

March 2, 2026
Dept. 9
Probate Tentative Rulings

1.	25PR0362	IN THE MATTER OF THE 2016 CHARLES H. CONN REVOCABLE TRUST
Confirming Trust Assets/Compelling Accounting and Production of Trust/Removal of Trustee		

Petitioner is a beneficiary of the 2016 Charles H. Conn Revocable Trust (“Trust”) and received a Notice of Irrevocable Trust, dated October 21, 2025 (Petition, Exhibit A), which notified her that her brother, Ronald Conn, is the current trustee of the Trust due to the incapacity of their father and the settlor of the Trust, Charles Conn. Petitioner responded to the notice on October 23, 2025, with a written demand that the real property that is an asset of the Trust be appropriately place in the name of the Trust, whereas it is currently titled in the name of the settlors as joint tenants. She also demanded a copy of the Trust and the settlor’s Will, an inventory of Trust assets and associated statements for financial accounts, the current location of any personal property that has been removed from the property since the date of the settlor’s incapacity, and information on the registration and titling of any vehicles owned by the settlor.

Respondent has not provided any of the information requested.

Petitioner contends that the Court has jurisdiction over the matter because, although the trustee resides in Tennessee, the settlor is a California resident, citing Probate Code § 17004.¹ Probate Code § 17002 provides that the principal place of administration of a trust is “the usual place where the day-to-day activity of the trust is carried on by the trustee or its representative who is primarily responsible for the administration of the trust.” In this case, the fiduciary duty of the trustee is to care for the needs and assets of the settlor, who is a California resident and resides in real property located in El Dorado County. “By accepting the trusteeship of a trust having its principal place of administration in this state the trustee submits personally to the jurisdiction of the court under this division.” Probate Code § 17003(a). This conclusion is confirmed by the fact that the trustee provided the Notice of Irrevocable Trust pursuant to California Probate Code § 16061.7. Petition, Exhibit A.

Proof of service of notice of the Petition was filed on January 5, 2026, but settlor’s daughter Cherie Guthrie was not included in the proof of service. Jacquelyn Hartsough, who may have an interest in the real property that is the subject of the Petition, was listed on the proof of service. There is no opposition filed in response to the Petition.

Petitioner requests that the trustee be removed pursuant to Probate Code § 15642 for failing to perform legally required accountings under Probate Code § 16062-16063 and for

¹ Probate Code § 17004: The court may exercise jurisdiction in proceedings under this division on any basis permitted by Section 410.10 of the Code of Civil Procedure.
Code of Civil Procedure § 410.10: A court of this state may exercise jurisdiction on any basis not inconsistent with the Constitution of this state or of the United States.

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failure to provide information to trust beneficiaries as required by Probate Code § 16060-16061.5.

The Petition further requests that the Court find the real property listed in the Petition is an asset of the Trust and order that it be placed in the name of the Trust. The Petition attaches as Exhibit C is a final judgment dated August 21, 2020, determining the separate property interests of the settlor and his former spouse, Jacquelyn Hartsough, in the real property. Hartsough has been notified of these proceedings due to her potential interest in the real property.

TENTATIVE RULING #1:

THIS MATTER IS CONTINUED TO 8:30A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE IN ORDER TO GIVE PETITIONER AN OPPORTUNITY TO PROVIDE PROOF OF SERVICE TO ALL BENEFICIARIES OF THE TRUST.

THE COURT ORDERS RESPONDENT TO PROVIDE A COPY OF THE TRUST AND AN INVENTORY OF ALL TRUST ASSETS AND ACCOUNTING TO PETITIONER NO LATER THAN MARCH 20, 2026.

THE COURT SETS AN ORDER TO SHOW CAUSE HEARING ON THE REMOVAL OF THE TRUSTEE ON APRIL 6, 2026, IN DEPARTMENT NINE.

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2.	22PR0057	ESTATE OF MORRIS
Status of Administration/OSC Removal		

At the last Status of Administration hearing on March 3, 2025, the Court noted that nothing new had been filed since the Inventory and Appraisal was filed on March 6, 2023.

TENTATIVE RULING #2: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

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3.	25PR0126	ESTATE OF MENSING
Final Distribution/Accounting		

Letters of Administration/Letters Testamentary were issued on July 28, 2025, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on November 12, 2025.

