



## Second/Final Check

Superior Court of California  
County of San Bernardino  
Probate Department

### **Probate Notes for Calendar Date: 06/16/22**

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

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

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

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

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

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

lc03/16/22-06/17

## Probate Notes

**Calendar # 1**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Order to Show Cause Hearing Waiver Of  
Signatures/ Status Of Declaration

**Case #:** PROPS1600930

**Case Name:** Mtr Of Troy A Brown

### **PARTIES:**

Eloyce Brown; Jerry Brown; Annelise Pacheco	Petitioner; Petitioner; Petitioner	Counsel:	Anderson & LeBlanc, APLC; Anderson & LeBlanc, A.P.L.C.; Mark William Regus, II
Troy A Brown	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** OSC re Waiver of Signatures

### **PRIOR ORDERS:**

Continued from 08/05/21 on Court's own motion.

Continued from 12/16/21 by stipulation. Oral report presented by Mr. Lee. Court will accept a declaration outlining their attempts to mail check. Declaration to include last known address and if check was cashed.

### **GENERAL INFORMATION**

- A. Letters of administration WWA issued to Jerry Brown, father, on 10/16/17; full authority no bond.

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

1. Matter set at 06/03/21 accounting review when counsel informed the court that two beneficiaries are nonresponsive and will not sign off on the accounting documents. The amount they are entitled to is de Minimis.
2. **Need** due diligence declaration of attempts to mail check as ordered by the court on 12/16/21.

### **RECOMMENDATION:**

Court's discretion re OSC.

(lc/em)

## Probate Notes

Calendar # 2

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 9:00 AM

Department S35 - SBJC

Hearing: Accounting Review

Case #: PROPS1700621

Case Name: Hyla Marrow

### PARTIES:

Hr Topalian	Petitioner	Counsel:	Jill Annette Brouard
Hyla Marrow	Decedent	Counsel:	
Marva Marrow	Objector	Counsel:	Pro Se
Jpmorgan Chase Bank, N.a	Respondent	Counsel:	Brett D Watson

### GENERAL INFORMATION

Status report on 05/22/19 not approved.

Continued from 06/27/19. Trial set and later vacated on 11/12/19. Dismissal re Pr.C.§ 850 petition granted.

Continued from 03/26/20 Per Gov. Code. § 68115.

Continued from 11/19/20. Counsel informed the Court that the estate is estimated at \$124,000 and intends to file a small estate declaration with an order for distribution.

Continued from 2/25/21. There being no appearance, the court continues this matter on its own motion as set forth below. Counsel for petitioner shall be personally present or present via courtcall at the next hearing.

Continued from 6/24/21. Case continued at the request of Jill Annette Brouard.

Reason for continuance: A small estate declaration was drop-filed on 06/23/21 and counsel intends to file a Petition to Terminate.

**THIS CASE SET FOR HEARING ON** Accounting review/Status.

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

1. **Amended** Letters Testamentary issued to HR Topalian, executrix, on 09/04/18; full authority, no bond.
2. **Need** final Inventory and Appraisal.
3. **Need** accounting or status report.
4. 1<sup>st</sup> Supplement to Petition for Termination of Proceeds and Discharge of Personal Representative filed 6/23/21, however no such petition has been filed in this action.  
**Need** noticed Petition for Termination.

### RECOMMENDATION

Need to clear notes.

(lc/em)

## Probate Notes

**Calendar # 3**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Accounting Review

**Case #:** PROPS1900233

**Case Name:** Carmen Macias

**PARTIES:**

Anthony Macias	Petitioner	Counsel:	MMZ Law Group, APLC
Carmen Macias	Decedent	Counsel:	

**THIS CASE IS SET FOR HEARING ON** Accounting Review

**PRIOR ORDERS**

Continued from 12/16/21 at the request of the Court. Reason for continuance: For Accounting to be filed.

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

1. Petitioner Anthony Macias appointed Administrator with Limited IAEA, with \$20,000 bond on 6/2/20.
2. Final Inventory & Appraisal filed 7/7/20.
3. Waiver of Account and Report filed 12/3/20 taken off calendar on 3/18//21. Per counsel, beneficiaries requesting full accounting.
4. **Need** Accounting.

**RECOMMENDATION:**

Inquire status.

(em)

## Probate Notes

**Calendar # 4**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Accounting Review

**Case #:** PROPS2100091

**Case Name:** Estate Of Donald John Mitchell

### **PARTIES:**

John Michael Mocherman II	Petitioner	Counsel:	Michael Charles Maddux
Donald John Mitchell	Decedent	Counsel:	
Dirk Mitchell; Russell Mitchell; W.c. Cox And Company, An Arizona Corporation	Third Party; Third Party; Third Party	Counsel:	Bryan Calvin Hartnell; Bryan Calvin Hartnell; Layne Allyn Bartholomew

### GENERAL INFORMATION

**05/05/22 Oral report presented by Mr. Maddux. Oral report presented by Mr. Theios. Oral report presented by Mr. Bartholomew. Court orders Mr. Maddux to file accounting prior to the next hearing. Court will consider imposing \$750. sanctions as to Mr. Maddux if accounting is not timely filed. Case continued at the request of the Court.**

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 Jon Michael Mocherman 2nd, on 04/12/22; full authority, \$20,000.00 bond.
2. Final Inventory and Appraisal filed 06/14/21. Will need financial statements in support of Inventory when accounting is filed.
3. **Need** accounting or status report..

### RECOMMENDATION

Inquire status of accounting. Petitioner may wish to obtain legal assistance  
(kd)

## Probate Notes

Calendar # 5

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 9:00 AM

Department S35 - SBJC

Hearing: Spousal/Domestic Partner Property Petition

Case #: PROSB2100013

Case Name: Estate Of: Sergio Sanchez

### PARTIES:

Carmen Garcia Jimenez	Petitioner	Counsel:	Pro Se
Sergio Lopez Sanchez	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Spousal Property Petition by Carmen Garcia Jimenez, spouse.

### PRIOR ORDERS:

Reset from Friday 07/30/21.

**Continued from 09/16/21 and 01/20/22.** \*interpreter\*. Notes to be cleared/assignments and/or points and authorities.

**Continued from 6/2/22.** Oral report presented by Mr. Parker. Case continued at the request of the Court. Reason for continuance: For probate notes to be cleared. File assignments. Notice to be given by Mr. Parker.

### GENERAL INFORMATION

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

1. Petitioner seeks confirmation of their half of community property and determination that decedent's half passed to petitioner without administration.
2. Petitioner and decedent were married on 11/13/04. Petitioner states decedent owned real property in his name as a married man. It is unclear date property was acquired. **Supp 12/23/21**; real property was acquired prior to the marriage on 05/19/00.
  - a. Copy of Interspousal Quitclaim Deed and Deed of Trust provided [see supp. filed 6/8/22]
  - b. Children Jamie and Sergio Lopez assign their interest to petitioner. Petitioner cites *Marvin v Marvin (1976)* [supp12/23/21] to find decedent's interest be transferred to petitioner.
  - c. Second Supplement filed 5/24/22 cites Estate of Wall (68 Cal.App.5<sup>th</sup> 168).
3. Waiver of Notice filed by Jaime Lopez and Sergio Lopez filed 6/16/22.
4. Proposed form order: ~05/17/21

### RECOMMENDATION:

Court's discretion subject to LR note below.  
(lc/em)

### LR Review note 2b

*Marvin v. Marvin* (1976) 18 Cal. 3d 660, 674, held: "...they may agree to pool their earnings and to hold all property acquired during the relationship in accord with the law

governing community property; conversely they may agree that each partner's earnings and the property acquired from those earnings remains the separate property of the earning partner. So long as the agreement does not rest upon illicit meretricious consideration, the parties may order their economic affairs as they choose, and no policy precludes the courts from enforcing such agreements.

1. The Court will need to consider evidence of the agreements between the parties in conjunction with the court's ability to enforce lawful agreements.

**Reviewed by Legal Research (ahc)**

## Probate Notes

**Calendar # 6**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Petition for Letters of Administration

**Case #:** PROSB2100981

**Case Name:** Estate Of Rene Canales

### **PARTIES:**

Jenny Canales	Petitioner	Counsel:	Pro Se
Rene Oswaldo Canales	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for letters of Administration with Full Authority under IAEA, by Jenny Canales (spouse). [Petitioner]

### **PRIOR ORDERS:**

**Continued from 12/29/21 at the request of the Court. Reason for continuance: For probate notes to be cleared.**

### **GENERAL INFORMATION:**

- a) DOD 08/08/21 (intestate)
- b) **Bond:** Petitioner requests bond "JTD". Court could require bond. Pr.C. § 8481(b). Appears \$392,867.00 is needed for full.
- c) Net Value of Estate: \$392,867.00
- d) Proof of Publication filed 3/25/22.
- e) Notice of Petition to Administer Estate filed 4/6/22.

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. Proposed Order:~ 11/29/21

### **RECOMMENDATION:**

Court's discretion. If approved, an Inventory and Appraisal is due by: **10/20/22**; An Accounting and/or Status Report is due by: **08/31/23**.

(cms/em)



## Probate Notes

**Calendar # 7**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Spousal/Domestic Partner Property Petition

**Case #:** PROSB2200473

**Case Name:** Estate Of: Eric Arrington

### **PARTIES:**

Evelyn Louise Combs	Petitioner	Counsel:	David Horton
Eric Albert Arrington	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Spousal Property Petition by Evelyn Louise Combs as Administrator to the Estate of Shirley Marie Combs-Arrington [Petitioner]

### **GENERAL INFORMATION:**

Date of Death: 10/4/16 (intestate)

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. Petitioner, as Special Administrator to the estate of Shirley Marie Comb-Arrington (surviving spouse of decedent who post-deceased decedent on 2/22/21) requests determination of property passing to surviving spouse as community property. Specifically, real property located in Rialto, San Bernardino County.
2. Petition alleges decedent and his spouse entered into a contract with the Redevelopment Agency of the City of Rialto to purchase the subject property. Petitioner provides Grant Deed and Deed of Trust with Assignments of Rent [p. 6-56]
3. Petition indicates decedent was survived by a parent who would have interest in decedent's estate pursuant to Pr.C. §6401, however only petitioner (as decedent's mother-in-law) is listed as an heir to the estate. **Need** verified supplement to clarify Eric's heirs at law at time of death, as petitioner is an heir to Shirley Marie Combs-Arrington's estate.
4. Notice of Hearing 5/23/22.
5. Matter appears to be related to PROSB2200152 (Estate of Shirley Combs-Arrington). Court's discretion to require a Notice of Related Case to be filed. **JTD**
6. No Proposed Order:

### **RECOMMENDATION:**

Need to clear note 3 Court's discretion regarding note 5.  
(em)

## Probate Notes

**Calendar # 8**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Petition for Letters of Administration

**Case #:** PROSB2200593

**Case Name:** Estate Of Ignacio Mompeller

**PARTIES:**

Cecilio Mompeller	Petitioner	Counsel:	Pro Se
Ignacio Mompeller	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Letters of Administration with Full IAEA by Ceceilio Mompeller (child of decedent) [petitioner]

**GENERAL INFORMATION:**

- a) DOD: 3/11/17 (Intestate)
- b) Alleged Net Value of Estate: \$100,000 all of which is real property.
- c) Petitioner alleges to be the sole heir of decedent. Notice of Petition to Administer Estate may not be required pursuant to Pr.C. § 1201.

**ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

- 1. **Petitioner alleges net value of the estate does not exceed \$100,000. Matter may not need formal probate and may proceed by way of summary probate proceeding pursuant to Pr.C. § 13151. Court may wish to inquire. JTD**
- 2. **Need** Proof of Publication.
- 3. **Need** Waiver of Bond (mandatory Judicial Council form DE-142)
- 4. **JTD** – Petitioner is sole heir and waives bond. The court may for good cause require that a bond be given per Pr.C. § 8481(b).
- 5. ~ Proposed Order: 4/26/22.

**RECOMMENDATION:**

Clear notes 2-3 then Court's discretion as to note 1. If approved, an Inventory and Appraisal is due by: 10/20/22. An Accounting and/or Status Report is due by: 08/31/23.  
(em)

## Probate Notes

Calendar # 9

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 9:00 AM

Department S35 - SBJC

Hearing: Petition for Probate of Will & Letters  
Testamentary

Case #: PROSB2200641

Case Name: Estate Of Ernest Neuhalfen

### PARTIES:

Jo E Larick	Petitioner	Counsel:	Pro Se
Ernest James Neuhalfen	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON Amended** Petition for Probate of Will and for Letters Testamentary with Full IAEA by Jo E Larick (friend of decedent/named executor) [petitioner]

### GENERAL INFORMATION:

- DOD: 2/17/22 (Testate)
- Alleged Net Value of Estate: **\$958,655** of which \$503,000 is personal property and \$455,655 is real property. There is a scrivener's error noted in the calculation.
- Proof of Publication filed 6/10/22.
- Will dated: 6/30/21 Lodged: 5/3/22.

### ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:

- Notice of Petition to Administer Estate filed 5/23/22 appears to have been executed by serving party prior to mailing date. **Need** corrected notice.
- Need** Duties and Liabilities (DE-147).
- Need** Confidential Statement of Birthdate and Driver's License Number (DE-147S)
- Will witnessed by Janet C. McCormack and Jo E. Larick, beneficiaries of the will. It appears that there is a presumption of duress, menace, fraud, or undue influence per Pr.C. § 6112(c) as the will was not witnessed by at least 2 disinterested subscribing witnesses. This presumption affects the burden of proof. **Need** verified supplement.
- JTD** – Petitioner requests waiver of bond as the will waives bond. The court may for good cause require that a bond be given per Pr.C. § 8481(b).
- No Proposed Order/Letters.

### RECOMMENDATION:

Clear notes 1-4, then Court's discretion. If approved, an Inventory and Appraisal is due by: **10/20/22**. An Accounting and/or Status Report is due by: **08/31/23**.  
(em)

## Probate Notes

**Calendar # 10**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Petition for Probate of Will & Letters  
Testamentary

**Case #:** PROSB2200713

**Case Name:** Estate Of Rita Price

### **PARTIES:**

Eric Price	Petitioner	Counsel:	John Gary Wurm
Rita M Price	Decedent	Counsel:	

X-REF: TRUSB2200043

**THIS CASE SET FOR HEARING ON** Petition for Probate of Will and for Letters Testamentary with Full IAEA by Eric Price (son of decedent/named executor) [petitioner]

### **PRIOR ORDERS:**

Hearing on Petition for Letters of Special Administration pending on 5/19/22.

### **GENERAL INFORMATION:**

- a) DOD: 12/2/21 (Testate)
- b) Alleged Net Value of Estate: \$375,000 all of which is real property.
- c) Notice of Petition to Administer Estate filed 5/18/2022.
- d) Will dated: 9/13/21 Lodged: 5/13/22
  - a. Will is self-proving pursuant to Pr.C. § 8220.

### **ISSUES AND DEFICIENCIES NOTED IN TH PLEADINGS:**

1. **Need** Proof of Publication.
2. **JTD** – Petitioner requests waiver of bond as the will waives bond. The court may for good cause require that a bond be given per Pr.C. § 8481(b).
3. ~ Proposed Order: 5/13/22.

### **RECOMMENDATION:**

Need to clear note 1, then Court's discretion. If approved, an Inventory and Appraisal is due by: **10/20/22**. An Accounting and/or Status Report is due by: **08/31/23**.

(em)

## Probate Notes

**Calendar # 11**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Petition for Probate of Will & Letters of  
Administration w/Will Annexed

**Case #:** PROSB2200741

**Case Name:** Estate Of Josephine Lamadrid

### **PARTIES:**

Paula Lyn Holman Yorba	Petitioner	Counsel:	SELTERS & SELTERS
Josephine A Lamadrid	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Probate of Will & Letters of Administration w/Will Annexed (**s/b Petition for Probate of Will and for Letters Testamentary with Full IAEA**) by Paula Lyn Holman Yorba (daughter of decedent/named executor) [petitioner]

### **GENERAL INFORMATION:**

- a) DOD: 11/25/21 (Testate)
- b) Alleged Net Value of Estate: \$80,000 all of which is real property.
- c) Notice of Petition to Administer Estate filed 5/26/22.
- d) Proof of Publication filed 6/14/22.
- e) Will dated: 12/7/20      lodged: 5/19/22.
  - a. Will is self-proving pursuant to Pr.C. 8220.

