed on 09/17/18 appears sufficient.

(lc)

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: 10/25/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS0900260

CASE NAME: GREGORY MICHAEL CONTRERAS

HEARING:

Hearing Re: STATUS ON DISSOLUTION PETITION

COUNSEL:

CARRIE L CONTRERAS (CPE)...HANSON, GORIAN, BRADFORD,  
GREGORY MICHAEL CONTRERAS (CEP)...JACK B OSBORN  
GRAGORY MICHAEL CONTRERAS (PET)...E JOAN NELMS

#### GENERAL INFORMATION

Continued from 03/29/18. Counsel Costales needs to file substitution of attorney [filed].

Continued from 05/10/18. Dissolution is currently on hold due to conservatorship.

Continued from 06/28/18. Court advised a petition re Successor Conservator will be filed.

**Continued from 9/13/18. Counsel stated parents will be filing for successor Conservator. Clerk's office to set hearing on 10/25/18.**

THIS CASE SET FOR HEARING ON Status on Dissolution Petition.

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

1. Court set matter on its own motion after review of 02/14/18 Court Investigator report.
2. Notice of dissolution filed 10/13/17.

#### RECOMMENDATION

Inquire status of successor petition.

(lc)

Future hearing dates: 11/1/18 Petition for Successor Conservator of person and estate by Joann and Sergio Contreras, parents

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: CON PS1800316

CASE NAME: DEBRA WILLIAMS

HEARING:

Petition for Appointment of Temporary Conservator

COUNSEL:

DEBRA WILLIAMS	(CEE)...MELVIN L FRIEDLAND
ROLAND WILLIAMS	(PET)...PRO/PER

Temporary hearing – No notes – JTD

(lc)

Future hearing

11/26/18 Petition for appointment of conservator



Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S36P  
-----

CASE#: SC SS02536

CASE NAME: MTR OF BRANDY LITTLES

**SEE ALSO 19**

HEARING:

Hearing Re: STATUS OF SUCCESSOR CONSERVATOR/APPOINT PG

COUNSEL:

BRANDY LITTLES

(CEP)...

VERDELL LITTLES

(CPE)...BRYAN C. HARTNELL

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Successor Conservator/appointment of Public Guardian.

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

1. Waiver of Account for Verdell Littles, mother, approved on 03/14/16. Verdell ***passed away leaving a vacancy as conservator.***
2. Matter set at 08/30/18 Accounting review hearing when court stated Public Guardian to take over conservatorship.

#### RECOMMENDATION

Inquire status of successor petition.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: JAMES MICHAEL WELCH

-----  
DATE: 10/25/18 TIME: 9:30 DEPT: S36P  
-----

CASE#: SC SS02536

CASE NAME: MTR OF BRANDY LITTLES

**SEE ALSO 18**

HEARING:

Accounting Review by \*\*\*

COUNSEL:

BRANDY LITTLES

(CEP)...

VERDELL LITTLES

(CPE)...BRYAN C. HARTNELL

#### GENERAL INFORMATION

Continued from 12/21/17 and 03/22/18. Court clarified Conservator, not conservatee, passed away on 12/15/17. A successor petition to be filed.

**Continued from 05/24/18 and 08/30/18. Public Guardian to take over as Conservator.**

THIS CASE SET FOR HEARING ON Accounting review.

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

1. Waiver of Account for Verdell Littles, mother, approved on 03/14/16. Verdell ***passed away leaving a vacancy as conservator.***
2. **Need** final account for Conservator beginning with 11/25/15. Counsel may be required to file for deceased conservator per Pr.C. § 2632.
  - a. Pr.C. § 2628 Petition to dispense submitted on 10/04/18; ***however, image not available for review in open access or LF at time of review on 10/22/18 am.***

#### RECOMMENDATION

Inquire status of accounting and successor petition.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## Readiness Calendar

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DATE: 10/25/18      TIME: 8:29      DEPT: S37P  
-----

