1.	26PR0046	IN THE MATTER OF THE DANIEL E. WILCOXEN EIGHTH RESTATED REVOCABLE TRUST DATED NOVEMBER 5, 2024
INSTRUCTION HEARING		

On April 24, 2026, Petitioner, David M. Widders ("Petitioner" or "Trustee"), filed a Petition for Instructions and for Construction of Trust Instrument; in the Alternative, for Determination of Validity and Appropriate Relief. Proof of Service was filed on May 1, 2026. On May 26, 2026, Petitioner filed a Supplement to the Petition which included a corrected Declaration of Robert P. Dudugjian Regarding Scrivener's Error in the Daniel E. Wilcoxen Eighth Revocable Trust.

Respondent, Patricia Hill ("Respondent") filed a Response and Objection on June 2, 2026. A Response was filed by Beneficiary, Martha A. Taylor ("Beneficiary Taylor"), on June 4, 2026. Trustee's Second Supplement and Declaration of Neli Tsoneva in Support of Petition were filed on June 24, 2026. Beneficiary Taylor filed a Response to Respondent's Response on July 21, 2026.

Legal Principles

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:
>> (1) Determining questions of construction of a trust instrument.
>> (3) Determining the validity of a trust provision.
>> (6) Instructing the trustee.
>> (13) Approving or directing the modification or termination of the trust.

Discussion

The Petition requests the Court direct the Trustee by interpreting the Eighth Restatement of the Trust which includes the phrase "real property" in the provision which directs the distribution of all of other personal tangible property. A Declaration of the Trust Protector, Robert Dudugjian ("Mr. Dudujian" or "Trust Protector"), provides that he communicated repeatedly over many years with the Settlor and he believed his intent to be that all the real property be part of the trust assets and that he did not intend to have any real property included as part of the catch all provision stated on page 9 paragraph (x). This interpretation is consistent with the Trust's stated goals and overall intent, as well as multiple prior restatements.

The Trust was restated multiple times during the Settlor's lifetime. The Fifth Restated Trust (May 2023) contained a tangible personal property clause which referred only to traditional categories of personal property, such as household goods, artwork, vehicles, collectibles, apparel, jewelry, etc., and did not reference real property. The phrase "real property" appeared for the first time in that clause within the Sixth Restated Trust and in each restatement thereafter, including the operative Eight Restatement. The Eighth Restatement also introduced Article Fifth, which provides for equal distribution of the residue of the Trust estate among ten named beneficiaries after payment of specific bequests, expenses, and obligations.

Of note, Mr. Dudujian was Settlor's original estate planning attorney. Upon his retirement, Settlor requested the trust document in WordPerfect from him, which was provided. Settlor thereafter signed the Sixth Restatement on May 29, 2024, and subsequently prepared the Seventh and Eighth Restatements himself.

Article Third, paragraph 12, gives cash bequests totaling $7.325 million; however the entire issue arises from the final unlettered paragraph, which instructs:

> Except as otherwise provided herein upon the death of the Trustor, <u>the Trustee shall distribute all tangible personal property</u> including, but not limited to, <u>real property</u>, household furnishings, appliances and fixtures, works of art, motor vehicles, pictures, collectibles, personal wearing apparel and jewelry, books, sporting goods, and hobby paraphernalia to be divided equally between SHIRLEY WILCOXEN if she survives me, her sisters and brother. All firearms and guns are left to DOUGLAS HILL. Trustor's gold Rolex watch is left to DREW M. WIDDERS. (emphasis added)

Settlor's pour-over Will, executed on the same date as the Eight Restatement, expresses his intent that "all my property, both personal and real" be transferred to the Trust. One could interpret this to reflect Settlor's understanding that personal property and real property were distinct categories requiring separate reference.

Schedule A to the Eighth Restatement separately enumerates the Trust's real property holdings as a distinct category of Trust assets, alongside bank accounts, vehicles, and other personal property, which reflects Settlor's consistent treatment of real property as a category separate from tangible personal property.

An Assignment of Personal Property was signed by Settlor on the same date he signed the Eighth Restatement, which transfers tangible personal property, including jewelry, clothing, household furnishings, works of art, boats, automobiles, sporting goods, electronic equipment, and musical instruments; however, it is silent as to any real property.

