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AFTER THE SECOND CHECK HAS BEEN  
COMPLETED. NO FURTHER  
DOCUMENTS WILL BE REVIEWED PRIOR  
TO HEARING.**

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CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

**PROBATE**

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700125

CASE NAME: WARADAH OMAR

HEARING:

FIRST AND FINAL Account and Report of ALEYYAH OMAR HILLARY and  
Petition for allowance of fees filed.

COUNSEL:

ALEYYAH OMAR HILLARY (PET)...JAMES B CHURCH  
WARADAH OMAR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Final  
Distribution

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

1. Petitioner waives statutory compensation.
2. Attorney requests statutory fees of \$7,422.50. Ok.
3. Attorney requests reimbursement of cost advanced of \$845.50. Itemized.
4. Petitioner requests reimbursement of the graduated filing fee of \$65.00 per  
Burkey v. State of California (2008) 161 Cal. App. 4<sup>th</sup> 465.

RECOMMENDATION:

RFA. If approved, court to set hearing on filing receipts and final discharge for 7/23/09.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700253

CASE NAME: MARIA MOSER

HEARING:  
Petition for FINAL DISTRIBUTION OF ACCOUNTING

COUNSEL:  
GEORGE MOSER (PET)...PRO/PER  
MARIA MOSER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Final Distribution

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

1. Need to file notice of hearing and proof of service.
2. Both residual heirs waive an accounting.
3. Petitioner requests authority to withhold \$348.79 for closing costs. Ok.
4. Petitioner requests a commission of \$2,000, which is less than the statutory compensation. The statutory compensation on the base of \$415,495 is \$11,309.90. Ok.
5. Petitioner paid an initial graduated filing fee of \$65.00 which petitioner is entitled to reimbursement per Burkey v. State of California (2008) 161 Cal. App. 4<sup>th</sup> 465.

RECOMMENDATION:

Need notice and then court's discretion. If approved, court to set hearing on filing receipts and final discharge for 7/23/09.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700595

CASE NAME: ROBERTO AMEZOLA JR

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

SANDRA L ZUBIA (PET)...SANDRA B DE MEO  
ROBERTO AMEZOLA JR (DEC)...

#### GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Inventory and Appraisal

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

1. No Inventory and Appraisal filed. Need same.

#### RECOMMENDATION

Inquire status. Need Court's ruling re 07/21/08.

**FILE IN IS THE COURTROOM ALREADY SINCE IT HAD HEARINGS ON 07/21/08.**

Future hearing dates: Accounting Review 12/04/08.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700699

CASE NAME: MTR OF ANN JOHNSON

HEARING:

FIRST AND FINAL Account and Report of MICHAEL BARBER and  
Petition for allowance of fees filed.

COUNSEL:

MICHAEL BARBER (PET)...JAMES B CHURCH  
ANN JOHNSON (DEC)...  
DEPT OF HEALTH CARE SERVICES (TP )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Account and Petition for Final  
Distribution

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

1. Petitioner requests statutory compensation of \$1,626.00, which is a reduced  
fee. Ok.
2. Attorney requests statutory fees of \$7,800.00. Ok.
3. Attorney requests reimbursement of costs advanced of \$745.87. Ok.

RECOMMENDATION:

Recommend for approval absent objections. If approved, court to set hearing on filing  
receipts and final discharge for 07/30/09.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700903

CASE NAME: BASIL IVAN FITZALLAN LORD

HEARING:

Hearing Re: STATUS OF CASE.

COUNSEL:

REGINALD O LORD (PET)...THOMAS W DOMINICK  
BASIL IVAN FITZALLAN LORD (DEC)...  
JOY ANNE ANDERSON (RES)...HARTNELL LISTER & MOORE

No notes – on for Status

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700957

CASE NAME: MTR OF MARIA SEMENOW

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

EMILY TREVINO (PET)...MITCHELLWEILER LAW CORPORATION  
MARIA SEMENOW (DEC)...

GENERAL INFORMATION:

Letters of Administration issued 1/7/08 (full authority, no bond)

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

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

1. No inventory is filed (overdue by 2 months)

RECOMMENDATION:

Find out status.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700999

CASE NAME: RICHARD L. HOPKINS JR.

**SEE ALSO 8 & 9**

HEARING:

OSC re: BOND SUFFICIENCY/SUSPENSION OF POWERS

COUNSEL:

DARCY NAJERA (PET)...DAVIS & WOJCK  
RICHARD L. HOPKINS JR (DEC)...

GENERAL INFORMATION:

**On 6/11/08, the court ordered additional bond of \$57,000 and suspended petitioner's powers until such time as the additional bond was posted.**

THIS CASE IS SET FOR HEARING ON OSC re bond sufficiency/suspension of powers.

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

1. Need additional bond of \$57,000. However, see petition for discharge of bond (matter 8)

RECOMMENDATION:

Need determination of petition for discharge of bond (matter 8)  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700999

CASE NAME: RICHARD L. HOPKINS JR.

**SEE ALSO 7 & 9**

HEARING:

Petition for DISCHARGE OF BOND FILED CONCURRENTLY WITH AMENDED  
PETITION FOR PROBATE OF WILL

COUNSEL:

DARCY NAJERA (PET)...DAVIS & WOJCK  
RICHARD L. HOPKINS JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Discharge of Bond filed Concurrently  
with Amended Petition for Probate of Will

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

1. Letters of Administration issued 1/14/08 with bond of \$198,000.  
Subsequently, petitioner located decedent's Last Will and Testament dated  
5/6/92 wherein bond is waived for petitioner as named executor.
2. Petitioner requests that Letters Testamentary be issued to petitioner and that  
petitioner not be required to post a bond.
3. No objections filed at the time of the review of this file.

