

April 6, 2026
Dept. 9
Probate Tentative Rulings

1.	25PR0362	IN THE MATTER OF THE 2016 CHARLES H. CONN REVOCABLE TRUST
Confirming Trust Assets / OSC Hearing to Remove 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 placed 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.

The Petition was filed on December 22, 2025. Subsequently the settlor died on February 13, 2026.

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.

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 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.

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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

At the hearing on March 2, 2026, the Court instructed the trustee to provide Petitioner with a copy of the Trust and an inventory of all Trust assets, then continued the matter to provide an opportunity to provide notice of the hearing to all Trust beneficiaries.

Following the hearing, Petitioner filed a supplemental Declaration establishing the existence of a Wells Fargo savings account that was held in the settlor's sole name until some time between March 31, 2025 and June 30, 2025, by which time the trustee was added as joint account holder. The Declaration also attaches copies of text messages indicating hostility between the trustee and Petitioner. Declaration of Deanna Martynse, dated March 24, 2026, para. 24, Exhibit 2.

Counsel for the trustee filed a Declaration, dated March 25, 2026, addressing the following issues raised by the Petition:

- Trustee became sole trustee of the Trust as of the date of the settlor's incapacity on April 29, 2025, and the trustee's position was that from that time until the settlor's death on February 13, 2026, the decedent was the only beneficiary of the Trust and the only party with standing to demand an accounting. Petitioner and the trustee communicated through counsel on these issues between December 2025 and February 4, 2026, without resolution. Declaration of Uri Grant, dated March 25, 2026, ("Grant Declaration") paras. 3-5, Exhibit 1.
- On February 23, 2026, trustee's counsel informed Petitioner's counsel of the settlor's death providing information about the proposed steps to transfer title of the real property to the Trust, which was complicated by the fact that the settlor had never retitled the property in his name as sole owner after his divorce from Hartsough. The letter further detailed a plan to provide an accounting of Trust assets, and finally, offering to discuss the issues raised in the pending Petition now that Petitioner had standing as a vested beneficiary. Grant Declaration, para. 6, Exhibit 2.
- On March 2, 2026, the Court ordered the Trust to provide information to Petitioner, which the trustee accomplished on March 18, 2026. Grant Declaration, para. 8-9, Exhibit 3. This did not include assets held in the settlor's name, which were part of his estate, not part of the Trust assets. Grant Declaration, para. 12. It did include a real property in Arizona and a vintage car collection. Grant Declaration, para. 13.
- The Wells Fargo savings account referenced in the Petition is held in the names of the settlor and the trustee as joint owners and is not a Trust asset. Grant Declaration, para. 14. This joint title was established before the April 29, 2025 date of settlor's incapacity. *Id.*, para. 15-16.
- Petitioner has specified no grounds for removal of the trustee, especially considering that the settlor passed two months ago and the trustee has been forthcoming and communicative to the beneficiaries. Grant Declaration, para. 17-18.

TENTATIVE RULING #1: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

April 6, 2026
Dept. 9
Probate Tentative Rulings

2.	26PR0041	ESTATE OF NEWTON
Letters of Administration		

Decedent died intestate on November 7, 2025, survived by Petitioner, her sister.

The Petition requests full authority under the Independent Administration of Estates Act.

A waiver of bond has been filed with the court by the Petitioner, the sole.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on February 23, 2026.

Pursuant to Probate Code § 1201, proof of service of notice of the hearing is not required because Petitioner is the only beneficiary of the estate.

Proof of publication was filed on March 13, 2026.

TENTATIVE RULING #2: 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).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

3.	PP20190015	ESTATE OF MCKINNEY
Status of Administration		

An Order for Final Distribution was entered on July 13, 2022. To date there are no receipts for distribution and no *ex parte* petition for final discharge.

There were no appearances at the previous Status of Administration hearing held on April 7, 2025.

At the Status of Administration hearing on April 8, 2024, attorney Laura Nelson-Becker informed the Court that there was one remaining asset to be distributed.

TENTATIVE RULING #3: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

4.	22PR0033	ESTATE OF KISSINGER
Status of Administration / Inventory and Appraisal		

A partial Inventory and Appraisal was filed on October 2, 2023. At the Status of Administration hearing held on April 8, 2024, there were no appearances and the Court continued the hearing on the Inventory and Appraisal. At the Status of Administration hearing held on April 7, 2025, counsel for the Administrator provided a status update and the Court continued the hearing on the Inventory and Appraisal.

