

July 20, 2026
Dept. 9
Probate Tentative Rulings

1.	26PR0156	DECEDENT'S ESTATE OF ROBERT SULLIVAN
LETTERS OF ADMINISTRATION		

Decedent died intestate on February 14, 2026, survived by Jennifer Lee Sullivan. Petitioner is decedent's daughter.

The Amended Petition is silent as to whether full or limited authority under the Independent Administration of Estates Act is requested.

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

There is no Duties/Liabilities statement (DE 147/DE 147s) on file with the court, as required by Probate Code § 8404.

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.

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

TENTATIVE RULING #1:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

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2.	26PR0161	ESTATE OF ANGELA BARBARA MAGDALENE ALLEN
PROBATE WILL/ISSUE LETTERS		

Decedent died testate on August 24, 2024, and has no survivors. Petitioner is Mia Ehsani, a California licensed professional fiduciary.

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

Gerald Reponen and Ruth Reponen were named as Co-Executors in the Will. Ruth Reopenen is deceased. Gerald Reponen filed a declination to serve as Executor on June 2, 2026, wherein he nominates Petitioner to serve as Executor.

The Will was lodged with the Court on June 2, 2026.

The Petition states that bond be fixed at \$1,000.

A Duties/Liabilities Statement (DE 147/DE 147S) was filed on June 2, 2026.

Proof of service of notice of the hearing on the Petition was filed on June 4, 2026.

Proof of publication was filed on June 25, 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, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED

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3.	26PR0163	ESTATE OF ROBERT F MURRAY
PROBATE WILL/ISSUE LETTERS		

Decedent died testate on March 23, 2026, survived by a spouse and two adult children. Petitioner, Tonya Renee Rizzo-Murray, is decedent's spouse.

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

Tonya Renee Rizzo-Murray was named as Executor in the Will.

The Will was lodged with the Court on June 2, 2026.

The Will waives bond.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on June 2, 2026.

Proof of service of notice of the hearing on the Petition was filed on June 9, 2026.

Proof of publication was filed on June 26, 2026.

TENTATIVE RULING #3:

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, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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4.	24PR0260	ESTATE OF SUSHANNA BELEW NEUNER
STATUS OF ADMINISTRATION		

Letters Testamentary were issued on July 21, 2025.

A Final Inventory and Appraisal was filed on March 3, 2025, and a Supplemental Inventory and Appraisal was filed on November 14, 2025. Decedent owed no real property at the time of death and thereby no change of ownership statement was filed as provided in section 480 of the California Revenue and Taxation Code.

There is no Petition for Final Distribution on file with the court.

TENTATIVE RULING #4:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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5.	26PR0157	ESTATE OF WAYNE PAUL TOWNZEN
LETTERS OF ADMINISTRATION		

Decedent died intestate on December 21, 2025, and has no survivors. Petitioner, Sylvia Leins, is decedent's sibling.

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

The Petition states that bond be fixed at \$360,000.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on June 1, 2026.

Proof of service of notice of the hearing on the Petition was filed on June 11, 2026.

Proof of publication was filed on July 2, 2026.

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).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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6.	26PR0171	ESTATE OF WENDY JEAN BARNETT
PROBATE WILL/ISSUE LETTERS		

Decedent died testate on April 19, 2026, and has no survivors. Petitioner, James Barnett, is decedent's brother.

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

James Barnett was named as Executor in the Will.

The Will was lodged with the Court on June 12, 2026.

The Will waives bond.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on June 12, 2026.

Proof of service of notice of the hearing on the Petition was filed on June 12, 2026.

Proof of publication was filed on July 6, 2026.

TENTATIVE RULING #6:

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, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

7.	26PR0138	IN RE: THE JOHN E. SOLTESZ AND LUCILLE S. SOLTESZ REVOCABLE TRUST DATED APRIL 5, 2003
PETITION HEARING		

On May 14, 2026, Petitioner, Cynthia Soltesz, filed a Petition for Order Confirming Trust Existence, Determining Ownership of Property, and Directing Transfer of Real Property (Prob. Code § 850 et seq., 17200 et seq.). A Notice of Hearing was filed on May 22, 2026. No opposition has been filed.

Petitioner requests the following relief:

1. An order confirming that, for purposes of transferring the Property into the Trust, "The Lucille S. Soltesz Revocable Trust Agreement dated April 20, 2003" is the same agreement as the John E. Soltesz and Lucille S. Soltesz Revocable Trust dated April 5, 2003; and
2. An order confirming that all right, title, and interest of Lucille S. Soltesz in and to the real property commonly known as 3857 Hillsborough Rd, Cameron Park, El Dorado, CA 95682-8505, APN 082-245-008-000 (formerly 082-245-08-100), with the legal description set forth above, currently vested in "Lucille S. Soltesz, an unmarried woman," is vested in and transferred to Cynthia Soltesz, Trustee of the John E. Soltesz and Lucille S. Soltesz Revocable Trust dated April 5, 2003.