CASE#: GAR PS1700358

CASE NAME: CARLOS MARTIN BECERRIL ET AL

### **SEE ALSO 2**

HEARING: Hearing re: Petition for Appointment of Guardian

#### COUNSEL:

CARLOS MARTIN BECERRIL	(MIN)...
ELIZABETH LYNN BECERRIL	(MIN)...
RENE BECERRIL JR	(FAT)...MBN & ASSOCIATES
STORMIE HALL	(GP )...PRO/PER
VIRGIL KIMSEY HALL	(GP )...PRO/PER

#### GENERAL INFORMATION:

Temporary Orders granted on 07/24/17. Virgil and Stormie Hall are appointed temporary guardians of Carlos and Elizabeth Becerril. Petitioner reports San Bernardino DCFS is involved in this matter.

Continued from **08/21/17** Mother deemed served by her presence in court. The Court determines minors are now residing with petitioners in Running Springs. Petitioner to provide attachments to guardian screening form regarding domestic violence incidents. Referred to Court Investigator for investigation and report. Visitation orders made. Minors to have no contact with Jesse Dealba.

Continued from **12/11/17 and 03/20/18**. Mother consents to guardianship. Father to file written objections. Petitioner to complete guardian screening form. Case is referred to Legal Aid for legal assistance. The Court re-refers matter to Court Investigator to interview all parties including father and minor. Referred to Court Investigator for investigation and report. All temporary orders to remain in full force and effect.

**Continued from 07/17/18. Father present. Tentative decision denying petition.**

**Pending family law action in Compton. Court recommended action be transferred to Riverside County as father resides in Perris. RFO ordered re custody and visitation to be filed in family law action. Temporary guardianship terminated.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Guardian, of the person only, by Stormie and Virgil Hall, maternal grandmother and spouse; minor: Carlos 7 and Elizabeth 3

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

1. **Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on

- a. unknown paternal grandparents in New Jersey,
  - b. maternal grandfather Hector Soto
  - c. Sibling Elizabeth if 12 or older.
2. Per minute order of 08/21/17 Court determines minors now reside with petitioners in Running Springs. Prior residence with mother in Compton, CA since the date of filing of UCCJEA on 07/24/17.
3. Court to see Guardianship Questionnaire by both petitioners, LF p. 4.
4. Domestic matter referenced in petition, LF p. 6; however, case number not provided. Court to inquire.
5. Court Investigator Report filed 11/14/17 and 07/05/18.
6. **Objections filed by father, Rene Becerril, Jr.**
7. ~Proposed form Order submitted: 07/24/17

RECOMMENDATION:

Need to clear note 1. Matter is contested.

(cs/nb/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18      TIME: 8:29      DEPT: S37P  
-----

CASE#: GAR PS1700358

CASE NAME: CARLOS MARTIN BECERRIL ET AL

**SEE ALSO 1**

HEARING:

Readiness Calendar

COUNSEL:

CARLOS MARTIN BECERRIL (MIN)...

ELIZABETH LYNN BECERRIL (MIN)...

RENE BECERRIL JR (FAT)...MBN & ASSOCIATES

STORMIE HALL (GP )...PRO/PER

VIRGIL KIMSEY HALL (GP )...PRO/PER

Readiness – No notes – JTD \*

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**PROBATE**

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1100589

CASE NAME: ESTATE OF FRANCES ABAHAZI

HEARING: Hearing re Final Discharge

COUNSEL:

BRYAN C HARTNELL ESQ

(TP )...HARTNELL LAW GROUP

FRANCES ABAHAZI

(DEC)...

GLENN BAUER

(PET)...JACK B. OSBORN

#### GENERAL INFORMATION

Continued from 05/19/16, 07/14/16, 01/05/17, 03/23/17, 07/20/17 and 11/16/17. Counsel recently located his client and discovered there is an error in that monies should be in hand are missing. Counsel attempting to track down error. Glenn Bauer to be present at next hearing is all funds are not found, accounted for and/or in hand to pay claim and Children's Village.