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. **JTD** – Petitioner requests waiver of bond as the will waives bond. The court may for good cause require that a bond be given per Pr.C. § 8481(b).
2. Proposed Order:

### **RECOMMENDATION:**

Court's discretion. If approved, an Inventory and Appraisal is due by: **10/20/22**. An Accounting and/or Status Report is due by: **08/31/23**.

(em)

## Probate Notes

**Calendar # 12**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S35 - SBJC

**Hearing:** Petition Hearing For Instructions And Order  
Confirming Sale

**Case #:** TRUPS2000093

**Case Name:** The Ignacia Leon Trust Dated 10/19/94

### **PARTIES:**

Patrick Guadalupe Leon	Petitioner	Counsel:	Dolen Tucker Tierney & Abraham
The Ignacia Leon Trust Dated October 19 1994	Trust	Counsel:	

Matter referred to Legal Research for review (LR)  
(em)

## Conservatorship Notes

**Calendar # 13**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S35 - SBJC

**Hearing:** Petition Hearing For Attorney's Fees And For  
Order Directing Payment To Court Appointed  
Counsel

**Case #:** CONPS2000311

**Case Name:** Conservatorship Josephine Rosalie Holub

### **PARTIES:**

Josephine Rosalie Holub	Conservatee	Counsel:	Donnasue Smith Ortiz
Coreen Leann Marsh	Conservator	Counsel:	

**XREF: TRUPS2100035** *DANNY R HOLUB FAMILY TRUST AGREEMENT*

**THIS CASE SET FOR HEARING ON** Petition for Attorney's Fees and for Order Directing  
Payment of Court Appointed Counsel by Attorney Donnasue Smith Ortiz

### **GENERAL INFORMATION:**

#### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. Petitioner as Court Appointed Counsel to conservatee Josephine Rosalie Holub seeks order directed payment of attorney's fees. Petitioner was appointed to represent the conservatee on February 3, 2021.
2. Petitioner seeks \$ 5,376.25 in attorney's fees for 12.65 hours at \$425 per hour [per 6/16/22 supplement]. [Itemization – p. 6-7]
3. Petitioner requests order that Correen Lean Marsh Conservator and/or Trustee of the Josephine R Holub Family Trust be ordered to pay the requested fees forthwith.
4. Notice given and filed 6/15/22.
5. ~ Proposed Order: 5/24/22

### **RECOMMENDATION:**

Clear notes, then Court's discretion.  
(em)

FUTURE HEARING: 01/11/2023 ACCOUNTING REVIEW

## Conservatorship Notes

**Calendar # 14**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S35 - SBJC

**Hearing:** Review Hearing

**Case #:** CONSB2100223

**Case Name:** Conservatorship Of Debra Nisporic

### **PARTIES:**

Lois Nisporic	Petitioner	Counsel:	James Beata Church
Debra Lynn Nisporic	Conservatee	Counsel:	William Michael Nassar

### **GENERAL INFORMATION**

**Continued from 12/15/21** at the request of the Court. Reason for continuance: Petitioner and/or Counsel are ordered to appear at the next hearing. Notice given by Judicial Assistant.

**Continued from 3/30/22. Attorney Appointed: - WILLIAM NASSAR. Clerk's office to provide copy of file to counsel. Order Appointing Counsel Filed. Case continued at the request of the Court. Reason for continuance: For probate notes to be cleared. For report to be filed. Notice given by Judicial Assistant.**

**THIS CASE IS SET FOR HEARING ON** Probate/Conservatorship Management Conference

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

1. Lois Nisporic was appointed limited conservator of the person on 03/14/05 by Superior Court of Riverside County.
2. Matter was transferred from Riverside County on 04/12/21 as the conservatee resides and intends to continue to reside in San Bernardino County.
3. **Need** report of court appointed counsel William Nassar.
4. **Need** CI Report.
5. **Need** amended Letters to reflect this county.

### **RECOMMENDATION**

Inquire status  
(cms/em)



## Conservatorship Notes

Calendar # 15

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 10:00 AM

Department S35 - SBJC

Hearing: Petition for Conservatorship

Case #: CONSB2100293

Case Name: Conservatorship Of Ashton De-Shawn Jackson

### PARTIES:

Ashley N Jackson	Petitioner	Counsel:	Pro Se
Ashton De-Shawn Jackson	Conservatee	Counsel:	Rosa M Marquez

**THIS CASE SET FOR HEARING ON** Petition for Appointment of **Limited** Conservator, of the **person only** by Ashley N Jackson, mother.

### PRIOR ORDERS:

**Rosa Marquez** appointed counsel on 12/16/21. Continued from 02/03/22 to clear notes. Counsel present for petitioner.

**Continued from 4/7/22. Stipulation & Order re: Appointment of Judge Pro Tem filed.**

**Probate notes cleared: Proof of service of citation. Certificate of Completion of conservatorship training class. Court finds good cause to appoint temporary guardian. ASHLEY N JACKSON is/are appointed as temporary guardian for the person of ASHTON DE-SHAWN JACKSON. No bond required. Order signed. Case continued at the request of the Court. Reason for continuance: For probate notes to be cleared**

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

1. Petitioner seeks powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351. **-JTD**
2. Petitioner seeks civil rights not be limited without court order. **-JTD**
3. Proposed conservatee is developmentally disabled. **Report of Counsel Rosa Marquez filed 03/18/22.**
4. Proposed conservatee is developmentally disabled. **IRC report filed 03/30/22.**
5. Petitioner seeks medical powers. **Capacity Declaration filed 12/09/21. Corrected Declaration filed 4/26/22.**
6. ~~Proof of service of citation is incomplete as to section 3; **date and time served.**~~  
**Need** proper proof of service of citation. Cleared by Court on 4/7/22.
7. ~~**Need** Certificate of Completion of the Conservatorship Training Class. Cleared by court on 4/7/22.~~
8. **Court Investigator report filed 01/18/22.**
9. Proposed Form Order: ~12/09/21

### RECOMMENDATION

Court's discretion. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5.

(lc/em)

## Conservatorship Notes

Calendar # 16

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 10:00 AM

Department S35 - SBJC

Hearing: Petition for Conservatorship

Case #: CONSB2200042

Case Name: Conservatorship Of Emy Caban

### PARTIES:

Emy Caban; Shirley Caban; Ramon Caban Vera	Petitioner; Petitioner; Petitioner	Counsel:	Javier Horacio Castillo; Javier Horacio Castillo; Javier Horacio Castillo
Emy Caban	Conservatee	Counsel:	Mark H McGuire

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Conservator (person-limited), by Emy Caban [mother]; Shirley Caban [sister]; Ramon Caban Vera [father] [Petitioners]

### PRIOR ORDERS:

**Continued from 3/30/22. Attorney Appointed: - MARK MCGUIRE. Clerk's office to provide copy of file to counsel. Order Appointing Counsel Filed. Case continued at the request of the Court. Reason for continuance: For probate notes to be cleared. For report to be filed.**

### GENERAL INFORMATION

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

1. No bond – person only.
2. Petitioners seek authority to fix residence or specific dwelling, access to confidential records and papers; consent to withhold consent to marriage of, or entrance into registered domestic partnership by limited conservatee; right of limited conservatee to contract; power to give or withhold medical consent; limit conservatee's right to control his/her social and sexual contacts and relationships; decisions concerning education of limited conservatee pursuant to Pr.C. § 2351. **JTD**
3. Petitioner seeks medical powers. **Capacity Declaration filed 3/3/22** appears partially incomplete and executed by school psychologist. Court to determine if this is sufficient. **JTD**
4. **Need** report of Court Appointed Counsel Mark McGuire.
5. Proposed conservatee is developmentally disabled. **IRC Report filed 6/14/22.**
6. Citation and Proof of Service filed 3/10/22.
7. **Need** Certificate of Completion of the Conservatorship Training Class by Ramon Caban Vera and Emy Caban.
8. **Court Investigator report filed 3/25/22.**
9. Notice of hearing filed 3/3/22 includes notice to Maternal Grandmother Maria Vilma Gonzalez whose address is unknown. Supplemental Declaration re: Attempt to Locate filed 6/14/22. Court to determine if sufficient. **JTD**

10. ~ Proposed Form Order: 2/14/22

**RECOMMENDATION**

Need to clear note 7, then Court's discretion. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Level of Care and Care Plan per Pr.C.§2352.5. (em)

## Conservatorship Notes

**VACATED**

**Calendar # 17**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S35 - SBJC

**Hearing:** Petition Hearing For Withdrawal/ Dismissal Of  
Petition For Appointment Of Conservator

**Case #:** CONSB2200157

**Case Name:** Conservatorship Of  
Brandon Christopher Thomas

### **PARTIES**

Linda Garrett Harrington	Petitioner	Counsel:	Pro Se
Brandon Christopher Thomas	Conservatee	Counsel:	

**VACATED by JA**

**THIS CASE SET FOR HEARING ON** Petition for Withdrawal/Dismissal of Petition for Appointment of Conservatorship of the Person by Linda Garrett Harrington

### **GENERAL INFORMATION**

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

1. Petitioner Linda Garrett Harrington petitions to withdraw the Petition for Appointment of Conservator filed 4/29/22. The Court denied Petitioner's request to be appointed Temporary Guardian and referred the matter to Department of Behavioral Health for evaluation. After speaking with the Court Investigator and Department of Behavioral Health, Petitioner wishes to dismiss this petition in favor of filing an LPS Conservatorship
2. It appears petitioner has not given notice if the initial petition. Court may wish to inquire if notice was given. If not, Court's discretion to require notice of this petition. **JTD**
3. ~ Proposed Order: 5/19/22

### **RECOMMENDATION**

Court's discretion subject to note 2.

(em)

## Conservatorship Notes

**Calendar # 18**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S35 - SBJC

**Hearing:** Petition for Conservatorship

**Case #:** CONSB2200192

**Case Name:** Conservatorship Of Shamique Unique Brown Hogarth

### **PARTIES**

Grenetta Browne	Petitioner	Counsel:	Pro Se
Shamique Unique Brown Hogarth	Conservatee	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Conservator of the person by Grenetta Browne [mother of proposed conservatee] [Petitioner

### **PRIOR ORDERS:**

**Petitioner appointed Temporary Conservator on 6/1/22.**

### **GENERAL INFORMATION**

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

1. Petitioner requests no bond – person only.
2. Petitioner seeks medical powers. **Capacity Declaration filed 6/1/22** is incomplete as it does not include the last date physician saw proposed conservatee and whether or not conservatee is a patient under continuing care. **JTD**
3. Petitioner seeks neurocognitive disorder powers. **Need** appointment of counsel for report.
4. **Need** return of Citation.
5. **Need** Certificate of Completion of the Conservatorship Training Class
6. **Need** Court Investigator Referral Report (Local form SB-360).
7. **Court Investigator report filed 6/13/22.**
8. **Need** Notice of hearing and proof of service.
9. ~ Proposed Form Order: 5/24/22.

### **RECOMMENDATION**

Need to clear notes. If approved, set hearing for Compliance Review for **1/19/23** for the filing of the following: proof of service of Order with Notification of Conservatee's Rights per Pr. C. §1830(c); Determination of Conservatee's Appropriate Level of Care per Pr. C. §2352.5; and Statement of Care Plan in accord with Pr. C. §2352.5.

(em)

## Guardianship Notes

Calendar # 19

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 11:00 AM

Department S35 - SBJC

Hearing: Petition for Termination of Guardianship

Case #: GARPS1700101

Case Name: Mtr Of Daniel E Roman Et Al

### PARTIES:

Daniel E Roman; Donna L Roman; Hailey J Roman	Minors	Counsel:	
Marlyn L Barba	Guardian	Counsel:	
Ernesto Roman	Father	Counsel:	Pro Se

**THIS CASE SET FOR HEARING ON** Petition to Terminate guardianship by Father Ernesto Roman

### PRIOR ORDERS:

Marlyn Barba (maternal great aunt) appointed guardian on **09/11/17**, person only. Continued from 04/01/21. Court finds that a referral to the Court Investigator is not necessary because the current guardian states that she consents to termination. As to notice to mother Johanna Gomez; witness -- Ernesto Roman is sworn and examined. Court clears notice of hearing and proof of service as to mother. Continued from 07/22/21. Notice cleared as to minors Daniel and Donna. Court noted there is a Family Law case *FAMSS1204309* wherein custody orders last made on 09/25/12. Referred to Court Investigator.

**Continued from 10/28/21.** Parties did not stipulate to Judge Pro Tem.

**Continued from 3/3/22. Probate notes cleared: Notice with N/A for department.**

**Referral to Family Court Services Mediation Filed - re visitation. Case continued at the request of the Court. Reason for continuance: For report to be filed.**

### GENERAL INFORMATION:

- Minors – Daniel 14 [09/07], Donna 13 [01/09] and Hailey 10 [03/11]
- Father seeks termination and alleges he is well suited to care for them.
- Maternal grandfather is deceased.

### ISSUES AND DEFICIENCIES IN PLEADINGS NOTED:

- Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on
  - Unknown paternal grandfather
- ~~Notice of Hearing and proof of service as to Marcela Padilla (paternal grandmother) filed on 06/18/21 has the following issues: **Need** proper notice.~~
  - ~~lists "N/A" for the department on page 1 of the form but should list S35.~~
  - ~~Section 5 of the proof does not indicate that a copy of the petition was served. Cleared by Court on 3/3/22.~~
- Need** names and addresses of relatives, petitioner indicates "unknown" for majority of parties.

4. **Court Investigator report filed 10/14/21 and addendum on 10/18/21**
5. **FCS Report filed 6/2/22 indicates parents did not appear, therefore mediation was not held.**
6. Due Diligence Declaration filed 04/05/21 as to Maternal grandmother Adela Gonzelez **JTD**
7. Proposed Order: ~02/19/21

**PE's COMMENTS:**

Need to clear notes 1 & 3.

(lc/ww/lc/em)



## Guardianship Notes

**Calendar # 20**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S35 - SBJC

**Hearing:** Petition for Termination of Guardianship

**Case #:** GARPS1900592

**Case Name:** Guardianship Of Ivan Joseph Garcia Et Al

### **PARTIES:**

Kathleen Moreno	Petitioner	Counsel:	Pro Se
Evelyn Rose Beltran; Ivan Joseph Garcia; Ivan Joseph Garcia	Minor; Minor; Minor	Counsel:	Pro Se; Pro Se
Matthew Briones; Kathleen Moreno	Guardian; Guardian	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Termination of Guardianship by Kathleen Moreno (guardian/maternal aunt) [Petitioner]

### **GENERAL INFORMATION**

Petitioner, Kathleen Moreno (maternal aunt of ward) was appointed temporary guardian on 12/10/19 and appointed general guardian on 9/16/20. Thereafter, Matthew Briones (maternal grandfather of ward) was appointed temporary guardian on 11/6/20 after Ms. Moreno informed the court she wished to retire as guardian of Ivan. Kathleen Moreno was then reinstated as temporary guardian on 5/4/21 when Matthew Briones withdrew his petition for appointment as general guardian. Kathleen Moreno currently has letters of temporary guardianship which have no expiration date.

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

1. Petitioner, Kathleen Moreno, current temporary guardian, seeks termination of guardianship and alleges the guardianship is detrimental to her physical and emotional well-being. Petitioner requests that Matthew Briones (maternal grandfather) be reinstated as guardian of Ivan. Petition alleges that petitioner, Matthew Briones and Eva Briones (mother of ward) have agreed that Matthew take guardianship of Ivan.
2. **Need** verified supplement to include full names and addresses of all persons related to the minor within the second degree (parents, grandparents, and siblings).
3. **Need** Petition for Appointment of (Successor) Guardian by Matthew Briones with all supporting forms and documentation.
4. **Need** CI Report (if referred)
5. **Need** Notice of Hearing.
6. ~ Proposed Order: 4/22/22

### **RECOMMENDATION:**

Need to clear notes.