Trust Existence

The Trust was established by John E. Soltesz and Lucille S. Soltesz as Grantors on April 5, 2003. John E. Soltesz, one of the grantors and a co-trustee of the Trust died on February 8, 2010. On May 9, 2010, Lucille S. Soltesz, the surviving Grantor, executed the First Amendment to the Trust ("First Amendment"). The First Amendment used an incomplete name of the Trust ("First Amendment to the *Lucille S. Soltesz Revocable Trust Agreement of April 5, 2003*") in its title, whereas the text of the First Amendment references the full and correct name of the Trust, namely *John E. Soltesz and Lucille S. Soltesz Revocable Trust* and the date of its creation, April 5, 2003.

On March 14, 2013, Lucille S. Soltesz, the surviving Grantor, executed the Second Amendment to the Trust ("Second Amendment"). The Second Amendment uses an incomplete name of the Trust as in the First Amendment and contains a scrivener's error resulting in an incorrect reference to the date of the creation of the Trust ("Second Amendment to the *Lucille S. Soltesz Revocable Trust Agreement of April 20, 2003*") in its title.

Petitioner contends that the text of the Second Amendment, like the First Amendment, references the original Trust and the First Amendment dated May 9, 2010, which reflects the intent to amend the original Trust notwithstanding the incorrect title and the scrivener's error as

to the date in the title. Per Petitioner's declaration, she conducted a diligent search of available records and did not find any documents related to the creation of any other trusts.

The Court's power to reform a trust agreement based on mistake is codified in Code of Civil Procedure § 3399, which provides:

When, through fraud or a mutual mistake of the parties, or a mistake of one party, which the other at the time knew or suspected, a written contract does not truly express the intention of the parties, it may be revised on the application of a party aggrieved, so as to express that intention, so far as it can be done without prejudice to rights acquired by third persons, in good faith and for value.

A declaration of trust may be reformed and revised under Code of Civil Procedure § 3399 to correct a drafting error which, if left intact, would conflict with the actual expressed intent of the contracting parties. *Ike v. Doolittle* (1998) 61 Cal.App.4th 51, 81; *Giammarrusco v. Simon* (2009) 171 Cal.App.4th 1586, 1606.

Upon review of the Trust, First Amendment, Second Amendment, and Declaration of Cynthia Soltesz, the Court finds it was the intent of Lucille S. Soltesz to amend the John E. Soltesz and Lucille S. Soltesz Revocable Trust Agreement.

Property

On April 4, 2011, Decedent and Grantor of the Trust, Lucille S. Soltesz, obtained certain property located at 3857 Hillsborough Rd, Cameron Park, El Dorado County, CA 95682-8505, carrying Assessor's Parcel Number 082- 245-008-000 (formerly 082-245-08-100) in her individual name, as an unmarried woman. A Grant Deed was recorded on April 7, 2011.

On July 3, 2014, after the execution of the Second Amendment, Grantor, Lucille S. Soltesz, signed and had notarized a Quitclaim Deed to transfer the Property into the Trust. The name of the Trust to which the Quitclaim Deed purported to transfer the Property to is the same as the title of the Second Amendment, which contained the incomplete name of the Trust and a scrivener's error related to the date of the creation of the Trust. The Quitclaim deed was never recorded for unknown reasons. Petitioner believes this was an error on behalf of the prior attorney.

Petitioner argues the Trustor's notarized signature on the Quitclaim Deed evidences her intent to treat the Property as a Trust asset, notwithstanding the incomplete trust name and incorrect trust date used in the deed.

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

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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.

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.

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 #7:

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).

IF A PARTY OR PARTIES WISH TO APPEAR REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

8.	25PR0285	IN THE MATTER OF CERWONKA LIVING TRUST
PETITION HEARING		

On October 17, 2025, Petitioner, Gerald F. Cerwonka ("Petitioner") filed a Petition to 1) Revoke Attorney-in-Fact Pursuant to Probate Code § 4541(d); 2) Compel Accounting by Attorney-in-Fact Pursuant to Probate § 4541(c); and 3) Recover Trust Assets Pursuant to Probate Code § 850. Respondent, Jennifer Peterson ("Respondent") filed a Response and Objection on February 9, 2026.

At the hearing on April 20, 2026, the Parties requested a continuance to allow time to meet and confer. A Reply to Respondent Jennifer Peterson's Responses and Objections to Petitioner Gerald F. Cerwonka's Petition to Revoke Respondent's Attorney in Fact, Compel Accounting, and Recover Trust Assets was filed on July 5, 2026.

The Trust at issue was established on March 21, 2000, and amended in 2011, by Janette Cerwonka ("Mrs. Cerwonka"), Respondent's mother, and Petitioner, Janette Cerwonka's husband. See Petition, Exhibit A. Mrs. Cerwonka and Petitioner are the current trustees and the only beneficiaries of the Trust during their lifetimes. When Mrs. Cerwonka was diagnosed with Alzheimer's in 2018, all three parties agreed to appoint Respondent as Mrs. Cerwonka's attorney-in-fact. See Petition, Exhibit B. This gave Respondent's authority to manage Trust assets, giving rise to a conflict between Petitioner as Trustee and Respondent as attorney-in-fact. Petitioner asserts that he believed that the power of attorney was only for health care decisions, not for financial decisions. Among the actions of Respondent that are contested by Petitioner:

1. Retitling the principal bank account from the name of the Trust to the joint names of Mrs. Cerwonka and Respondent, and thereafter using the account in a manner to which Petitioner objects;
2. Refinancing Trust real property assets, which increased indebtedness and monthly payment amounts;
3. Transferring \$535,000 to Mrs. Cerwonka's sister, Patricia Macklin in what was represented as a loan repayment;
4. Making payments to the Department of the Treasury and the California Franchise Tax Board (\$13,500 in total) without explanation;
5. Making payment to an orthodontist for the benefit of Respondent's daughter (\$5,082.00)

Petitioner asserts that Mrs. Cerwonka's health now meets the statutory standard for incapacity pursuant to Probate Code § 4541(d) (2) and requests the Court to revoke the power of attorney and compel and accounting from Respondent.