RECOMMENDATION:

Court's discretion.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700999

CASE NAME: RICHARD L. HOPKINS JR.

**SEE ALSO 7 & 8**

HEARING:

Petition for Probate, Letters of Tstmntry with full authority  
under IAEA.

COUNSEL:

DARCY NAJERA (PET)...DAVIS & WOJCK  
RICHARD L. HOPKINS JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate and for Letters Testamentary  
with full authority under IAEA

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

1. Will waives bond.

RECOMMENDATION:

Court's discretion.

Future date: Accounting review 2/4/09

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701092

CASE NAME: ADELE LOUISE ASHTON

***VACATED- FINAL I&A FILED.***

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
BRUCE ROBERT LEWIS (PET)...HORSPOOL & PARKER  
ADELE LOUISE ASHTON (DEC)...

FUTURE HEARING DATES:  
3/19/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701097

CASE NAME: DARRYL K. CAMPBELL

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

VICTOR P LOPEZ (PET)...PRO/PER  
DARRYL K CAMPBELL (DEC)...  
BRYAN CAMPBELL (OBJ)...HARTNELL, LISTER & MOORE  
CALIFORNIA RECONVEYANCE COMPAN(OFFICE OF THE GENERAL COUNSEL  
)...OFFICE OF  
WASHINGTON MUTUAL BANK (OFFICE OF THE GENERAL COUNSEL  
)...OFFICE OF

GENERAL INFORMATION:

Letters Testamentary issued 1/3/08 (full authority, no bond)

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

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

1. No inventory is filed. Note: A petition for return of real property to estate is calendared for 8/12/08.

RECOMMENDATION:

Court may wish to trail this matter with petition for return of real property to estate on 8/12/08.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701153

CASE NAME: PAUL JOHN FLEMING

HEARING:  
Hearing Re: REPORT ON STATUS OF ADMINISTRATION.

COUNSEL:  
MATTHEW LEE FLEMING (PET)...PRO/PER  
PAUL JOHN FLEMING (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Report of Status and Petition for Termination of Probate

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

1. Petitioner alleges the assets of the estate are a vehicle and real property. The vehicle was repossessed by the lienholder and the real property is subject to a reverse mortgage through Wells Fargo who is threatening foreclosure. Petitioner also alleges the heirs of the state are not in a position to purchase the property in order to preserve the asset. In addition, the petitioner is unable to sell the real property as it will not be enough to satisfy the loan and costs of sale. Therefore, petitioner requests authority to abandon the real property to foreclosure and close the estate for want of assets.

RECOMMENDATION:

Court's discretion. If approved, court to set hearing on filing final discharge for 7/23/09.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800541

CASE NAME: TYRUS D. COWDEN

HEARING:  
Petition to determine succession to Real Property

COUNSEL:  
TRUST COMPANY OF THE OZARKS, T(PET)...MICHAEL W BROWN  
TYRUS D. COWDEN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to determine succession to real property

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

1. Petitioner is the trustee of decedent's trust and claims a 100% ownership interest in decedent's five acres of unimproved real property in San Bernardino County (APN: 0435-301-38) pursuant to the terms of decedent's pour over will.
2. No objections filed at the time of the review of this file.

RECOMMENDATION:  
Court's discretion.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: RPRRS02857

CASE NAME: \*\*MASTER FILE PERCY & BELVA STILES TRUST\*\*

HEARING:  
Readiness Calendar

COUNSEL:

STEPHEN D STILES	(PET)...	OVERLAND BORENSTEIN SCHEPER &
BERT W HUMPHRIES JR	(CC )...	PRO/PER
BERT W HUMPHRIES JR	(APP)...	PRO/PER
BERT W HUMPHRIES JR	(APP)...	YOUNG HENRIE HUMPHRIES & MASON
BERT W HUMPHRIES JR	(APP)...	YOUNG HENRIE HUMPHRIES & MASON
MARILYN VARNEY	(OBJ)...	D. BRIAN REIDER
BERT W HUMPHRIES JR	(YOUNG HENRIE HUMPHRIES &	
MASON)...	YOUNG HEN	
STEPHEN D STILES	(	)...
MARK A BORENSTEIN	(	)...
JENNIFER W KENNEDY	(	)...
STEPHEN D STILES	(	)...
MARILYN VARNEY	(	)...
MARK A BORENSTEIN	(	)...
JENNIFER W KENNEDY	(	)...
STEPHEN D STILES	(	)...
MARILYN VARNEY	(	)...
MARK A BORENSTEIN	(	)...
JENNIFER W KENNEDY	(	)...
STEPHEN D STILES	(	)...
MARILYN VARNEY	(	)...
MARK A BORENSTEIN	(	)...
JENNIFER W KENNEDY	(	)...

No calendar notes – Readiness Calendar.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: SC SS01841

CASE NAME: MATTER OF MAXINE SCOTT

HEARING:  
Readiness Calendar

COUNSEL:

TERRY HILLOCK	(CPE)...	MARTIN E KELLER
MAXINE SCOTT	(CEP)...	C.L. FARRELL
BRENDA MANUEL	(TP )...	PRO/PER
SANDRA MANUEL	(PRO/PER	)...PRO/PER
MYRNA DOEREL	(PRO/PER	)...PRO/PER
PAUL MANUEL	(PRO/PER	)...PRO/PER

No calendar notes – Readiness Calendar.

**Court to see confidential memo from Court Investigator.**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06955

CASE NAME: EST OF MARGARET M RHODES

HEARING:  
Hearing re Final Discharge

COUNSEL:  
ROBERT C RHODES (PET)...HARRY J HISTEN  
MARGARET M RHODES (DEC)...