(em)

## Guardianship Notes

Calendar # 21

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 11:00 AM

Department S35 - SBJC

Hearing: Petition for Appointment of Guardian

Case #: GARSB2100331

Case Name: Guardianship Of Elijah Horton, Et Al.

### PARTIES:

Daisy Shakes Chisholm	Petitioner	Counsel:	
Elijah Horton; Ethan Horton; Isaac Horton; Ivory Horton	Minors	Counsel:	

### **SEE ALSO 22**

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Daisy Shakes Chisholm, paternal grandmother.

### **PRIOR ORDERS:**

Temporary hearing **Continued from 12/09/21. Father Alpha Horton objects.**

**Continued from 01/06/22** by stipulation. Father present. Court suggested parties us Talking Parents for all communication. Referred to Court Investigator. All parties to cooperate with Court Investigator and failure to do so may result in sanctions up to \$1,500 imposed.

**Continued from 3/17/22. Court inquires of Petitioner. Referred to Court Investigator for DCFS referral per PrC1513b COURT HAS RECEIVED CONCERNING INFORMATION AS TO MINORS IVORY AND ISAAC. Court request the investigator contact Zekia Fields in regards to this matter. Case continued at the request of the Court. Reason for continuance: For report to be filed.**

### **GENERAL INFORMATION**

- A. Minors and Ages: Elijah 12 [02/10], Ethan 11 [12/10; and Twins Ivory and Isaac 9 [10/12]
- B. Mother of Minor: Tina Horton
- C. Father of Minor: Alpha Horton
- D. Siblings over Age 12+: Austin; age unknown

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

1. Requests to excuse notice filed **12/20/21** as to the following: **JTD**
  - a. Mother
  - b. Sibling Austin
  - c. Maternal grandfather
  - d. Paternal grandfather
2. **Personal Service**
  - a. Father: **No – has appeared twice. Does the Court wish to deem served?**  
**JTD**
3. **Notice by Mail**

- a. Paternal Grandmother: **Petitioner**
- b. Maternal Grandmother: **Deceased**
4. **Need** notice of related case **CSKS160127**.
5. Referral for CII: **Need** parent's Social Security numbers and mother's DOB if attainable.
6. **Court investigator report filed 3/11/22. Court Investigator Special Report filed 6/14/22**
7. ~ Proposed Order: 12/02/21

**RECOMMENDATION:**

Need to clear notes.

(lc/em)

## Guardianship Notes

**Calendar # 22**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S35 - SBJC

**Hearing:** Petition for Appointment of Temporary Guardian

**Case #:** GARSB2100331

**Case Name:** Guardianship Of Elijah Horton, Et Al.

**PARTIES:**

Daisy Shakes Chisholm	Petitioner	Counsel:	
Elijah Horton; Ethan Horton; Isaac Horton; Ivory Horton	Minors	Counsel:	

**SEE ALSO 21**

Temporary hearing continued by stipulation 1/6/22 & 3/17/22 – No notes. Court to review report filed 3/11/22 – **JTD**

(lc/em)

## Guardianship Notes

**Calendar # 23**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S35 - SBJC

**Hearing:** Petition for Appointment of Guardian

**Case #:** GARSB2200052

**Case Name:** Guardianship Of Soleil Harris

### **PARTIES:**

Sharon L Harris	Petitioner	Counsel:	Pro Se
Soleil S Harris	Minor	Counsel:	
Lacheeka Michelle Harris	Mother	Counsel:	Pro Se

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Sharon L Harris, maternal grandmother.

### **PRIOR ORDERS:**

Sharon Harris appointed temporary guardian on 02/09/22. Referred to Court Investigator for DCFS emergency referral. Minor is allegedly in danger in mother's care.

**Continued from 3/3/22. Probate notes cleared: Service to mother, father and paternal grandfather. Referred to Court Investigator. Case continued at the request of the Court. Reason for continuance: For probate notes to be cleared, For report to be filed. Court trial requested. Temporary letters to continue to 6/23/2022. Court makes orders pursuant to Pretrial Order Re 1) Exchange of Statement of Witnesses and Description and Copies of Evidence and 2) Continuances as attached and ordered incorporated into the minute order. A copy of this order is provided in court today. Exchange deadline is set for 4:00 PM 7/27/23. Proof of Service (POS-030) must be filed as to the trial documents exchanged- Proof of Service to be filed by 4:00 PM 7/27/23. Court orders that personal/Court Call appearances of trial counsel/self-represented litigants is required for the readiness hearing in Department S35. Court notes that if there is failure to appear, the Court will consider imposing sanctions, including the dismissal of the petition or the waiver of the objections, as applicable in this case. The Court inquires of parties and/or counsel re: Pretrial Order. Parties and/or counsel state that the Pretrial Order is received and understood. Order Signed: COURT'S PRETRIAL ORDERS**

### **GENERAL INFORMATION**

- A. Minor and Age: Soleil 9 [09/12]
- B. Mother of Minor: Lacheeka Harris
- C. Father of Minor: Robert Hughes
- D. Siblings over Age 12+: Unknown

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

- 1. **Personal Service**
  - a. Mother: **Cleared by Court on 3/3/22.**
  - b. Father: **Cleared by Court on 3/3/22.**

2. **Notice by Mail**

- a. Paternal Grandfather: Cleared by Court on 3/3/22.
  - b. Paternal Grandmother: **No, allegedly unknown. Court's discretion to require due diligence declaration. JTD**
  - c. Maternal Grandfather: **No:**
  - d. Maternal Grandmother: **Petitioner**
  - e. Siblings Age 12+: **No, allegedly unknown. Court's discretion to require due diligence declaration. JTD**
3. Referral for CII: **Need** father's DOB and both parent's Social Security numbers if attainable.
  4. **CI Report filed 6/16/22.**
  5. **Need** DCFS emergency referral disposition.
  6. ~ Proposed Order: 02/02/22
  7. **Objections filed on 02/14/22 by Mother Lacheeka Harris**

**RECOMMENDATION:**

**Matter contested.** Need to clear note 2-3 and need reports. Matter set for trial.

(lc/em)

FUTURE HEARING:

07/27/2023 TRIAL READINESS

08/23/2023 COURT TRIAL

08/24/2023 COURT TRIAL

## Guardianship Notes

**Calendar # 24**

**Honorable: Douglas K Mann**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S35 - SBJC

**Hearing:** Petition for Appointment of Guardian

**Case #:** GARSB2200211

**Case Name:** Guardianship Of Arianna Herrera

### **PARTIES:**

Gabriela Herrera	Petitioner	Counsel:	Pro Se
Arianna Carmen Herrera	Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian of Minor (estate only) by Gabriela Herrera (mother of proposed ward) [Petitioner]

### **GENERAL INFORMATION**

- A. Minor(s) and Age: Arianna Carmen Herrera [Age: 1; DOB: 08/2019]
- B. Mother of Minor(s): Gabriella Herrera
- C. Father of Minor(s): Henry Herrera (deceased)
- D. Sibling(s) over Age 12+:

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

#### **1. Personal Service**

- a. Mother: **Petitioner**
- b. Father: **Deceased**
- c. Minor(s) (Age 12+): n/a

#### **2. Notice by Mail**

- a. Paternal Grandfather: No, allegedly deceased.
- b. Paternal Grandmother: No, whereabouts unknown. **Petitioner alleges estrangement [see supp. filed 6/16/22]. JTD**
- c. Maternal Grandfather: Yes: filed 4/29/22.
- d. Maternal Grandmother: No: filed 4/29/22.
- e. Sibling(s) (Age 12+): n/a

- 3. Petitioner requests bond be fixed at \$20,000. Petitioner estimates value of the guardianship estate to be \$110,000 which consists of life insurance proceeds. Proposed bond appears to be insufficient pursuant to Pr.C. §2320(c)(1). Court may wish to require balance of the insurance proceeds be placed in a blocked account.

#### **JTD**

- 4. Petitioner seeks orders authorizing exercise of independent powers pursuant to Pr.C. § 2590 as follows: power to contact, power to operate at risk of the estate a business, farm or enterprise; power to grant and take options; power to sell at public or private sale real or personal property of the estate; power to create by grant or otherwise, easements and servitudes; power to borrow money and give security for the repayment thereof; power to purchase real and/or personal property; power to alter, improve, repair or raze, replace and rebuild property of the estate; power to let or

lease property; power to lend money on adequate security, power to exchange property [powers fully enumerated on page 4 of petition]. Question need for 2590 powers. Does the court wish to appoint a Guardian Ad Litem for the minor? **JTD**

5. The court may wish to inquire if a probate estate has been opened on behalf of Henry Herrera (proposed ward's deceased father) as Arianna *may* be entitled to probate estate proceeds. **JTD**
6. **Need** CI Report (if referred)
7. ~ Proposed Order: 4/22/22.

**RECOMMENDATION:**

Court's discretion regarding notes 2b, 3-6.

(em)



## Guardianship Notes

Calendar # 25

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 11:00 AM

Department S35 - SBJC

Hearing: Petition for Appointment of Guardian

Case #: GARSB2200212

Case Name: Guardianship Of Ezekiel Hernandez

### PARTIES:

Jerry Hernandez; Rebecca Hernandez	Petitioners	Counsel:	Pro Se
Ezekiel Asher Hernandez	Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian of Minor (person only) by Jerry Hernandez and Rebecca Hernandez (maternal grandparents) [Petitioner]

### GENERAL INFORMATION

- A. Minor(s) and Age: Ezekiel Asher Hernandez [Age: 2; DOB: 11/2019]
- B. Mother of Minor(s): Juliana Hernandez (deceased)
- C. Father of Minor(s): Allegedly unknown
- D. Sibling(s) over Age 12+: Alfredo Hernandez, Gerardo Hernandez, Mariana Hernandez Guerrero (ages unknown)

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

#### 1. Personal Service

- a. Mother: **Deceased**
- b. Father: Allegedly unknown. **Need** copy of birth certificate(s) per local rule 20-1302.
- c. Minor(s) (Age 12+): n/a

#### 2. Notice by Mail

- a. Paternal Grandfather: Allegedly unknown (see note 1b)
  - b. Paternal Grandmother: Allegedly unknown (see note 1b)
  - c. Maternal Grandfather: **Petitioner**
  - d. Maternal Grandmother: **Petitioner**
  - e. Sibling(s) (Age 12+): **Need** notice to Alfredo Hernandez, Gerardo Hernandez, Mariana Hernandez Guerrero *if they are 12 years of age or older*.
3. Guardianship Questionnaire filed Jerry Hernandez does not include employment information. **Need** amended form.
  4. **Need** Indian Child Inquiry Attachment [ICWA-010(A)]
  5. **Need** CI Report (if referred).
  6. **Amended Petition filed 5/4/22 appears to request estate powers, however petition is incomplete and does not include required attachments. Need complete amended petition with all attachments.**
  7. ~ Proposed Order: 4/22/22.

**RECOMMENDATION:**

Petition appears to be moot as petitioners are seeking estate powers. Amended petition set for hearing on 7/26/22.

(em)

FUTURE HEARING: 07/26/2022 HEARING ON PETITION FOR APPOINTMENT OF GUARDIAN

## Guardianship Notes

Calendar # 26

Honorable: Douglas K Mann

Date: 06/23/2022

Time: 11:00 AM

Department S35 - SBJC

Hearing: Petition for Appointment of Guardian

Case #: GARSB2200213

Case Name: Guardianship Of Robyn Grim, Et Al.

### PARTIES:

Clarese Hill; Rachel Hill	Petitioners	Counsel:	Pro Se
Rhy'lee Burnom; Robyn Sade Grim	Minors	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian of Minor (person only) by Rachel Hill (mother of minors) [petitioner] requesting appointment of Clarese Hill (maternal grandmother)

### GENERAL INFORMATION

- A. Minor(s) and Age:
  - a. Robyn Sade Grim [Age: 5; DOB: 12/2016]
  - b. Rhy'lee Burnom [Age: 1; DOB: 09/2000]
- B. Mother of Minor(s): Rachel Hill (**petitioner**)
- C. Father of Minor(s): Javan Burnom
- D. Sibling(s) over Age 12+: n/a

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

- 1. **Personal Service**
  - a. Mother: **Petitioner**
  - b. Father: No; **need** notice or due diligence declaration.
  - c. Minor(s) (Age 12+): n/a
- 2. **Notice by Mail**
  - a. Paternal Grandfather: No, allegedly unknown. **Need** notice or due diligence declaration.
  - b. Paternal Grandmother: No, allegedly unknown. **Need** notice or due diligence declaration.
  - c. Maternal Grandfather: No, allegedly unknown. Question if father was not listed on petitioner's birth certificate. Petitioner may submit copy of her birth certificate if father was not listed or file due diligence declaration. **Need** same.
  - d. Maternal Grandmother: Clarese Hill (**nominee**) [consent filed 4/22/22] **JTD**
  - e. Sibling(s) (Age 12+): n/a
- 3. **Need** completed Indian Child Inquiry Attachment for Rhy'lee [ICWA-010(A)]
- 4. Guardianship Questionnaire filed 4/22/22 includes references that may be related to petitioner and proposed guardian. If so, **need** amended form to include 2 references not related to proposed guardian.

5. Confidential Guardian Screening Form filed 4/22/22 does not include complete date of birth for proposed guardian or school information for Robyn. **Need** amended form to include same.
6. Declaration under UCCJEA filed 4/22/22 indicates there is a guardianship proceeding. **Need** case number and case information. Petitioner to submit amended form or supplement.
7. CII Referral Form filed 4/22/22 does not include Javan Burnom's (father) social security number. **Need** amended form to include same, *if social security number is obtainable*.
8. Proposed Guardian Clarese Hill resides in Murrieta, Riverside County. Court's discretion to order matter transferred to Riverside County Superior upon appointment of guardian. **JTD**
9. **Need** CI Report (if referred)
10. ~ Proposed Order: 4/22/22.

**RECOMMENDATION:**

Need to clear notes, then Court's discretion regarding notes 8-9.

(em)

## Probate Notes

**Calendar # 1**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Accounting Petition To Settle The  
Eight Account And Compensate The Attorney

**Case #:** PROPS0900240

**Case Name:** Brittany Herlong S.n. Trust

**PARTIES:**

Harold Herlong; Harold D Herlong; Donnasue Smith Ortiz	Petitioner; Petitioner;	Counsel:	Dennis Michael Sandoval; Donnasue Smith Ortiz
Brittany D. Herlong Special Needs Trust;	Trust; Trust	Counsel:	
Harold D Herlong;	Trustee;	Counsel:	Dennis Michael Sandoval;

Currently under review by Legal Research.

(lc)

## Probate Notes

**Calendar # 2**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Accounting

**Case #:** PROPS1100680

**Case Name:** Pete G. Corrales & Carmen C. Corrales Trust

### **PARTIES:**

Gilbert Corrales; Lorraine Corrales	Petitioner; Petitioner	Counsel:	Law Offices of Harvey P Payne III; Jason Louis Gaudy
Pete G. Corrales & Carmen C. Corrales Trust	Trust	Counsel:	

Currently under review by Legal Research.

(lc)

## Probate Notes

**Calendar # 3**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Accounting Second Account Current

**Case #:** PROPS1600744

**Case Name:** Mtr Of Alice L Wall

### **PARTIES:**

Bill Wall; Jennifer June Wall Walsten	Petitioner; Petitioner	Counsel:	Charles J Staveley; Edward G Operini
Alice L Wall	Decedent	Counsel:	

Moved to add on calendar – No notes – JTD

(lc)

## Probate Notes

**Calendar # 4**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing Re: Petition For Determination Of  
Entitlement To Distribution

**Case #:** PROPS1901240

**Case Name:** The Estate Brant W. Israelson

### **PARTIES:**

Valeria Stivers	Petitioner	Counsel:	Shelby T Shelton
Brant W. Israelson	Decedent	Counsel:	
<del>Tyler Israelson</del> <b><i>Israelson</i></b>	Third Party	Counsel:	Charles Michael Farano
Tyler Israelson	Objector	Counsel:	Charles Michael Farano

***XREF CIVDS1937945 Tyler Israelson v Valerie Stivers***

Currently under review by Legal Research.