Continued from **01/25/18**. **Glen Bauer is ill and out of state**. Final distribution order vacated. Personal representative was given incorrect information re unclaimed funds.

**Continued from 04/12/18 and 07/12/18. Newly found/unclaimed property to be assessed.**

THIS CASE SET FOR HEARING ON Final Discharge

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

1. Final distribution for Glen Bauer approved on 08/18/15. Order **Vacated on 01/25/18.**
2. ~~Need receipts from Children's Village and Bryan Hartnell.~~
3. ~~Amended creditor's claim filed on 04/18/17 by Bryan Hartnell. The claim has not been paid as ordered in the 08/18/15 Order re First and Final Accounting.~~
4. ~~Need Ex Parte Petition for Final Discharge and Order.~~
5. **Need** status report.
6. Declaration filed 07/16/18 by personal representative indicating there may be assets of \$7,500 that were paid to estate on 07/20/12. Court to clarify as it is not clear if estate actually received those funds as there is no Inventory and Appraisal or receipt indicating as such.

#### RECOMMENDATION

Need status report.

(lc/ww/lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1501189

***Vacated***

CASE NAME: INGEBURG ELISABETH GOETZ

HEARING:

Accounting Review by \*\*\*

COUNSEL:

FRIEDJOF SCHWARZ

(OBJ)...HOLGER SIEGWART

HOLGER SIEGWART

(PET)...SIEGWART GERMAN AMERICAN

INGEBURG ELISABETH GOETZ

(DEC)...

MELODIE Z SCOTT

(HARTNELL LAW GROUP

MELODIE Z SCOTT

(PET)...RYAN J GALLANT

***XREF: PROPS1300322 (Ingeburg Goetz) CONPS1400211 (Ingeburg Elisabeth Goetz)***

(lc)

Future hearing dates: 11/29/18 Final Accounting by ***Holger Siegwart***

12/06/18 Final Discharge re ***Melodie Scott***

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1601137

CASE NAME: BERNARD MCCARRON

HEARING:

Hearing re Final Discharge

COUNSEL:

BERNARD MCCARRON      (DEC)...

JAMES MCCARRON      (PET)...ROBERT A KRASNEY

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Final Discharge.

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

1. Final Distribution for James McCarron, son, approved on 10/19/17.
2. Personal representative is sole heir, no receipt required.
3. **Need** Ex Parte Petition for Final Discharge and Order.

#### RECOMMENDATION

Inquire status of discharge order.

(lc)



Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700077

CASE NAME: GEFREY EDMUND NOVAK

HEARING:

FINAL REPORT AND PETITION Account and Report of MYRON F NOVAK  
and Petition for allowance of fees filed.

COUNSEL:

GEFFREY EDMUND NOVAK (DEC)...  
MYRON F NOVAK (PET)...G STEVEN CUEVAS

GENERAL INFORMATION

**Continued from 07/12/18.**

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Myron Novak, brother.

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

1. Assets on hand \$227,268.30 of which \$217,268.30 is cash.
2. Administrator is sole heir, waives accounting and statutory compensation.
3. Counsel seeks statutory fees of \$7,994.50. Ok.
4. **Need** Bank of America statement to support Inventory and Appraisal cash balance per local rule 20-908.
5. No proposed order. Submit after hearing.

RECOMMENDATION

RFA subject to note 3. If approved, set hearing on the filing of final discharge for **11/07/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18      TIME: 8:30      DEPT: S37P  
-----

CASE#: PRO PS1700469

CASE NAME: MARIA E RAMIREZ REVOCABLE TRUST

**SEE ALSO 8**

HEARING:

Hearing Re: RECEIPT OF SETTLEMENT

COUNSEL:

DOLORES RENTERIA (PET)...NEIL J DE LEON

LORRAINE RENTERIA (PET)...NEIL J DE LEON

MARIA E RAMIREZ REVOCABLE TRUS (TRU)...

MARY FRANCES LOPEZ-TIANA (PET)...JOSHUA D RAMIREZ

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Receipt of Settlement.

