

SUPERIOR COURT OF CALIFORNIA
COUNTY OF SAN BERNARDINO

Communications & Public Information Office



www.sb-court.org | courts-pio@sb-court.org

Rod Cortez
Presiding Judge

Anabel Z. Romero
Court Executive Officer

PUBLIC NOTICE

RELEASE DATE: FEBRUARY 27, 2026

PROPOSED NEW AND AMENDED LOCAL COURT RULES AND FORMS

SAN BERNARDINO, CA - San Bernardino Superior Court (SBSC) proposes new and amended Local Rules of Court and Local Forms (attached) which will become effective on July 1, 2026.

All public comments must be made to SBSC's Assistant General Counsel, Susan Jones, at courts-pio@sb-court.org. If you do not have internet access, comments may be mailed to: Superior Court of California, County of San Bernardino, Attention: Susan Jones, Assistant General Counsel, 247 West Third Street, San Bernardino, CA 92415-0210. All comments must be received no later than April 13, 2026. This notice has been posted on the court's website at www.sb-court.org.

For media inquiries, contact Assistant General Counsel, Susan Jones, at courts-pio@sbcourt.org.



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO

247 West Third Street, 11th Floor San Bernardino, Ca 92415-0302

www.sb-court.org

AMENDED PROPOSED LOCAL RULES

RULE 561 TENTATIVE RULINGS

- (a) A judicial officer may provide tentative rulings. A tentative ruling on a law and motion matter may be obtained by accessing the court's website at <https://sanbernardino.courts.ca.gov/> after 3:00 p.m. on the court day before the hearing, or by telephoning the ~~court's Administrative Assistants at the numbers below~~ department as directed on the Tentative Rulings page on the court's website at <https://sanbernardino.court.ca.gov>.
- (b) Any party who wishes to orally argue the motion may appear on the date and time set for hearing, pursuant to *California Rules of Court*, Rule 3.1308 (a) (2) and Rule 3.1306. Failure to appear shall be deemed a waiver of oral argument. All posted tentative rulings shall become the final ruling of the Court on the scheduled hearing date if no party appears. Should a hearing be held the Court may, in its discretion, modify or affirm the tentative ruling and advise the parties of its ruling at the hearing or by further Order.
- (c) If the parties wish to submit on the tentative ruling, no appearance will be necessary if the department's judicial assistant is notified by 4:00 p.m. the day before the hearing. The tentative will then become the final ruling.
- (d) The Court will not entertain a request for continuance unless stipulated to by all parties and no further papers may be filed once the tentative ruling has been posted.
- (e) The party prevailing on the motion shall serve all parties with written notice of the court's ruling.

~~(f) Telephone numbers assigned to the civil courtrooms are as follows:~~

For departments S24, S25, S26, S36:	(909) 708-8853
For departments S16, S23, S27, S29, S35:	(909) 521-3447
For departments S14, S28, S32, S37:	(909) 521-3085
For departments S17, S22, S30, S31, S33:	(909) 708-8756
For departments R12, R14, R17:	(909) 285-3753
For department V11:	(760) 269-4869

(Eff. July 1, 2021. Amended, eff. August 15, 2023, and July 1, 2024. As amended, eff. January 1, 2026.)

NEW PROPOSED LOCAL FORMS

ATTORNEY OR PARTY WITHOUT ATTORNEY: NAME: FIRM NAME: STREET ADDRESS: CITY: STATE: ZIP CODE: TELEPHONE NO.: FAX NO.: E-MAIL: ATTORNEY FOR:	STATE BAR NO.:	<i>For Court Use Only</i>	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:			
<input type="checkbox"/> Conservatorship of the <input type="checkbox"/> Person and <input type="checkbox"/> Estate of [<input type="checkbox"/> Limited]: <input type="checkbox"/> In Re Matter of:		CASE NUMBER:	
		HEARING DATE AND TIME:	
ORDER APPOINTING GUARDIAN AD LITEM – CONSERVATORSHIP		JUDICIAL OFFICER:	DEPT:

This Court, on _____ (date), at _____ (time) at _____ (department)
 hereby appoints _____ as Guardian Ad Litem
 [hereinafter "GAL"] to protect the rights and best interests of:

Proposed Conservatee Conservatee Other (please list) _____

and to be of beneficial assistance to the Court in the resolution of the matter.