GENERAL INFORMATION:  
Order for Final Distribution granted on 7/19/07

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:  
1. Petitioner is the sole heir and distribution is cash only. Need to submit final discharge declaration.

RECOMMENDATION:  
Find out status.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07107

CASE NAME: ESTATE OF WALTER L STILSON

HEARING:  
Hearing re Final Discharge

COUNSEL:  
CAROLYN G PALMIERI (PET)...WILLIAM J. BRUNICK  
WALTER L STILSON (DEC)...

GENERAL INFORMATION:  
Order for Final Distribution granted on 8/30/07

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

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

1. No receipts or final discharge are filed.

RECOMMENDATION:  
Find out status.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07179

CASE NAME: EST OF BARBARA CARTWRIGHT

**SEE ALSO 19**

HEARING:  
Hearing Re: STATUS.

COUNSEL:

WORLDWIDE ASSET PURCHASING LLC(PET)...RORY W CLARK  
BARBARA CARTWRIGHT (DEC)...  
RUTH L HENRICKS (PET)...HARTNELL LISTER & MOORE  
YATAKA MATSUMOTO (TP )...MARTIN E KELLER  
DEPT OF HEALTH CARE SERVICES ( )...

See notes below (matter 19)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07179

CASE NAME: EST OF BARBARA CARTWRIGHT

**SEE ALSO 18**

HEARING:

Petition for ORDER DETERMINING INTEREST IN REAL PROPERTY AND  
DIRECTING TRANSFER OF REAL PROP TO PET

COUNSEL:

WORLDWIDE ASSET PURCHASING LLC(PET)...RORY W CLARK  
BARBARA CARTWRIGHT (DEC)...  
RUTH L HENRICKS (PET)...HARTNELL LISTER & MOORE  
YATAKA MATSUMOTO (TP )...MARTIN E KELLER  
DEPT OF HEALTH CARE SERVICES ( )...

GENERAL INFORMATION:

**Continued from 3/29/07 to trail OSC hearing.**

**Continued from 6/14/07 and 7/26/07 at request of counsel.**

**Continued from 9/6/07, 11/15/07 and 2/14/08 at request of counsel. Mediation is still being discussed.**

**Last continued from 4/24/08 – parties request status conference.**

THIS CASE IS SET FOR HEARING ON petition to determine interest in real property and directing transfer of real property to petitioner

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

1. Petitioner, Yutaka Matsumoto files this Pr.C.§850 petition alleging that petitioner has an equal ownership interest in real property located at 26288 Bertie Lane, Highland which is titled in the name of the decedent. As petitioner and decedent allegedly entered into an oral agreement whereby petitioner and decedent would share the assets of a business known as Quintessence that petitioner and decedent formed on or about 1980. Petitioner further alleges that the business "Quintessence" ceased doing business in our about 1997 and thereafter incurred substantial indebtedness in caring for decedent. Petitioner finally alleges that petitioner contributed monies toward the mortgage, repair &

improvements or the real property in reliance of the oral agreement. Need copy of vesting deed.

2. **On 1/25/07 the court issued a citation against petitioner Mr. Matsumoto to appear on 3/15/07 and show cause why he has claim to real property. Court has continued this OSC to 5/3/07. On 3/15/07 the parties stated they were working on settlement. Same on 5/3/07. On 6-14-07 the parties indicated that objections would be filed.**
3. **Objection filed by Ruth Hendricks, administrator.**

RECOMMENDATION:

Determine settlement negotiations or alternatively, set for contested hearing.

(/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

**CONSERVATORSHIPS**

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DATE: 07/24/08 TIME: 10:00 DEPT: E1  
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CASE #: SC SS02714

CASE NAME: MATTER OF WENDY EDER

HEARING:

SECOND Account and Report of INLAND COUNTIES REGIONAL CENTER INC  
and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTE(CE )...BRUNICK MCELHANEY & BECKETT  
WENDY EDER (CTE)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

Accounting period covers 12/01/05 – 02/29/08.

Assets on hand \$38,719.80 (\$34,829.80 in cash, remainder in burial plot and insurance)

THIS CASE SET FOR HEARING ON Second Account Current and Report of Inland  
Valley Regional Center.

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

1. Attorney requests fees of \$1,087.50. Itemized, based on 4.5 hours at \$125 per hour and 7 hours at \$75 per hour for paralegal services.
2. Cash is held in Inland Counties Master Trust.
3. Petitioner waives fees and instead requests approval of payment of trustee fees already taken by Master Trust of California. Annual fee of \$875 or \$218.75 per quarter for a total of \$1,718.75 this accounting period. Judge to decide
4. Petitioner requests the authority to allow Master Trust of California to continue taking quarterly trustee fees of \$218.75 per quarter for a total of \$875 a year. The amount is based on the size of the estate at this time.
5. Last Court Investigator report filed on 12/21/07.

RECOMMENDATION

Recommend for approval subject to court's determination re compensation and fees. If approved, set next Accounting Review for 07/30/09.

(cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: CONPS0600027

CASE NAME: CHRISTOPHER GERLACH

HEARING:

FIRST Account and Report of EDWIN L GERLACH, TRUDI A GERLACH and  
Petition for allowance of fees filed.

COUNSEL:

EDWIN L GERLACH (PET)...MCPETERS MCALEARNEY SHIMOFF &  
TRUDI A GERLACH (PET)...MCPETERS MCALEARNEY SHIMOFF &  
CHRISTOPHER GERLACH (CEE)...