TENTATIVE RULING #4: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

5.	26PR0033	IN THE MATTER OF DAVID LEMOINE
Determine Trust Assets		

The Trust was executed on May 30, 2000. Settlor acquired a real property eleven years after executing the Trust documents, but did not record title to that property in the name of the Trust. The Trust provides:

Definition of Trust Estate. All property subject to this instrument from time to time is referred to as the "trust estate" and shall be held, administered, and distributed as provided in this instrument. The trustee shall hold, administer, and distribute the property described in the Schedule of Trust Assets (which is attached hereto and made a part of this trust instrument), any other property that may be hereafter subject to this trust, and the income and proceeds attributable to: David P. Lemoine Revocable Trust, all such property, in accordance with the provisions of this instrument.

Trust, Article Two, Section 2.1.

Additions to Trust. From time to time, the trustee may accept additions to this trust from any source. All such additions shall become part of the trust estate and shall be held, administered, and distributed in accordance with the terms of this instrument. That additional property shall become part of the trust estate on written acceptance of it by the trustee. Any additions to the trust shall be made by designating in writing the property to be added. However, the titling of any account, deed, or similar asset in the name of the trustee, as trustee of this trust, or any alternate or successor trustee acting under this instrument, shall be deemed to be a transfer to this trust. Any designation by a third party, whether by will, deed, account title designation, or similar transfer, shall also be a transfer to the trust estate.

Trust, Article Two, Section 2.2.

Settlor's pour-over Will provides that the Trust is the sole beneficiary of any assets not held in the name of the Trust at the time of his death. Petition, Exhibit D. The real property that is the subject of the Petition is the only asset of decedent that was not in the name of the Trust at the time of his death.

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

April 6, 2026
Dept. 9
Probate Tentative Rulings

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.

* * *

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 with the Court on February 17, 2026.

Pursuant to Probate Code §850 and *Estate of Heggstad* (1993) 16 Cal.App. 4th 943, 947-950, the Court finds sufficient evidence that decedent intended the above-mentioned assets be part of the Trust.

TENTATIVE RULING #5: 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).

April 6, 2026
Dept. 9
Probate Tentative Rulings

6.	25PR0305	ESTATE OF ABRAHAMSON
Succession to Real Property		

Decedent died on December 25, 2019. This Petition is filed by Myrna Lunceford and Deborah Land, who are presumably decedent's siblings, pursuant to Probate Code § 13150 et seq. That statute allows the Court to determine succession to real property outside of probate for real property that is valued at less than \$166,250 for a decedent who died prior to April 1, 2022. The Petition indicates that the decedent died intestate with no surviving parents, children or spouse, and that no probate was opened for the estate.

Item 14 of the Petition indicates that the names of decedent's siblings are attached to the Petition but no such attachment is included with the filed document. The Petition indicates that the value of decedent's real property is less than the limit for a small estate. Probate Code § 13151. However, the Petition does not attach an inventory and appraisal (Judicial Council Forms DE-160, DE-161), nor does the Petition identify the real property, as required by the statute. Probate Code § 13152.

The matter was heard on December 29, 2025, but there were no appearances. The Court continued the matter to allow the Petitioners an opportunity to conform the Petition to the requirements of Probate Code § 13152.

At the hearing on March 16, 2026, counsel for Petitioners appeared and the Court continued the matter. Nothing new has been filed since that hearing.

TENTATIVE RULING #6: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

April 6, 2026
Dept. 9
Probate Tentative Rulings

7.	23PR0181	ESTATE OF MADEIRA
Status of Administration		

An Order for Final Distribution was entered on May 1, 2024. There were no appearances at the Status of Administration hearing held on April 7, 2025. Nothing new has been filed since that date.

TENTATIVE RULING #7: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

8.	26PR0001	ESTATE OF MILLER
Letters Testamentary		

Decedent died intestate on September 5, 2024, survived by four adult children. Petitioner is decedent's daughter. The other three daughters are Petitioner's half-sisters.

At the previous hearing the Court admitted the Will to probate and directed Petitioner to prepare an order that meets the requirements of Probate Code § 8223. The Court further found that Petitioner has exercised reasonable diligence in attempting to locate decedent's three daughters and may serve proof of notice of this hearing by publication.

The Court continued the hearing to allow Petitioner an opportunity to file proof of publication, which was filed on March 13, 2026.

