

June 15, 2026
Dept. 9
Probate Tentative Rulings

1.	25PR0120	ESTATE OF YVONNE ARMSTRONG
Status of Administration		

Letters of Administration/Letters Testamentary were issued on **July 1, 2025**.

An Inventory and Appraisal was filed on **September 2, 2025**.

An Order for First and Final Account and Distribution was filed on **February 2, 2026** and **approved March 4, 2026**

There are no Receipts of Distribution on file with the court.

There is no ex parte Petition for Final Discharge (Judicial Council Form DE-295) on file with the court.

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 #1: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 15, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JUNE 14, 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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2.	26PR0116	MATTER OF JASON AND KATHLEEN BRANDES
PETITION TO ESTABLISH FACT, DATE, AND PLACE OF MARRIAGE		

Petitioner Kathleen Burns Brandes seeks to establish the date of marriage between herself and her husband Jason James Henry Brandes as July 23, 1988. An amended petition was filed on May 8, 2026 to add the signature of both Petitioners. A marriage certificate signed by Reverend Albert High is attached and declares the parties were married on that date.

TENTATIVE RULING #2: ABSENT OBJECTION THE PETITION IS GRANTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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3.	25PR0085	ESTATE OF BEVERLY D CAMPOS
Status of Administration		

Letters of Administration/Letters Testamentary were issued on June 16, 2025, granting Petitioner full authority under the Independent Administration of Estates Act. Petitioner is decedent's spouse and the other heir is decedent's adult child.

The Petition for Final Distribution was approved on January 26, 2026

No status report has been filed with the court

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, JUNE 15, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JUNE 14, 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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4.	25PR0093	ESTATE OF JEANNE C. MCKAY
Status of Administration		

Letters of Administration were issued on July 18, 2025.

A Final Inventory and Appraisal was approved on March 9, 2026.

No status report has been filed with the court

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 #4: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 15, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JUNE 14, 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.

5.	24PR0065	ESTATE OF JAMES HAYNES
PETITION FOR FINAL DISTRIBUTION ON WAIVER OF ACCOUNTING, AND FOR DISCHARGE		

Letters of Administration/Letters Testamentary were issued on **May 20, 2026**, granting Petitioner full authority under the Independent Administration of Estates Act.

An Inventory and Appraisal was filed on January 14, 2026. However, the inventory and Appraisal has no values or breakdown. It states nothing other than a total value of the estate without explanation of \$263,191.18. The court also does not have a copy of the will. The petition listed four beneficiaries, but the distributions alleged are to only two individuals.

No Waivers of Account **or Waivers of Notice** were executed by the heirs entitled to distributions under the estate except the Petitioner.

Proof of Service of Notice of the hearing on the Petition was not filed.

Per Local Rule 10.07.12 Petitions for final distribution must include a report of the following:

1. That no federal or California estate taxes are payable or that they have been paid;
2. That income taxes and all other taxes (e.g. supplemental real property taxes or personal property taxes, if any, have been paid or otherwise provided for.

If estate taxes are payable or paid: 1) the petition shall set forth whether said taxes were prorated pursuant to Probate Code section 20100, et seq., or the provisions of the will; and 2) the petition must reflect whether or not there are non-probate assets includable in the gross estate for estate tax purposes.

TENTATIVE RULING #5: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 15, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JUNE 14, 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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6.	22PR0228	ESTATE OF ROBERT MARSHALL
Status of Administration		

TENTATIVE RULING #6: MATTER IS DROPPED FROM CALENDAR.

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7.	24PR0198	ESTATE OF DAVID SHUI-LUNG CHAU
Final Distribution Hearing		

Letters of Administration/Letters Testamentary were issued on **September 9, 2024**, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on April 2, 2025 at the time the inventory and appraisal is filed, you must also file a change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 480 of the California Revenue and Taxation Code.

Proof of Service of Notice of the hearing on the Petition was filed on May 28, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes **specifics of distribution**.