GENERAL INFORMATION:

Accounting covers period: 3/8/07 – 4/30/08

Assets on hand: \$1,585,915.59 (\$929,230.64 cash, mutual funds \$19,516.59 and the  
balance in bonds)

THIS CASE IS SET FOR HEARING ON First Account Current and Petition for Allowance  
of Fees

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

1. Petitioner, Trudi Gerlach, has been paid for caring for conservatee pursuant  
to the Court Order of 10/18/07, a total of \$26,500.
2. Attorney requests fees of \$6,399.50. Billed at \$215/hour for attorney time  
and \$75/hour for paralegal time. Itemized. JTD
3. Bond is currently fixed at \$1,632,000. However, with the current value of  
assets on hand, estimated annual income and bond recovery costs (CRC  
7.207), bond should be fixed at \$1,744,000 (a total increase of \$112,000).  
JTD

RECOMMENDATION:

RFA subject to court's discretion re fees and bond increase. If approved, set next  
accounting review for 7/29/10.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: CONPS0700238

CASE NAME: ALICE B MCEACHERN

HEARING:

Conservatorship Compliance Review Hearing on PETITION of WILLIAM  
BEALS

COUNSEL:

SANDRA L KASCHEBUFSKI (CPE)...HORSPOOL & PARKER  
ALICE B MCEACHERN (CEP)...  
WILLIAM BEALS (PET)...JAMES B CHURCH

GENERAL INFORMATION:

Letters of Conservatorship (person only) issued 3/20/08

THIS CASE IS SET FOR HEARING ON Conservatorship Compliance Review

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

1. Need to file Care Plan per Pr.C. §2352.5.

RECOMMENDATION:

Need to file Care Plan and also set review date for 6-month CI report for 10/23/08.

(gls)

HONORABLE JUDGE J MICHAEL WELCH  
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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS01452

CASE NAME: IN THE MATTER OF GUIDO APPOLONI

HEARING:

SIXTH Account and Report of JANET SELVAGGIO and Petition for allowance of fees filed.

COUNSEL:

JANET SELVAGGIO (CPE)...SWARNER & FITZGERALD  
GUIDO APPOLONI (CEP)...  
US DEPT VETARANS AFFAIRS REG. (TP )...ALAN K ACHEN

GENERAL INFORMATION:

Accounting covers period: 2/15/06 – 4/1/08

Assets on hand: \$37,175.88 (cash of \$34,175.88 and the balance in personal property items)

THIS CASE IS SET FOR HEARING ON Sixth Account Current and Petition for Allowance of Fees

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

1. Petitioner waives fees for this accounting period.
2. Attorney requests fees of \$787.50. Billed at \$225/hour for 3.5 hours. Itemized. Judge to decide
3. Petitioner requests that bond be increased to \$78,000 (a total increase of \$18,000). Appears adequate.
4. During the accounting period, conservatee was moved to Rose Garden Residential Care, Mentone, CA. Court may wish to have Court Investigator do a supplemental report re least restrictive placement.

RECOMMENDATION:

Recommend for approval absent objections and court's discretion re fees. Court may also wish to refer matter to CI for a supplemental report re move to Rose Gardens. If approved, set next accounting review for 7/29/10.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS01616

CASE NAME: MATTER OF ETHEL M WAYMIRE

HEARING:  
Accounting Review

COUNSEL:  
RUTH L HENRICKS (CE)...NANCY J YOUNG  
ETHEL MARIE WAYMIRE (CTE)...

GENERAL INFORMATION:  
6<sup>th</sup> Accounting is due for the period 5/22/06 – 5/21/08  
**continued from 1/24/08**

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. No accounting is filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notice bond company.  
(gls)

Superior Court of Calif, County of San Bernardino

Page: 25

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS02011

CASE NAME: MATTER OF RUBY SLONEKER

HEARING:

Accounting Review

COUNSEL:

RUBY SLONEKER	(CTE)...	DONNA STURGILL DIAZ
KENNETH M FONT	(CPE)...	EDWARD B FISCHEL
PRISCILLA CALBO	(SC )...	PRO/PER
MELODIE Z. SCOTT	(SC )...	SHERRI L KASTILAHN
C. L. FARRELL	(TP )...	C.L. FARRELL
CAROLYN MARIE SMITH	(PRO/PER	)...PRO/PER
AVERY CLARK CALBO	(PRO/PER	)...PRO/PER
KENNETH MARK CALBO	(PRO/PER	)...PRO/PER
MARK CALBO	(PRO/PER	)...PRO/PER
MARIE BUTLER RICHARDSON	(	)...
PRISCILLA MILLIRON	(PRO/PER	)...PRO/PER
JUDY A. MILLER	(PRO/PER	)...PRO/PER

GENERAL INFORMATION:

5<sup>th</sup> Account is due for the period 5/1/07 – 4/30/08 by Melodie Scott, Successor Conservator

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. No accounting is filed.
2. Note: On 12/05/07, petitioner was ordered to post an additional \$125,000 bond. The register of actions indicates bond was posted on 12/18/07. However, there is no documents re bond in the file. Require petitioner to submit a copy of original bond posted on 12/18/07.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notify bonding company.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS02703

CASE NAME: MTRR OF EVELYN RUBY HORTON

HEARING:

SECOND CURRENT AND THIRD AND FINAL ETC Account and Report of  
ROBERT MICHAEL HORTON and Petition for allowance of fees filed.