Petitioner further requests the power of attorney to be revoked for conflict of interest, actions in excess of Respondent's authority under the instrument and in violation of her duties

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pursuant to Probate Code §§ 4230, 4232(a) and 4233, including retitling the bank account and refinancing the real properties. *Gomez v. Smith* (2020) 54Cal.App.5th 1016.

Petitioner requests the Court to order recovery of twice the value of any loss of the value of the Trust property, profits realized by Respondent, and lost profits of the Trust resulting from the breach of Respondent's duties, pursuant to Probate Code §§ 4231.5 and 859.

Petitioner further requests the Court to revoke Respondent's power of attorney, compel an accounting and return Trust property to the Trust pursuant to Probate Code § 850.

The Objection to the Petition is filed by decedent's daughter and Petitioner's step-daughter. Respondent counters that the Trust document lists all Trust assets as either the separate property of Mrs. Cerwonka or the separate property of Petitioner, without designating any community property assets. Mrs. Cerwonka's separate property assets were all to be distributed to Respondent upon Mrs. Cerwonka's death, with the exception of a life estate granted to Petitioner to live in the settlors' primary residence during his lifetime. According to Schedule C of the Trust, attached to the Objection as Exhibit 1, the separate property assets of Mrs. Cerwonka include:

- All Bank of America Accounts, including the Account ending in -09834.
- 1431 Plateau Circle, South Lake Tahoe, CA 96150
- 926 Macinaw Road, South Lake Tahoe, CA 96150
- 948 Tallac Street, South Lake Tahoe, CA 96150
- 888 San Jose, South Lake Tahoe, CA 96150
- 696 San Francisco, South Lake Tahoe, CA 96510

The Third Amendment to Trust, see Objection, Exhibit 2, grants to Petitioner:

(1) an interest in the net income from 926 Macinaw Road for his lifetime ;and

(2) an exclusive right to possess and occupy 1431 Plateau Circle during his lifetime following Ms. Cerwonka's death, subject to the condition that he would be responsible for the mortgage payments and other expenses.

According to Respondent, Mrs. Cerwonka asked Respondent to undertake the power of attorney in 2018. See Objection, Exhibit 3. The Objection asserts that Mrs. Cerwonka was able to manage her own finances without support from Respondent until 2022, which included the 2021 refinancing of the real properties in order to pay off a promissory note for a debt owed to her sister, which is documented in Exhibit 4 to the Objection. The timing of the refinance was determined because of historically low interest rates at the time, and an impending due date for repayment of the loan. Respondent notes that Petitioner consented to these refinancings, as evidenced by his execution of the resulting grant deeds. Objection, Exhibit 5. Further, Respondent argues that the refinancing of the rental property (926 Macinaw Road) resulted in

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reducing monthly payments, reducing the interest rate and shortening the life of the loan. For the other property, the primary residence of the settlors (1431 Plateau Circle), the refinancing reduced the interest rate and made possible the early repayment of the loan on the Macinaw Road rental property. Respondent notes that she received no benefit from these transactions.

Respondent notes that Petitioner never objected to Respondent's activities with respect to her mother's financial affairs until 2025, when Petitioner's son requested a copy of the power of attorney, which she provided to him. The Petition was filed in October 2025, claiming that he is a beneficiary of the separate property assets of Mrs. Cerwonka, contrary to the provisions of the Trust, and that he had no knowledge of the refinancings, which is belied by his signatures on the grant deeds.

Respondent argues that the demand for termination of her power of attorney based on fraud or undue influence in its creation is barred by the statute of limitations, given that the Petition admits that Petitioner received a copy of that document in 2018 (Petition, para. 5). Similarly, the retitling of the bank account was accomplished in 2019, from which Petitioner received 95 checks between 2019 and 2025 totaling \$78,036.40, which checks reflected that the ownership of the account was then held by Respondent and her mother jointly.

Respondent asserts that Petitioner is also suffering from cognitive decline such that he no longer has capacity to act as trustee of the Trust.

Finally, Respondent notes that whether or not Petitioner is able to afford mortgage payments is a hypothetical question because Mrs. Cerwonka is still living and is still paying the mortgage on the property through the mortgage payments that are contested by the Petition. Hypothetically speaking, Petitioner may predecease Mrs. Cerwonka, rendering this argument moot, and further, he has assets of his own as his separate property and the right to rental income from the 926 Macinaw property. Accordingly, this issue is not ripe for adjudication.