The Eighth Restatement provides specific transfers of real property, including 9692 Endsleigh Court and 69-555 Waikoloa Beach Drive, Unit 1302. A specific devise of 3388 Apollo Circle to Florentine Abbott was also included in the Eighth Restatement.

Article Fifth in the Eighth Restatement provides a residuary distribution scheme for ten beneficiaries. Many beneficiaries have argued the proper interpretation of Article Third, paragraph 12 does not include the distribution of trust real property and is limited to the distribution of tangible personal property.

There are two interpretations regarding the effect of the phrase "real property in the final unlettered paragraph of Article Third, paragraph 12:

1. The phrase "real property" in the tangible personal property distribution clause is given its plain meaning, and all Trust real property (other than specifically bequeathed parcels) passes to Shirley A. Wilcoxen and her siblings ("Interpretation One"); and
2. The reference to "real property" in the tangible personal property distribution clause is construed not to govern the distribution of trust real property, and the clause is limited to the distribution of tangible personal property, with all real property not otherwise specifically bequeathed remaining part of the general trust estate available to satisfy the cash bequests under Article Third, paragraph 12(a)-(x) and any remaining balance passing through the Article Fifth residuary scheme ("Interpretation Two").

The Declaration of Trust Protector provides upon review of the Eighth Amendment, Article Third, paragraph 12 erroneously states that tangible personal property includes "real property." Trust Protector instructs the inclusion of "real property" within the clause for tangible personal property is not part of the definition of personal property. Additionally, with the addition of Article Fifth, it creates a circular reference to the distribution of property and both provisions cannot exist. Based upon the ordinary usage and standard estate planning practice, tangible personal property does not include real property. Having known Settlor for over 40 years, the residuary definition provided in Article Fifth controls over inconsistencies in the closing paragraph of Paragraph 12 of Article Third. The Trust makes separate transfers of real property, which demonstrates real property was intended to be handled outside of the personal effects clause.

Petitioner makes the following requests:

1. The Court determine the proper construction of the final unlettered paragraph of Article Third, paragraph 12 of the Daniel E. Wilcoxen Eighth Restated Revocable Trust, including whether the phrase "real property" in Article Third, paragraph 12 of the Daniel E. Wilcoxen Eighth Restated Revocable Trust directs distribution of Trust real

property to Shirley A. Wilcoxen and her siblings, or whether the clause is construed as limited to the distribution of tangible personal property;

2. The Court instructs Petitioner, as Successor Trustee, concerning administration and distribution of the Trust consistent with that construction;
3. If the Court determines the issue cannot be resolved through construction of the instrument and admissible extrinsic evidence alone, the Court determine the validity or effect of the disputed language and grant such further relief as may be appropriate under Probate Code §§ 17200(b)(3), 17200(b)(13), and if necessary § 15409.

Respondent requests the Court adopt "Interpretation One" and distribute the trust assets according to the plain language of the Trust instrument. Respondent argues that Settlor intentionally revised the final sub-section of Article Three paragraph 12 to include "real property." Respondent is under the belief that Settlor was in the process of preparing a Ninth Restatement to the Trust prior to his death, which would have left greater gifts to the siblings of Shirley Wilcoxen, and reduced or eliminated certain gifts to other individuals named in the Eighth Restatement.

Respondent asserts that Settlor's pour-over Will and Schedule A to the Eighth Restatement reflects his understanding that personal property and real property are distinct categories of assets and he nevertheless chose to insert the phrase "real property" into the contested paragraph. As an experienced attorney for over forty years, he specifically inserted the term "real property" into the contested paragraph on his own volition.

Respondent contends that Petitioner has not presented any clear and convincing evidence to support the proposed reformation of the Trust pursuant to Interpretation Two. Trust Protector is authorized to "correct ambiguities, including scrivener errors, that might otherwise require court construction or reformation"; however, Respondent asserts he does not have authority to amend the plain and unambiguous language of the Trust instrument. Moreover, Trust Protector's declaration does not contain any clear and convincing evidence to support reformation.

Respondent argues there is no evidence to support modification of the Eighth Restatement pursuant to Probate Code § 15409. Additionally, Respondent asserts that as this dispute is not a "contest" or "attack" on the Trust or its provisions but is rather a question of trust interpretation, Trustee should be prohibited from using Trust assets to litigate this matter. In the event the Court decides not to adopt "Interpretation One," Respondent requests an evidentiary hearing.