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

1. Matter set on 07/12/18 when counsel reported matter was settled.
2. Inquire status of settlement.
3. Request for Dismissal submitted by Dolores and Lorraine Renteria on 07/12/18; however, not processed at time of review.

#### RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700469

CASE NAME: MARIA E RAMIREZ REVOCABLE TRUST

## SEE ALSO 7

HEARING: Hearing Re: FIRST AND FINAL ACCOUNTING

### COUNSEL:

DOLORES RENTERIA (PET)...NEIL J DE LEON

LORRAINE RENTERIA (PET)...NEIL J DE LEON

MARIA E RAMIREZ REVOCABLE TRUS (TRU)...

MARY FRANCES LOPEZ-TIANA (PET)...JOSHUA D RAMIREZ

### GENERAL INFORMATION

Continued from 12/14/17 and 03/08/18. Attorney's fees approved in the reduced amount of \$1,634.50 and Trustee fees of \$581.25. Court will not authorize trustee costs of \$33,114.40 without proof of payments and receipts. Court specifically requests information on health services, cremation and catering costs and hearing aids (see transcript).

**Continued from 05/24/18. Counsel reported fees have been reduced by ½. Request is not for \$18,000. On 07/12/18 hearing, counsel reported matter has settled.**

THIS CASE SET FOR HEARING ON Final Account of Trust Administration by Mary Lopez-Tiana, Successor Trustee.

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

1. Accounting period 07/05/16 – 10/15/17.
2. Assets on hand \$254,516.90 in cash.
3. Attorney Ramos was paid \$9,565.50 in fees and costs for 28 hours at \$450. A balance of \$2,730 due is also being requested. [Acct.10/18LFpg75-82]. Costs of \$170.50 appear to be overhead per local rule 20-909. JTD **reduced per minute order.**
4. Trustee seeks ratification of fees paid of \$2,000 for 23.25 hours. [Acct.10/18LFpg83-84]. Trust allows reasonable fees [Acct.10/18LFpg35]. **reduced per minute order.**
5. Trust does not require bond.
6. Trustee reimbursed herself costs of \$33,114.40. [Acct.10/18LFpg12-14]. Receipts for cremation, catering etc. filed 05/03/18.
7. **Objections filed 12/11/17 by beneficiaries Dolores and Lorraine Renteria on 12/11/17 seeking \$33,114.40 surcharge for reimbursements and explanation of \$110,000 deficiency in sale price of real property.**

8. No proposed order. Submit after hearing.

**RECOMMENDATION**

Court's discretion. If approved and ***if*** trust is court supervised, set hearing on the filing of receipts for **11/07/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700609  
CASE NAME: MTR OF RONALD V HEUERMAN

HEARING: Verified report of executor and waiver of Account and Report of  
KATHLEEN MARIE VAN SICKLE and Petition for allowance of fees

COUNSEL:  
INHERITANCE FUNDING COMPANY, I (TP )...STEVEN D SCHROEDER  
KATHLEEN MARIE VAN SICKLE (PET)...MARIVEL M ZIALCITA  
RONALD V HEUERMAN (DEC)...

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Waiver of Final Account, Distribution and Petition for Allowance of Fees by Kathleen Van Sickle, daughter/Executrix.

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

1. Both beneficiaries waive accounting.
2. Assets on hand consist of real property and cash. **Need** actual cash amount on hand stated local rule 20-906.
3. Executrix and counsel seek statutory fees of \$17,452 each. Ok.
  - a. Fees are calculated with income. **Need** supporting schedules per Cal Rules of Ct 7.705(b)(6).
4. Counsel seeks extraordinary fees of \$3,005 for 9 hours at \$190/375 per hour. Itemized [LFpg35]. **JTD**
5. Executrix seeks a reserve of \$1,000.
6. Final Inventory and Appraisal filed 02/06/18; however, is not dated by executrix or counsel.
  - a. **Need** dated Inventory and Appraisal
  - b. **Need** statements to support cash balances per local rule 20-908.
7. Executrix bought out other beneficiary Kevin Heuerman' share of real property; however, question if Kevin voluntarily assigned his interests to Inheritance funding, rather than wait for payment as the fees appear very costly? **Need** verified supplement.
8. **Supplement filed on 10/19/18. Second check deadline was 10/18/18. Image not available in open access or LF at time of review on 10/22/18 am.**
9. No proposed order. Submit after hearing.