TENTATIVE RULING #8:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

9.	26PR0151	IN THE MATTER OF JAMES BARNETT
PETITION HEARING		

On May 27, 2026, Petitioner filed a Petition for Order Confirming Trust Assets (Probate Code § 850(a)(3). A Notice of Hearing was filed on June 4, 2026. Proof of Service were filed on June 12, 2026 confirming Morgan Stanley and Bank of America were served. No opposition has been filed.

Petitioner seeks the following relief:

1. The Wendy Barnett's Legacy, Final Wishes & Trust dated February 20, 2025 is a valid trust and that James Barnett is the current trustee thereof; and
2. The assets set forth in Exhibit "E" are assets subject to the management and control of James Barnett, as sole Trustee of The Wendy Barnett's Legacy, Final Wishes & Trust dated February 20, 2025, under the Bill of Transfer and Notice of Assignment document or under Schedule A of the Trust Agreement

The Settlor of Wendy Barnett's Legacy, Final Wishes & Trust dated February 20, 2025 (the "Trust") was Wendy Jean Barnett (the "Settlor"), who died on April 19, 2026. Petitioner, James Barnett ("Petitioner" or "Trustee") is presently acting as Trustee.

Probate Code § 17200, in part, provides:

(a) Except as provided in Section 15800, a trustee or beneficiary of a trust may petition the court under this chapter concerning the internal affairs of the trust or to determine the existence of the trust.

(b) Proceedings concerning the internal affairs of a trust include, but are not limited to, proceedings for any of the following purposes:

(3) Determining the validity of a trust provision.

(5) Settling the accounts and passing upon the acts of the trustee, including the exercise of discretionary powers.

Paragraph 4(a) of the Trust states that Settlor and Petitioner will be the Co-Trustees of the Trust, and that if one of them cannot serve due to death, the other shall continue to serve as sole Trustee of the Trust.

In paragraph 2 of the Trust, the Settlor declared that the property described in schedule A is transferred in Trust to be held, administered, and distributed under the terms of the Trust. Schedule A lists, among other items, the following:

- Bank of America, Account Type: All
- Morgan Stanley, Account Type: Money Market

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- The following stocks and/or bonds:
 - 5,307 shares of Uber Shares issued by Uber Technologies, Certificate Number: XXX2418
 - 391 shares of Common Stock issued by Uber Technologies, Certificate Number XXXXXXX7213

A Bill of Transfer and Notice of Assignment was signed by Settlor on February 20, 2025 which documented her intent to transfer and assign to the Co-Trustees all of Settlor's interests in Schedule A. Settlor also signed letters to her financial institutions informing them that she was the grantor of a living trust and that she had transferred all of her right, title and interest in the referenced accounts to the Trust. She further requested they make note of this transfer and update their records such that the above-referenced account(s) is/are registered in the name of 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.

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.

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The Court is inclined to grant Petitioner's request upon receipt of documentary evidence establishing the designated assets belong to Settlor.

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

10.	26PR0165	IN THE MATTER OF JUNE O. KNOX LIVING TRUST DATED FEBRUARY 1, 2000
INSTRUCTION HEARING		

On June 4, 2026, Petitioner filed a Petition for Orders Under Cal. Prob Code § 850(a)(3) Confirming Trust Ownership of Property. A Notice of Hearing was filed on June 11, 2026. No opposition has been filed.

Petitioner seeks the following relief:

1. Finding that all notices have been provided as required by law;
2. Confirming that the following financial accounts are assets of the June O. Knox Living Trust dated February 1, 2000, subject to the terms of the trust and under the control of the trustee of the trust: (1) Chase Bank Certificate of Deposit Account #0484; and (2) Chase Bank Certificate of Deposit Account #0487.

Settlor, June O. Knox ("Settlor"), executed a declaration of trust entitled the June O. Knox Living Trust on February 1, 2000. Settlor executed the First Restatement to the trust on September 21, 2020. Article 1, Paragraph 1.1 of the restated trust instrument provides that:

The property described in the attached list of Trust Property, marked 'Schedule A,' is now held by the Trustee in trust. This property and any other property later transferred to the Trust is hereafter referred to as the "Trust Property" and shall be held, administered, and distributed as provided in this document and any subsequent amendments to this document.

Items 1, 2, and 3 on Schedule A to the restated trust instrument are (1) Chase Bank savings acct # 7668012120; (2) Chase Bank checking acct # 894196872; and (3) Chase Bank CD # 9318487683.

Paragraph 4.1.1. of the Trust entitled Distribution of Chase Bank Accounts instructs:

The Trustee shall divide and distribute the funds remaining in the Settlor's Chase Bank Accounts as follows: one-half to Joyce Kilburg and James Kilburg, or the survivor of them, and one-half to Gina Courter and Robert Courter, or the survivor of them.

On September 21, 2020 Settlor also executed her Last Will and Testament, which provides in Article 2, paragraph 2.2:

I give all of my probate estate, after expenses and taxes are paid under this Will, to the then-acting Trustee of the June O. Knox Living Trust dated February 1, 2000 and restated in full on September 21, 2020, to be held and administered by the

trustee according to the terms and conditions of that trust including, without limitation, any amendment made to it before my death.