TENTATIVE RULING #8: 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). PETITIONER SHALL PREPARE AN ORDER THAT COMPLIES WITH PROBATE CODE § 8223.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

9.	PP20210149	ESTATE OF SCOTT
OSC Hearing		

Related Case: PP20210150

This is the lead case of two consolidated cases. In both cases an Order for Final Discharge was entered on July 18, 2025.

TENTATIVE RULING #9: AN ORDER FOR FINAL DISCHARGE HAVING BEEN ENTERED BY THE COURT ON JULY 18, 2025, THE MATTER IS DROPPED FROM CALENDAR, AND CASES PP20210149 AND PP20210150 ARE DISMISSED.

April 6, 2026
Dept. 9
Probate Tentative Rulings

10.	25PR0144	ESTATE OF SHEPARD
Final Distribution		

Letters of Administration/Letters Testamentary were issued on June 30, 2025, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on January 9, 2026.

Proof of Service of Notice of the hearing on the Petition was filed on March 4, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate is to the trustee of the 2016 Shepard Family Trust, pursuant to the terms of decedent's Will.

The Petition complies with Local Rule 10.07.12.

Petitioner's counsel has waived statutory attorney fees.

The Petition requests:

1. The administration of the estate be brought to a close;
2. The First and Final Account filed with the Petition be settled, allowed and approved;
3. All acts, transactions and proceedings of the Administrator be ratified, confirmed and approved;
4. That waiver of statutory compensation to the personal representative and Petitioner's counsel be approved;
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 #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).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, APRIL 5, 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.

April 6, 2026
Dept. 9
Probate Tentative Rulings

11.	25PR0034	ESTATE OF SPRINGS
Status of Administration		

TENTATIVE RULING #11: AN ORDER FOR FINAL DISTRIBUTION HAVING BEEN ENTERED BY THE COURT ON MARCH 5, 2026, THE MATTER IS CONTINUED TO 8:30 A.M. ON MONDAY, APRIL 5, 2027, IN DEPARTMENT NINE, BY WHICH TIME THE COURT EXPECTS RECEIPTS AND AN EX PARTE PETITION FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) TO BE FILED WITH THE COURT.

April 6, 2026
Dept. 9
Probate Tentative Rulings

12.	24PR0031	ESTATE OF TALBOT aka CARTER
Status of Administration		

Letters were issued on June 27, 2024. Petitioner is in violation of Probate Code §8800 for failure to file an Inventory and Appraisal within four months of Letters issuing.

Counsel for Petitioner filed a motion to be relieved, as there has been no contact with Petitioner. The estate's sole asset was the decedent's home, which was sold in a foreclosure sale in mid-November 2024. There is no proposed Order.

Nothing new has been filed since May 14, 2025.

TENTATIVE RULING #12: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, APRIL 6, 2026, IN DEPARTMENT NINE.

April 6, 2026
Dept. 9
Probate Tentative Rulings

13.	PP20110069	AVIS JEWEL O'ROURKE SPECIAL NEEDS TRUST
Accounting Hearing		

The conservatee of this Special Needs trust died on July 15, 2023. The trustee, her sister, has filed the Ninth and Tenth Accounts for the Trust to cover the period of April 22, 2023, between the closing of the Eighth account and October 21, 2025, the present in order to settle accounts and close the Trust. No expenditures occurred or are anticipated following October 21, 2025, other than those that are detailed in the Petition.

- There is a creditor claim from the California Department of Health Care Services (“DHCS”) in the amount of \$1,431,269.35. Petition, Exhibit A.
- Property on hand is valued at \$120,418.62 plus accrued interest.
- Petitioner requests authority to retain \$5,000 to cover any additional expenses that may arise, in particular the possibility of capital gains taxes on 2024 tax returns. This should be resolved by 2028, and any remaining funds would be remitted to DHCS.
- Petitioner requests authority to pay herself \$2,448 in trustee fees.
- Petitioner requests approval of the payment of \$8,430.75 in attorneys’ fees for services provided in the Tenth accounting period.
- Petitioner requests authority to pay an additional \$6,347.80 in attorneys’ fees for services provided in the Tenth accounting period.
- Petitioner requests authority to pay all remaining assets to DHCS, and
- Petitioner requests authority to close the Trust and be relieved as trustee upon payment of all remaining funds to DHCS.

TENTATIVE RULING #13: 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).