COUNSEL:

ROBERT MICHAEL HORTON (CPE)...DIANA DIMAGGIO  
EVELYN RUBY HORTON (CEP)...  
RECHE CANYON CONVALESCENT CENT(TP )...MCCANN & CARROLL

GENERAL INFORMATION

**Continued from 6/16/08 at request of counsel**

THIS CASE IS SET FOR HEARING ON 2<sup>nd</sup> account current AND 3<sup>rd</sup> & final account and  
petition for fees

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

2<sup>nd</sup> account:

1. Accounting period covers 12/6/05 – 11/20/07 (2 years).
2. Assets on hand \$251,355.47 consisting of cash and a time share.
3. Account statements filed. However, disbursements raise the following concerns  
(need verified supplement explaining necessity of expenditures):
  - a Check # 1172 to Alan Horton in the amount of \$1,871.40;
  - b Check # 1173 to Alan Horton in the amount of \$5,628.65;
4. Need original bill statements for board and care facility per Pr. C. § 2620(c)(5).

3<sup>rd</sup> & final account:

- 5 Conservatee died 11/20/07.
- 6 Accounting period covers 11/21/07 – 2/14/08
- 7 Assets on hand \$250,919.02 consisting of cash and a time share.

- 8 Petitioner requests compensation of \$3,500 for time (158.80 hours) and mileage. Itemized supplemental filed. However, entries on 02-06 for 9.00 hours and 06/06 for 4.00 hours does not specify the repairs made to conservatee's house. File verified supplement.
- 9 Attorney requests fees of \$8,093.00 for legal services including the sale of conservatee's residence during this accounting period. Billing is based on a rate for attorney at \$250/hour and for paralegal at \$75/hour for a total of 41.40 hours.

**RECOMMENDATION:**

Clear notes, then court's discretion. If petition granted, court will have to set future hearing dates. Set hearing for filing of receipts and discharge for 06-22-09.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 07/24/08 TIME: 10:30 DEPT: E1  
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CASE #: SPRSS03583

CASE NAME: MTR OF MEYON S. GAINES SPECIAL NEEDS TRST

HEARING: HEARING RE : POSSIBLE APPOINTMENT OF LINDA MAXWELL  
FROM TRUST ETC

COUNSEL:

MELODIE Z. SCOTT (TEE)...HARTNELL HORSPOOL & FOX  
SAMUEL SEGURA (HARTNELL HORSPOOL & FOX )...HARTNELL  
CONNIE ADAMS (PRO/PER )...PRO/PER  
BOND SERVICES OF CALIFORNIA (PRO/PER )...PRO/PER  
JAMES H. BROWN (JAMES B CHURCH )...JAMES B C  
AMERICAN CONTRACTORS INDEMNITY (PRO/PER )...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Re: Possible appointment of Linda Maxwell from Trust Etc.

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

1. On 07/16/08, Court ruled that Connie Adams would not be appointed as successor trustee. Parties suggested private Fiduciary Linda Maxwell. Matter was set to see if Mrs. Maxwell will accept appointment.

RECOMMENDATION

Court's discretion

.  
(cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

**MISC.**

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DATE: 07/24/08 TIME: 1:30 DEPT: E1  
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CASE #: SPRSS04863

CASE NAME: ESTATE OF DOLORES A HOOVER

HEARING:  
Mandatory Settlement Conference

COUNSEL:

ROBERT BROOD	(PET)...YBARRONDO & PATTERSON
DOLORES A HOOVER	(DEC)...
MELANIE J JOYCE	(OBJ)...FELIX M MARTIN
JAMES HOOVER	(THOMPSON & COLEGATE )...THOMPSON

No calendar notes – Mandatory Settlement Conference.

**9/25/08** HRG RE: MOTION FOR SUMMARY ADJUDICATION OF ISSUES

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

***PROBATE***

-----  
DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: CONPS0800068

CASE NAME: DANIELLE S. OAKLEY

HEARING:  
Readiness Calendar

COUNSEL:  
LUANN F MAGEE (CP)...PRO/PER  
DANIELLE S OAKLEY (CTP)...DONNASUE SMITH-ORTIZ

No calendar notes - Readiness

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0700868

CASE NAME: ROBERT T. VON KANEL

HEARING:

Waiver of account and for final distribution.

COUNSEL:

CHARLES A VON KANEL (PET)...THE GROSSMAN LAW FIRM A.P.C  
ROBERT T VON KANEL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Final  
Distribution

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

1. Petitioner is the sole heir and waives an accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$21,267.58. Ok.
4. Petitioner had initially paid a graduated filing fee of \$165.00 which petitioner/estate is entitled to reimbursement per Estate of Claeysens (2008) 161 Cal. App 4<sup>th</sup> 465. Court may wish to order the sum of \$165.00 reimbursed to the estate.

RECOMMENDATION:

RFA. If approved, court to set hearing on filing receipts and final discharge for 7/30/09.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0701172

CASE NAME: JOSE ABRIL

HEARING:

FIRST AND FINAL Account and Report of MARGARITA HOLMSTROM and  
Petition for allowance of fees filed.

COUNSEL:

MARGARITA HOLMSTROM (PET)...CHRISTOPHER E OVERGAARD  
JOSE ABRIL (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON First and Final Report on Waiver of Account and  
Petition for Final Distribution

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

1. All residual beneficiaries have waived an accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$5,647.00. Ok.

RECOMMENDATION:

RFA. If approved, court to set hearing on filing receipts and final discharge for 7/30/09.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800388

CASE NAME: the Freddie W popejoy and Patricia a Popejoy trust

HEARING:  
Status Conference

COUNSEL:  
JONATHAN POPEJOY (PET)...WELCH DACRE & ASSOCIATES, P.C.

No calendar notes – Status Conference.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800560

CASE NAME: FRANCES MARIE TRAUTMAN

HEARING:

Petition for Probate, Letters of Tstmntry with full authority  
under IAEA.