Settlor became incapacitated prior to death and Petitioner began administering the trust as Successor Trustee. Pursuant to her fiduciary duties, Petitioner asked Chase Bank to establish certificate of deposit accounts and transfer funds from Settlor's checking and savings accounts to the CD accounts to make the Trust assets productive. These assets had previously been transferred into the Trust by Settlor. When the CD accounts were opened, the Chase Bank representative titled the accounts in the Settlor's individual name and noted Petitioner as the Attorney-in-Fact under Settlor's Power of Attorney. Unbeknownst to Petitioner, this unintentionally converted the funds from the trust to Settlor as an individual. The error was not discovered until after Settlor's 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 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.

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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 #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).

IF A PARTY OR PARTIES WISH TO APPEAR REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

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11.	25PR0138	IN THE MATTER OF KEVIN BRADY
REVIEW HEARING		

Letters of Administration were issued on August 6, 2025.

A Final Inventory and Appraisal was filed on May 1, 2026.

A Report of Status of Administration was filed on July 13, 2026, which informed the Court a supplemental Inventory and Appraisal may be necessary. Petitioner requests an additional twelve months from the date of this Report of Status of Administration for the filing for an order for final distribution of the Estate.

TENTATIVE RULING #11:

PETITIONER'S REQUEST IS GRANTED.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

NO HEARING ON THIS MATTER WILL BE HELD UNLESS A REQUEST FOR ORAL ARGUMENT IS TRANSMITTED ELECTRONICALLY THROUGH THE COURT'S WEBSITE OR BY TELEPHONE TO THE COURT AT (530) 621-6551 BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. CAL. RULE CT. 3.1308; LOCAL RULE 8.05.07; SEE ALSO LEWIS V. SUPERIOR COURT, 19 CAL.4TH 1232, 1247 (1999).

NOTICE TO ALL PARTIES OF A REQUEST FOR ORAL ARGUMENT AND THE GROUNDS UPON WHICH ARGUMENT IS BEING REQUESTED MUST BE MADE BY TELEPHONE OR IN PERSON BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. CAL. RULE CT. 3.1308; EL DORADO COUNTY LOCAL RULE 8.05.07. PROOF OF SERVICE OF SAID NOTICE MUST BE FILED PRIOR TO OR AT THE HEARING.

LONG CAUSE HEARINGS MUST BE REQUESTED BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED AND THE PARTIES ARE TO PROVIDE THE COURT WITH THREE MUTUALLY AGREEABLE DATES ON FRIDAY AFTERNOONS AT 2:30 P.M. LONG CAUSE ORAL ARGUMENT REQUESTS WILL BE SET FOR HEARING ON ONE OF THE THREE MUTUALLY AGREEABLE DATES ON FRIDAY AFTERNOONS AT 2:30 P.M. THE COURT WILL ADVISE THE PARTIES OF THE LONG CAUSE HEARING DATE AND TIME BY 5:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. PARTIES MAY PERSONALLY APPEAR AT THE HEARING.

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12.	26PR0098	IN THE MATTER OF THE LARRY R. BRYANT AND SHARON K. BRYANT 1990 LIVING TRUST, AS AMENDED
PETITION HEARING		

Petitioner is Trustee of the Trust that was created May 1, 1990, and restated February 25, 2011, and amended on July 30, 2003, and March 23, 2018. The period covered by the report of account is June 10, 2024 to the date of filing.

The Petition requests the Court to issue an Order:

1. The First and Final Report and Accounting by Trustee, as 3 set forth herein, be approved;
2. All of the reported acts and proceedings of Petitioner as Trustee, as presented to this court, be confirmed and approved;
3. Distribution of one-half (1/2) of the Trust is confirmed as follows:
 - a. DANIEL LINAREZ, \$0.00 (balance of note due)
 - b. RAVEN R. PRATAS, \$145, 274
 - c. ROBYN BUNDERSON, \$145,274
 - d. JEANNETTE SHARP, \$145, 274
 - e. JEFF LIDEN, \$145, 274
 - f. MARY C. McELWAIN, \$145, 274
 - g. GINA D. HERBST, \$145,274
 - h. VALLEY HUMANE SOCIETY, \$145,274
 - i. TRI-VALLEY RESCUE, \$145, 274
 - j. PLANNED PARENTHOOD NOR- CAL SHASTA DIVISION ,19 \$145,274
4. Such further order as the Court deems proper

The Court continued the hearing to July 20, 2026, as there was no Proof of Service of the Petition filed with the Court. Nothing further has been filed with the Court.

Per the Court's order on June 8, 2026, this case was consolidated with case no. 26PR0117.

TENTATIVE RULING #12:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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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**IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530)
621-5867 AND MEETING INFORMATION WILL BE PROVIDED.**

13.	26PR0159	IN THE MATTER OF WILLIAM CHARLES KREISL
HEARING – DETERMINING TITLE TO REAL PROPERTY		

On June 1, 2026, Petitioners, William Charles Kreisl and Stefan Kreisl (collectively “Petitioners”), filed a Petition for Order Determining Title to Real Property and Order Authorizing Real Property to be Conveyed to Trust. A Notice of Hearing was filed on June 2, 2026. No opposition has been filed.