Per Local Rule 10.07.12 Petitions for final distribution must include a report of the following:

3. That no federal or California estate taxes are payable or that they have been paid;
4. That income taxes and all other taxes (e.g. supplemental real property taxes or personal property taxes, if any, have been paid or otherwise provided for.

If estate taxes are payable or paid: 1) the petition shall set forth whether said taxes were prorated pursuant to Probate Code section 20100, et seq., or the provisions of the will; and 2) the petition must reflect whether or not there are non-probate assets includable in the gross estate for estate tax purposes.

The Petition requests:

1. Notice of the Petition has been given as required by law;
2. The administration of the estate be brought to a close without the requirement of an accounting;
3. The First and Final Account filed with the Petition be settled, allowed and approved;
4. All acts, transactions and proceedings of the Administrator be ratified, confirmed and approved;
5. The Administrator be authorized to pay statutory attorney fees in the amount of \$19,006.32, plus \$951.00 for costs advanced to the estate;
6. The Administrator be authorized to pay herself \$19,006.32 in statutory compensation;

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7. Approval of distribution of the estate to the persons entitled to it pursuant to the Petition for Final Distribution, **specifics of distribution;**
8. All creditor claims not properly filed with the court and served on the estate be barred;
9. 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.
10. **Upon filing of receipts and the Ex Parte Petition for Discharge, Petition may be discharged and released from all liability that may be incurred thereafter.**

TENTATIVE RULING #7: ABSENT OBJECTION, THE PETITION FOR FINAL DISTRIBUTION AND APPROVAL OF ACCOUNT ARE GRANTED. 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, JUNE 14, 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.	25PR0283	ESTATE OF JACK PEFLEY
Accounting Hearing, Surcharge, Appointment of Trustee		

Petitioner Anthony Pefley (“petitioner”) alleges he is the successor trustee of the SAP Family Trust (the “Trust”). On March 5, 2026, he petitioned 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.

The matter was continued from May 4, 2026, because petitioner had not submitted a copy of the Trust for the court’s review. Later on May 4, 2026, petitioner submitted a copy of the Trust. On May 7, 2026, petitioner submitted a copy of the original “short form” of the Trust, claiming that petitioner’s name does not appear as the successor trustee but it “should.” Petitioner also submitted a copy of the durable power of attorney for health care executed by Sally Pefley on July 9, 1997.

Proof of service filed March 6, 2026, shows the petition was served upon counsel for Yue Tang. In a letter to the court received January 20, 2026, counsel indicated that Ms. Tang is the trustee.

The copy of the Trust filed May 4, 2026, shows that the remainder beneficiaries include: (1) Shannan M. Pefley; (2) petitioner; (3) Jack Louis Pefley (Jr.); and (4) Donna Lee Pefley. To date, there is no proof of service of the instant petition on the other beneficiaries. There are only proofs of service filed March 10, 2026, for the document entitled, “Removal of Current Trustee,” upon Shannan Pefley and Jack Pefley.

TENTATIVE RULING #8: APPEARANCES ARE REQUIRED AT 8:30 A.M., MONDAY, JUNE 15, 2026, IN DEPARTMENT NINE, AT WHICH TIME THE COURT WILL INQUIRE PETITIONER REGARDING THE PARTIES TO THIS CASE AND SERVICE OF PROCESS.

9.	25PR0239	IN THE MATTER OF THE PETROCCHI 1994 TRUST
Petition to Compel Trustee to Provide Responses to First Account and Report, Breach of Trust, Removal, Costs and Attorneys fees		

This matter is before the court for hearing of the petition filed September 12, 2025, which seeks an order: (1) compelling the trustee to provide responses to the first account and report; (2) compelling redress of a breach of trust; (3) removing the trustee; and (4) granting petitioner attorney fees and costs.

The hearing has been continued multiple times based upon stipulation and/or request of the parties. The court includes below a copy of its tentative ruling issued January 26, 2026.