## RECOMMENDATION

Need to clear notes 2-3, 6-7. If approved, set hearing on the filing of receipts and final discharge for **11/07/19**.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
-----

CASE#: PRO PS1700817

CASE NAME: FRANCES SYLVIA ARCHIBEQUE

HEARING: Petition for PRELIMINARY DISTRIBUTION REIMBURSEMENT IF  
COSTS AD VENCED WITHDRAWAL OF FUNDS FROM BLOCKED ACCOUNT

COUNSEL:

DEPARTMENT OF HEALTH CARE SERV (TP )...PRO/PER

FRANCES SYLVIA ARCHIBEQUE (DEC)...

RONALD V ARCHIBEQUE (PET)...CANDICE A GARCIA-

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Preliminary Distribution, Petition for reimbursement and Preliminary Distribution of Attorney's Compensation Pr.C. § 11620 by Ronald Archibeque, son.

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

1. Letters Testamentary issued to Ronald Archibeque, son, on 12/27/17; full authority no bond.
2. Executor seeks preliminary distribution of statutory fees for counsel of \$6,500, which is 50% of current statutory fee calculation. Executor anticipates an additional \$138,234.50 from the Estate of Luna.
3. Executor seeks reimbursement of costs advanced of \$955.30. Itemized [LFpg5].
4. Executor seeks preliminary distribution to the Trust [beneficiary] totaling \$144,761.80.
5. Executor seeks authority to withdrawal funds from blocked account to also pay Department of Health Services claim allowed of \$196,521.11.
6. ~Proposed Order: 09/20/18.

RECOMMENDATION

Court's discretion.

(lc)

Future hearing: 01/16/19 Accounting review

Superior Court of Calif, County of San Bernardino

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

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DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1700870

CASE NAME: ETHAN MATTHEW MIZERA

HEARING:

Hearing Re: PROOF OF BLOCKED ACCOUNT

COUNSEL:

ETHAN MATTHEW MIZERA (DEC)...  
KIMBERLY LEZETTE AYALA (PET)...PRO/PER  
SAVANNAH ELLEN MIZERA (MIN)...

GENERAL INFORMATION

**Continued from 04/26/18 and 07/12/18. No appearance on 07/12. Kimberly Ayala to be present at next hearing.**

THIS CASE SET FOR HEARING ON Proof of Blocked Account.

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

1. Kimberly Ayala, mother, appointed guardian of estate under this probate case number for Savannah Mizera, 4, on 02/08/18.
2. Proof of blocked account filed on 07/06/18.
3. **Note:** no accounting reviews have been set for accounting and/or waiver; however, funds will be blocked. Does court wish to require waivers to be filed biannually?

**JTD**

RECOMMENDATION

Court's discretion.

(lc)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/25/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1701092

CASE NAME: THE MICHAEL E FRY TRUST

HEARING:

Hearing Re: STATUS OF DISMISSAL

COUNSEL:

CHESTER EDWARD FRY

(PET)...DAVID M. HUYNH

DENISE FRY

(OBJ)...ERIC S MCINTOSH

THE MICHAEL E FRY TRUST

(TRU)...

***XREF: PROPS1500838 (Michael Edward Fry)***

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Status of Dismissal

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

1. Matter set on 07/12/18 when counsel reported petition for Determination of Question of Construction of Trust etc. will be withdrawn per settlement. Matter to be heard with PROPS1500838.

RECOMMENDATION

Inquire status of dismissal

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701287

CASE NAME: LAZARO P. HERNANDEZ

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

COUNSEL:

LAZARO P. HERNANDEZ

(DEC)...