(lc)



## Probate Notes

Calendar # 5

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 9:00 AM

Department S36 - SBJC

Hearing: Hearing on Accounting First Account Current;  
Status Report Of Admin; Req That Bond Be  
Increased

Case #: PROPS2000566

Case Name: Estate Of Patricia Louis Robinson

### **PARTIES:**

Anela Richie	Petitioner	Counsel:	Lora Sue Friedman
Patricia Louise Robinson	Decedent	Counsel:	
Susan Winters-McIntosh	Third Party	Counsel:	Thomas William Dominick

**THIS CASE SET FOR HEARING ON** 1<sup>st</sup> Account and Request for Bond Increase by Anela Richie, granddaughter/administrator.

### **PRIOR ORDERS:**

### **GENERAL INFORMATION**

- A. Letters of Administration issued to Anela Richie, granddaughter, on 01/26/21; full authority \$585,210 bond.

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

1. Accounting period 01/13/20 – 12/29/21.
2. Assets on Hand: \$715,849 of which \$126,399 is cash and remainder in real and personal property which includes several vehicles.
3. Summary of Account in body of report indicates beginning balance of accounting, \$772,154.25 does not match Inventory and Appraisal [11/09/21] balance of \$722,154.25. However, summary of account appears to have correct beginning balance.
4. **Need** bank statements to support Inventory and Appraisal balance as well as ending balance of accounting per local rule Need bank statements to support Inventory and Appraisal balance per local rule 20-908.
5. Distributions indicate monies to heirs in 2020, prior to appointment of administrator, as follows [p39]: **Need** further clarification as there was no authority to distribute at that time.
  - a. Kevin Winters \$10,969.87 total
  - b. Susan Winters \$32,497 total, which includes attorney's fees.
  - c. "Blanca's Expenses" \$954.58 [p36], clarify who Blanca is.
6. Administrator seeks bond be increased to \$728,943.82. Reappraisal for sale filed 03/14/22. Real properties valued at \$805,000, encumbrance unknown. **JTD**

7. **Need** notice of hearing and proof of service including to Counsel Tom Dominick for Susan Winters-McIntosh.
8. Proposed Order: None.

**RECOMMENDATION:**

Need to clear notes 4, 5 and 7. If approved, next accounting due by **06/15/23**

(lc)

## Probate Notes

Calendar # 6

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 9:00 AM

Department S36 - SBJC

Hearing: Hearing on Accounting First And Final Account  
And Report Of Status Of Administration

Case #: PROPS2000650

Case Name: Estate Of Robert V Perez

### PARTIES:

Art Perez	Petitioner	Counsel:	Maureen M Muratore
Robert V Perez	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Final Account, Petition for Final Distribution and Allowance of fees, by Art Perez, executor.

### PRIOR ORDERS

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

1. Accounting period 10/20/20 – 01/13/22.
2. Assets on Hand: \$158,382.50 in cash, two firearms and furnishings.
3. Executor seeks creditor's claim filed by himself on 12/17/20 for \$8,659.56 be approved re funeral expenses. **No** proposed order appears to have been submitted; therefore, court was unable to approve at time of submission. Receipts not attached to claim. **JTD**
4. Executor seeks to purchase 2 firearms from the estate and amount be deducted from his reimbursement of costs; \$275 total.
  - a. Firearms must be sold/exchanged at a dealer. Executor shall comply with Penal Code §§ 27875 and/or 27920 for the alleged firearm transfers. (only needed if not sold at dealer) **If** sale or transfer is made to or through a licensed firearms dealer, there is no need to fulfill the PC 27875 or 27545 requirements. **Court to inquire.**
5. Proposed Order: ~02/09/22.

### **FEES & COSTS: JTD**

- A. Attorney and Personal Representative seek statutory fees of \$10,528.92 each [p6].
- B. Reimbursement of costs by Executor \$7,624.79 reduced to \$7,349.79, see note 4 [p18]
- C. Reserve: \$1,490.

### **RECOMMENDATION:**

Court's discretion. If approved, filing of receipts and final discharge due by **06/15/23**.  
(lc)

## Probate Notes

**Calendar # 7**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Order to Show Cause Hearing Failure To File  
Inventory And Appraisal

**Case #:** PROPS2100416

**Case Name:** Estate Of Martin Tovar

**PARTIES:**

Christian Tovar	Petitioner	Counsel:	The Lepe Law Firm, APC
Martin Tovar	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON OSC** re Failure to File Inventory and Appraisal.

**PRIOR ORDERS:**

**OSC set on 01/27/22 when no Inventory and Appraisal was filed. Failure to file may impose sanctions.**

**GENERAL INFORMATION**

- A. Letters of Administration issued to Christian Tovar, son, on 05/25/21; full authority, no bond.

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

1. Final Inventory and Appraisal filed 05/24/22; \$315,868.37 of which \$11,868.37 is cash.
2. Accounting due 07/19/22.

**RECOMMENDATION:**

Court's discretion re OSC.

(lc)

## Probate Notes

Calendar # 8

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 9:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Letters of Administration

Case #: PROSB2200180

Case Name: Estate Of

Alice Chavarria

### **PARTIES:**

Gina I Marks; Cecelia A Vazquez	Petitioner; Petitioner	Counsel:	Robert A Claval; Richard F Nevins
Alice L Chavarria	Decedent	Counsel:	

See Also 9

### **MATTER SET FOR HEARING:**

- Petition for Letters of Administration with full IAEA by ***Cecelia A Vazquez, daughter.***
- ***Competing*** Petition for Letters of Administration with full IAEA by ***Gina I Marks, daughter.***

### **PRIOR ORDERS:**

Continued from 03/17/22. Competing petition to be filed. 04/26/22 hearing reset for 06/23/22.

### **GENERAL INFORMATION:**

#### **Petitioner Cecelia A Vazquez, daughter**

- A. Petitioner seeks bond of \$245,000
- B. Net estate value \$245,000 in real property.

#### **Competing petitioner Gina I Marks, daughter.**

- C. Bond: Petitioner seeks no bond. See note 2.
- D. Net Value of Estate: \$250,000 of which \$5,000 is personal property.

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

#### **Petitioner Cecelia A Vazquez, daughter**

1. Proposed order ~02/09/22

#### **Competing petitioner Gina I Marks, daughter.**

2. **Need** verified supplement as to why bond should be waived; section 3e. **Supp 06/15/22:** Petitioner does not seek to waive bond as this is a contested matter. ***This does not clear the note.***
3. Proposed Order: ~06/13/22.

**RECOMMENDATION:**

Need to clear note 2; Contested matter. Petitioners have equal priority. If approved, an Inventory and Appraisal is due by **10/20/22**. An Accounting or Status Report is due by **08/31/23**.

(/lc)

## Probate Notes

**Calendar # 9**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200180

**Case Name:** Estate Of

Alice Chavarria

### **PARTIES:**

Gina I Marks; Cecelia A Vazquez	Petitioner; Petitioner	Counsel:	Robert A Claval; Richard F Nevins
Alice L Chavarria	Decedent	Counsel:	

### ***See Also 8***

See notes on other matter.

(lc)

## Probate Notes

**Calendar # 10**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition to Determine Succession to  
Real Property

**Case #:** PROSB2200490

**Case Name:** Estate Of  
Timothy Black

### **PARTIES:**

Monica Powell	Petitioner	Counsel:	Pro Se
Timothy S Black	Decedent	Counsel:	

### **THIS CASE SET FOR HEARING ON**

Petition to Determine Succession to real property by Monica Powell, daughter.

### **PRIOR ORDERS:**

### **GENERAL INFORMATION**

A. Date of Death. 10/15/21

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

1. Petitioner seeks 100% interest in decedent's 100% interest in real property per intestate succession. Petitioner is alleged sole heir. Decedent is survived by siblings; however, are not entitled to distribution.
2. ~Proposed Order: 03/16/22.

### **RECOMMENDATION:**

Court's discretion.

(lc)



## Probate Notes

**Calendar # 11**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hrg on Petition for Probate of Will & Letters  
Testamentary

**Case #:** PROSB2200705

**Case Name:** Estate Of

David Eichler

### **PARTIES:**

Layla Eichler	Petitioner	Counsel:	Edward J. Miller
David Westcott Eichler	Decedent	Counsel:	

**MATTER SET FOR HEARING:** Petition for Probate of Will & Letters Testamentary w/full IAEA authority by Layla Eichler, daughter/named executrix

### **PRIOR ORDERS:**

### **GENERAL INFORMATION:**

- A. Petitioner seeks \$20,000 bond.
- B. Petitioner is a resident of Montana and court has discretion to require bond per Pr.C. §8571
- C. Net estate value \$460,000 of which \$210,000 is personal property.
- D. DOD 03/29/22.

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. **Need** corrected Notice of Petition to Administer Estate and proof of service. Notices filed do not have section 5 checked as to authority; however, publication appears to be accurate.
2. Proposed order ~05/12/22

### **RECOMMENDATION:**

RFA subject to note 1. If approved, an Inventory and Appraisal is due by: **10/20/22**. Accounting or Status Report is due by **08/10/23**

(kd/lc)

## Probate Notes

**Calendar # 12**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200724

**Case Name:** Estate Of

Ola Campbell

### **PARTIES:**

Charles Heard	Petitioner	Counsel:	Scott Moga
Ola Lee Campbell	Decedent	Counsel:	

**MATTER SET FOR HEARING:** Petition for Letters of Administration w/full IAEA authority by Charles Heard, son

### **PRIOR ORDERS:**

### **GENERAL INFORMATION:**

- A. Petitioner seeks \$260,000 bond.
- B. Net estate value: \$263,510.00 of which \$3,000.00 is personal property.
- C. DOD 11/28/21

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

- 1. Proposed order ~05/12/22.

### **RECOMMENDATION:**

RFA, \$260,000 bond. If approved, an Inventory and Appraisal is due by **10/20/22**. Accounting or Status Report is due by **08/10/23**

(kd/lc)

**Probate Notes**

***Vacated***

**Calendar # 13**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Motion Re: Eduardo Digon's Notice Of Motion  
And Motion To Compel Attendance

**Case #:** TRUPS2000034

**Case Name:** The Eduardo Digon And Juana Esther Digon 1998 Digo

**PARTIES:**

Eduardo M Digon; Juana Esther Digon	Petitioner; Petitioner	Counsel:	Fullerton, Lemann, Schaefer & Dominick; Mark William Regus, II
The Eduardo Digon And Juana Esther Digon 1998 Digon Revocable Trust	Trust	Counsel:	
Maria Malchev	Objector	Counsel:	Mark William Regus, II

***Vacated***

(lc)

Future hearing dates: 09/19/22 Petition to Determine Title and Petition to Confirm Removal of Successor

## Probate Notes

**Calendar # 14**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200740

**Case Name:** Estate Of

David Elliott

### **PARTIES:**

David Anthony Elliott	Decedent	Counsel:	
Breanna Dominguez	Guardian Ad Litem	To:	Trust
Valerie Iniguez	Administrator	Counsel:	Kyle R Graves

**MATTER SET FOR HEARING:** Petition for Letters of Administration w/full IAEA authority by Valerie Iniguez, girlfriend and co-owner of real property

### **PRIOR ORDERS:**

**Valerie Iniguez appointed special administrator on 05/26/22. Attorney Breanna Dominguez appointed GAL for Maggie Elliott.**

### **GENERAL INFORMATION:**

- A. Petitioner seeks any cash be placed in blocked account.
- B. Net estate value: \$100,000 in real property. *No cash in estate; petitioner seeks **full** authority.*
- C. DOD 01/01/22

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. **Need** report of GAL Breanna Dominguez.
2. Proposed order ~05/19/22

### **RECOMMENDATION:**

Need report, Court's discretion re bond/blocked account. If approved, an Inventory and Appraisal is due by: **10/20/22**. Accounting or Status Report is due by **08/31/23**

(kd/lc)

## Conservatorship Notes

Calendar # 15

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 10:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Conservatorship

Case #: CONSB2100075

Case Name: Conservatorship Of  
Susan Carol Allen Ashmore

### **PARTIES:**

Ruth L Henricks	Petitioner	Counsel:	Bryan Calvin Hartnell
Susan Carol Allen Ashmore	Conservatee	Counsel:	
J David Horspool	Guardian Ad Litem	to:	Conservatee

### **See Also 16**

### **THIS CASE SET FOR HEARING ON**

- Petition for Appointment of Conservator, of the person by ***Ruth L. Henricks, PPF.***
- ***Competing*** Petition for Appointment of Conservator, of the ***person and estate***, by ***Scott Allen, son***, for himself ***Stacey Allen (person)*** and ***Robert Hammond, PPF(estate)***, respectively

### **PRIOR ORDERS:**

On 07/15/21 Ruth Henricks appointed temporary conservator of the person on 07/15/21. Continued from **08/25/21** continued by stipulation. Reason for continuance: For probate notes to be cleared. Written objections by Scott Allen to be filed by 10/15/21 or shall be deemed waived.

Continued from 11/17/21 at the request of Scott Allen. Reason for continuance: To file a competing petition. Court orders to be filed by 12/1/21 or will deemed waived. Temporary letters to continue to 3/9/2022. Court directs the clerk's office to set the competing petition once filed for 3/9/22. Referred to Court Investigator for updated report to include the objector. Hearing on Petition for Conservatorship set for 3/9/2022.

Continued from 01/06/22 Matter continued by stipulation. Reason for continuance: To be hear with other pending petitions. Attorney Appointed GAL J David Horspool. Clerk's office to provide copy of file to counsel Hearing on Petition for Conservatorship set for 3/9/2022

On 01/07/22 Ruth Henricks (PPF) appointed temporary conservator of the person and estate on 01/07/22; \$20,000.00 bond.

At 01/25/22 hearing Attorney George Theios brings to the Courts attention that the Court Investigator did not get to interview Ruth Henricks as she was out ill. The report has been completed and the CI stated they will not interview her without court order. Court orders the Court Investigator to interview Ruth Henricks and prepare and submit a supplemental report for the 3/9/22 hearing. Referred to Court Investigator for updated report to include interview with Ruth Henricks.

Continued from 04/20/22 due to power outage.

**GENERAL INFORMATION**

**Petitioner 1 Ruth L. Henricks, PPF.**

- A. Ruth Henricks appointed temporary conservator of the person on 07/15/21.
- B. Ruth Henricks appointed temporary conservator of the person and estate on 01/07/22; \$20,000.00 bond.

**Competing Petitioner Scott Allen, son, for himself–Stacey Allen (person) and Robert Hammond, PPF (estate)**

- C. Petitioner seeks bond of \$220,000. Petitioner has been told assets are held in trust.
- D. Scott Allen nominates Robert Hammond as conservator of **estate** and Robert Hammond consents.

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

**Petitioner 1 Ruth L. Henricks, PPF.**

- 1. Petitioner is a professional fiduciary and alleges that the proposed conservatee's primary caregiver, Michael Allen (son), is ill and unable to serve as conservator. [pet p. 12].
- 2. It is noted that the conservatee has a trust where she names Michael Allen (son) as co-trustee. The proposed conservatee is no longer able to serve and requests a professional or a bank to serve. [pet. p. 9]. Question – Whether a Petition for Appointment of Successor Trustee has been filed with this Court and assigned a TRU case number? **JTD**
- 3. Petitioner seeks medical powers. **Need** Capacity Declaration with attachment GC-335A.
- 4. Petitioner seeks neurocognitive disorder powers [pet. p. 13].
  - a. **Need** report of GAL Horspool.
  - b. **Need** appointment of counsel.
- 5. Notice of hearing and proof of service filed on 07/15/21; however, **Need** notice to:
  - a. Scott Allen (son) served as to temporary and appeared 01/06/22 **JTD**
  - b. Evan Allen (grandson) served as to temporary.
- 6. CI reports filed 08/17/21, 12/30/21 & **02/16/22**
- 7. Citation served.
- 8. **Objections filed 10/15/21 by Son Scott Allen.**
- 9. Proposed Form Order: ~07/09/21

**Competing Petitioner Scott Allen, son, for himself–Stacey Allen (person) and Robert Hammond, PPF (estate)**

- 10. Petitioner seeks medical powers. **Need** Capacity Declaration with attachment GC-335A. Petitioner alleges Bryan Hartnell was to coordinate with temporary conservator to obtain Capacity Declaration.
- 11. Petitioner seeks neurocognitive disorder powers.
  - a. **Need** report of GAL Horspool
  - b. **Need** appointment of counsel for report

12. **Need** return of Citation. Proof of service filed on 12/01/21 is incomplete as to all sections. **Citation filed 12/01/21; however, proof of service is incomplete. Proof of service attached to supplement is also illegible.**

13. **Need** Certificate of Completion of the Conservatorship Training Class for Scott Allen

14. CI Report filed **12/30/21**.

15. Proposed Form Order: ~11/30/21.

### **RECOMMENDATION**

Need to clear notes 3-5 and 10-13. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the required documents. Accounting is due by **08/31/23**.