Waivers of Account were executed by all the heirs entitled to distributions under the estate.

There is no Proof of Service of Notice of the hearing on the Petition on file with the Court.

The proposed distribution of the estate is in equal shares to each of decedent's three adult children.

The Petition is in compliance with Local Rule 10.07.12

The Petition requests:

1. The administration of the estate be brought to a close without the requirement of an accounting;
2. All acts, transactions and proceedings of the Administrator be ratified, confirmed and approved;
3. The Administrator be authorized to pay statutory attorney fees in the amount of \$6,920.14;
4. Approval of distribution of the estate to the persons entitled to it pursuant to the Petition for Final Distribution;
5. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be distributed to the beneficiaries as set forth in the Petition;
6. **Upon filing of receipts and the Ex Parte Petition for Discharge, Petitioner may be discharged and released from all liability that may be incurred thereafter.**

TENTATIVE RULING #3: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

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4.	PP20210097	IN THE MATTER OF THE JENNIFER GOULD SPECIAL NEEDS TRUST
Third Account & Report		

Petitioner is Trustee of the Trust that was created by Order of the court on October 9, 2019. The period covered by the report of account is April 1, 2023-March 31, 2025.

Proof of Service of Notice of the Petition was filed on June 28, 2023.

The Petition requests the court to issue an Order:

1. Settling and allowing the account and ratifying, approving and confirming all actions and transactions of the trustee as set forth in the report;
2. Authorizing Petitioner to pay herself compensation in the amount of \$5,968.60 for her services as Trustee, and in the amount of \$6,341.50 for her services as Conservator;
3. Authorizing Petitioner to pay attorney fees in the amount of \$3,145 for legal services to the Trustee, \$1,671 for legal services to the Conservator, and \$34.30 for reimbursement of costs;
4. Reducing the bond amount to a total of \$220,361 to reflect the reduction in Trust assets from \$237,768 during the accounting period.

TENTATIVE RULING #4: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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5.	PP20200089	CONSERVATORSHIP OF CAROLYN FOWLER
Status of Administration		

TENTATIVE RULING #5: AN ORDER FOR FINAL DISCHARGE HAVING BEEN ENTERED BY THE COURT ON NOVEMBER 12, 2025, THE MATTER IS DROPPED FROM CALENDAR.

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6.	PP20210174	ESTATE OF FOWLER
Status of Administration		

The status update filed by the Administrator reports that the entity holding the undistributed assets of the estate requires the estate to be held open pending final transfer and distribution. The Administrator will file an *ex parte* petition for final discharge once that process is completed.

TENTATIVE RULING #6:

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 1, 2027, IN DEPARTMENT NINE. PETITIONER OR COUNSEL ARE ORDERED TO PERSONALLY APPEAR, OR FILE A STATUS UPDATE WITH THE COURT AT LEAST TWO WEEKS BEFORE THAT HEARING.

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7.	PP20210211	ESTATE OF DOUGLAS DEISENROTH
Status of Administration		

Letters of Administration were issued on December 8, 2021. The Final Inventory and Appraisal was filed on May 3, 2022. There have been no new filings since the Status of Administration hearing on June 2, 2025.

Counsel for the Administrator appeared at the Status of Administration hearing held on December 1, 2025, and provided an update.

TENTATIVE RULING #7: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 1, 2027, IN DEPARTMENT NINE. PETITIONER OR COUNSEL ARE ORDERED TO PERSONALLY APPEAR, OR FILE A STATUS UPDATE WITH THE COURT AT LEAST TWO WEEKS BEFORE THAT HEARING.

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8.	25PR0281	ESTATE OF CLINGAN
Petition to Determine Succession of Real Property		

This matter relates to a Petition to Determine Succession of Real Property brought by Petitioner Laura Foss. Following an evidentiary hearing on December 31, 2025, the Court determined that the decedent's holographic Will was valid and that the decedent left the residential real property, his bank account and his cars to Petitioner.