THE COURT ORDERS, the Guardian Ad Litem shall have:

- Access to a complete case file from the court, without charge;
- Authority to file with the court, without charge, any petition, motion or legal pleading that may be of benefit to Proposed Conservatee/Conservatee;
- Access to obtain copies of court documents and to obtain certified copies of any court documents, without charge;
- Right to notice of any proceeding to which Proposed Conservatee/Conservatee is entitled to notice;
- Filed with the Court a written report by the next hearing date;

- Reasonable access for visitation with Proposed Conservatee/Conservatee with adequate notice;
- Access to any mental health and/or medical professional treating the Proposed Conservatee/Conservatee;
- Right to obtain medical records for Proposed Conservatee/Conservatee. The right to obtain medical information which would otherwise be protected and is governed under the Health Insurance Portability and Accountability Act of 1996 [HIPPA], 42 USC §1320d and 45 CFR pts 160, 164, and California law. This release of information extends to all health care providers with respect to rights regarding the use and disclosure of identifiable protected health information or other medical records. This release of information extends to all medical persons including, but not limited to, any physician, health care professional, dentist, health plan, hospital;
- Right to Seek independent psychological or medical evaluation of Proposed Conservatee/Conservatee for purpose of any pending proceedings, upon application to the Court;
- Right to Obtain copies of any and all estate planning documents executed by Proposed Conservatee/Conservatee or which names Proposed Conservatee/Conservatee as the primary or contingent beneficiary, including but not limited to the following: Wills, Trusts, Powers of Attorney, Beneficiary Designations, and Transfer of Death Deeds;
- Right to File for or obtain an injunction, temporary restraining order, restraining order, protective order or any other type of injunction or protective order to protect Proposed Conservatee/Conservatee;
- Right to seek a special needs trust, trust or other testamentary instrument for the benefit of Proposed Conservatee/Conservatee, subject to Court approval;
- Right to obtain any and all Educational Records and information of Proposed Conservatee/Conservatee, including, but not limited to, any assessments, assessment plans, testing, reports, Individualized Education Plans, Attendance Records, School Medical Records (including immunizations, testing and care plans), and Special Education Records;
- Work with Court-Appointed Counsel, while maintaining the Proposed Conservatee/Conservatee's best interests to obtain preliminary settlement, subject to Probate Court approval of settlement agreements, including, but not limited to, dependent adult compromises, special needs trusts, and pooled trusts.
- Exclusive authority to advocate for Proposed Conservatee/Conservatee's best interest in litigation, including but not limited to, deciding strategy, filing pleadings, obtain discovery, trial decisions, object to proposed settlements that are not in the Proposed Conservatee/Conservatee best interest.

Other orders (specify):

Date:

Signature of Judicial Officer

Accountability Act of 1996 [HIPPA], 42 USC §1320d and 45 CFR pts 160, 164, and California law. This release of information extends to all health care providers with respect to rights regarding the use and disclosure of identifiable protected health information or other medical records. This release of information extends to all medical persons including, but not limited to, any physician, health care professional, dentist, health plan, hospital;

- Right to Seek independent psychological or medical evaluation of Minor for purpose of any pending proceedings, upon application to the Court;
- Right to Obtain copies of any and all estate planning documents which names Minor as the primary or contingent beneficiary, including but not limited to the following: Wills, Trusts, Powers of Attorney, Beneficiary Designations, and Transfer of Death Deeds;
- Right to File for or obtain an injunction, temporary restraining order, restraining order, protective order or any other type of injunction or protective order to protect Minor;
- Right to seek a special needs trust, trust or other testamentary instrument for the benefit of Minor, subject to Court approval;
- Right to obtain any and all Educational Records and information of Minor, including, but not limited to, any assessments, assessment plans, testing, reports, Individualized Education Plans, Attendance Records, School Medical Records (including immunizations, testing and care plans), and Special Education Records;
- Right to obtain preliminary settlement, subject to Probate Court approval of settlement agreements, including, but not limited to, minor's compromises, special needs trusts, and blocked accounts. (Prob. Code §§ 3500, 3600 et seq.; Cal. Rules of Court 7.950–7.955);
- Exclusive authority to advocate for a minor in litigation, including but not limited to, deciding strategy, filing pleadings, obtain discovery, trial decisions, object to proposed settlements that are not in the Minor's best interest.
- Other orders (specify):

Date:

Signature of Judicial Officer

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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pursuant to Probate Code § 10402 (full authority) or Probate Code § 10403 (limited authority). This authority has not been revoked.

