

Current Probate Tentative Rulings

Time	Case Number	Style	Tentative
9:00	16PR00412	Estate of Sheptor, John Charles	At the request of counsel this matter is continued to January 21, 2025 at 9:00 a.m.
9:00	20PR00100	Francisco M Quezada Settlement Protection Trust	The Order to Show Cause issued on June 12, 2024 is vacated. The First Account and Report is settled and approved, and bond is decreased to \$207,000. The next accounting is to be filed by June 10, 2025 with a hearing on July 22, 2025 at 9:00 a.m. The Court will sign the form of order submitted by counsel.
9:00	21PR00516	Estate of Jamison, Jacqueline	At the request of counsel this matter is continued to January 21, 2025 at 9:00 a.m.
9:00	21PR00585	Estate of Harness, Katherine M	At the request of counsel this matter is continued to November 12, 2024 at 9:00 a.m.
9:00	22PR00100	Estate of Soost, Elaine L	The Court will hear from counsel as to the status of filing the ex parte petition for final discharge.
9:00	22PR00238	Estate of Steinke, Ronald Alan	Dennis Steinke is removed as executor of the estate for failing to properly administer the estate and timely file a petition for final distribution. The Public Administrator is appointed as administrator of the estate with will annexed and is directed to file an order for probate and letters of administration with will annexed. A final distribution hearing is set for December 10, 2024 at 9:00 a.m.
9:00	22PR00252	Estate of Battaglia, Barbara Lynne	The court will hear from counsel as to the status of filing the ex parte petition for final discharge.
9:00	22PR00349	Estate of Shuman, Patricia A	The Court will hear from counsel as to the status of filing the petition for final distribution.
9:00	22PR00356	Estate of Wrangham, Steven Jerome	The Court has received the First and Final Account and Report, which is set for hearing on August 13, 2024 at 9:00 a.m. The Review Hearing is continued to that date.

9:00	22PR00484	Estate of Ahart, Peter	At the request of counsel this matter is continued to September 10, 2024 at 9:00 a.m.
9:00	22PR00509	Estate of Vichare, Manisha Prabhakar	At the request of counsel this matter is continued to October 22, 2024 at 9:00 a.m.
9:00	23PR00092	Maguire Trust as Amended dated July 22, 2008	The Court will hear from counsel.
9:00	23PR00224	Estate of Griffith, Vera Rourke	The Court will hear from Administrator James Griffith as to the status of filing the petition for final distribution.
9:00	23PR00275	Estate of Lane, Mary C	The Court will hear from counsel as to the status of filing the petition for final distribution.
9:00	23PR00278	Estate of Yamate, Winston T	The First and Final Report of Administrator is settled and approved, and the matter is set for a final discharge hearing on January 21, 2025 at 9:00 a.m. The Court will sign the form of order submitted by counsel.
9:00	23PR00291	Hunter Revocable Inter Vivos Trust	The Court, pursuant to California Rules of Court Rules 3.1113(g) and 3.1300, in its discretion has considered the Memorandum of Points and Authorities in Support of Motion for Summary Judgment or in the Alternative, Summary Adjudication even in light of the fact that it exceeds the maximum page limit. Respondent's Evidentiary Objections are overruled as to Nos. 4-8, 10-14, 17-23, 24-27, and 39-43; and sustained as to Nos. 1 (lacks foundation, improper authentication), 2 (lacks foundation, improper authentication), 3 (relevance), 9 (relevance), 15 (relevance), 16 (relevance), and 28-38 (relevance). The Court finds that a triable issue of material fact exists as to the whether there was undue influence in relation to Mrs. Hunter's execution of the July 2019 Trust [See UMF No 29]; and a triable issue of material fact as to Mrs. Hunter's capacity at the time of execution of the July 2019 Trust [See UMF Nos. 16, 17, 18, 19, 20, 21, 23, 24, 25, 27, 28, 29, 30, 31, 32, 33, 34, 36, 37, and 39]. The Court also finds that the Probate Code §859 Cause of Action is properly stated as a separate independent cause of action. As such, the Motion is denied in its entirety. Counsel for the Petitioner shall submit a form of order consistent with this ruling within two weeks.
9:00	23PR00296	Estate of Koehler, Wilmer John, Jr.	Absent the filing of a written objection, the First and Final Report and Account is settled and approved, the Review Hearing on August 20, 2024 is vacated, and the matter is set for a final discharge hearing on January 21, 2025 at 9:00 a.m. The Court will sign the form of order submitted by counsel.

