

May 4, 2026
Dept. 9
Probate Tentative Rulings

1.	26PR0040	ESTATE OF APLANALP
Letters of Administration		

Decedent died intestate on January 28, 2026, survived by his mother, one adult daughter and one minor daughter. Petitioner is decedent's mother. The Petition requests full authority under the Independent Administration of Estates Act.

The Petition requests that bond be fixed at \$20,000.00 and that she have no authority to sell decedent's real property.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on February 13, 2026.

Proof of service of notice of the hearing on the Petition was filed on March 20, 2026.

Proof of publication was filed on April 14, 2026.

TENTATIVE RULING #1:

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, MAY 3, 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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May 4, 2026
Dept. 9
Probate Tentative Rulings

2.	PP20200127	ESTATE OF ARANDA
Petition for Initial Distribution		

Petitioner and personal representative of the Estate of Marseco Aranda, submits this Petition for Initial Distribution of Estate pursuant to Probate Code §11620.

Decedent died on April 12, 2020. The estate mostly consists of real property, which is being sold. There are no known creditors of the estate and the time for filing of claims has expired.

Decedent's Will provides for several specific monetary gifts as follows: \$10,000 to Marsesca Elaine Zimmerman, \$10,000 to Jose Marseco Aranda, \$5,000 to Michelle Angela Tellez, \$5,000 to Michael Travis Cordero, and \$10,000 to Elizabeth Ann Lopez. The residue of the estate goes to Petitioner.

Petitioner will advance the necessary funds to the Estate in order to fulfill the specific gifts, with the understanding that Petitioner will be reimbursed from the estate once the real property is sold.

There is no objection.

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).

THE STATUS OF ADMINISTRATION HEARING SET FOR 8:30 A.M. ON MONDAY, SEPTEMBER 14, 2026, IN DEPARTMENT NINE REMAINS ON CALENDAR. 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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May 4, 2026
Dept. 9
Probate Tentative Rulings

3.	26PR0116	MATTER OF BRANDES
Petition to Establish		

Petitioner Kathleen Burns Brandes seeks to establish the date of marriage between herself and her husband Jason James Henry Brandes as July 23, 1988. Both parties are listed as Petitioners but the Petition is only signed by Kathleen and not Jason. A marriage certificate signed by Reverend Albert High is attached and declares the parties were married on that date.

TENTATIVE RULING #3:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

4.	25PR0045	ESTATE OF DAVIS
Status		

The administrator filed an update with the Court indicating that the real property is being prepared for sale and once sold, the distribution will move forward. Petitioner indicates that she has been in communication with the heirs and has kept them informed of the progress.

TENTATIVE RULING #4:

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 3, 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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May 4, 2026
Dept. 9
Probate Tentative Rulings

5.	26PR0039	MATTER OF WEAVER SPECIAL NEEDS TRUST
Petition		

Petitioner, Mia Ehsani, as Trustee of the Finn Weaver Special Needs Trust (“Trust”) requests authorization to purchase a handicapped accessible vehicle which will be used to transport the beneficiary and will accommodate his needs. Paragraph C of the Trust provides that “Special Needs” includes “travel needs”.

The fair market value of the liquid Trust assets, as of January 31, 2026, is \$1,238,531.79. Additionally, the Trust is the recipient of annuities which were purchased for the total sum of \$2,250,000.00 and that make payments to the Trust commencing in the amount of \$14,659.53 per month for 20 years, guaranteed.

As indicated by Exhibit C, the cost of the vehicle is \$41,694.37 and the cost of the conversion package is \$40,460.00, of which the Regional Center has agreed to pay the sum of \$37,560.00. Petitioner is requesting authority to spend up to \$50,000.00 on the purchase of a vehicle, with title to be held in the name of beneficiary’s parents. The Trust will have a lien on the vehicle, and will be responsible for payment of registration fees, insurance, major maintenance and repairs.

As part of this Petition, Petitioner is also requesting attorney’s fees in the amount of \$2,700 plus filing costs of \$200.

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).