The settlor Beatrice Petrocchi amended the Trust on August 12, 2020, and died on October 30, 2021. Following a succession of resignations of named trustees (Petition, Exhs. A-C), on November 17, 2022 Paul Petrocchi served a Notification by Trustee pursuant to Probate Code § 16061.7(a)(2) that he was serving as the current trustee. Petition, Exh. D. According to the Petition, a First Account was received from the trustee on February 10, 2023, and no accounting has been received since. Petition, Exhs. E, F, G. Petitioner is a beneficiary of the Trust.

Petitioner alleges that the trustee has not provided any further accounting after February 10, 2023, despite repeated requests from Petitioner. Petition, page 3:5-10, Exh. G. Petitioner requests the Court to compel the trustee to respond to Petitioner's June 18, 2025, inquiry regarding specifics of the First Account and Report made pursuant to Probate Code § 16061. Petitioner alleges that the trustee has breached his fiduciary duty in failing to deal impartially with beneficiaries (Probate Code § 16003), to preserve Trust property (Probate Code § 16006), to make Trust property productive (Probate Code § 16007), to follow the standard of care of a prudent investor (Probate Code §§ 16045-16049) and to provide beneficiaries with relevant information pertaining to the trust on written request (Probate Code § 16061).

Petitioner further believes that the trustee improperly valued personal property distributed to favor Trustee, that the trustee incurred \$235,573.06 in losses from the sale of stock. And that the trustee has not yet made final distributions and continues to hold significant liquid assets.

Petitioner further requests the Court:

- To order the trustee to reimburse Petitioner for half the value of the loss of the stock sales;
- To require the trustee to provide an accounting for the period of October 30, 2021;
- To remove the trustee and appoint a professional trustee who should be instructed to revalue the personal property that has already been distributed.

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Petitioner also requests award of attorney's fees based on the probate Court's broad equitable powers.

At the hearing on January 5, 2026, the Court indicated that if documents are not produced the Court would be inclined to suspend the Trustee.

On March 12, 2026, Petitioner issued a subpoena duces tecum directed to Charles Schwab. As of March 17, 2026, the parties intended to continue meet and confer efforts and review and share documents. Nothing new has been filed since March 17, 2026.

TENTATIVE RULING #9: APPEARANCES ARE REQUIRED AT 8:30 A.M., MONDAY, JUNE 15, 2026, IN DEPARTMENT NINE.

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10.	26PR0055	ESTATE OF THERESA MARIE BUSTAMANTE
Petition to Determine Succession to Real Property		

Petitioner, who is also the executor of decedent's estate, seeks an order determining succession of real property by petition pursuant to Probate Code section 13150, et seq. According to the decedent's will, petitioner is only entitled to a 10 percent interest in the real property. The other 90 percent interest is bequeathed to the other nine beneficiaries identified in the decedent's will. Because the petitioner is not entitled to succeed the entire interest of the real property (see, Prob. Code, § 13152, subd. (a)(4)), the court finds that the procedure of determining succession to property under Probate Code section 13150, et seq. may not be used in this case.

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

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11.	25PR0087	THE ESTATE OF MONTY JOHN STAUDINGER
Status of Administration		

Letters of Administration were issued on July 11, 2025.

An Inventory and Appraisal was filed on November 19, 2025. At the time the inventory and appraisal was filed, the change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 480 of the California Revenue and Taxation Code, was filed.

A Petition for Final Distribution was filed on June 2, 2026. A hearing on said petition is currently set for hearing on July 20, 2026.

TENTATIVE RULING #11: THE COURT, ON ITS OWN MOTION, CONTINUES THE STATUS OF ADMINISTRATION HEARING TO 8:30 A.M., MONDAY, DECEMBER 13, 2026, IN DEPARTMENT NINE. THE HEARING ON THE PETITION FOR FINAL DISTRIBUTION IS CONFIRMED FOR 8:30 A.M., MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

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12.	24PR0033	ESTATE OF LARRY H. STEWARD
Status of Administration		

Letters of administration were issued June 9, 2025.