COUNSEL:

ROBERT W TRAUTMAN (PET)...PRO/PER  
FRANCES MARIE TRAUTMAN (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate of Will and for Letters  
Testamentary with full authority under IAEA

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

1. Will waives bond.

RECOMMENDATION:

Recommend for approval absent objections. If petition granted court will have to set  
future dates. Set hearing for filing of inventory and appraisal for 02/26/09. Set hearing for  
filing of accounting and/or status report for 10/01/09. Any accounting to be filed 30 days in  
advance.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800568

CASE NAME: WITT 1990 CHARITABLE REMAINDER UNITRUST

HEARING:  
Petition for ORDER APPOINTING SUCCESSOR TRUSTEE

COUNSEL:  
EASTER SEALS TRI COUNTIES, CAL(PET)...LOYE M BARTON

GENERAL INFORMATION

Trust assets approximately \$57,000.

THIS CASE SET FOR HEARING ON Petition for Order Appointing Successor Trustee

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

1. Notice of hearing and proof of service is insufficient Pr. C. § 17203. Need 30 days notice; 29 days notice was given.
2. On or about 11/30/90, Fred and Eleanor Witt established the Witt 1990 Charitable Remainder Unitrust. On 09/18/04, Co-Trustee Fred C. Witt passed away and on 12/22/04 the remaining co-trustee, Eleanor F. Witt, passed away. The trust fails to list a successor trustee.
3. Petitioner, Easter Seals Tri-County, requests of itself as Successor Trustee of the Witt Charitable Remainder Unitrust. Petitioner seeks appointment of successor trustee for the sole purpose of distribution of the assets and termination of the Trust. The charitable remaindermen beneficiaries are as follows:
  - a. The Salvation Army
  - b. Easter Seals Tri-Counties, California formerly known as Easter Seal Society of San Luis Obispo
4. All beneficiaries nominate petitioner and waive bond.
5. Petitioner accepts appointment as successor trustee.

RECOMMENDATION

Need proper notice then Court's discretion  
(cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: RPRRS02296

CASE NAME: ALEXANDER P GRABOWSKI

HEARING:  
Accounting Review

COUNSEL:  
PATRICK F GRABOWSKI (PET)...RODIGER LAW OFFICE  
ALEXANDER P GRABOWSKI (DEC)...  
LAURENCE L GRABOWSKI (OBJ)...CONKLE & OLE STEN

GENERAL INFORMATION:  
Prior status report was granted on 12/6/07

THIS CASE IS SET FOR HEARING ON Accounting Review

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

1. No accounting or further status report is filed.

RECOMMENDATION:  
Find out status.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: RPRRS02740

CASE NAME: CLAUDE DAVIS JR.

HEARING:  
Readiness Calendar

COUNSEL:  
ANTHONY WAYNE DAVIS (PET)...PRO/PER  
CLAUDE DAVIS JR. (DEC)...  
WALTER G RICHARDSON (PET)...WALCH & WALCH  
DEBORAH COLEMAN (OBJ)...WALCH & WALCH

No calendar notes - Readiness

**TRIAL 7/28 7/29**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: RPRRS02968

CASE NAME: \*\*\*MASTER FILE GEORGE MICHAEL KESSLER\*\*\*\*.

HEARING:

Petition for ACCOUNT FOR ESTATE PROPERTY; TO RESPOND TO CONTEMPT ALLEGATIONS; & FOR ATTY FEES & COSTS

COUNSEL:

GLEN PORTER (PET)...BETTY AUTON-BECK  
GEORGE MICHAEL KESSLER (DEC)...  
HELGA KESSLER (TP )...LAYNE A BARTHOLOMEW  
JOLI GORDIEN (DANIEL HANOUM )...DANIEL HA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to Account for Estate Property and to Respond to Contempt Allegations and for Attorney's fees and costs

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

1. Proof of service filed. However, petitioner did not use mandatory Judicial Council Forms or notice of hearing. Need proper notice.
2. Petitioners, Joli Gordien and Gordien and Associates Real Estate, are interested parties in this estate as creditors. Petitioners entered into a written exclusive real estate listing agreement with the personal representative, Glen Porter for real property located at 596 Doane Ave., Claremont. Petitioners allege that Helga Kessler and Patricia Santos are in wrongful possession and control of estate property by specifically instructing Claremont Escrow not to release sales proceeds fully earned by petitioners as sales commissions. Petitioners request that the court issue a citation to Helga Kessler and Patricia Santos per Pr.C. §8870(a) to appear and show cause why they have collaborated and conspired to possess estate property. Court may wish to inquire why the personal representative, Glen Porter, has not brought this petition instead of the real estate broker.
3. Declaration in support filed by petitioners' counsel Daniel Hanoum.

4. Petitioners' counsel seeks for Helga Kessler and Patricia Santos each to pay sanctions per CCP § 1218(a). Also, counsel seeks attorney's fees for 15 hours at \$250 an hour plus costs in the amount of \$410, for a total amount of \$4,160.00 to be paid by Helga Kessler and Patricia Santos. Not itemized. Need to file verified supplement.

RECOMMENDATION:

Need to clear notes 1 and 4 then Court's discretion re issuance of Citations to Helga Kessler and Patricia Santos.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS05368

CASE NAME: EST OF JAMES J LIPKE

HEARING:

Hearing Re: Receipts and Final Discharge.

COUNSEL:

DEBRA A LIPKE	(PET)...PRO/PER
JAMES J LIPKE	(DEC)...
CINDY M RAZZETTI	(SA )...BRYAN C. HARTNELL
LOUIE H ARMENTA	(TP )...DAVID G CURRIE
JOHN F WALLACE	(PAUL H LUSBY )...PAUL H LU
MICHAEL A LIPKE	( )...
DAVID LIPKE	( )...