Respondent requests the following relief:

1. Interpreting the Trust according to its plain language;

2. Confirming the validity and effect of the contested paragraph as written under Probate Code § 17200(b)(3);
3. Instructing the Trustee to distribute the Trust assets according to “Interpretation One” of the contested paragraph;
4. Denying Petitioner’s requests for relief under Probate Code §§ 17200(b)(13) and 15409; and
5. Awarding Respondent reasonable attorneys’ fees and costs in this matter.

Beneficiary Taylor provides that as a friend who worked closely with Settlor for over twenty years, Settlor often spoke about his plans for his estate after his death. Based upon these discussions, Beneficiary Taylor believes the proper construction is Interpretation Two. Settlor discussed his gifts with her and chose them deliberately based on his feelings at the time. As Settlor closely followed his finances, he would not have designed a plan that gave his real estate away through a clause about personal belongings, reduced his own cash gifts, and likely left little or nothing for the residuary that he had just created, which would occur if Interpretation One was followed.

Beneficiary Taylor asserts that the Trust instrument and documents executed the same day are consistent with Settlor’s intent regarding Interpretation Two. As read as a whole, the contested paragraph distributes only Settlor’s tangible personal property, and the words “real property” have no operative effect.

Yvonne R. Edelman, daughter of Settlor, is under the belief that Settlor did not intend that most of his estate, which consisted of real property, to pass through a paragraph concerning his personal belongings, to her mother, Shirley Wilcoxen, Patricia Hill, James Wright, and Terea Don.

Beneficiary, Neli Tsoneva (“Beneficiary Tsoneva”), provides that she worked as the legal assistant to Settlor until he suffered a stroke on February 13, 2025. Beneficiary Tsoneva instructs Settlor did not use a computer to prepare his documents but would rather dictate his changes to her or write his changes by hand on a printed document in which she would then prepare the typed version for him. Beneficiary Tsoneva provides the Eighth Restatement bearing Settlor’s handwritten revisions, which he gave to her. (Tsoneva Dec.; Exhibit 1). In those revisions, Settlor struck through the bequest to Kellen Ray and the entire paragraph distributing tangible personal property, including the reference to “real property”, to Shirley Wilcoxen and her siblings. He only left the gifts of firearms to Douglas Hill, and his gold Rolex watch to Drew Widders. He also changed the amounts of several specific bequests.

Beneficiary Tsoneva attests that she incorporated those handwritten revisions into the Eighth Restated Trust’s WordPerfect document and titled it “AMENDMENT 1”. (Tsoneva Dec.; Exhibit 2). This was completed on or around February 7, 2025, approximately one week before

Settlor suffered a stroke. Beneficiary Tsoneva states that she titled the document "AMENDMENT 1" pending further direction from whether Settlor wanted it called Amendment 1 or a Ninth Restatement. Settlor did not give her that direction prior to suffering a stroke on February 13, 2025, and did not give her any further changes after February 7, 2025.

The Court finds that the Settlor's intent is consistent with "Interpretation Two." The Court orders that for the purpose of trust administration, the words "real property" are struck from the final unlettered paragraph of Article Third, paragraph 12 on page 9 of the Eighth Restatement, and the Trustee shall act consistent with this Court's instruction.

The final unlettered paragraph of Article Third, paragraph 12 shall be read as follows:

> Except as otherwise provided herein upon the death of the Trustor, the Trustee shall distribute all tangible personal property including, but not limited to, household furnishings, appliances and fixtures, works of art, motor vehicles, pictures, collectibles, personal wearing apparel and jewelry, books, sporting goods, and hobby paraphernalia to be divided equally between SHIRLEY WILCOXEN if she survives me, her sisters and brother. All firearms and guns are left to DOUGLAS HILL. Trustor's gold Rolex watch is left to DREW M. WIDDERS.

TENTATIVE RULING #1:

ABSENT OBJECTION THE PETITION FOR INSTRUCTION IS GRANTED DIRECTING THE TRUSTEE TO ACT CONSISTENT WITH THE COURT'S INSTRUCTION TO DISREGARD THE WORDS "REAL PROPERTY" IN THE FINAL UNLETTERED PARAGRAPH OF ARTICLE THIRD, PARAGRAPH 12 ON PAGE 9 OF THE EIGHTH RESTATEMENT.

ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT AT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

2.	**25PR0153**	**ESTATE OF ELIZABETH IRENE BRIDGES**
STATUS OF ADMINISTRATION		

Letters Testamentary have not been issued.