(lc/cms/lc)

## Conservatorship Notes

**Calendar # 16**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Conservatorship

**Case #:** CONSB2100075

**Case Name:** Conservatorship Of  
Susan Carol Allen Ashmore

### **PARTIES:**

Ruth L Henricks	Petitioner	Counsel:	Bryan Calvin Hartnell
Susan Carol Allen Ashmore	Conservatee	Counsel:	
J David Horspool	Guardian Ad Litem	to:	Conservatee

### ***See Also 15***

See notes on other matter

(lc)



## Conservatorship Notes

Calendar # 17

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 10:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Conservatorship

Case #: CONSB2100076

Case Name: Conservatorship Of  
John Jimenez

### **PARTIES:**

Clarice Jimenez	Petitioner	Counsel:	Marivel M Zialcita
John Jimenez	Conservatee	Counsel:	
Jennifer Daniel	Guardian Ad Litem	to:	Conservatee

### ***See Also 18***

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Conservator, of the person and estate by Clarice Jimenez, daughter

**PRIOR ORDERS:** At 07/19/21 ExParte orders denied – Court orders that Clarice Jimenez be able to have a one hour visit with the proposed conservatee in the next 3 days. Court orders Maria Jimenez to cooperate with petitioner to get a capacity declaration completed as to the proposed conservatee. Maria Jimenez to file objections by 08/16/21.

**Continued 12/21/21 at the request of the Court. Reason for continuance: Supplement to be filed.**

**Continued from 04/12/22 by stipulation.**

**Conservatee died on 08/23/21.**

Continued from 09/01/21 by stipulation. The proposed conservatee has passed away. A notice of death to be filed. Court will continue the matter for Attorney Zialcita to file a request for sanctions for failure to comply with court order. Notice to be given by Attorney Marivel Zialcita.

**Continued from 11/24/21** at request of Attorney Marivel Zialcita for notes to be cleared.

**Continued 12/21/21 at the request of the Court. Reason for continuance: Supplement to be filed.**

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

1. Petitioner Clarice Jimenez seeks bond of \$50,000.00 – Insufficient. Suggest bond \$561,200.00. **JTD**
2. Petitioner seeks medical powers. **Need** Capacity Declaration.
3. Will the Court appoint counsel and/ or Guardian Ad Litem for the conservatee?  
**Need** appointment for report.
4. **Need** return of Citation.

5. **Need** Certificate of Completion of the Conservatorship Training Class (1)
6. CII referral filed 07/12/21; however, **need** social security number and DOB as to other household members.
7. **Need** Order appointing Court Investigator (Form GC-330).
8. **Need** Court Investigator report
9. Notice given.
10. No Objections by Maria Jimenez to date, as ordered on 07/19/21.
11. Proposed Form Order: none. **Need** proposed orders and letters.

**RECOMMENDATION**

Moot as conservatee has passed away.

(/nb/kd/lc)

## Conservatorship Notes

Calendar # 18

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 10:00 AM

Department S36 - SBJC

Hearing: Hearing Re: Petition for Non-compliance Of  
Court Order

Case #: CONSB2100076

Case Name: Conservatorship Of  
John Jimenez

### **PARTIES:**

Clarice Jimenez	Petitioner	Counsel:	Marivel M Zialcita
John Jimenez	Conservatee	Counsel:	
Jennifer Daniel	Guardian Ad Litem	to:	Conservatee

**See Also 17**

**THIS CASE SET FOR HEARING ON [Supplemented 12/17/21]** Petition for Non-Compliance of Court Order and California Rules of Court 2.30 Sanctions and Surcharge against Maria Jimenez and for Attorney's Fees by Clarice Jimenez, daughter [Petitioner].

### **PRIOR ORDERS**

***Conservatee died on 08/23/21.***

Continued 12/12/21 at the request of the Court. Reason for continuance: Supplement to be filed.

**Continued from 04/12/22 by stipulation.**

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

1. Petitioner Clarice Jimenez alleges that Maria Jimenez has not adhered to Court orders re: visitation with Conservatee.
2. Petitioner indicates Maria Jimenez has not accommodated visits on several occasions; has involved law enforcement to limit access to Conservatee; and maliciously had a TRO served on Petitioner and her sisters before Conservatee's funeral, thereby, preventing Petitioner and her sisters to attend Conservatee's funeral.
3. Petitioner requests a surcharge and order against Maria Jimenez for attorney fees of **\$11,381.73-updated in supplement. Supp of 12/17/21** itemizes attorney's fees. Attorney fees are \$475 per hr.; greater than the community standard. **JTD.**
  - a. **Further supplement filed 03/24/22 which appears to reiterate visit attempts etc.**
4. Petitioner further requests the Court order sanctions against Maria Jimenez for Non-Compliance of Orders.

5. **Response by Maria Jimenez, filed 11/12/21, denies allegations; requests dismissal of Petition for Sanctions; and requests Petition for Surcharge be dismissed.**
6. **Reply to supplement filed by Maria Jimenez on 04/06/22.**

**RECOMMENDATION**

Courts discretion.

(nb/kd/lc)

## Conservatorship Notes

Calendar # 19

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 10:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Conservatorship

Case #: CONSB2200070

Case Name: Conservatorship Of  
Kalvin G Morales

### **PARTIES:**

Ma R Hernandez Ceja; George G Morales Jr ; George G. Morales; Karla V Morales	Petitioner; Petitioner; Petitioner;	Counsel:	Gisselle M Quintana
Kalvin G Morales	Conservatee	Counsel:	Mark H McGuire
Mark H McGuire	Guardian Ad Litem	to:	Conservatee

**THIS CASE SET FOR HEARING ON** Petition for Appointment of **Limited** Conservator, of the **person only** by George and Karla Morales and George Morales, Jr., parents and brother.

### **PRIOR ORDERS:**

Karla Morales appointed temporary Conservator of the person on 03/14/22.

**Continued from 04/14/22. \*Interpreter\*. Mark McGuire waives service of citation. George Jr and George Morales added as temporary conservators of the person. Temporary letters to continue to 06/23/22. Withdrawal to act of Ma Hernandez granted.**

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

1. All petitioners appear to reside at same residence.
2. Petitioners seek powers re habilitation, treatment, training, medical etc. per Pr.C. § 2351. **-JTD**
3. Petitioners seek civil rights not be limited without court order. **-JTD**
4. Petition requests court order that proposed conservatee lacks capacity to enter into valid marriage per Pr.C. §1901. **-JTD**
5. Petitioner seeks medical powers. Capacity Declaration filed **03/04/22**.
6. Proposed conservatee is developmentally disabled.
  - a. Report of Counsel McGuire filed **03/14/22**.
  - b. IRC report filed **06/15/22**.
7. Certificates of Completion of the Conservatorship Training Class filed.
8. Court Investigator report filed **03/31/22**
9. Proposed Form Order: ~03/04/22

### **RECOMMENDATION**

Court's discretion. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the required documents.

(lc)

## Guardianship Notes

Calendar # 20

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 11:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Appointment of Guardian

Case #: GARSB2100104

Case Name: Guardianship Of  
Justin Ruis

### PARTIES:

Marlo Marie Hunt	Petitioner	Counsel:	Pro Se
Justin Gage Ruis	Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Marlo Marie Hunt, paternal grandmother

### PRIOR ORDERS:

Marlo Marie Hunt appointed temporary guardian on 07/30/21. Mother to file and serve written objections by 08/31/21. Mother Julie Hanning to do a drug test by 08/02/21 at her expense. Results to be file or brought to next hearing. Continued from 09/09/21. Mother present and deemed served. Copy of drug test is filed by mother. Mother directed to file her written objections forthwith. Referred to Court Investigator.

**Continued from 01/20/22. Visitation with minor is to be determine between parties. Temporary letters continue to 06/23/22. Re-referred to Court Investigator.**

### GENERAL INFORMATION

- A. Minor and Age: Justin 3 [4/18]
- B. Mother of Minor: Julie Hanning
- C. Father of Minor: Joseph Ruis
- D. Siblings over Age 12+: Javien 13 ***GARSB2100105 next matter***

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

- 1. **Personal Service**
  - a. Mother: **served.**
  - b. Father: **No:**
- 2. **Notice by Mail**
  - a. Paternal Grandfather: **No:**
  - b. Paternal Grandmother: **Petitioner**
  - c. Maternal Grandfather: **No:**
  - d. Maternal Grandmother: **No - unknown**
  - e. Siblings Age 12+: **No**
- 3. Referral for CII: **Need** parent's Social Security numbers if attainable.

4. **Need** notice of related case for **GARSB2100105** *Siblings Javien and Jayce*
5. Court Investigator report filed **01/11/22** and **06/06/22**.
6. Proposed Order: ~07/27/21

**RECOMMENDATION:**

Need to clear note 1-4.

(lc)



## Guardianship Notes

Calendar # 21

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 11:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Appointment of Guardian

Case #: GARSB2100105

Case Name: Guardianship Of

Javien Ruis, Et Al.

### **PARTIES:**

Amber Marie Maze; Michael Matthew Maze	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Javien Ruis; Jayce Ruis	Minor; Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Michael and Amber Maze, aunt and uncle.

### **PRIOR ORDERS:**

Michael and Amber Maze appointed temporary guardians on 07/30/21. Mother to file and serve written objections by 08/31/21. Mother Julie Hanning to do a drug test by 08/02/21 at her expense. Results to be file or brought to next hearing.

Continued from 09/09/21. Mother present and deemed served. Copy of drug test is filed by mother. Mother directed to file her written objections forthwith. Referred to Court Investigator.

**Continued from 01/20/22. Visitation with minor is to be determine between parties. Temporary letters continue to 06/23/22. Re-referred to Court Investigator.**

### **GENERAL INFORMATION**

- A. Minors and Age: Javien 13 [8/08] and Jayce 11 [06/10]
- B. Mother of Minor: Julie Hanning
- C. Father of Minor: Joseph Ruis
- D. Siblings over Age 12+: n/a

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

- 1. **Personal Service**
  - a. Mother: **served.**
  - b. Father: **No:**
  - c. Minors (Age 12+): **No:**
- 2. **Notice by Mail -**
  - a. Paternal Grandfather: **No:**
  - b. Paternal Grandmother: **No:**
  - c. Maternal Grandfather: **No:**
  - d. Maternal Grandmother: **No - unknown**

3. Referral for CII: **Need** parent's Social Security numbers if attainable.
4. **Need** notice of related case for **GARSB2100104 Sibling Justin**
5. Court Investigator report filed **01/11/22** and **06/06/22**.
6. Proposed Order: ~07/27/21

**RECOMMENDATION:**

Need to clear note 1-4.

(lc)

## Guardianship Notes

**Calendar # 22**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Final Accounting

**Case #:** GARSS1100334

**Case Name:** In Matter Re Jolisha Horne Etal

### **PARTIES:**

Janerio Christopher; Jolisha Horne	Minor; Minor	Counsel:	
Leslie Christopher; Leslie Christopher; Leslie Christopher	Guardian of Person/Estate;	Counsel:	Pro Se; Pro Se; Pro Se

**THIS CASE SET FOR HEARING ON** Final Account, by Leslie Christopher, Guardian/maternal aunt; ward Janerio 19.

### **PRIOR ORDERS:**

Continued from 10/21/21. No service, report not in proper format. Accounting or written status report to be filed no later than 02/17/22.

**Continued from 03/17/22 to clear notes and bring ExParte petition for final discharge.**

### **GENERAL INFORMATION**

Guardian discharged as to other minor, Jolisha, on 10/27/15.

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

1. ***\*Note an ExParte Petition to dispense approved on 03/22/22; accounting period 04/21/15 to present. Court may wish to deem this as a final account as minute order indicates a final discharge shall be submitted.***
2. **Need** receipt for Janerio.
3. **Need** ExParte Petition for Final Discharge Order.

### **RECOMMENDATION:**

Need to clear note 2-3, Court's discretion re note 1.

(lc)

## Guardianship Notes

**Calendar # 23**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARSB2200256

**Case Name:** Guardianship Of  
Logan Morain

**PARTIES:**

Devin Lyon	Petitioner	Counsel:	Valerie Lee Murphy
Logan Morain	Minor	Counsel:	

Amended Petition filed 05/19/22 supersedes this petition.

(kd)

Future Hearing: 07/05/2022 Hearing On Amended Petition for Appointment Of Guardianship

## Guardianship Notes

Calendar # 24

Honorable: Michelle Gilleece

Date: 06/23/2022

Time: 11:00 AM

Department S36 - SBJC

Hearing: Hearing on Petition for Termination of  
Guardianship

Case #: GARPS1900436

Case Name: Roderick Acosta Jr And Brian Huerta

### PARTIES:

David Casco; Yuriana Casco	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Roderick Acosta Jr ; Brian F Huerta	Minor; Minor	Counsel:	
Laurianne Casco	Mother	Counsel:	Pro Se

**THIS CASE SET FOR HEARING ON** Petition for Termination of Guardianship by Laurianne Casco, mother.

### PRIOR ORDERS:

### GENERAL INFORMATION:

- A. Yuriana and David Casco, maternal grandparents, appointed guardian of person only on 08/27/20.
- B. Minors – Roderick 5 [7/16] and Brian 3 [02/19]
- C. Laurianne Casco seeks termination on the basis she indicates she is employed, has a stable home and child care.

### ISSUES AND DEFICIENCIES IN PLEADINGS NOTED:

1. **Need** notice of hearing and proof of mailed service [GC-020] or due diligence declaration on
  - a. Guardians/maternal grandparents.
  - b. Father Roderick Acosta.
  - c. Paternal grandfather – unknown per initial petition for guardianship.
  - d. Paternal grandmother – incomplete section; however, is Fidelina Landaverde per initial petition for guardianship.
2. **If** referred to Court Investigator, **need** report.
3. Proposed Form Order: ~05/16/22

### RECOMMENDATION

Need to clear notice.

(kd/lc)

# Guardianship Notes

**Calendar # 25**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S36 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARSB2200264

**Case Name:** Guardianship Of  
Eddie Cendejas

## **PARTIES:**

Sonja Aracely Cendejas; Josie Marie Kankelborg	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Eddie Donovan Cendejas	Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian of the Person, by Sonja Aracely Cendejas and Josie Marie Kankelborg, sister and paternal grandmother.

## **PRIOR ORDERS:**

**Josie Marie Kankelborg and Sonja Aracely Cendejas appointed temporary guardians of the person on 05/24/22.**

## **GENERAL INFORMATION**

- A. Minor and Age: Eddie 5 [07/16]
- B. Mother of Minor: Itavia M Harber
- C. Father of Minor: Edward Cendejas-deceased as of 09/03/21
- D. Sibling over Age 12+ Sonya -petitioner
- E. Petitioners indicates intent to adopt.
- F. Minor has resided with the petitioners since birth

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

- 1. **Personal Service**
  - a. Mother: **Due diligence declaration filed 05/24/22**
  - b. Father: **deceased**
- 2. **Notice by Mail**
  - a. Paternal Grandfather: **No**
  - b. Paternal Grandmother: **petitioner**
  - c. Maternal Grandfather: **No - unknown**
  - d. Maternal Grandmother: **No - unknown**
- 3. Petitioners request the right to apply for public benefits and SSI
- 4. CI Report: **Need** report if referred
- 5. ~Proposed Order: 05/19/22

## **RECOMMENDATION:**

Need to clear note 2 and then Court's discretion.