There is no Inventory and Appraisal on file with the court. Probate Code §8800 requires that the personal representative file an Inventory and Appraisal with the Court within 4 months from the issuance of letters.

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

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JUNE 14, 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.	26PR0122	WARREN AND MARY ANN CROSBY FAMILY TRUST
Transfer in from Sacramento County		

On February 4, 2026, the Sacramento County Superior Court appointed Christina Tomolillo to serve as successor trustee of the Warren Roger Crosby and Mary Ann Crosby Family Trust Dated June 18, 1991 (the "Trust"), without bond and transferred the matter to the El Dorado County Superior Court. This court is in receipt of the certified copy of the case file from Sacramento County.

The last remaining asset of the Trust is a promissory note dated April 5, 1994, which remains to be distributed to the estate of William Michael Tomolillo.

TENTATIVE RULING #13: THE COURT SETS A HEARING RE: STATUS OF ADMINISTRATION AT 8:30 A.M., MONDAY, JUNE 14, 2027, IN DEPARTMENT NINE. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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14.	24PR0084	THE MATTER OF THE VISMAN FAMILY REVOCABLE TRUST
Compel Trust Accounting		

On April 27, 2026, petitioner Brad Visman (“petitioner”) filed a petition seeking an order to: (1) compel trustees Michael Visman and Mark Visman (collectively, “trustees”) to account; (2) enjoin trustees from paying any further attorney fees from the trust estate absent court approval; (3) deny compensation of trustees; (4) remove trustees and appoint a professional fiduciary as trustee; (5) surcharge the trustees’ shares in the trust estate in an amount equal to the loss of value of the trust estate resulting from trustees’ alleged breach of trust, with interest; and (6) award attorney fees and costs incurred in bringing the instant petition.

With respect to accounting, the current trustees have been administering the Trust since the death of settlor Ruth Visman on October 15, 2023. Petitioner claims the trustees have failed to provide a code-compliant accounting. Petitioner alleges he first requested an accounting from the trustees in petitioner’s April 2, 2024, petition for instructions. Thereafter, on July 17, 2024, and again on May 29, 2025, petitioner issued additional written requests for accountings. On April 8, 2025, the trustees provided a “preliminary accounting.” In their objection to the instant petition, the trustees indicated that the only missing or incomplete item relates to the transfer of property to petitioner. The trustees stated they anticipated providing the updated accounting to petitioner “within weeks.” Pursuant to Probate Code section 16061, the court orders the trustees to serve a code-compliant accounting upon petitioner (covering the period of October 15, 2023, through the date of the court’s order) within 30 days of the notice of entry of order.

With respect to all other issues in the instant petitioner, the court finds good cause to continue the hearing to September 21, 2026, to allow the court time to issue its final ruling on the April 2, 2024, petition for instructions, which was taken under submission as of May 1, 2026. The court held a seven-day trial on the matter in late 2025, issued a tentative ruling on March 19, 2026, and allowed the parties to file objections and/or responses to the court’s tentative ruling. With the exception of the request for accountings, the issues in the instant petition are largely dependent on the court’s findings on the April 2, 2024, petition for instructions.

TENTATIVE RULING #14: THE COURT ORDERS THE TRUSTEES TO SERVE A CODE-COMPLIANT ACCOUNTING UPON PETITIONER (COVERING THE PERIOD OF OCTOBER 15, 2023, THROUGH THE DATE OF THE COURT’S ORDER) WITHIN 30 DAYS OF THE NOTICE OF ENTRY OF ORDER. WITH RESPECT TO ALL REMAINING ISSUES IN THE INSTANT PETITION, THE COURT CONTINUES THE MATTER TO 8:30 A.M., MONDAY, SEPTEMBER 21, 2026, IN DEPARTMENT NINE. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

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15.	26PR0121	ESTATE OF PAULA ZDENEK
Petition to Determine Succession to Real Property		

TENTATIVE RULING #15: 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).