9:00	23PR00306	Estate of Lawrence, Jean Marie	The First and Final Account is settled and approved, the Review Hearing on August 6, 2024 is vacated, and the matter is set for a final discharge hearing on January 28, 2025 at 9:00 a.m. The Court will sign the form of order submitted by counsel.
9:00	23PR00502	Estate of Montgomery, Robert L	The Court has not received a Notice of Hearing or proof that the Petition was served on those entitled to notice under <i>Probate Code</i> §1220, 11601, 11620. The Court will hear from counsel.
9:00	24PR00078	Charles Burroughs and Virginia Burroughs 1985 Living Trust and Its Subtrusts	This matter was last before the Court on June 25, 2024 and the Court set a court trial and trial readiness conference. On the Court's own motion today's hearing for status of mediation is vacated. No appearances are necessary.
9:00	24PR00096	Estate of Chilton, Wanda Juanita	The petition is granted, the undated holographic will attached to the petition is admitted to probate, letters of administration with will annexed with full authority shall issue, bond is ordered in the amount of \$667,500.00, Jane Dolan is appointed as probate referee and a final distribution hearing is confirmed for May 6, 2025 at 9:00 a.m. In the event the administrator is unable to file the petition for final distribution seven (7) days prior to the final distribution hearing, a status update shall be filed seven (7) days prior to the hearing. The Court will sign the form of order submitted by counsel.
9:00	24PR00215	In the Matter of: Sage, Brenna M	The Court is in receipt of sufficient proof of funding the annuity. This matter has concluded, and no appearances are required.
9:00	24PR00228	Dotty M Marshall Trust, Dated January 14, 2009 as Amended by the First Amendment of Trust, Dated January 24, 2012	Absent objection, Bruce Irving Marshall is removed as trustee and Bonita Susan Richardson is appointed as temporary trustee during the pendency of this litigation. Respondent Bruce Irving Marshall is to provide a code compliant accounting of the trust from January 22, 2022 to July 23, 2024. The matter is continued to October 22, 2024 at 9:00 a.m. for hearing on the accounting and further proceedings. Counsel for the petitioners shall submit a form of order within 2 weeks.
9:00	24PR00248	Estate of Fletcher, Bernard Lee	The petition is granted, letters of administration with full authority shall issue, bond is waived, Jane Dolan is appointed as probate referee, and a final distribution hearing is set for July 22, 2025 at 9:00 a.m. In the event the administrator is unable to file the petition for final distribution seven (7) days

			prior to the final distribution hearing, a status update shall be filed seven (7) days prior to the hearing. The Court will sign the form of order submitted by counsel.
9:00	24PR00249	Estate of: Davidson, Gloria Dean	The Petition is incomplete at Paragraph 8, including the required Inventory and Appraisal (Mandatory Judicial Council Form DE-160/DE-161); there is no Attachment 11 identifying the legal description of any real property and description of any personal property; Paragraph 13 is incomplete and fails to include the claimed interest in the real and personal property; and there is no Attachment 14 setting forth the names, relationships to decedent, ages, and residence or mailing addresses, as far as known to or reasonably ascertainable by petitioner, of all persons named or checked in items 1, 9, and 10 and all other persons who may be entitled to inherit decedent's property in the absence of a will. In addition, the Court has not received the required Notice of Hearing establishing that sufficient notice was provided. The matter is continued to September 24, 2024 at 9:00 a.m. for the filing of an Amended Petition and Notice of Hearing.
9:00	24PR00263	Charlotte E Drew & Tanya D Drew Special Needs Trust Dated August 28, 1990	The First Account and Report is settled and approved. The next accounting shall be filed by January 31, 2025, with a hearing set for March 31, 2025 at 9:00 a.m. The Court will sign the form of order submitted by counsel.
9:00	24PR00284	Estate of Lee, Elton Wilbur	The petition is granted, letters testamentary with full authority shall issue, bond is waived, Jane Dolan is appointed as probate referee and a final distribution hearing is set for July 22, 2025 at 9:00 a.m. In the event the personal representative is unable to file the petition for final distribution seven (7) days prior to the final distribution hearing, a status update shall be filed seven (7) days prior to the hearing. Counsel shall submit a form of order within two weeks.
9:00	24PR00288	Estate of Netick, Alexander	The petition is granted, letters of administration with full authority shall issue, bond is waived. Jane Dolan is appointed as probate referee and a final distribution hearing is set for July 22, 2025 at 9:00 a.m. In the event the personal representative is unable to file the petition for final distribution seven (7) days prior to the final distribution hearing, a status update shall be filed seven (7) days prior to the hearing. The Court will sign the form of order submitted by counsel.
9:00	PR-39743	Parker Irrevocable Trust Established April 16, 2010	The Court shares the concerns raised by the petition that excessive double-time and overtime is being charged by the caretakers, that IHSS is not being utilized and that Ms. Sadler is "dependent on her regular caregiving paychecks, and cannot afford to have the increased income attributable to overtime and double time reduced..." The Court understands that Ms. Parker wishes to have her mother continue to serve as one of her primary caregivers but the Court is concerned as to the depletion of the Trust's corpus to fulfill these wishes. The Court will hear from the petitioner as to the specific orders she is requesting the Court to make and will hear from parties.