4. BOND AND BLOCKED ACCOUNT

Bond was waived ordered in the amount of _____ and remains current.

Funds in the amount of _____ were deposited into a blocked account.

5. STATUS OF ESTATE

Petitioner has performed all duties required of petitioner for the estate of the decedent with respect to the administration of the estate. The estate is now ready for distribution and is in a condition to be closed.

6. NOTICE OF DEATH

Notice of Petition to Administer Estate, which constitutes one form of notice to creditors, has been published for the period and in the manner prescribed by law. Within thirty (30) days after the completion of publication, an Affidavit of Publication showing due publication in the manner and form required by law was filed with the clerk of the court. Reasonable efforts were made to identify creditors of the estate and Notice of Administration to Creditors was sent to all known creditors of the estate on *(date or dates when Notice was mailed)* _____. More than four months have elapsed since the first issuance of Letters, and the time for filing or presenting claims has expired.

7. CREDITORS' CLAIMS

No claims have been filed with the court or presented to the personal representative.

The following claims have been filed with the court or presented to the personal representative:

Name of Creditor	Date Claim Filed	Purpose	Amount of Claim	Allowed/Rejected
a. _____	_____	_____	_____	_____
b. _____	_____	_____	_____	_____
c. _____	_____	_____	_____	_____
d. _____	_____	_____	_____	_____
e. _____	_____	_____	_____	_____

All claims have been allowed and paid or satisfied in full.

The following claims were allowed and have not yet been paid or satisfied:

Name of Creditor	Approved amount	Reason claim not paid or satisfied:
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____
e. _____	_____	_____

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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8. COMPLIANCE WITH PROBATE CODE §9202

a. Notice to the Director of Health Services:

is not required under Probate Code Section 9292 because the decedent did not receive and was not the surviving spouse of someone who received Medi-Cal benefits.

OR

has been given as required by law under Probate Code Section 9202. A notice was received from the Director of Health Services stating that no creditor's claim will be filed against the estate because decedent has not received any Medi-Cal benefits.

has not been given.

b. Notice to the Director of the California Victim Compensation or to the Government Claims Board:

was not sent under Probate Code Section 9202(b) because no heir is confined in a prison or facility under the jurisdiction of the Department of Corrections or the Department of the Juvenile Justice or confined in any county or city jail, road camp, industrial farm, or other local correctional facility.

has been given under Probate Code section 9202(b). No creditor's claim has been received, or the creditor's claim of \$_____ has been paid as set forth above.

has not been given.

c. Notice to the Franchise Tax Board:

has been provided as required by Probate Code section 9202(c) as provided in section 1215. Notice was sent on _____, 20____. (Attach copy of Notice)

has not been given.

9. DEBTS OF DECEDENT

All debts of decedent and of the estate and all expenses of administration, except closing expenses and statutory commissions of the personal representative (*and their attorneys*) have been paid.

10. INVENTORY AND APPRAISAL

An Inventory and Appraisal was returned and filed on (*date inventory was filed*) _____ showing a value of \$ _____. (*check the box below and add information if additional inventories filed*)

One or more Supplemental Inventory and Appraisal was filed in the amount(s) of \$ _____ for total assets belonging to the estate of \$ _____.

Petitioner alleges that such inventory/inventories contain all the assets of decedent's estate that have come to petitioner's knowledge or possession.

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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11. ACTIONS TAKEN UNDER INDEPENDENT ADMINISTRATION OF ESTATES ACT

Decedent's real property located at _____ was sold for \$ _____, on (date) _____ under the Independent Administration of Estates Act. A Notice of Proposed Action was given as prescribed by law to the persons entitled to receive notice. Objections to the sale were were not received. (Add, if applicable): The net proceeds of sale will be distributed as part of the residue of the decedent's estate.

OR

(Describe actions taken): _____

A Notice of Proposed Action was given as prescribed by law to the persons entitled to receive notice. Objections to the actions stated were were not received.

12. PERSONAL PROPERTY TAXES

All personal property taxes due and payable by this estate have been paid

OR

No personal property taxes are due and payable by this estate.

13. CALIFORNIA AND FEDERAL ESTATE TAXES

A federal estate tax return, Form 706, has not been filed because the estate is not sufficient to require such a return. No California estate taxes are due and payable by this estate.

14. INCOME TAXES

All California and federal income taxes due and payable by the estate will be paid by the personal representative from decedent's estate prior to distribution.