The Petition alleges that the gross value of decedent's interest in the real property described in item 11 did not exceed \$750,000. Although the Court appointed a probate referee following the evidentiary hearing on December 31, 2025, there is no Inventory and Appraisal completed by a probate referee and showing the value of the property subject to this Petition on file with the Court. Probate Code § 13152(e) requires that Form DE300 also be attached to the Petition, *see* Petition paragraph 8(b). That form is included with the Petition.

Attachment 11 contains the legal description and APN of the real property.

It also contains a description of the personal property in California passing to Petitioner, and decedent's interest in the property.

Attachment 14 contains the names, relationships to decedent, ages, and residence/ mailing addresses, as far as known to or reasonably ascertainable by petitioner, of all persons named or checked in items 1, 9, and 10, all other persons who may be entitled to inherit decedent's property in the absence of a will, and all persons designated in the will to receive any property.

TENTATIVE RULING #8: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

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9.	25PR0340	ESTATE OF BURGETT
Letters of Administration		

Decedent is Clarence Burgett. It appears that his spouse, Barabra Burgett, is predeceased. Petitioner Michael Glass, appearing *pro per*, does not specify his relationship to decedent.

The Petition requests full authority under the Independent Administration of Estates Act, however, it is not clear whether there is a Will. If there is a Will, it has not been lodged with the Court.

The Petition does not request a bond, nor does it say that bond has been waived by the Will, if there is one, and there are no waivers on file by the beneficiaries of a Will or by any heirs through intestate succession.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on December 8, 2025.

Proof of service of notice of the hearing on the Petition was filed on December 15, 2025, but no persons have been identified as having received the notice.

There is no proof of publication on file with the court, as required by Probate Code §§ 8120, 8121.

TENTATIVE RULING #9: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

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10.	26PR0030	In the Matter of Emmersynn Rae Hall
Compromise Minor's Claim		

This is a Petition to compromise a minor's claim. The Petition states the minor sustained emotional dysregulation and post-traumatic stress resulting from an auto accident in 2024. Petitioner requests the court authorize a compromise of the minor's claim against defendant/respondent in the gross amount of \$15,000.

The Petition states the minor incurred \$233 in medical expenses that would be deducted from the settlement. Copies of invoices for the claimed medical expenses are attached to the Petition as required by Local Rules of the El Dorado County Superior Court, Rule 7.10.12A.(6).

The Petition states that the minor has fully recovered and there are no permanent injuries. A doctor's report concerning the minor's condition and prognosis of recovery is attached, as required by Local Rules of the El Dorado County Superior Court, Rule 7.10.12A.(3).

The minor's attorney requests attorney's fees in the amount of \$3,750, which represents 25% of the gross settlement amount. The court uses a reasonable fee standard when approving and allowing the amount of attorney's fees payable from money or property paid or to be paid for the benefit of a minor or a person with a disability. (Local Rules of the El Dorado County Superior Court, Rule 7.10.12A.(8); California Rules of Court, Rule 7.955(a)(1).) The Petition does include a Declaration by the attorney as required by California Rules of Court, Rule 7.955(c). The minor's attorney also requests reimbursement for costs in the amount of \$486.50.

With respect to the \$10,530.50 due to the minor, the Petition requests that they be deposited into an insured account with Pacific Life and Annuity Services, subject to withdrawal with court authorization. See attachment 18(b)(2), which includes the name and address of the depository, as required by Local Rules of the El Dorado County Superior Court, Rule 7.10.12A(7).

The minor's presence at the hearing will be required in order for the court to approve the Petition. Local Rules of the El Dorado County Superior Court, Rule 7.10.12.C.

TENTATIVE RULING #10: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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11.	25PR0011	In the Matter of Robert Errett Weishar
Status of Administration		

Letters of Administration were issued on March 25, 2025. An Inventory and Appraisal was filed on November 24, 2025.

TENTATIVE RULING #11: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 1, 2027, IN DEPARTMENT NINE. PETITIONER OR COUNSEL ARE ORDERED TO PERSONALLY APPEAR, OR FILE A STATUS UPDATE WITH THE COURT AT LEAST TWO WEEKS BEFORE THAT HEARING.