<u>10:00</u>	16MH00188	*Confidential*	The Court will hear from counsel.
10:00	23MH00351	*Confidential*	The First Account and Report is settled and approved, and future accountings are waived pursuant to Probate Code §2628. The Court will sign the form of order submitted by counsel.
<u>10:15</u>	22PR00631	Conservatorship of Freese, Alfred	The Court will hear from counsel as to the status of filing the First and Final accounting.
10:15	23PR00098	Conservatorship of Arballo, Judith Ann	The petition of Natalie Ludwig to be relieved as counsel is granted. Counsel shall submit a form of order within two weeks. Based upon the Court Investigator's report dated July 11, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and shall continue. Fees are deferred. The court investigator's report is due by June 10, 2025 with a review hearing on July 22, 2025 at 10:15 a.m. The Court will prepare the form of order.
10:15	23PR00241	Limited Conservatorship of: Dawson, Edward	Based upon the Court Investigator's report dated July 8, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and shall continue. Fees are deferred. The conservatee cannot communicate, with or without reasonable accommodations, a desire to participate in the voting process. The court investigator's report is due by June 9, 2026 with a review hearing on July 21, 2026 at 10:15 a.m. The Court will sign the form of order submitted by counsel.
10:15	23PR00596	Conservatorship of James, Kathleen	Based upon the Court Investigator's report dated June 7, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and shall continue. Fees are deferred. The Court confirms the first annual review dates for the person and estate as previously set: The court investigator's information sheet and accounting are due by December 10, 2024 with a review hearing on January 21, 2025 at 10:15 a.m. The Court will sign the form of order submitted by counsel.
10:15	PR-41344	Conservatorship of Carson, Dakota	The Court will hear from counsel.
<u>10:30</u>	21PR00109	Conservatorship of: Pollard, Kelly	The Court will hear from counsel.
10:30	23PR00500	Guardianship of: Leonard, Jayden Wayne	Based upon the report of the Court Investigator dated July 11, 2024, which the Court has read and considered, the guardianship of the estate is necessary and appropriate, and the petition is granted. The court investigator information sheet is due by June 10, 2025 with a review hearing on July 22, 2025 at 10:30 a.m. The Court will hear from counsel as to why this matter should not be transferred to El Dorado County. The matter is continued to August 27, 2024 at 10:30 a.m. for proof of deposit into a blocked account. The Court will sign the form of order submitted by counsel.

10:30	24PR00184	Conservatorship of: Magine, Korin Alyssa	Based upon the Court Investigator's reports dated May 29, 2024 and July 19, 2024 and Dr. Celeste Reinking's capacity declaration dated May 29, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and the petition is granted. Fees are deferred. The court investigator information sheet is due by December 10, 2024 with a six-month review hearing on January 21, 2025 at 10:30 a.m. A one-year review hearing is set for July 22, 2025 at 10:30 a.m. with the court investigator's information sheet due on June 10, 2025. The Court will sign the form of order submitted by counsel.
10:30	24PR00185	Conservatorship of: Geddes, Max Issac	Based upon the Court Investigator's reports dated May 29, 2024 and July 19, 2024 and Dr. Celeste Reinking's capacity declaration dated May 29, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and the petition is granted. Fees are deferred. The court investigator information sheet is due by December 10, 2024 with a six-month review hearing on January 21, 2025 at 10:30 a.m. A one-year review hearing is set for July 22, 2025 at 10:30 a.m. with the court investigator's information sheet due on June 10, 2025. The Court will sign the form of order submitted by counsel.
10:30	PR-33209	Conservatorship of Wagoner, Scott	Based upon the Court Investigator's report dated June 24, 2024, the conservatorship is necessary and appropriate and shall continue. Fees are deferred. The court investigator's information sheet is due by June 10, 2025 with a review hearing on July 22, 2025 at 10:30 a.m. The Court will hear from counsel as to the efforts to get Mr. Wagoner enrolled in a day program. The Court will sign the form of order submitted by counsel.
10:30	PR-34702	Conservatorship of Tillger, Carin Leigh	The Seventeenth Account is settled and approved. The next accounting shall be filed by June 10, 2025, with a hearing date of July 22, 2025 at 10:30 a.m. The Court will sign the form of order submitted by the conservator.
10:30	PR-40119	Conservatorship of Wralstad, Kimi Edith	Mr. Latimer is appointed to represent Ms. Wralstad. The matter is continued to August 27, 2024 at 10:30 a.m. to allow Mr. Latimer time to meet with his client. Mr. Latimer is also directed to speak to the conservator Susan DeConti about the process of transferring the conservatorship to Shasta County where the conservatee resides.
10:30	PR-41093	Conservatorship of Moser, James	At the request of the Court Investigator this matter is continued August 27, 2024 at 10:30 a.m.
10:30	PR-41367	Conservatorship of: Scherbert, Esther Elizabeth	Based upon the Court Investigator's report dated June 21, 2024, which the Court has read and considered, the conservatorship is necessary and appropriate and shall continue. Fees are deferred. The conservatee is not capable of communication, with or without reasonable accommodation, a desire to participate in the voting process. The court investigator's information sheet is due by June 10, 2025 with a review hearing on July 22, 2025 at 10:30 a.m. The Court will sign the form of order submitted by counsel.