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May 4, 2026
Dept. 9
Probate Tentative Rulings

6.	25PR0281	ESTATE OF CLINGAN
Petition to Determine Succession of Real Property		

The case was heard on March 2, 2026, at which time Petitioner requested a continuance. There is still no Inventory and Appraisal on file.

TENTATIVE RULING #6:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

7.	25PR0036	ESTATE OF HAPPE
Status		

Petitioner filed a status update indicating that the real property has not been sold.

TENTATIVE RULING #7:

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 3, 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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May 4, 2026
Dept. 9
Probate Tentative Rulings

8.	24PR0037	ESTATE OF HEIMBERG
Status		

Letters issued on May 6, 2024. A creditor's claim by UC Davis Health was filed on July 22, 2024. A Final Inventory and Appraisal was filed on September 6, 2024.

TENTATIVE RULING #8:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

9.	24PR0112	MATTER OF DIGUIRICO REVOCABLE LIVING TRUST
Status		

The Court made several findings at the hearing on April 13, 2026. This hearing is to address the status.

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

10.	25PR0042	ESTATE OF BARRERA
Status		

Letters issued on May 6, 2025. In violation of Probate Code §8800, no Inventory and Appraisal has been completed.

TENTATIVE RULING #10:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

11.	26PR0075	MATTER OF KELLER LIVING TRUST
Petition		

Petitioner Andreea Keller is the surviving spouse of Decedent, the nominated executor of the decedent's Will and the Trustee of the Keller Living Trust ("Trust"). Respondent Evelyne Keller is the decedent's former spouse. Respondent Charles Schwab & Co., Inc. holds the brokerage account at issue herein.

Decedent died on November 1, 2025, and decedent's testamentary documents consisted of The Keller Living Trust and a "pour-over" Will that devised the residue of his estate to the Trust. Pursuant to the terms of the Trust, the entire Trust corpus passed to the Surviving Spouse without exception, subject to the terms of the Trust.
jkgreen86@protonmail.com

A judgment of dissolution was entered in the marriage of the Decedent and Respondent on March 29, 2012, in the Superior Court of California, County of Alameda. A certified copy of the Judgment is attached as Exhibit B. Petitioner herein and Decedent were married July 20, 2013.

The subject of this proceeding, a Charles Schwab brokerage contributory IRA account titled in the name of the decedent and ending in #1777, has a balance of approximately \$37,000. Petitioner alleges on information and belief that the former spouse is listed as beneficiary, but the parties divorced prior to death. Petitioner further alleges on information and belief that the former spouse has refused to relinquish her interest in the account. Charles Schwab has frozen the account due to competing claims, alleging that a court order or mutual agreement of the parties, i.e, Petitioner herein and the designated beneficiary, is required.

Petitioner seeks an order declaring the effect of Probate Code § 5040 and Family Code § 2024 on the beneficiary designation, directing Schwab to disregard any revoked designation in favor of a former spouse, and authorizing Schwab to distribute the account proceeds in accordance with California law.

There is no response by Respondent.

TENTATIVE RULING #11:

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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May 4, 2026
Dept. 9
Probate Tentative Rulings

12.	25PR0055	ESTATE OF ROSCOE
Status		

Letters issued May 9, 2025. Two creditors' claims were timely filed. Final Inventory and Appraisal was filed on November 12, 2025.

TENTATIVE RULING #12:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

13.	25PR0038	MATTER OF MARABUTO
Status		

TENTATIVE RULING #13:

**AN ORDER FOR FINAL DISCHARGE HAVING BEEN ENTERED BY THE COURT DECEMBER 9, 2025,
THE MATTER IS DROPPED FROM CALENDAR.**

May 4, 2026
Dept. 9
Probate Tentative Rulings

14.	23PR0176	MATTER OF VANDER VEEN FAMILY TRUST
Status & Motion to Compel		

Respondent moves for an order compelling further responses and imposition of monetary sanctions regarding demand for production of documents, set two. In the Motion, Respondent states that meet and confer efforts have been unsuccessful. In her Opposition, Petitioner states she has provided adequate responses.