The Petition requests the following relief:

1. The Wells Fargo Individual Brokerage account be re-titled to reflect ownership by the Trust: William Charles Kreisl and Stefan Kreisl, Co-Trustees of The William Kreisl Living Revocable Trust, dated January 8, 2026;
2. That the First Northern Bank Business Checking Account be re-titled to reflect ownership by the Trust: William Charles Kreisl and Stefan Kreisl, Co-Trustees of The William Kreisl Living Revocable Trust, dated January 8, 2026;
3. That the Schools First Federal Credit Union checking account be re-titled to reflect ownership by the Trust: William Charles Kreisl and Stefan Kreisl, Co-Trustees of The William Kreisl Living Revocable Trust, dated January 8, 2026;
4. That that Schools First Federal Credit Union savings account be re-titled to reflect ownership by the Trust: William Charles Kreisl and Stefan Kreisl, Co-Trustees of The William Kreisl Living Revocable Trust, January 8, 2026; and
5. Notice of hearing has been given as required by law.

On January 8, 2026, William Kreisel (“Settlor”), created The William Kreisl Living Revocable Trust (the “Trust”). Settlor died on February 15, 2026. Petitioners accepted trusteeship upon Settlor’s death and are acting as Co-Successor Trustees.

Schedule A of the Trust lists assets which Settlor intended to be owned by the Trust, specifically: Wells Fargo checking, savings, and money market accounts; First National Bank business and personal checking accounts; and Schools First Federal Credit Union checking account.

Settlor does not hold any of his assets at First National Bank but rather First Northern Bank. Petitioners believe that the inclusion of First National Bank on Schedule A was a typographical error that was inadvertently overlooked due to the urgency of ensuring the Trust and estate plan were signed and notarized before Settlor passed away.

Petitioners further assert that Settlor listed Oakstone Construction, Inc. as a Trust asset, which owns the First Northern Bank (i.e., First National Bank) account, which demonstrates the Settlor’s intent to include the First Northern Bank accounts in Trust, as well as the typographical error.

The Assignment of Business Interest states:

WITHOUT CONSIDERATION, the undersigned does hereby assign, **transfer and set over to WILLIAM KREISL, as Trustee of THE WILLIAM KREISL LIVING REVOCABLE TRUST, U/A dated January 8, 2026, all of my right, title and interest in the business entity known as OAKSTONE CONSTRUCTION, INC, 4028 Yosemite Place, Placerville, California; and shall include, but not be limited to, the goodwill, accounts receivable, equipment, inventory, bank accounts and all other assets of the business of whatever manner, wherever located, and whenever acquired. The foregoing assignment and transfer shall apply even though "record" ownership or title, in some instances, may, presently or in the future, be registered in my individual name, in which event such record ownership shall hereafter be deemed held in trust even though such trusteeship remains undisclosed.**
(emphasis added)

Despite Settlor specifying Wells Fargo checking, savings, and money market accounts on Schedule A, Settlor also owned a Wells Fargo Individual Brokerage Account held in his individual name which was not specifically referenced. Additionally, Settlor owned a Schools First Federal Credit Union Savings Account which was not included on Schedule A despite listing a Schools First Federal Credit Union Checking Account.

Petitioners assert that despite these accounts not being explicitly identified on Schedule A, Settlor intended the accounts be included as Trust assets based upon the Declaration of Trust, the Will, the Trust itself, and the Declarations of Charles Kreisl and Stefan Kreisl.

The Declaration of Trust provides:

I, WILLIAM KREISL, hereby declare that **all assets of every kind and description and wheresoever situated which I presently own or hereafter acquire** (regardless of the means by which acquired and/or the record title in which held: including, by way of illustration and not limitation, all real property, investments, **bank accounts, etc.), other than any Individual Retirement Accounts or other type of plan which is tax deferred under the Internal Revenue Code of 1986, as amended, are transferred to and the same shall be owned by: THE WILLIAM KREISL LIVING REVOCABLE TRUST**, being a revocable living trust, which exists under a certain Trust Agreement created by concurrently herewith. me The foregoing declaration and transfer shall apply even though "record" ownership or title, in some instances, may, presently or in the future, be registered in my respective individual name, in which event such record ownership shall hereafter be deemed held in trust even though such trusteeship remains undisclosed. **This declaration and transfer shall constitute an intention to transfer the above-listed assets to the above-mentioned trust for purposes of the ruling in Estate of**

Heggstad (1993), 16 Cal.App.4th 943. This declaration may be terminated by me by written notice to the Trustee of the above-mentioned trust. (emphasis added)

Article 3, paragraph 3.B of Settlor's Will instructs:

Gift to Trust. **I give, devise and bequeath the remainder of my estate to the then-acting Trustee or Trustees of the above-mentioned Trust Agreement, together with any additions or amendments thereto, to be added to the principal of that Trust and to be held, administered and distributed under the Trust Agreement and any amendments to such Trust Agreement.** I direct that such Trust Agreement shall not be administered under court supervision, control or accounting, and the Trustee thereof shall not be required to give bond in such capacity. (emphasis added)

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.

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.

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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 #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).

IF A PARTY OR PARTIES WISH TO APPEAR REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

14.	24PR0301	MATTER OF REGINA MIESCH VS COLLEEN OBRIEN
PETITION HEARING AND MOTION FOR LEAVE TO AMEND PETITION		

This matter is before the Court on two matters: 1) Petitioner's Petition for Removal of Trustee; For Breach of Trust; Financial Elder Abuse and for Award of Attorney Fees and Damages (the "Petition") filed on November 7, 2024; and 2) Petitioner's Motion for Leave to Amend Petition for Removal of Trustee; For Breach of Trust; Financial Elder Abuse and for Award of Attorney Fees and Damages.