SANDRA PALOMO

(PET)...THOMAS C. BOBZIN

***XREF: PROPS1701288 (Guadalupe Palomo spouse)***

#### GENERAL INFORMATION

Continued from 02/08/18. Bond waiver accepted.

Continued from 04/26/18. Publication current proof only 14 days. Sandra Palomo appointed special administrator to marshal assets, work with lender etc.

**Continued from 07/12/18. Sandra Palomo appointed special administrator.**

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

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

1. Letters of special administration do not appear to be issued at time of review.
2. It appears **next** matter may be spouse as petitioner's parents died simultaneously.
3. Petitioner is sole heir and waives bond. Net estate value is \$21,000 of which \$2,000 is personal property. Petitioner is a resident of Nevada, Court accepted bond waiver.
4. **Need** proof of publication.
5. ***Special letters not submitted in order to issue.***
6. No proposed order submitted.

#### RECOMMENDATION

Need to clear note 4, no 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)

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

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DATE: 10/25/18 TIME: 8:30 DEPT: S37P  
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CASE#: PRO PS1701288  
CASE NAME: GUADALUPE PALOMO  
HEARING: Hearing re: Petition for Letters of Admin. W/ Full Authority  
under IAEA.

COUNSEL:

GUADALUPE PALOMO (DEC)..  
SANDRA PALOMO (PET)...THOMAS C. BOBZIN

***XREF: PROPS1701287 (Lazaro P Hernandez spouse)***

GENERAL INFORMATION

Continued from 02/08/18. Bond waiver accepted.

Continued from 04/26/18. Publication current proof only 14 days. Sandra Palomo appointed special administrator to marshal assets, work with lender etc.

**Continued from 07/12/18. Sandra Palomo appointed special administrator.**

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

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

1. It appears previous matter may be spouse as petitioner's parents died simultaneously.
2. Petitioner is sole heir and waives bond. Net estate value is \$21,000 of which \$2,000 is personal property. Petitioner is a resident of Nevada, Court accepted bond waiver.
3. **Need** proof of publication.
4. **Need** Duties and Liabilities form. Alternatively, does court wish to waive as filed in related case? **JTD**
5. ***Special letters not submitted in order to issue.***
6. ~Proposed form order: 12/21/17.

RECOMMENDATION

Need to clear notes 3-4, 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)

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PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/25/18      TIME: 8:30      DEPT: S37P  
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CASE#: PRO PS1800899

CASE NAME: TIMOTHY REX WILLMARTH

HEARING:

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

COUNSEL:

JEANETTE MARTINEZ	(PET)...SAM PRICE
TIMOTHY REX WILLMARTH	(DEC)...

GENERAL INFORMATION

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

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

1. All heirs waive bond. Net estate value is \$200,000 in real property and personal property TBT. Court for good cause could require bond per Pr.C. § 8481(b).
2. Proof of publication filed 10/12/18; **however, image is incomplete. Clerk's office notified and counsel allegedly stated this is how publication was sent.**
3. No proposed order submitted.

RECOMMENDATION

Need to clear note 2, 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)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

## TRUSTS AND MOTIONS

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DATE: 10/25/18      TIME: 8:35      DEPT: S37P  
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CASE#: TRU PS1800179

CASE NAME: ISABELLA ESCAMILLA SANCHEZ 2018 SPECIAL NEEDS TRUS

HEARING:

Petition for PETITION FOR AUTHORITY TO CREATE SPECIAL NEEDS  
TRUST

COUNSEL:

ISABELLA ESCAMILLA SANCHEZ 201 (TRU)...

WELLS

(PET)...GREGORY J. LEDERMAN

Currently under review by legal research.

30 days' notice filed 09/11/18 appears sufficient, including to all public entities.

(lc)

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/25/18      TIME: 8:35      DEPT: S37P  
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CASE#: TRU PS1800180

CASE NAME: Sandoval Family Trust Dated 07/27/1994

HEARING:

Petition for Instructions and Trust Interpretation

COUNSEL:

SANDOVAL FAMILY TRUST DATED JU (TRU)...