GENERAL INFORMATION:

Order for Final Distribution granted 5/17/07

**Continued from 5/22/08 at request of counsel. \$5,000 is still in reserve to be distributed.**

THIS CASE IS SET FOR HEARING ON filing Receipts and final discharge

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

1. No receipts or final discharge declaration is filed.

RECOMMENDATION:

Find out status.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS06513

CASE NAME: LINDA G CRAMBERG TRUST

HEARING:

Hearing Re: Status.

COUNSEL:

BRIAN D LYNCH (PET)...JOHN M RAGER  
DAVID L CARDWELL (PET)...  
STEPHANIE WOOD (STE)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:

Continued from 12/14/06, 2/15/07, 6/14/07 and 8/16/07. On 2/1/07, the court granted authority for the clerk to execute a deed of trust in the amount of \$62,000 and promissory note. Last continued to finalize and enforce settlement.

On 11/1/07 Court granted Mr. Mickus to sell real property in Yucaipa and continues status review to 1/24/08.

Continued from 12/20/07 at request of counsel to sell Tennessee property.

**Last continued from 1/24/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON status review

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

1. This matter started as a petition to ascertain beneficiaries, determine distribution, remove trustee, compel accounting and compel redress for breach of trust. A partial settlement was reached on 7-28-06. Apparently additional issues were resolved on 8-1-06.
2. Prior calendar notes indicate additional issues have not yet been resolved but prior minute orders do not specify what additional issues remain before the court.
3. **Status report filed by Attorney Rager indicating the trust is pending the disposition of the real property in Tennessee. As the Tennessee property was removed from the trusts prior to decedent's death, Brian Lynch will conduct an ancillary probate in Tennessee and that property will go to Brian Lynch.**

RECOMMENDATION:

Inquire status. Set compliance date for the filing of a final accounting (i.e., 2/26/09)  
(/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS06514

CASE NAME: \*\* MF\*\*LINDA GAIL CARDWELL

HEARING:  
Hearing Re: Status Review.

COUNSEL:

DAVID L CARDWELL (PET)...FULLERTON LEMANN SCHAEFFER & D  
LINDA GAIL CARDWELL (DEC)...  
JOHN D MICKUS (SPA)...PRO/PER  
BRIAN D LYNCH (OBJ)...JOHN M RAGER  
STEPHANIE WOOD (E. JOAN NELMS )...E. JOAN N

GENERAL INFORMATION

continued from 12/14/06 and 8/16/07 at request of counsel to finalize settlement.  
**Last continued from 11/1/07 and 1/24/08. Court requires counsel to file written status report with the court 30 days prior to 1/24/08. Nothing new is filed.**

THIS CASE IS SET FOR HEARING ON status review

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

1. Per the minute order of 8-1-06 the parties reached a settlement. Court then continued matter for a status review.
2. No status report is filed.

RECOMMENDATION:

Court's discretion.  
(/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS07126

CASE NAME: ESTATE OF BETTY JOYCE MARTIN

HEARING:

Hearing Re: Receipts and Final Discharge.

COUNSEL:

DEBRA A. YOUNG (PET)...ELISABETH KEMPE-OLINGER  
BETTY JOYCE MARTIN (DEC)...

GENERAL INFORMATION:

Order for Final Distributed granted on 7/19/07

THIS CASE IS SET FOR HEARING ON filing Receipts and Final Discharge

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

1. Receipt is filed.
2. Final Discharge and Order filed.

RECOMMENDATION:

Court may wish to sign the final discharge and order.

(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **CONSERVATORSHIPS**

-----  
DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0600016

CASE NAME: EVERLEANER DAVIS

**VACATED**

HEARING:  
Accounting Review

COUNSEL:  
PHYLLIS E COLLINS (PET)...EDWARD B FISCHER  
EVERLEANER DAVIS (PCE)...

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0700076

CASE NAME: JOSHUA O QUIEL

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

JORGE O QUIEL	(CP )...JOHN L WELCH
GLADYS M QUIEL	(CP )...JOHN L WELCH
JOSHUA O QUIEL	(CTP)...C.L. FARRELL

GENERAL INFORMATION:

**Continued from 4/17/08. Attorney Farrell objects to the inventory. The Court finds the inventory insufficient and orders counsel for petitioner to file an amended Inventory.**

**Continued from 5/22/08 to file a corrected inventory**

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

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

1. Inventory filed 3/18/08 is insufficient. Personal property items are an Attachment No. 2 item which must be valued by the probate referee. Need corrected Inventory.
2. Need to file proof of service on inventory as well as Notice of How to Object to Inventory per Pr.C. §2610(a).
3. No formal objections are filed by Attorney Farrell.

RECOMMENDATION:

Find out status of corrected Inventory.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0700176

CASE NAME: JOSE LUIS JIMENEZ

HEARING:  
Hearing Re: CI 6 MONTH REVIEW.

COUNSEL:  
ESTHER JIMENEZ (CP)...PRO/PER  
JOSE JIMENEZ (CP)...PRO/PER  
JOSE LUIS JIMENEZ (CTP)...CRAIG M PARKER

GENERAL INFORMATION:  
Letters of Limited Conservatorship (person only) issued 12/20/07

THIS CASE IS SET FOR HEARING ON Court Investigator's 6-month Review

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

1. Need CI report.

RECOMMENDATION:  
Need CI report.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS3224

CASE NAME: IN THE MATTER OF LAUNA LUGINSKY

**SEE ALSO 17**

HEARING:

Hearing Re: FILING MEDICAL CAPACITY DEC & ADDING MED POWERS.

COUNSEL:

SYLVIA LUGINSKY (CPE)...BUXBAUM & CHAKMAK  
LAUNA LUGINSKY (CEP)...  
LISSA ANNE MARTINEZ (SC )...