MOTION FOR LEAVE TO AMEND

Petitioner moves for leave to amend the Petition. A Notice of Hearing was filed on June 18, 2026. There is no opposition to the motion in the Court's file.

Pursuant to California Rules of Court, Rule 3.1324, Petitioner identifies what allegations in the previous pleading are proposed to be deleted and what allegations are proposed to be amended. Petitioner erroneously filed the Amended Petition prematurely on June 15, 2026. Counsel for Petitioner and Respondents agreed despite this error, Petitioner would proceed with filing the underlying Motion for Leave.

A Declaration of Peter P. Vlautin, III and Memorandum of Points and Authorities provide that the proposed amendment adds a stand alone count of violation of Business and Professions Code § 7031 which is supported by Defendants' responses to informal and formal discovery that were received in May, as well as the addition of facts to support these allegations. An amendment could not be made earlier, as the information was not known prior to the receipt of Respondents' discovery responses. Such an amendment is necessary to permit this action to be decided on its merits.

Petitioner asserts Respondents will not be prejudiced, as they have been aware of the facts that give rise to the amendment and additional facts during the conversations between counsel, allegations in the original Petition, and briefs filed in the stipulation matter. Petitioner does not request Respondents to respond in quicker than the normal thirty days or longer if needed.

"The court may, in furtherance of justice, and on any terms as may be proper, allow a party to amend any pleading or proceeding by adding or striking out the name of any party, or by correcting a mistake in the name of a party, or a mistake in any other respect; and may, upon like terms, enlarge the time for answer or demurrer. The court may likewise, in its discretion, after notice to the adverse party, allow, upon any terms as may be just, an amendment to any pleading or proceeding in other particulars; and may upon like terms allow an answer to be made after the time limited by this code." Code of Civil Procedure, § 473(a)(1).

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There is a general policy in this state of great liberality in allowing amendment of pleadings at any stage of the litigation to allow cases to be decided on their merits. (*Kittredge Sports Co. v. Superior Court* (1989) 213 Cal.App.3d 1045, 1047.) The rule of great liberality is particularly important where an amendment is sought to an answer. (*Hulsey v. Koehler* (1990) 218 Cal.App.3d 1150, 1159; *Hyman v. Tarplee* (1944) 64 Cal.App.2d 805, 813-814.) "...it is a rare case in which 'a court will be justified in refusing a party leave to amend his pleadings so that he may properly present his case.' (Citations omitted.) If the motion to amend is timely made and the granting of the motion will not prejudice the opposing party, it is error to refuse permission to amend and where the refusal also results in a party being deprived of the right to assert a meritorious cause of action or a meritorious defense, it is not only error but an abuse of discretion. (Citations omitted.)" (*Morgan v. Superior Court* (1959) 172 Cal.App.2d 527, 530.) "...absent a showing of prejudice to the adverse party, the rule of great liberality in allowing amendment of pleadings will prevail. (*Higgins v. Del Faro* (1981) 123 Cal.App.3d 558, 564, 176 Cal.Rptr. 704.)" (*Board of Trustees of Leland Stanford Jr. University v. Superior Court* (2007) 149 Cal.App.4th 1154, 1163.)

It is irrelevant that new legal theories are introduced in the proposed amended pleading as long as the proposed amendments relate to the same general set of facts in the pleading that will be superseded. (*Kittredge Sports Co. v. Superior Court* (1989) 213 Cal.App.3d 1045, 1048.)

Petitioner's Motion for Leave to Amend is granted. Respondent's Response shall be filed within 30 days of the Court's order. A hearing on Petitioner's First Amended Petition is scheduled for September 14, 2026, at 8:30 a.m. in department nine.

TENTATIVE RULING #14:

PETITIONER'S MOTION FOR LEAVE TO AMEND IS GRANTED. RESPONDENT'S RESPONSE SHALL BE FILED WITHIN 30 DAYS OF THE COURT'S ORDER. A HEARING ON PETITIONER'S FIRST AMENDED PETITION IS SCHEDULED FOR SEPTEMBER 14, 2026, AT 8:30 A.M. IN DEPARTMENT NINE.

NO HEARING ON THIS MATTER WILL BE HELD UNLESS A REQUEST FOR ORAL ARGUMENT IS TRANSMITTED ELECTRONICALLY THROUGH THE COURT'S WEBSITE OR BY TELEPHONE TO THE COURT AT (530) 621-6551 BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. CAL. RULE CT. 3.1308; LOCAL RULE 8.05.07; SEE ALSO LEWIS V. SUPERIOR COURT, 19 CAL.4TH 1232, 1247 (1999).

NOTICE TO ALL PARTIES OF A REQUEST FOR ORAL ARGUMENT AND THE GROUNDS UPON WHICH ARGUMENT IS BEING REQUESTED MUST BE MADE BY TELEPHONE OR IN PERSON BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. CAL. RULE CT. 3.1308; EL DORADO COUNTY LOCAL RULE 8.05.07. PROOF OF SERVICE OF SAID NOTICE MUST BE FILED PRIOR TO OR AT THE HEARING.