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12.	PP20200228	ESTATE OF KAMINE
Status of Administration/OSC Removal		

At the hearings of June 16, 2025, and October 6, 2025, the Court found that neither the personal representative nor their counsel appeared or filed a status report for the hearings. The Court set an Order to Show Cause for removal, suspension or sanctions against the personal representative, which was heard on November 24, 2025. The Administrator did not appear and the Court set this date for the OSC Hearing for removal of the Administrator.

TENTATIVE RULING #12: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 1, 2027, IN DEPARTMENT NINE. PETITIONER OR COUNSEL ARE ORDERED TO PERSONALLY APPEAR, OR FILE A STATUS UPDATE WITH THE COURT AT LEAST TWO WEEKS BEFORE THAT HEARING.

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13.	23PR0248	ESTATE OF MARTIN
Status of Administration		

TENTATIVE RULING #13: AN ORDER FOR FINAL DISCHARGE HAVING BEEN ENTERED BY THE COURT MARCH 3, 2025, THE MATTER IS DROPPED FROM CALENDAR AND THE ESTATE IS CLOSED.

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14.	26PR0014	In the Matter of Katherine Streeter
Determine Trust Assets		

The Petitioners are co-trustees of the Clarence W. Street and Katherine Street Revocable Trust (“Trust”) and request the Court to find that the Ameriprise Investment Account listed in the Petition be found to be an asset of the Trust.

The last settlor died on September 4, 2024. When the Trust was created the settlors executed a “General Transfer and Assignment to Trust”, Petition Exhibit C, and a “Schedule of Trust Assets, Petition Exhibit D, listing the property intended to be included as Trust assets. The General Transfer and Assignment specifies that “any and all assets and interests in assets of whatsoever nature or kind, real or personal, of the Assignor, whether presently owned or hereafter acquired (regardless of the means by which acquired), including, but not limited to, bank accounts (such as checking, savings, certificates of deposit, and the like); mutual and money market funds of all kinds; securities (such as stocks, bonds, treasury bills, notes receivable, and the like); agency and custody accounts (such as account(s) at banks, brokerage firms, and the like); . . .” were to be included as Trust assets.

The pour-over Will of the last surviving settlor named the Trust as the sole beneficiary of her Will, and devised any property not already held in the name of the Trust to the Trust.

Probate Code § 850 permits a trustee who has a claim to property, the title to or possession of which is held by another, to file a petition requesting that the court make an order pursuant to Probate Code § 856 authorizing and directing the person having title to or possession of real property to execute a conveyance or transfer to a person entitled thereto, or granting other appropriate relief. Probate Code § 851 requires the Petitioner to serve notice of the hearing and a copy of the Petition at least 30 days prior to the hearing to each person claiming an interest in or having title to or possession of the property. When the matter concerns a decedent estate, notice shall also be given to any heir or devisee whose interest may be affected by the Petition in accordance with Probate Code § 1200.

Probate Code § 857 provides that in the event that the court issues such an Order:

(a) The order is prima facie evidence of the correctness of the proceedings and of the authority of the personal representative or other fiduciary or other person to make the conveyance or transfer.

(b) After entry of an order that the personal representative, other fiduciary, or other person execute a conveyance or transfer, the person entitled thereunder has the right to the possession of the property, and the right to hold the property, according to the terms of the order as if the property had been conveyed or transferred in accordance with the terms of the order.

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Notice of the hearing and a copy of the Petition were mailed at least 30 days prior to the hearing, to each person claiming an interest in or having title to or possession of the property, as well as any heir or devisee whose interest may be affected by the Petition. The notice and Petition were mailed and filed on January 21, 2026.

TENTATIVE RULING #14: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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15.	25PR0010	ESTATE OF HEWITT
Status of Administration		

The Administrator has filed a Status report with the Court reporting that the disposition of the assets of the estate is ongoing, including a mediation scheduled to resolve title to the real property. No further appearance is required. The Court will set another Status of Administration hearing in a year, and the Administrator can file anything before then as needed to conclude the probate proceedings.

TENTATIVE RULING #15:

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 1, 2027, IN DEPARTMENT NINE. PETITIONER OR COUNSEL ARE ORDERED TO PERSONALLY APPEAR, OR FILE A STATUS UPDATE WITH THE COURT AT LEAST TWO WEEKS BEFORE THAT HEARING.