There is no Inventory and Appraisal on file with the Court.

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

On July 28, 2025, the Court denied Petitioner's request for Petition for Letters Testamentary after finding that the "Proof of Holographic Instrument" was not a Holographic Instrument. As such, the Court determined no Will and no Holographic Instrument had been submitted and a Petition for Letters Testamentary were not proper at the time.

The Court set a Status of Administration hearing for July 27, 2026, and ordered the Personal Representative or their Counsel to appear, or to file a status report at least two weeks in advance.

To date, no status report has been received.

TENTATIVE RULING #2:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

3.	**22PR0276**	**ESTATE OF DAVID CROSS COTE**
REVIEW HEARING		

Order Appointing Administrator was filed on March 5, 2024.

Letters of Administration without authority to administer the estate under the Independent Administration of Estates Act ("IAEA") were issued on March 5, 2025.

<u>There is no Inventory and Appraisal on file with the Court</u>.

<u>There is no Petition for Final Distribution on file with the Court</u>.

On July 23, 2025, the Court continued the hearing to July 27, 2026, and ordered the Personal Representative to appear.

On January 29, 2026, the Court entered an Order which granted the Administrator of the Estate of David Cross Cote with full authority to administer the estate under the IAEA.

<u>Nothing further has been filed since this time</u>.

TENTATIVE RULING #3:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

4.	**25PR0351**	**ESTATE OF SALLY ANN WOOD**
PETITION HEARING		

At the hearing held on June 22, 2026, the Parties provided a status update on the progress of settlement discussions and requested a continuance. Nothing new has been filed since the previous hearing.

TENTATIVE RULING #4:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

5.	**26PR0108**	**IN THE MATTER THE 2021 HANNA WALKER FAMILY TRUST**
INSTRUCTION HEARING		

On April 15, 2026, Petitioner filed a Petition for Instructions and Order of Removal of Trustee. Petitioner requests the Court to instruct Respondent to report to the Court and beneficiaries as to the proper accounting, inventory, appraisal, and distribution of trust assets. Petitioner further requests the Court order the removal of the Trustee for failing to properly administer the trust. A Notice of Hearing was lodged with the Court; however, the Proof of Service was not signed as required.

At the hearing on June 8, 2026, Petitioner's counsel requested a continuance to complete service, which was granted. Nothing further has been filed.

TENTATIVE RULING #5:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

6.	**24PR0028**	**ESTATE OF STEPHEN RUSSELL HENKE**
STATUS OF ADMINISTRATION		

On September 19, 2025, the Court granted the Petition for Final Distribution.

On January 20, 2026, an Ex Parte Petition for Final Discharge and Order was received, which has not been entered by the Court. The Court notes information regarding the distribution of property was not provided in section 1 of the Ex Parte Petition.

TENTATIVE RULING #6:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

7.	25PR0357	THE ESTATE OF RICHARD R. HERRMANN
FINAL DISTRIBUTION HEARING		

Letters Testamentary were issued on February 5, 2026, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on April 29, 2026. 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.

Waivers of Account were executed by the sole beneficiary entitled to distribution under the estate. No Waivers of Notice were executed.

Proof of Service of Notice of the hearing on the Petition was filed on June 15, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes full distribution to Launa Herrmann, Trustee of the Hermann Family Trust dated October 6, 1994.

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, nor are any California or federal income or personal property taxes payable.

The Petition requests:

1. The administration of this estate be closed;
2. The first and final report on waiver of account of Petitioner be settled, allowed, and approved as filed;
3. All acts and proceedings of Petitioner as personal representative as set forth in this petition be confirmed and approved;

4. Petitioner be authorized to pay Shiells and Hammer $24,394.00 as statutory compensation for services rendered to Petitioner and the estate;
5. Distribution of the estate in Petitioner's hands and any other property of Decedent or the estate not known or discovered that may belong to the estate or in which the decedent or the estate may have any interest be made to the persons entitled to it, as set forth in the petition;
6. **<u>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.</u>**

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).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 2, 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.