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LONG CAUSE HEARINGS MUST BE REQUESTED BY 4:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED AND THE PARTIES ARE TO PROVIDE THE COURT WITH THREE MUTUALLY AGREEABLE DATES ON FRIDAY AFTERNOONS AT 2:30 P.M. LONG CAUSE ORAL ARGUMENT REQUESTS WILL BE SET FOR HEARING ON ONE OF THE THREE MUTUALLY AGREEABLE DATES ON FRIDAY AFTERNOONS AT 2:30 P.M. THE COURT WILL ADVISE THE PARTIES OF THE LONG CAUSE HEARING DATE AND TIME BY 5:00 P.M. ON THE DAY THE TENTATIVE RULING IS ISSUED. PARTIES MAY PERSONALLY APPEAR AT THE HEARING.

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15.	26PR0117	MATTER OF THE LARRY R. BRYANT & SHARRON K. BRYANT 1990 LIVING TRUST DATED 5-1-1990
TRANSFER IN		

This matter was transferred from Contra Costa County on February 17, 2026. The Court is not in receipt of the court file from Contra Costa County.

Per the Court's order on June 8, 2026, this case was consolidated with case no. 26PR0098.

TENTATIVE RULING #15:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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16.	24PR0309	THE ESTATE OF LORETTA MAE MENDES
REVIEW HEARING		

On June 12, 2026, Objector, Rene Senna, provided notice of settlement of entire case.

A Notice of Hearing of Petition for Probate was filed on June 12, 2026.

The Court set a Review Hearing for July 20, 2026. Nothing further has been filed.

TENTATIVE RULING #16:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JULY 26, 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.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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17.	25PR0087	THE ESTATE OF MONTY JOHN STAUDINGER
FINAL DISTRIBUTION HEARING		

Letters of Administration were issued on July 11, 2025, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final 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 First and Final Account and Report of Administrator was filed on June 2, 2026.

Proof of Service of Notice of the hearing on the Petition was filed on July 1, 2026. Vanessa Yvonne Wolfe has filed a request for special notice in this proceeding. A Proof of Service by Mail on Vanessa Yvonne Wolfe was filed on July 1, 2026.

The proposed distribution of the estate includes 100% of decedent's community property be distributed to decedent's surviving spouse and decedent's separate property be distributed equally between decedent's surviving spouse and his two adult children.

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.

Petitioner confirms that no federal or California estate taxes are payable and all personal property taxes have been paid. All income taxes due and payable have either been paid or are adequately secured. No personal property taxes are due or payable and all real property taxes have been paid or are adequately secured.

The Petition requests:

1. The administration of this Estate be brought to a close;
2. The First and Final Account and Report of Administrator and Petition thereon be settled, allowed, and approved in all respects as filed;

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3. All of the reported acts and proceedings of Petitioner as Administrator as set forth in this Petition be confirmed and approved;
4. Petitioner be authorized and directed to pay to herself the sum of \$11,309.95 as statutory compensation for ordinary services rendered as Administrator;
5. Petitioner be authorized and directed to pay her attorneys, GOFF LEGAL, PC, the sum of \$11,309.95 as statutory compensation for ordinary services rendered to Petitioner and to the Estate;
6. Petitioner be authorized and directed to reimburse herself for costs in the amount of \$194,466.50 for administrative and other court-approved costs in the establishment and management of the decedent's conservatorship matter;
7. Petitioner be authorized and directed to pay her attorneys, GOFF LEGAL, PC, (1) the sum of \$859.05 as reimbursement of costs advanced on behalf of the Estate; and (2) a sum not to exceed \$650.00 for anticipated costs in connection with the filing and settlement of the First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance of Statutory Compensation to Administrator and Attorney, For Approval of Costs to Administrator And Attorney, and For Final Distribution and the filing of receipts and discharge;
8. Petitioner be authorized and directed to retain \$2,000.00 in cash from the final distribution for closing expenses of administration and be authorized and directed to deliver the unused part of the reserve to CYNTHIA FAYE STAUDINGER, VANESSA YVONNE WOLFE, and MONTY SHAWN STAUDINGER, without further Court order, after all closing expenses have been paid;
9. Final Distribution of the Estate of the Decedent in Petitioner's possession be made outright in equal shares to CYNTHIA FAYE STAUDINGER, VANESSA YVONNE WOLFE, and MONTY SHAWN STAUDINGER, with distribution occurring after payment of the administrative expenses prayed herein.
10. Any other property of the Decedent or the Estate, located in California, not now known or hereafter discovered that may belong to the Estate or in which the Decedent or the Estate may have any interest shall be distributed as follows: 1) As to community property, outright, one hundred percent (100%) to CYNTHIA FAYE STAUDINGER; and, 2) As to separate property, outright, in equal shares to CYNTHIA FAYE STAUDINGER, VANESSA YVONNE WOLFE, and MONTY SHAWN STAUDINGER, all without need of further court order; and
11. **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.**

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The Court is inclined to grant the Petition as requested upon receipt of the Order After Hearing pertaining to the reimbursement of costs in the establishment and management of decedent's conservatorship matter.

TENTATIVE RULING #17:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 20, 2026, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.