OR

No California or federal income taxes are due and payable by the estate.

15. INVESTMENT OF CASH ON HAND

Petitioner has invested and maintained all cash in interest bearing accounts or in investments authorized by law or the governing instrument, except for an amount of cash that is reasonably necessary for the orderly administration of the estate as required by Probate Code §1064(a)(5).

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16. **WAIVER OF ACCOUNT** *(if applicable)*

(Name(s)) _____

the person(s) entitled to distribution of all of the estate, waive(s) an account by petitioner. Such waiver(s) are on file OR will be filed in this proceeding OR are attached hereto.

17. **SUMMARY OF ACCOUNT** *(if account not waived)*

Petitioner is chargeable with and is entitled to the credits set forth in the Summary of Account below. The account covers the period from *(date of death or ending period of last account filed)* _____ to *(end of period covered by this account)* _____. Schedules A through _____ in support of the Summary of Account are attached hereto and incorporated herein by this reference:

CHARGES

a. Inventory and Appraisal		\$ _____
b. Supplemental Inventory and Appraisal (if any)		\$ _____
c. Additional Property Received (if any)		\$ _____
d. Income Receipts During Account Period	(Schedule A)	\$ _____
e. Gains on Sales or Other Disposition of Assets	(Schedule B)	\$ _____
f. Net Income from Trade or Business (if any)	(Schedule C)	\$ _____
Total Charges		\$ _____

CREDITS

a. Disbursements During Accounting Period	(Schedule D)	\$ _____
b. Losses on Sales or Other Disposition of Assets	(Schedule E)	\$ _____
c. Net Loss from Trade or Business (if any)	(Schedule F)	\$ _____
d. Distributions to Beneficiaries (if any)	(Schedule G)	\$ _____
e. Property on Hand at End of Accounting Period	(Schedule G)	\$ _____
Total Credits		\$ _____

18. **CHARACTER OF PROPERTY**

The whole of the estate is decedent's

separate one-half interest in the community property of decedent and his/her surviving spouse quasi-community property OR
 (Describe interest if mixed): _____

19. **SCHEDULE OF PURCHASES OR OTHER CHANGES IN FORM OF ASSETS**

Certain assets were disposed of or changed in form during the administration of the estate. All changes in investments are shown on Attachment 19, attached hereto and made a part hereof by reference.

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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20. INTESTATE HEIRS/DEVISEES UNDER WILL

The following are the decedent's heirs under the laws of intestate succession devisees named in the decedent's Will: _____

<u>Name</u>	<u>Age</u>	<u>Relationship to Decedent</u>	<u>Address</u>
a. _____	_____	_____	_____
b. _____	_____	_____	_____
c. _____	_____	_____	_____
d. _____	_____	_____	_____
e. _____	_____	_____	_____
f. _____	_____	_____	_____
g. _____	_____	_____	_____
h. _____	_____	_____	_____
i. _____	_____	_____	_____
j. _____	_____	_____	_____

Additional heirs/devisees are listed in Attachment _____.

21. PROPOSED DISTRIBUTION OF ESTATE

By the terms of decedent's Will Pursuant to the laws of intestate succession, the estate should be distributed as shown on Attachment 21 OR as follows:

<u>Name</u>	<u>Description of Share of Estate</u>
a. _____	_____
b. _____	_____
c. _____	_____
d. _____	_____
e. _____	_____

22. COMPUTATION OF STATUTORY COMPENSATION

The statutory compensation payable to the executor's administrator's administrator-with-will-annexed for services is \$ _____, computed on a fee base of \$ _____. The statutory attorneys' compensation payable for services is \$ _____. The fee base and statutory attorneys' fees are arrived at as follows:

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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FEE BASE

- a. Inventory and Appraisal \$ _____
- b. Supplemental Inventory (if any) \$ _____
- c. Income Receipts During Account Period \$ _____
- d. Gains on Sales \$ _____
- e. Less: Losses on Sale \$ _____
- TOTAL FEE BASE** **\$ _____**

STATUTORY FEE COMPUTATION

- a. 4% of first \$100,000 \$ _____
- b. 3% of next \$100,000 \$ _____
- c. 2% of next \$800,000 \$ _____
- d. 1% of next \$1,000,000 to \$10,000,000 \$ _____
- TOTAL FEE** **\$ _____**

23. STATUTORY EXECUTOR/ADMINISTRATOR COMPENSATION

Petitioner should be authorized to pay themselves the sum of \$ _____ for ordinary services rendered to the estate in discharge of this obligation.