Prior to seeking Court intervention, the Court expects parties to engage in meet and confer efforts and acknowledges Respondent's efforts. Appearances are required so that the parties can meet and confer. If necessary, the Court will provide a new hearing date to hear the Motion.

TENTATIVE RULING #14:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 4, 2026, IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

15.	25PR0283	ESTATE OF PEFFLEY
Petition for Instructions		

Petitioner is the successor trustee of the SAP Family Trust. He petitions the Court to issue instructions, compel the return of trust property, impose double damages for bad-faith taking, order an accounting, and grant all equitable relief necessary. He claims there are three pieces of real property at issue.

Petitioner states that Respondents include Jack L. Pefley, Sr. (deceased) and Yue Tang Pefley, who acted as trustees or purported trustees after the Trust became irrevocable, and that the beneficiary of the Trust is Shannon Marie Pefley, a dependent adult with permanent special needs.

Petitioner asks that the Court take several actions, however, there is no copy of the Trust provided. A complete copy of the Trust and any restatements or amendments are required for the Court's review.

TENTATIVE RULING #15:

THE HEARING IS CONTINUED TO MONDAY, JUNE 15, 2026, AT 8:30 AM IN DEPARTMENT NINE.

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May 4, 2026
Dept. 9
Probate Tentative Rulings

16.	26PR0060	MATTER OF BUCHANAN
Petition to Appoint Successor Trustee		

Petitioner, Howard Speer (“Petitioner” or “Howard”), respectfully presents this Petition for Order Appointing Successor Trustee for Testamentary Trust to Fill Vacancy (Probate Code §§ 15660(d) and 17200(b)(10)).

H. H. Buchanan, also known as Rudy Buchanan (“Decedent”), died testate on April 2, 1978, in El Dorado County, California, and was a resident of El Dorado County, California, at the time of his death. Decedent’s Last Will and Testament dated September 10, 1971 (“Decedent’s Will”) was duly admitted to probate in these proceedings (a copy of Decedent’s Will is attached hereto as Exhibit A and incorporated herein by reference). An Order Approving Final Account and Report and Decree of Distribution was filed in these proceedings on June 24, 1980 (the “Order”) (a copy of the Order is attached hereto as Exhibit B and incorporated herein by reference).

Pursuant to paragraph 5 of the Order, a testamentary trust was established for the benefit of Decedent’s spouse, Jean Buchanan (“Jean”), for Jean’s lifetime. Upon Jean’s death, the remaining assets of the testamentary trust were to be distributed to Decedent’s daughter, Betty Jo Speer (“Betty Jo”). Max H. Hoseit (“Max”) was named as the trustee of the testamentary trust per the Order. Jean died on February 25, 2006. Betty Jo died on June 13, 2019. Max died on January 31, 2025.

Although Betty Jo was entitled to outright distribution of the testamentary trust assets upon Jean’s death, record title to an undivided 20% interest in real property located at 152 Highway 50, Stateline, Douglas County, Nevada (the “real property”), is currently vested in Max’s name as trustee of the testamentary trust. The real property is currently in escrow and a successor trustee is needed to manage, convey and deal with the testamentary trust’s undivided 20% interest in the real property. Betty Jo died intestate, survived by her husband, who is the Petitioner, and their two adult children. The children, Liz and Gary, have each consented to Petitioner being appointed as the trustee. A Consent to Appointment of Successor Trustee signed by Liz is attached hereto as Exhibit C and incorporated herein by reference. A Consent to Appointment of Successor Trustee signed by Gary is attached hereto as Exhibit D and incorporated herein by reference.

TENTATIVE RULING #16:

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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May 4, 2026
Dept. 9
Probate Tentative Rulings

17.	26PR0076	MATTER OF BRUNNER
Letters of Administration		

Decedent died intestate on January 26, 2026, survived by one adult sibling, who is the Petitioner.

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

Waiver of bond has been filed with the court by the heirs.

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 April 16, 2026.

TENTATIVE RULING #17:

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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