(kd/lc)

## Probate Notes

**Calendar # 26**

**Honorable: Michelle Gilleece**

**Date:** 06/23/2022

**Time:** 1:30 PM

Department S36 - SBJC

**Hearing:** Settlement Conference

**Case #:** PROPS2000430

**Case Name:** Estate Of Abel Montes Lucio

### **PARTIES:**

Elias Chavez Lucio; Nelly Lucio	Petitioner; Petitioner	Counsel:	Romaine Lokahandwala Law Group, LLP; Nigel John Burns
Abel Montes Lucio	Decedent	Counsel:	

Status conference continued from 05/04/22. All parties and counsel to be present. Any and all briefs shall be served and filed no later than 06/16/22.

(lc)

Future hearing dates: 08/18/22 Notice of Motion to Amend Elias Lucio's Petition to Appoint  
08/18/22 Petition for Probate of Will WWA

## Guardianship Notes

**Calendar # 1**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 8:30 AM

Department S37 - SBJC

**Hearing:** Petition Hearing Petition For Visitation

**Case #:** GARSB2100069

**Case Name:** Guardianship Of  
Josiah Nickolia Saddler

### **PARTIES:**

Shirley O'neal; Charles H O'neal	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Josiah Nickolia Saddler	Minor	Counsel:	
Ryan O'neal	Father	Counsel:	

### **SEE ALSO 2**

No Notes – Visitation.  
(nb)



**Guardianship Notes**  
**Honorable: Tara Reilly**

**Calendar # 2**

**Date:** 06/23/2022

**Time:** 8:30 AM

Department S37 - SBJC

**Hearing:** Trial Readiness Conference Petition For  
Guardianship

**Case #:** GARSB2100069

**Case Name:** Guardianship Of  
Josiah Nickolia Saddler

**PARTIES:**

Shirley O'neal; Charles H O'neal	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Josiah Nickolia Saddler	Minor	Counsel:	
Ryan O'neal	Father	Counsel:	

**SEE ALSO 1**

No notes – Trial Readiness.  
(nb)

## Probate Notes

**Calendar # 3**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing Re: 2nd Accounting Report Of Trustee

**Case #:** CIVDS1510563

**Case Name:** Monica Zamarron -v- American Honda Motor Co, Et Al

**PARTIES:**

Wells Fargo Bank, National Association	Petitioner	Counsel:	RODNUNSKY & ASSOCIATES
Monica Zamarron 2017 Special Needs Trust	Trust	Counsel:	
Sandra Felix; Yvette Figueroa; Donnasue Ortiz	Guardian Ad Litem	To:	Trust; Trust; Trust

**SEE ALSO 4**

**XREF: TRUSB2200012** *MONICA ZAMARRON 2017 SPECIAL NEEDS TRUST*

Currently under review by Legal Research.  
(LR)

## Probate Notes

**Calendar # 4**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Order to Show Cause Hearing Sanctions For  
Failing To Appear 1/13/22

**Case #:** CIVDS1510563

**Case Name:** Monica Zamarron -v- American Honda Motor Co, Et Al

### **PARTIES:**

Wells Fargo Bank, National Association	Petitioner	Counsel:	RODNUNSKY & ASSOCIATES
Monica Zamarron 2017 Special Needs Trust	Trust	Counsel:	
Sandra Felix; Yvette Figueroa; Donnasue Ortiz	Guardian Ad Litem; Guardian Ad Litem; Guardian Ad Litem		Trust; Trust; Trust

**SEE ALSO 3**

**XREF: TRUSB2200012** *MONICA ZAMARRON 2017 SPECIAL NEEDS TRUST*

Currently under review by Legal Research.  
(LR)

## Probate Notes

**Calendar # 5**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Probate Status Report Hearing First Report On  
Status Of Administration

**Case #:** PROPS2001008

**Case Name:** Estate Of Gregory Evan Wallace

### **PARTIES:**

Linda Wallace Bentz	Petitioner	Counsel:	Damien J Snow
Gregory Evan Wallace	Decedent	Counsel:	

### GENERAL INFORMATION

Date of Death: 03/10/20

Final Inventory & Appraisal filed 06/07/21.

THIS CASE IS SET FOR HEARING ON Status Report [filed 03/11/22].

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

1. The Administrator, Linda Wallace Bentz, requests an additional one (1) year to complete the Administration of the Estate because the Administrator has been unable to sell the estate's real property.
2. As of the date of this petition, the petitioner has successfully obtained a writ of possession for the Valley Vista Rd. property and expects to have a Sheriff's lockout date in the near future allowing her to regain possession of the property.
3. As soon as is practicable after regaining possession of the Valley Vista Rd. property, the Petitioner intends to list it on the MLS and sell it for fair market value with the assistance of a licensed professional realtor.
4. For the foregoing reasons, continued administration of the estate is necessary and Petitioner requests additional time to administer and close the probate estate.
5. Proof of Service, only, filed on 03/11/22. **Need** Notice of Hearing and proof of service in accord with Pr.C. § 12201. Whenever a status report is filed without an accounting, notice must indicate a right to an accounting in accord with Pr.C. §10950. **This form of notice is mandatory.**
6. No proposed Order.

### RECOMMENDATION:

Require notice then Courts discretion. If approved, next Accounting Review due by **03/14/23.**

(nb)

## Probate Notes

**Calendar # 6**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Spousal/Domestic Partner Property  
Petition

**Case #:** PROPS2100018

**Case Name:** Estate Of Eleanor M. Lambeth

### **PARTIES:**

Kevin James Lambeth	Petitioner	Counsel:	Solomon A Cheifer
Eleanor M. Lambeth	Decedent	Counsel:	

### **X-REF: BPRBS00835**

#### GENERAL INFORMATION

Date of Death: 01/09/04

**Continued 02/17/21.** Matter continued at the request of counsel who contacted the Judicial Assistant prior to this matter being called. Counsel indicates there was a prior probate petition filed on this estate and requests additional time to research that case. Possible related case is BPRBS00835.

**Continued 06/09/21** at the request of Solomon A Cheifer for probate notes to be cleared. Counsel made request via telephone call.

**Continued from 10/27/21** on courts motion. Order on BPRBS00835 to be sent to counsel.

**Continued from 01/06/22 at request of counsel, Solomon A Cheifer. Will has been found. Counsel to discuss how to proceed with his client.**

THIS CASE SET FOR HEARING ON Petition to Determine Succession to Real Property by Kevin James Lambeth, son/sole heir

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

1. NOTE: Petition to Determine Succession to Real Property filed previously under BPRBS00835. Petition not imaged, unable to determine if it is the real property that is subject to this petition.
2. Petitioner seeks 100% interest; in decedent's 100% interest; in real property per intestate succession.
3. ~Proposed Form Order: 01/07/21

#### RECOMMENDATION

Court's discretion.

(kd/nb)

## Probate Notes

**Calendar # 7**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition to Determine Succession to  
Real Property

**Case #:** PROSB2101028

**Case Name:** Estate Of  
Theil Eastabrook

### **PARTIES:**

John Snowden	Petitioner	Counsel:	Stephanie L Weisman
Theil Mckinney Eastabrook	Decedent	Counsel:	

### GENERAL INFORMATION

Date of Death: 11/30/2008

**Continued from 01/20/22 on courts motion for amended petition adding all grandchildren to be filed. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Succession to Real Property by grandson, John Snowden ["Petitioner"].

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

1. Section 1 to petition does not include all persons claiming an interest in subject property. **Supp. (03/14/22)** includes all signatures.
2. Inventory & Appraisal attached to petition has the following issues:
  - a. **Need** signatures of verification by all parties.  
**Need** corrected inventory
3. Petitioner requests a determination that decedent's 25% interest in real property located at Morongo Valley, in San Bernardino County, pass to petitioner without administration. Petitioner is decedent's grandson and an heir to a post-deceased beneficiary, daughter, Jean P. Bowman. Petitioner attaches a copy of decedent's holographic will (also typed) indicating her 3 daughters, who are all now deceased, to inherit subject real property.
4. Vesting deed **supp** (06/10/22 pg 20)
5. Assignment of Interest by Charles Stanley to Jimmy James Alford filed 03/14/22.
6. ~Proposed Order:06/08/22

### RECOMMENDATION:

Need corrected I&A; then Court's Discretion.  
(nb/kd)

## Probate Notes

**Calendar # 8**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition to Determine Succession to  
Real Property

**Case #:** PROSB2101148

**Case Name:** Estate Of  
Sherry Embrey

### **PARTIES:**

Kimberly Ann Swanson	Petitioner	Counsel:	Pro Se
Sherry Ann Embrey	Decedent	Counsel:	

### **GENERAL INFORMATION**

Date of Death: 10/09/08 (intestate)

**PRIOR ORDERS:** 03/02/22. Kimberly Ann Swanson is sworn in. The Court recommends petitioner to hire a Probate attorney. The Court notes petitioner has two other siblings not listed on Petition. The Court informs petitioner she may re-file Petition to Determine Succession to Real Property with all surviving heirs. Petition Denied without prejudice.

**THIS CASE IS SET FOR HEARING ON** Petition to Determine Succession to Real Property (03/18/22) by issues, Kimberly Ann Swanson, **Donald Earl Embray and Mitchel Raymond Embrey [Petitioners]**

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

1. **Need** Final Inventory & Appraisal that is verified by all petitioners and signed by Probate Referee.
2. **Need** verified supplement to paragraph 9; re: whether decedent is survived by a spouse, registered domestic partner and/or issue of predeceased child.
3. Attachment 11 to petition does not include character of the property as community, separate, or quasi-community property. **Need** verified supplement.
4. Section 15 to petition re: if there is a will is incomplete. **Need** verified supplement
5. **Need** Attachment 13 re: specific property interest claimed by each petitioner in the real property, via verified supplement, which is not included as alleged.
6. Petitioners allege decedent was a resident of the County, and owned real property in California at the time of death.
7. Petitioners request a determination that decedent's real property located in San Bernardino County (Blue Jay) pass to petitioners without administration.
8. No Proposed Order.

### **RECOMMENDATION**

Clear notes 1-5.

(em/nb)

## Probate Notes

**Calendar # 9**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hrg on Petition for Probate of Will & Letters  
Testamentary

**Case #:** PROSB2200188

**Case Name:** Estate Of  
Jeffrey Michaels

### **PARTIES:**

Julie Michaels	Petitioner	Counsel:	Grace M Kim
Jeffrey Michaels	Decedent	Counsel:	

**MATTER SET FOR HEARING:** Petition for Probate of Will & Letters Testamentary by Julie Michaels, surviving spouse [petitioner]

**PRIOR ORDERS:** Continued from 03/17/22 on courts motion for notes to be cleared.

### **GENERAL INFORMATION:**

A. DOD 05/24/21

B. Will dated: 09/11/01

lodged: 04/19/22

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. Petition indicates all heirs waive bond. The court may for good cause require that a bond be given, either before or after issuance of letters per Pr.C. § 8481(b). Net estate \$300,000.00 in personal property. **JTD.**
2. Copy of will attached to petition is not legible. **Need** a legible copy. Notice filed 04/19/22 does not include copy of Will.
3. Notice of Petition to Administer Estate and proof of service filed 02/17/22. However, unable to determine if notice is complete per note 2.

### **PE'S COMMENTS:**

Need to clear notes 2 then Courts discretion re: bond. If approved, an Inventory and Appraisal is due by: **10/20/22**. Accounting or Status Report is due by **08/31/23**. Any accounting to be filed 30 days in advance local rule 20-901. Note requirements of local rule 20-908.

**PROPOSED ORDER LODGED:** No order submitted.

(kd/nb)



## Probate Notes

**Calendar # 10**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Spousal/Domestic Partner Property  
Petition

**Case #:** PROSB2200579

**Case Name:** Estate Of:  
Anita Walton

### **PARTIES:**

Robert R Walton Iii	Petitioner	Counsel:	Victoria Paige Herrick
Anita Gail Walton	Decedent	Counsel:	

### GENERAL INFORMATION:

Date of Death: 07/07/11

THIS CASE IS SET FOR HEARING ON Spousal Property Petition by Robert R. Walton ["Petitioner"].

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

1. Robert R. Walton requests a determination of real property passing to the surviving spouse as community property. Specifically, real property at Hesperia, in San Bernardino County.
2. Petitioner and decedent married in 1987. The real property was purchased in 2006 from the Mother of the decedent. Petitioner and decedent made payments on loan attached to said Property from community funds. Petitioner continues to make payments. Petitioner and Decedent intended to add petitioner's name to property, but did not do so prior to Decedent's death in 2011.
3. Assignment by sole issue, Katie J. Walton, in favor of petitioner, filed 04/22/22.
4. Notice given.
5. ~Proposed Form Order 04/22/22

### RECOMMENDATION:

Courts discretion.

(nb)

**Probate Notes**

**Calendar # 11**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200729

**Case Name:** Estate Of  
Esequiel Gomez

**PARTIES:**

Myrna Gomez Hackett	Petitioner	Counsel:	Diana J. Carloni
Esequiel Frank Gomez	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Letters of Administration with full IAEA by daughter, Myrna Gomez Hackett [Petitioner]

**PRIOR ORDERS:** none

**GENERAL INFORMATION:**

Date of Death: 09/19/16

- a) Bond: Petitioner requests bond of \$25,000 be fixed and anything over \$20,000 to be deposited into a blocked account at Desert Community Bank in Apple Valley, CA.

**JTD**

- b) Net Value of Estate: \$141,500 (\$141,000 real property & \$500 personal)

**ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

- 1. ~Proposed Order/Letters: 05/17/22

**RECOMMENDATION:**

Court's discretion re: bond. If approved, an Inventory and Appraisal is due by: 10/20/22. An Accounting or Status Report is due by: 08/31/23.

(nb/kd)

## Probate Notes

**Calendar # 12**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200739

**Case Name:** Estate Of  
William Swanson

### **PARTIES:**

Diana Johnson	Petitioner	Counsel:	Kyle R Graves
William C Swanson	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Letters of Administration with full IAEA by Cousin, Diana Johnson [**Non-Resident** Petitioner].

**PRIOR ORDERS:** none

### **GENERAL INFORMATION:**

Date of Death: 03/11/22

- a) Bond: Petitioner requests bond be fixed at \$380,000. Appears sufficient.
- b) Net Value of Estate: \$380,000 in real property

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. Section 3 h (2) to petition does not include permanent address of petitioner. **Supp. (06/13/22) cures this note.**
2. Section 7 re: predeceased spouse to petition is not completed. **Supp (06/13/22) cures this note.**
3. Section 8 to petition does not include paternal next of kin identified by Public Administrator's Office. **Supp (06/13/22) cures this note.**
4. ~Proposed Order/Letters: 05/19/22

### **RECOMMENDATION:**

Court's discretion re: bond. If approved, an Inventory and Appraisal is due by: 10/20/22. An Accounting or Status Report is due by: 08/31/23.

(nb/kd)

## Probate Notes

**Calendar # 13**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 9:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Letters of Administration

**Case #:** PROSB2200747

**Case Name:** Estate Of  
Tomas Torres Gomez

### **PARTIES:**

Emily A Vezie	Petitioner	Counsel:	Linda Moravec Varga
Tomas Torres Gomez	Decedent	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Letters of Administration with full IAEA by daughter, Emily A. Vezie [Non-Resident Petitioner].