GENERAL INFORMATION:

Court grants conservatorship to Lissa Anne Martinez as successor conservator of the person and estate (without bond)

**Continued from 4/24/08 for new Medical Capacity Declaration**

THIS CASE IS SET FOR HEARING ON re filing Medical Capacity Declaration and Adding Medical Powers.

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

1. Medical Capacity Declaration filed 5/2/08 supporting medical powers.

RECOMMENDATION:

None. Court may wish to set an accounting review for the successor conservator for 7/2/09.

(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS3224

CASE NAME: IN THE MATTER OF LAUNA LUGINSKY

**SEE ALSO 16**

HEARING:  
Accounting Review

COUNSEL:

SYLVIA LUGINSKY (CPE)...BUXBAUM & CHAKMAK  
LAUNA LUGINSKY (CEP)...  
LISSA ANNE MARTINEZ (SC )...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review for final accounting to be filed by Sylvia Luginsky

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

1. No accounting is filed. Note: The court previously granted a waiver of accounting as conservatorship estate met the requirements of Pr.C. §2628.

RECOMMENDATION:

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

CIVCAL4 REDLANDS DISTRICT  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: VC VS00358

CASE NAME: MTR OF JOSEPH ALMA HALL

**SEE ALSO 18A 18B**

HEARING:

Petition for Appointment of Conservator

COUNSEL:

RICHARD HALL	(CP )...GUY HERREMAN
JOSEPH ALMA HALL	(CTP)...WALTER T MOORE
VALERIE HALL	(OBJ)...PRO/PER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator person and estate.

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

1. This is an amended petition. Petitioner is currently Conservator of the person and wishes to maintain all petitioner's current powers. Petitioner is seeking estate powers.
2. Petitioner is also seeking Pr. C. § 2590 powers to employ an attorney. However, Pr. C. § 2591 no longer has that option. Court may wish to deny such powers.
3. It is unclear why estate powers are being sought. Petitioner states that there is no estate value and the Conservatee has \$12,000 in public benefits. However, it appears that Conservator may be requesting estate powers in order to receive and manage money from insurance settlement from the death of the Conservatee's mother.

RECOMMENDATION

Court's discretion. If approved, set hearing for filing of Inventory and Appraisal, proof of recordation of letters, including proof of service of Inventory and Appraisal instructions for objection to Inventory and Appraisal and order appointing Conservator in accord with Pr.C.§§ 1830, 2313, 2352 and 2610 for 02/03/09. Set hearing for accounting Review for 10/01/09.

CIVCAL4 REDLANDS DISTRICT  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: VC VS00358

CASE NAME: MTR OF JOSEPH ALMA HALL

**SEE ALSO 18 18B**

HEARING:

Hearing Re:EXPARTE PETITION FOR APPOINTMENT OF GUARDIAN AD-LITEM.

COUNSEL:

RICHARD HALL	(CP )...GUY HERREMAN
JOSEPH ALMA HALL	(CTP)...WALTER T MOORE
VALERIE HALL	(OBJ)...PRO/PER

See notes next matter

CIVCAL4 REDLANDS DISTRICT  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 07/24/08 TIME: 10:30 DEPT: E2  
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CASE #: VC VS00358

CASE NAME: MTR OF JOSEPH ALMA HALL

**SEE ALSO 18 18A**

HEARING:

Hearing Re: APPOINTMENT OF GUARDIAN AD-LITEM.

COUNSEL:

RICHARD HALL	(CP )...GUY HERREMAN
JOSEPH ALMA HALL	(CTP)...WALTER T MOORE
VALERIE HALL	(OBJ)...PRO/PER

GENERAL INFORMATION:

Continued from 06-09-08, wherein, conservator's objections to Walter Moore acting as private fiduciary were overruled, without prejudice.

**Continued from 07/03/08 at request of counsel to be heard with related matters. Mr. Herreman was ordered to be prepared to address issue of counsel's possible conflict of interest. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Appointment of Guardian Ad-Litem

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

- 1 Petitioner, Walter Moore, requests to be appointed as Guardian ad Litem to negotiate an insurance settlement with Mercury Insurance Company.
- 2 Need Notice of Hearing and proof of service.

RECOMMENDATION:

Need notice and then Court's discretion.

(vet/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN MISC.

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DATE: 07/24/08 TIME: 1:30 DEPT: E2  
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CASE #: PROPS0700468

CASE NAME: TERRAZAS LIVING TRUST

HEARING:  
Hearing Re: OSC RE: SURCHARGE

COUNSEL:

DAVID TERRAZAS (PET)...LAW OFFICES OF ALEXANDERE MACK  
DANIEL TERRAZAS (PET)...LAW OFFICES OF ALEXANDERE MACK

CONRAD AND JULIA H TERRAZAS (DEC)...  
JULIA H TERRAZAS (TEE)...MYERS & PORTER

GENERAL INFORMATION

THIS CASE SET FOR HEARING ON OSC re: Surcharge

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

1. Matter was set on 06/27/08. Court found appropriate service was made on Julia Terrazas. The Court issued a bench warrant for Julia Terrazas to be held to the next court hearing date. If she fails to appear, the bench warrant will be released and the Court will proceed in the absence of Ms. Terrazas or her counsel.
2. On 06/27/08, the Court set an OSC re Surcharge concerning loss to the estate occasioned by Ms. Terrazas' failure to file an accounting. The Court reserved jurisdiction over the issue of attorney fees for the failure of Ms. Terrazas' counsel to appear in court. Note to Court: Attorney Macksoud was ordered to prepare a notice of ruling and serve on Julia Terrazas and her attorney.

RECOMMENDATION

Court's discretion

(cbr)