OR

By signing this petition, Petitioner waives the right to statutory commissions as executor administrator administrator-with-will-annexed.

24. STATUTORY ATTORNEY COMPENSATION

Petitioner should be authorized to pay Attorney the sum of \$ _____ for ordinary services rendered to the estate in discharge of this obligation.

OR

Statutory attorney compensation is not requested.

25. EXTRAORDINARY FEES NOT REQUESTED

No extraordinary fees are requested by Petitioner or Attorney. *If extraordinary fees are requested, this form should not be used.*

26. REIMBURSEMENT EXECUTOR/ADMINISTRATOR

Petitioner should be authorized to reimburse themselves the sum of \$ _____ for costs incurred in administration.

27. REIMBURSEMENT ATTORNEY

Petitioner should be authorized to pay Attorney the sum of \$ _____ for costs incurred in administration.

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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28. DISCLOSURE OF RELATIONSHIPS BETWEEN FIDUCIARY, ATTORNEYS, AND OTHER AGENTS HIRED BY FIDUCIARY

- Petitioner has no personal, financial or other relationship with attorneys or other agents hired by the petitioner.
- OR
- Petitioner has the following personal, financial or other relationship with attorneys or other agents hired by the petitioner:

29. CLOSING EXPENSES

Petitioner asks for authorization to withhold the sum of \$ _____ to offset closing costs and expenses, and as a reserve for any liability that may hereafter be determined to be due from this estate.

30. SPECIAL NOTICE

- No one has filed a Request for Special Notice.
- OR
- (Name(s)) _____ has filed a Request for Special Notice.

WHEREFORE, petitioner prays for an order of this court that:

- a. The administration of this estate be brought to a close without the requirement of an accounting by the petitioner *(only check if accounting has been waived)*.
- b. The PETITION FOR FINAL DISTRIBUTION AND ALLOWANCE OF STATUTORY FEES TO PERSONAL REPRESENTATIVE AND STATUTORY ATTORNEY FEES AND SETTLEMENT OF *(number of accounting)* _____ AND FINAL ACCOUNT ACCOUNT CURRENT WAIVER OF ACCOUNT AND REPORT OF EXECUTOR ADMINISTRATOR ADMINISTRATOR-WITH-WILL-ANNEXED *(match caption on first page)* be settled, allowed, and approved as filed;
- c. All the acts and proceedings of Petitioner as executor administrator administrator-with-will-annexed be confirmed and approved;
- d. Petitioner shall be authorized to withhold \$ _____ to defray closing expenses and to pay any additional liabilities;
- e. *(If applicable)* Petitioner shall be authorized and directed to pay themselves the sum of \$ _____, representing statutory compensation for ordinary services rendered in the administration of this estate.
- f. *(If applicable)* Petitioner shall be authorized and directed to pay Attorney the sum of \$ _____, representing statutory compensation for ordinary services rendered in the administration of this estate.
- g. Distribution of the estate of decedent in petitioner's hands and any other property of decedent or the estate not now known or discovered be made to the persons entitled to it, as set forth in the petition; and that
- h. Such further order be made as the court considers proper.

IN THE MATTER OF THE ESTATE OF:	CASE NUMBER:
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Dated: _____

(SIGNATURE OF PETITIONER/ATTORNEY FOR PETITIONER)

(TYPE OR PRINT NAME OF PETITIONER/ATTORNEY FOR PETITIONER)

VERIFICATION
CCP 446, 2015.5

I declare that:

I am the executor administrator administrator-with-will-annexed of the above-entitled estate. I have read the foregoing PETITION FOR FINAL DISTRIBUTION AND ALLOWANCE OF FEES TO PERSONAL REPRESENTATIVE FIRST AND FINAL ACCOUNT WAIVER OF ACCOUNT AND REPORT OF EXECUTOR ADMINISTRATOR ADMINISTRATOR-WITH-WILL-ANNEXED (*match caption on first page*), and know the contents thereof; the same is true of my own knowledge, except as to those matters which are therein stated upon my information or belief, and as to those matters I believe them to be true.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this verification was executed on (*date*) _____ at (*city*) _____ (*state*) _____.

Dated: _____

(SIGNATURE OF PETITIONER/ATTORNEY FOR PETITIONER)

(TYPE OR PRINT NAME OF PETITIONER/ATTORNEY FOR PETITIONER)