**PRIOR ORDERS:** none

### **GENERAL INFORMATION:**

Date of Death: 03/13/22

- a) Bond: Petitioner requests bond of \$532,400 be fixed. Appears sufficient. **JTD**
- b) Net Value of Estate: \$532,400 (\$518,000 real property & \$14,400 personal)
- c) Decedent died a nonresident of California and left an estate in this county
- d) Notice ok/publication ok

### **ISSUES AND DEFICIENCIES NOTED IN THE PLEADINGS:**

1. ~Proposed Order/Letters: 05/19/22

### **RECOMMENDATION:**

Court's discretion re: bond. If approved, an Inventory and Appraisal is due by: 10/20/22. An Accounting or Status Report is due by: 08/31/23.  
(nb/kd)

## Conservatorship Notes

**Calendar # 14**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S37 - SBJC

**Hearing:** First And Final Account And Petition For Final  
Distribution

**Case #:** CONPS1800008

**Case Name:** Mtr Of Manuel Bustamante Sr

### **PARTIES:**

Manuel Bustamante Sr ; Vincent Bustamante; Olivia Dilbeck	Petitioner; Petitioner; Petitioner	Counsel:	Caldwell, Kennedy & Porter; Gordon L Dayton; Gordon L Dayton
Manuel Bustamante Sr	Conservatee	Counsel:	Caldwell, Kennedy & Porter
Vincent Bustamante; Olivia Dilbeck	Conservator; Conservator	Counsel:	

Purported Accounting filed in several, separate counterparts and filed on separate dates.  
**Need** one, complete, Amended First and Final Account et seq., to be filed 30 days before  
hearing date. Note requirements of Local Rules.

(nb)

## Conservatorship Notes

**Calendar # 15**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S37 - SBJC

**Hearing:** Petition Hearing Petition Allowance Of Attorney Fees And Compensation Of Petitioner

**Case #:** CONPS2100017

**Case Name:** Conservatorship Of Maxine K Dilliard

### **PARTIES:**

Roger W Kirst	Petitioner	Counsel:	Mark H McGuire
Maxine K Dilliard; Roger W Kirst	Conservatee; Conservatee	Counsel:	Mark H McGuire
Craig Parker	Guardian Ad Litem	to:	Conservatee

### GENERAL INFORMATION

On May 5, 2022 the Court in Dakota County, MN issued an Order transferring the conservatorship to MN. A copy of the Order is attached to supplement filed 05/23/22.

THIS CASE SET FOR HEARING ON Petition for Allowance of Attorney's Fees and Compensation of Petitioner and Reimbursement for Costs Advanced by Conservator, Roger Kirst [Petitioner].

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

1. Attorney requests **fees** of **\$11,195.00** and **costs** advanced of **\$2,980.35 totaling \$14,175.35**. Billed at \$290-\$325/hour for 27.3 hours' attorney time and \$110-\$130/hour for 27.25 hours' paralegal time for services from 01/05/21 thru 03/31/22, for which, Conservator has already **advanced \$11,961.35 leaving a total due of \$1,615.00**. Itemized [see this petition, LF, pgs. 12, 16-56]. **JTD**
  - a. Prayer reflects non-billable time of \$599.00 indicating the amount due of \$2,214.00
2. Petitioner requests reimbursement for legal fees advanced and **costs totaling \$18,318.48** for services from 01/05/21 thru 03/31/22. Itemized [see this petition, LF, pgs. 13-14]. **JTD**
3. Notice given.
4. Proposed Order: 05/23/22 is incomplete as it does not include amounts prayed for in petition.

### RECOMMENDATION

Courts discretion.

(nb)

FUTURE HEARING: 08/01/22 HEARING RE: PROOF OF CONSERVATORSHIP IN MINNESOTA  
08/01/22 PETITION HEARING FOR ORDER FIXING COMPENSATION

## Conservatorship Notes

**Calendar # 16**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Conservatorship

**Case #:** CONSB2100317

**Case Name:** Conservatorship Of Raymond Joseph Belmonte

### **PARTIES:**

Norma Linda Gamez; Norma Muro	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Raymond Joseph Belmonte	Conservatee	Counsel:	Pro Se

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Conservator, of the person, by Norma Linda Gamez, Sister, and Norma Linda Muro, Mother (Petitioners)

### **PRIOR ORDERS:**

**01/05/22** Norma Linda Gamez and Norma Muro are appointed temporary co-conservators of the person of Raymond Joseph Belmonte. Petitioner's advised to contact IRC regarding services.

**Continued from 03/10/22 on courts motion for notes to be cleared. The Court notes counsel waives citation. Temporary letters to continue to 6/30/2022. Notice given by Counsel.**

### **GENERAL INFORMATION**

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

1. Petitioner seeks medical powers. **Need** Capacity Declaration.
2. Petitioner seeks neurocognitive disorder powers. Report by court-appointed counsel, Shelby Shelton, filed 02/17/22.
3. CI Report filed 03/04/22.
4. ~~Need return of Citation~~ Waived on 03/10/22.
5. **Need** Certificate of Completion of the Conservatorship Training Class (2)
6. Notice given.
7. No Proposed Form Order or Letters.

### **RECOMMENDATION**

Need to clear notes 1 & 5. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the required documents.

(ac/nb)

## Conservatorship Notes

**Calendar # 17**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Conservatorship

**Case #:** CONSB2200028

**Case Name:** Conservatorship Of  
Charles Cotton

### **PARTIES:**

Dwayne Haynes; Heather Jenkins	Petitioner; Petitioner	Counsel:	Jeanne Elizabeth Kennedy; Jack Brian Osborn
Charles Cotton	Conservatee	Counsel:	Rose C Rosado

### **SEE ALSO 18**

See other matter.  
(nb)



## Conservatorship Notes

**Calendar # 18**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 10:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Conservatorship

**Case #:** CONSB2200028

**Case Name:** Conservatorship Of  
Charles Cotton

### **PARTIES:**

Dwayne Haynes; Heather Jenkins	Petitioner; Petitioner	Counsel:	Jeanne Elizabeth Kennedy; Jack Brian Osborn
Charles Cotton	Conservatee	Counsel:	Rose C Rosado

### **SEE ALSO 17**

### **Petition #1:**

#### GENERAL INFORMATION

Continued from **03/16/22** at the request of the Court. Reason for continuance: For probate notes to be cleared. For Counsel's report to be filed. The Court orders all Powers of Attorney revoked as of today, 3/16/22. Attorney Appointed: ROSE ROSADO Clerk's office to provide copy of file to counsel Order Appointing Counsel Filed On its own motion, the Court finds good cause to appoint temporary conservator. Heather Jenkins is/are appointed as temporary conservator for the person and estate of Charles Cotton expiring 12/31/22. Bond required in the amount of \$95,000.00 Order to be filed. Hearing on Petition for Conservatorship set for 6/1/2022

Ex Parte Order to Increase Bond entered on **05/23/22**. The Temporary Conservator to file a supplemental bond in the amount of \$320,000.00.

**Continued from 06/01/22 by stipulation to trail hearing on competing petition. Temporary letters to continue. Notice waived.**

THIS CASE SET FOR HEARING ON Petition for Appointment of Conservator of person and estate by **Heather Jenkins**, niece and petitioner.

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

1. Petitioner seeks bond of \$95,000.00.
2. Petitioner seeks medical powers. Capacity Declaration filed 05/23/22. However, signature lines are not dated. **JTD**
3. Petitioner seeks major neurocognitive disorder powers.
4. Attorney Rose C. Rosado appointed counsel. **Need Report.**
5. Petitioners seek estate powers under Pr.C. § 2590; powers requested not specified. **Supp. (05/27/22) indicates estate powers are not being sought.**
6. Citation and proof of service filed 02/23/22.
7. Certificate of Completion of the Conservatorship Training Class filed 03/07/22
8. Notice given.

9. **Need** CI report
10. **Objections filed 05/18/22 by Dwayne Hayes.**
11. **Response to Objections filed 05/31/22 by Heather Jenkins.**
12. **Objections filed 06/01/22 by Charles Cotton**
13. ~Proposed Form Order: 01/28/22

**RECOMMENDATION**

Need Attorney and CI reports. JTD re: bond & note 2. If approved, set hearing for Compliance Review for **01/19/23** for the filing of the following: proof of service of Order with Notification of Conservatee’s rights per Pr.C. §1830(c); Level of Care and Care Plan per Pr.C. §2352.5; Inventory & Appraisal, and Proof of Service if I&A and Instructions for Objection per Pr.C. § 2610; recordation of letters if applicable per Pr.C. § 2313.

Accounting Review due by **08/31/23**. Any accounting to be filed 30 days in advance. (kd/cms/nb)

\*\*\*\*\*

**Petition #2:**

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Conservator, of the Person and Estate, by alternate nominee, **Dwayne Haynes** [Petitioner – 2<sup>nd</sup> Cousin].

**PRIOR ORDERS:** See other matter.

**GENERAL INFORMATION**

Proposed Conservatee nominated his cousin, Lillian C. Haynes, as his Conservator and named Petitioner as the alternate Conservator. Attached to the petition is the Proposed Conservatee’s Advanced Health Care Directive signed on December 12, 2003 [pgs. 12-19].

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

1. Petitioner seeks bond of TBD. Estimated value of the estate “Unknown.” **JTD**
2. Petitioner seeks powers re habilitation, treatment, training, medical etc per Pr.C. §2351-2358. **JTD**
3. Petitioner seeks Pr. C. §2590 powers to sell real and/or personal property, including conservatee’s primary residence and proceeds to be used for Conservatee’s care and personal needs. Suggest Court require a separate petition after appointment with required showing per Pr. C. 2540 et seq. **JTD**
4. **Need** Capacity Declaration with Attachment GC-335A.
5. Petitioner seeks neurocognitive disorder powers. **Need** report by court-appointed counsel, Rose Rosado.
6. **Need** Certificate of Completion of the Conservatorship Training Class
7. **Need** Court Investigator report
8. Citation with proof of service filed 05/24/22.
9. Notice given.
10. ~Proposed Form Order/Letters: 05/18/22

**RECOMMENDATION**

Need to clear notes 4-7 then Courts discretion re: bond and requested powers. If approved, set hearing for Compliance Review on **01/19/23** for the filing of the required documents. Accounting is due by **08/31/23**.

(nb)

**Guardianship Notes**  
**Honorable: Tara Reilly**

**Calendar # 19**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Termination of  
Guardianship

**Case #:** GARPS1700096

**Case Name:** Mtr Of Elaine Lillian Castaneda

**PARTIES:**

Teresa Lopez	Petitioner	Counsel:	Pro Se
Elaine Lillian Castaneda	Minor	Counsel:	
Jeffery Castenda	Father	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Termination of Guardianship by Jeffery Castenda, father.

**PRIOR ORDERS:**

Continued from **09/30/21** Ex Parte. Need fully noticed hearing. Guardians are not to remove the minor from the state without court approval.

Continued from **01/13/22**. Referred to Court Investigator.

**Continued from 03/24/22 on courts motion for notes to be cleared. Notice by Judicial Assistant. All existing temporary orders shall remain in full force and effect.**

**GENERAL INFORMATION:**

A. Teresa Lopez, maternal grandmother, appointed guardian on 01/11/18.

B. Minor – Elaine 9 [06/12]

**ISSUES AND DEFICIENCIES IN PLEADINGS NOTED:**

1. Request to excuse notice filed 11/15/21 as to mother. Notice to other parties sufficient. **JTD**
2. Letters of Recommendation filed 05/31/22
3. Court Investigator report placed in S37 bin on 03/16/22 per register of actions.
4. Proposed Form Order: ~09/24/21

**RECOMMENDATION**

Court's discretion re note 1.

(lc/nb/kd)

## Guardianship Notes

**Calendar # 20**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Termination of  
Guardianship

**Case #:** GARPS1700550

**Case Name:** Aeriauna, Aysiah, Roxanna Urbina

### **PARTIES:**

Teresa Long; William Long 2	Petitioner; Petitioner	Counsel:	Amy York Garrett; Amy York Garrett
Aeriauna Carmen Irene Urbina; Aysiah Leigh Urbina; Roxanna Roxy Lenette Urbina	Minor; Minor; Minor	Counsel:	

### GENERAL INFORMATION:

#### PROIR ORDERS:

Petitioners were appointed Guardians of the Person on 04/26/18.

Order on County of San Bernardino Request for Child Support entered on 02/26/21.

THIS CASE IS SET FOR HEARING ON Petition for Termination of Guardianship, person only, by Guardians, Teresa Long and William Long II [Petitioners – maternal grandparents]; minors, Aeriauna (17 ½ - DOB 08/2004) & Aysia (16 ½).

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

1. Petitioners, Teresa Long and William Long II, request that the guardianship of the person be terminated. Petitioners are minors' Temporary Guardian of the person.
2. Petitioners allege it is in the best interest of the minors that the guardianship of the person be terminated as minors' have strongly stated to guardians their desire to return to their mother in Ohio. They have been having communication with their mother for the past two years, through their counseling sessions with their respective therapist.
3. Petitioners are told by my granddaughters that mother has had a steady job for the past two years and that mother is clean. Petitioners do not have any information to support these statements.
4. Both girls ave become very rebellious and are insisting going back to their mother. In September 2021, Aeriauana started missing classes at school and started ditching her sports medicine class after school. On or about September 29, 2021, Aaeriauna told us she wanted out of the house and that her mother had proven to her she had completed her rehabilitation program and secured housing. She was defiant and told us she no longer wanted to be at our home. We were worried that

she would become a statistic for runaways and we were at the breaking point, so we allowed her to return with her mother. Aeriauna will be 18 on August 7, 2022. Aysiah - 16-1/2 is angry and defiant and insisting she be allowed to move back to Ohio with her mother.

5. Petitioners request that the court terminate our guardianship as to Aeriauna and Aysiah.
6. Consent to Termination and Waiver of Service and Notice of Hearing signed by Co-Guardians, sibling Roxanna and minor Aysiah, only.
7. Declaration filed 06/16/22 by Teresa Long
8. **Need** Termination of Guardianship Parent Questionnaire.
9. Notices of Acknowledgment filed on 05/25/22 is not signed by minor, Aeriauna, nor mother, Toni M. Fuller.
10. Notice of Hearing with proof of mailed service to:
  - a. Father; Anthony Urbina;
  - b. Mother, Toni M. Fuller;
  - c. Minor, Aeriauna;
  - d. Paternal grandmother; Linda A. Olmeda.
11. ~proposed order: 06/16/22

#### RECOMMENDATION

Need to clear note 8 then Courts discretion re: termination.  
(nb/kd)

## Guardianship Notes

**Calendar # 21**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Termination of  
Guardianship (as To Tania Funderurk)

**Case #:** GARPS1900229

**Case Name:** Treasure L. Funderburk Et Al

### **PARTIES:**

Alvernon C.d. Cain; Venita Haggerty-cofer; Nina S. Winfield	Petitioner; Petitioner; Petitioner	Counsel:	Pro Se; Pro Se; Pro Se
Tania Kathleen Funderburk; Treasure Lashae Funderburk	Minor; Minor	Counsel:	Pro Se; Pro Se
Venita Haggerty-cofer; Nina S. Winfield	Guardian; Guardian	Counsel:	

### **SEE ALSO 22**

**MATTER SET FOR HEARING:** Petition for Termination of Guardianship by Venita Haggerty-Cofer and Nina S. Winfield, maternal grandmother and aunt; minors: Treasure and Tania

### **PRIOR ORDERS:**

Venita Haggerty-Cofer and Nina S. Winfield appointed temporary guardians of the person only on **05/29/19**; general co-guardians of the person only on **02/25/20**.

Continued from **07/07/21**. A petition for successor must be filed. Minor Treasure present; minor Tania is in Georgia residing with her sister Tameka Funderburk, possibly in Atlanta. Father resides in Los Angeles. Tania is to be returned to California and placed with temporary guardians. Minor Treasure has permission to remain in residence of Ms. Raney until next hearing.

Continued from **09/09/21** for successor petition to be filed. Tania is residing with her sister Tameka Funderburk in Georgia and wants to remain with her sister. Tania permitted to reside in Georgia with her sister as long as a guardianship is filed in Georgia. When court is presented with proof, she will grant this petition as to Tania. Tamaxnishba Ramey wishes to become successor guardian of Treasure. Petition to be filed.

Continued from **12/23/21**. Need successor Guardian petition to be filed. Notice waived to father and Paternal grandparents.

**Continued from 03/03/02 on courts motion. Tameka, potential successor guardian, has not responded to guardians and has not initiated a successor guardianship. As to TANIA FUNDERBURK: When/if successor guardianship petition filed in Georgia the Court will concede jurisdiction to the state of Georgia.**

**The Court orders that TANIA FUNDERBURK be returned to the state of California by 3/15/22 unless petition for guardianship is filed in the state of Georgia. Matter referred to the DA Child Abduction unit. As to TREASURE FUNDERBURK:**

TREASURE reports she is living with Great-Great Aunt in Victorville. TREASURE is ordered to contact guardians once a week. Petition for successor guardianship to be filed as to TREASURE. TREASURE referred to Legal Aid for assistance.