VIRGINIA LUJAN

(PET)...KRISTINE BORGIA

Currently under review by legal research.

30 days' notice filed 09/11/18 appears sufficient.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

**CONSERVATORSHIP**

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DATE: 10/25/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON DS1000197

***Vacated***

CASE NAME: CAMILLE A. DALISAY

HEARING:

Hearing Re: CONFIRMATION OF TRANSFER

COUNSEL:

ALFRED DALISAY                      (PET)...JOSEPH P FOLEY

CAMILLE A. DALISAY                (CEE)...

LUCILLE DALISAY                    (PET)...JOSEPH P FOLEY

Receipt and acknowledgement filed 07/25/18 indicating Riverside Case number  
PRIN1802166

(LC)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

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DATE: 10/25/18      TIME: 9:30      DEPT: S37P  
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CASE#: CON PS1800088

CASE NAME: MTR OF VIVIAN WILLIAMS

**SEE ALSO 20, 21**

HEARING:

Hearing Re: COUNSEL'S REPORT

COUNSEL:

FITZGERALD WILLIAMS

(CPE)... MILES & HATCHER,

VIVIAN WILLIAMS

(CPE)... DONNASUE ORTIZ

GENERAL INFORMATION

**Continued from 08/02/18. Fitzgerald Williams and counsel to appear at next hearing.**

THIS CASE SET FOR HEARING ON Counsel's Report.

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

1. Matter set on 07/05/18 after review of report of Counsel Donnasue Smith Ortiz.  
Court to address issues in report.

RECOMMENDATION

Court's discretion.

(lc)



Superior Court of Calif, County of San Bernardino

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CIVPRO

San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS1800088

CASE NAME: MTR OF VIVIAN WILLIAMS

**SEE ALSO 19, 21**

HEARING:

Hearing Re: POSS SUSPENSION OF TEMP ORDERS AND LETTERS

COUNSEL:

FITZGERALD WILLIAMS

(CPE)... MILES & HATCHER,

VIVIAN WILLIAMS

(CPE)... DONNASUE ORTIZ

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Possible Suspension of Temporary Orders and Letters.

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

1. Matter set at 08/02/18 hearing when there was no appearance by Fitzgerald Williams or Counsel re issues in report of counsel.

#### RECOMMENDATION

Court's discretion.

(lc)

Superior Court of Calif, County of San Bernardino

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San Bernardino District

PROBATE/CONSERVATORSHIP CALENDAR

HONORABLE: TARA REILLY

-----  
DATE: 10/25/18      TIME: 9:30      DEPT: S37P  
-----

CASE#: CON PS1800088

CASE NAME: MTR OF VIVIAN WILLIAMS

**SEE ALSO 19, 20**

HEARING: Petition for Appointment of Conservator

COUNSEL:

FITZGERALD WILLIAMS

(CPE)... MILES & HATCHER,

VIVIAN WILLIAMS

(CPE)... DONNASUE ORTIZ

GENERAL INFORMATION

Fitzgerald Williams, son, appointed temporary conservator of person and estate on 03/26/18; \$241,000 bond.

Continued from 04/26/18. Donnasue Smith Ortiz appointed counsel.

**Continued from 07/05/18. Issues raised put on calendar. See other matters.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate by Fitzgerald Williams, son.

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

1. Petitioner seeks bond of \$183,000. Court requires bond of \$241,000.
2. Petitioner seeks medical powers. Capacity Declaration filed 04/25/18; however, date last seen is incomplete. **JTD**
3. Petitioner seeks dementia powers. Report of Counsel Donnasue Smith Ortiz. Filed 06/27/18.
4. Citation served; however, was served by petitioner. **Need** service by third party not of this proceeding.
5. Certificate of Completion of the Conservatorship Training Class filed 09/06/18.
6. Court Investigator report filed 04/17/18.
7. ~Proposed Form Order: 03/19/18.

RECOMMENDATION

Need to clear note 4; \$241,000 bond. 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)