**GENERAL INFORMATION:**

- A. Minors and Ages:
  - 1. Treasure 16 [07/05]
  - 2. Tania 13 [01/09]
- B. Mother of Minor: Andrea Andrewin- **Deceased.**
- C. Father of Minor: Darryl Funderburk
- D. Siblings over Age 12+: N/A
- E. Guardians Venita Haggerty-Cofer and Nina S. Winfield seek termination of guardianship as to minors Treasure and Tania as children wish to relocate to godmother.

**DEFICIENCIES IN PAPERS NOTED:**

- 1. **Notice by Mail**
  - a. Mother: **Deceased.**
  - b. Father: **Waived**
  - c. Minors (Age 12+): **No**
  - d. Paternal Grandfather: **Waived**
  - e. Paternal Grandmother: **Waived**
  - f. Maternal Grandfather: **No**
  - g. Maternal Grandmother: **Petitioner**
- 2. Petition section 9 re: names and address is incomplete to the names and addresses of the father; maternal grandfather; paternal grandfather; and paternal grandmother. **Need** verified supplement or amended petition filed.
- 3. CII Referral (Local Form SB-13548) filed 04/28/21 is missing the information the names, DOBs, and SSNs for both parents. **Need** completed form.
- 4. **Need:** If referred to Court Investigator, a CI report would be required.
- 5. ~Proposed Form Order: 04/28/21

**PE's COMMENTS**

Need to clear notes 1-3 and Inquire status of successor guardianship and Georgia guardianship.  
(ww/lc/nb)



## Guardianship Notes

**Calendar # 22**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARPS1900229

**Case Name:** Treasure L. Funderburk Et Al

### **PARTIES:**

Alvernon C.d. Cain; Venita Haggerty-cofer; Nina S. Winfield	Petitioner; Petitioner; Petitioner	Counsel:	Pro Se; Pro Se; Pro Se
Tania Kathleen Funderburk; Treasure Lashae Funderburk	Minor; Minor	Counsel:	Pro Se; Pro Se
Venita Haggerty-cofer; Nina S. Winfield	Guardian; Guardian	Counsel:	

**SEE ALSO 21**

**THIS CASE SET FOR HEARING ON** Petition for Appointment of **Successor** Guardian of the person of Treasure Funderburk only by Alvernon C. D. Cain (maternal great-aunt) [Petitioner]

**PRIOR ORDERS:** Venita Haggerty Cofer and Nina S Winfield were appointed co-guardians on 02/25/20.

Venita Haggerty Cofer and Nina S Winfield (co-guardians) filed a Petition for Termination - matter was continued to 06/23/22.

**Continued from 05/18/22 on courts motion for notes to be cleared. Petitioner and/or Counsel are ordered to appear at the next hearing. Notice by Judicial Assistant.**

### **GENERAL INFORMATION**

- A. Minor(s) and Age: Treasure (16)
- B. Mother of Minor(s): Andrea Anderwin (allegedly deceased)
- C. Father of Minor(s): Darell Funderburk
- D. Sibling(s) over Age 12+: Tania (13)
- E. Petition for Successor Guardianship filed per 03/03/22 minute order.

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

#### **1. Personal Service**

- a. Mother: No: deceased. Request to dispense with notice =. [pet. p. 5]
- b. Father: No:
- c. Minor(s) (Age 12+): No:

#### **2. Notice by Mail or**

- a. Paternal Grandfather: No: allegedly unknown. **Need** Due Diligence Declaration:

- b. Paternal Grandmother: No: allegedly unknown. **Need** Due Diligence Declaration:
  - c. Maternal Grandfather: No:
  - d. Maternal Grandmother: No:
  - e. Sibling(s) (Age 12+): No:
3. Petitioner requests orders related to Pr.C § 2351-2358 as specified in attachment 1e Guardian(s) be awarded the care, custody, and control of the minor child including charge of the education of the minor child and the authority to authorize all medical, dental, psychiatric, and psychological treatment or therapy needed.
  4. **Need** Guardianship Questionnaire.
  5. **Need** Confidential Guardian Screening Form.
  6. CI Report: **Need** if referred.
  7. ~Proposed Order/Letters: 04/12/22

**RECOMMENDATION:**

Need to clear notes 1, 2, 4, & 5 then Court's discretion.  
(cms/nb)

# Guardianship Notes

**Calendar # 23**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing Re: Status Of Visitation And Parenting Plan

**Case #:** GARPS1900577

**Case Name:** Guardianship Of Michael Gomez Magdaleno

**PARTIES:**

Linda T Cabral	Petitioner	Counsel:	Pro Se
Michael Gomez Magdaleno	Minor	Counsel:	
Emily Lerner; Shelby Shelton	Guardian Ad Litem; Guardian Ad Litem	of:	Minor; Minor
Caitlyn Gomez	Mother	Counsel:	Pro Se

No notes – Status.  
(nb)

## Guardianship Notes

**Calendar # 24**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Trial Setting Conference

**Case #:** GARSB2100017

**Case Name:** Guardianship Of  
Baron Dalton Davis

### **PARTIES:**

Judith Watson	Petitioner	Counsel:	Crista Marie Haynes
Baron Dalton Davis	Minor	Counsel:	
Derrick Davis	Father	Counsel:	Daniel Bocic Martinez

No notes – TSC.  
(nb)

## Guardianship Notes

**Calendar # 25**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARSB2100309

**Case Name:** Guardianship Of  
Darrell Ellis, Et Al.

### **PARTIES:**

Heather Jiminez	Petitioner	Counsel:	Pro Se
Daniel Robert Lee Ellis; Darrell Christopher Lee Ellis; Emmalee Rose Marie Ellis	Minor; Minor; Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Heather Jiminez, sister-in-law.

### **PRIOR ORDERS:**

Heather Jiminez appointed Temporary guardian of the person on 11/29/21.

Continued from **12/30/21** to clear notes. Temporary letters to continue to 06/30/22.

**Continued from 03/17/22 on courts motion for notes to be cleared. The Court determines that petitioner is sister-in-law of minors. Declarations of due diligence to be filed as to Paternal Grandparents and Maternal Grandfather. The Court notes Maternal Grandmother has passed away. Notice to older sibling has been given. (Oldest sibling has the same name as relative.) The Court orders all visitation between minors and father be supervised pending further of the Court. Father to have visitation only as arranged by the guardian. Referred to Court Investigator**

### **GENERAL INFORMATION**

- A. Minors and Ages: Darrell 14 [2/08], Emmalee 11 [10/10] and Daniel 9 [10/12]
- B. Mother of Minor: Tina Pogue
- C. Father of Minor: Darrell Ellis
- D. Siblings over Age 12+: Dylan, Dustin, Darrik, Amanda, Sarah and Nicholas; ages unknown.

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

1. Parts of petition indicate Heather and Matthew Jimenez are petitioning together and other parts have Matthew's name redacted. **Need** verified supplement and/or amendment to petition.
2. **Personal Service**
  - a. Mother: **Yes**
  - b. Father: **Yes**
  - c. Minors (Age 12+): **No**
3. **Notice by Mail**

- a. Paternal Grandfather: **Purportedly deceased per notice filed 03/24/22 - JTD**
  - b. Paternal Grandmother: **Purportedly deceased per notice filed 03/24/22 - JTD**
  - c. Maternal Grandfather: **Purportedly deceased per notice filed 03/24/22 - JTD**
  - d. Maternal Grandmother: **deceased**
  - e. Siblings Age 12+: **Yes**
4. UCCJEA: **Need** full 5 years of residency; 3 provided. UCCJEA filed 03/24/22 indicates "Unknown" for period of residence and that minors' have been residing with Petitioner in Beaumont, Riverside County since 10/15/21. Improper venue. **JTD**
5. CI Report: **need**
6. Proposed Order: ~11/18/21

**RECOMMENDATION:**

Need to clear notes then Courts discretion re: notes 3 & 4.

(lc/nb)

## Guardianship Notes

Calendar # 26

Honorable: Tara Reilly

Date: 06/23/2022

Time: 11:00 AM

Department S37 - SBJC

Hearing: Hearing on Petition for Appointment of Guardian

Case #: GARSB2200038

Case Name: Guardianship Of  
Princeton Cleveland

### PARTIES:

Mary Cleveland	Petitioner	Counsel:	Pro Se
Princeton Love Cleveland	Minor	Counsel:	

**THIS CASE SET FOR HEARING ON** Petition for Guardianship of person only by Mary Cleveland, maternal grandmother.

### PRIOR ORDERS:

Mary Cleveland appointed temporary guardian of the person on **02/03/22**. Mother consented and reported father named in petition is not the father. Referred to Court Investigator. 03/10/22 hearing vacated and reset for 05/12/22.

**Continued from 05/12/22 on courts motion for notes to be cleared and for notice to be given. The Court waives notice as to father and paternal grandparents. The Court orders a certified copy of birth certificate be filed with the court. The Court will grant this matter when certified copy of birth certificate filed. Notice by Judicial Assistant.**

### GENERAL INFORMATION

- A. Minor and Age: Princeton 2 months [1/22]
- B. Mother of Minor: Channing Strange
- C. Father of Minor: Jonathan Ivy ***mother says this is not father.***
- D. Siblings over Age 12+: Nylah; age unknown.

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

1. **Personal Service**
  - a. Mother: **Appeared at temporary and consented.**
  - b. Father: **waived**
2. **Notice by Mail**
  - a. Paternal Grandfather: **waived**
  - b. Paternal Grandmother: **waived**
  - c. Maternal Grandfather: **Deceased**
  - d. Maternal Grandmother: **Petitioner**
  - e. Siblings Age 12+: **No**
3. Guardianship Questionnaire: Lists two other minors; Madison and Taylor [p.1]. **Court to inquire.**
4. UCCJEA: Incomplete as to whom minor is residing with. **Need** completed form.

5. Referral for CII: **Need** father's DOB and Social Security number as well as other member of household, Erica's, Social Security number if attainable.
6. CI Report placed in S37 bin on 04/28/22 per register of actions.
7. Proposed Order: ~01/27/22

**RECOMMENDATION:**

Need to clear note 4.

(lc/ac/nb)



## Guardianship Notes

**Calendar # 27**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARSB2200118

**Case Name:** Guardianship Of  
Mason Morrisette, Et Al.

### **PARTIES:**

Adam Looman; Nicole Looman	Petitioner; Petitioner	Counsel:	Pro Se; Pro Se
Aubree Nicole Morrisette; Kaylee Grace Morrisette; Mason Bradley Morrisette	Minor; Minor; Minor	Counsel:	

**X-REF: CIVBA 2200109; GARSS 1400394**

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian of the Person, only, by maternal 2nd cousin and spouse, Nicole Looman and Adam Looman [Petitioners]

### **PRIOR ORDERS:**

**03/17/22:** Ex parte orders are Granted. NICOLE LOOMAN, ADAM LOOMAN appointed as temporary guardian for the person. No bond required. Ex parte order signed. The Court orders no further service needed as to father. The Court orders parties to submit a written agreement as to father's visitation for the Court's signature. Referred to Court Investigator. Court orders 04/20/2022 Hearing on Petition for Appointment of Guardian hearing Off Calendar. Advanced and continued.

**03/21/22:** The Court vacates its previous referral to the Court Investigator. Referred to DCFS for non-relative guardianship report. Clerk's office to provide copy of file to counsel /DCFS. Existing date of 6/23/22 confirmed.

### **GENERAL INFORMATION**

- A. Minor(s) and Age: Mason (9); Aubree (8); Kaylee (6)
- B. Mother of Minor(s): Christine Morrisette
- C. Father of Minor(s): Shaun Lungert
- D. Sibling(s) over Age 12+: n/a
- E. Petitioners allege parental custody would be detrimental to the minor(s).

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

#### **1. Personal Service**

- a. Mother: **Need**
- b. Father: **Need**
- c. Minor(s) (Age 12+): **N/A**

#### **2. Notice by Mail**

- a. Paternal Grandfather: **Need**
- b. Paternal Grandmother: **Need**

- c. Maternal Grandfather: **deceased per petition**
- d. Maternal Grandmother: **unknown**
- e. Sibling(s) (Age 12+): **n/a**
- 3. Guardianship Questionnaire: **Need** page 4 to Child Information Attachment as to Kaylee re: Nicole's Guardianship Questionnaire.
- 4. Confidential Guardian Screening Form: **Need** Attachments 14 & 15 to Nicole's Guardian Screening Form.
- 5. UCCJEA: Does not give residence information for the last 5 years. **Need** verified supplement.
- 6. Consent of Guardian: **Need** as to Adam.
- 7. CI Report: upon referral
- 8. DCFS report (if non-relative): **Need**
- 9. ~Proposed Order/Letters: 03/10/22

**RECOMMENDATION:**

Need to clear notes.

(nb/kd)

## Guardianship Notes

**Calendar # 28**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 11:00 AM

Department S37 - SBJC

**Hearing:** Hearing on Petition for Appointment of Guardian

**Case #:** GARSB2200267

**Case Name:** Guardianship Of  
Jalia Thomas, Et Al.

### PARTIES:

Jalia Marie Thomas; Kameon Anari Thomas	Minor; Minor	Counsel:	
Latishia Williams	Guardian Person Only	Counsel:	Pro Se

**THIS CASE SET FOR HEARING ON** Petition for Appointment of Guardian, Person only, by Latishia Williams [**Non-Relative** Petitioner].

**PRIOR ORDERS:** Latishia Williams appointed Temporary Guardians of the Person on 05/26/22.

### GENERAL INFORMATION

- A. Minor(s) and Age: Jalia (11); Kamron (9)
- B. Mother of Minor(s): Ashlee Marie Thomas
- C. Father of Minor(s): purportedly unknown
- D. Sibling(s) over Age 12+: none
- E. Intent to adopt indicated.

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

1. Section 2 to Child Information Attachment does not include father; paternal grandparent nor maternal grandparent information. **Need** verified supplement.
2. **Need** Page 5 re ICWA Inquiry as to minor Kamron, only.
3. **Personal Service**
  - a. Mother: **No; Request to Excuse Notice filed 05/20/22. JTD**
  - b. Father: **No:**
  - c. Minor(s) (Age 12+): **Yes: No:**

When a person who is to receive personal notice of a guardianship proceeding is incarcerated at the time of filing of the Petition for Guardianship, the Court may find that service by certified mail is legally sufficient. Such a request for alternative service **shall be accompanied by a declaration** explaining why it would be a hardship for the petitioner to personally serve the incarcerated person. (Local Rule 20-1317). **Need proof of certified mail service** with accompanying declaration.

4. **Notice by Mail**
  - a. Paternal Grandfather: **Need**
  - b. Paternal Grandmother: **Need**
  - c. Maternal Grandfather: **Need**

- d. Maternal Grandmother: **Need**
- e. Sibling(s) (Age 12+): **Need**
- 5. UCCJEA: Does not provide residence information for the last 5 years. **Need**
- 6. Consent of Guardian: Consent Section not signed. **Need**
- 7. CI Report: upon referral
- 8. DCFS report (if non-relative): **Need**
- 9. Proposed Order/Letters: 05/20/22

**RECOMMENDATION:**

Need to clear notes then Courts discretion re: Request to Excuse Notice.

(nb)

# Conservatorship Notes

**Calendar # 29**

**Honorable: Tara Reilly**

**Date:** 06/23/2022

**Time:** 1:30 PM

Department S37 - SBJC

**Hearing:** Court Trial Petition For Conservatorship (2nd Day)

**Case #:** CONPS2100087

**Case Name:** Conservatorship Of Jennifer Goede

**PARTIES:**

Jennifer Goede	Conservatee	Counsel:	Emily Lerner
Charlene Goede; Donna Hinman; Gregory Hinman	Conservator; Conservator; Conservator	Counsel:	
Rosa Marquez	Guardian Ad Litem	to:	Conservatee

No notes – Court Trial.  
(nb)