8.	26PR0173	IN THE MATTER OF TANYA HIBBARD
PETITION FOR ORDER CONFIRMING REAL PROPERTY		

On June 9, 2026, Petitioner, Tayna Hibbard, Trustee of the Janne Hibbard Living Trust dated June 5, 2025 ("Petitioner" or "Trustee"), filed a Petition Under Probate Code Sections 850 and 17200 for Order Confirming Real Property as Trust Property; Memorandum of Points and Authorities; Declaration of Tanya Hibbard. A Notice of Hearing was filed on June 25, 2026. No opposition has been received.

Petitioner requests the following relief:

1. Confirm the real property commonly known as 751 Meadowview Acres Road, Cool, California 95614, APN 071-461-041-000 is an asset of the Janne Hibbard Living Trust dated June 5, 2025;
2. Confirm that Tanya Hibbard, as Trustee of the Janne Hibbard Living Trust dated June 5, 2025, has authority to administer, manage, convey, sell, refinance, encumber, lease, distribute, and otherwise deal with the Property as Trust property; and
3. Authorize any title company, escrow holder, county recorder, assessor, governmental agency, financial institution, and third party to rely on the Court's order as confirming that the Property is Trust property.

On June 5, 2025, Janne Hibbard ("Settlor") established the Janne Hibbard Living Trust by written trust agreement. The trust provides that title to assets should be taken in the following form: "Janne Hibbard, Trustee of the Janne Hibbard Living Trust, dated June 5, 2025, and any amendments thereto."

The trust agreement states that by execution of the agreement, Settlor transferred, conveyed, and assigned to her Trustee the trust property described on Schedule A, and that the Trustee accepted and agreed to hold such property under the terms of the trust agreement. Schedule A to the trust agreement identifies the trust property as: "All real and personal property in my possession." Exhibit E.

On September 28, 2025, the Trust became irrevocable upon the death of Settlor.

The real property at issue is commonly known as 4751 Meadowview Acres Road, Cool, California 95614 (the "Property"), APN: 71-460-41-000. Petitioner is informed and believes that Settlor owned the Property during her lifetime and intended the Property to be held and administered as an asset of the Trust. This was evidenced by Settlor executing a grant deed to transfer the property, which was recorded. Exhibit A. However, the legal description was incomplete due to a scrivener's error relying on two deeds that were of record. Exhibits B and C.

Additionally, the Certification of Trust executed by Settlor before her death states that the Trust holds the real property located at 4751 Meadowview Acres Road, Cool, California.

Due to the scrivener’s error, title records do not clearly and correctly reflect that the Property is held in the name of the Trust.

The correct legal description of the Property is:

Parcel One:

Lot 58, as shown on that certain Map entitled "Meadowview Acres Unit No. 1, a Rural Subdivision", filed in the office of the County Recorder of said County on September 3, 1985, in Map Book G, at page 27 and as amended January 29, 1986 in Map Book "G" at page 34. Excepting Therefrom: All that portion of Lot 58 of that certain Subdivision Map entitled "Amended Meadowview Acres Unit 1" filed in Book G of Maps at Page 34 in the County Recorder's Office, County of El Dorado, State of California, being a portion of Sections 29 and 30, Township 12 North, Range 9 East, M.D.M. , more particularly described as follows: Beginning at the Southwest corner of said Lot 58, being in the centerline of a creek; thence North 35 deg 55' 19" West, 192.94 feet along the West line of said Lot 58; thence leaving said west line North 59 deg 47' 00" East, 38.08 feet to a 3/4 inch capped iron pipe stamped L.S. 4663; thence South 30 deg 13' 00" East, 196.92 feet to a point on the South line of said Lot 58; thence along said South line South 74 deg 24' 36" West, 19.53 feet to the Southwest corner of said Lot 58 and the Point of Beginning.

Parcel Two:

All that portion of Lot 59 of that certain Subdivision Map entitled "Amended Meadowview acres Unit 1" filed in Book G of Maps at Page 34 in the County Recorder's Office, County of El Dorado, State of California, being a portion of Sections 29 and 30, Township 12 North, Range 9 East, M.D.M. , more particularly described as follows:

Beginning at a point on the Easterly line of said Lot 59 from which the Southeast corner of said Lot 59 bears South 35 deg 55' 19" East, 192.94 feet; thence along said Easterly line North 35 deg 55' 19" West, 214.84 feet to the Northeasterly corner of said Lot 59; thence along the Northerly line of said Lot 59 South 65 deg 14' 48" West,52.50 feet; thence leaving said Northerly line South 48 deg 48' 55" East, 230.83 feet to the Point of Beginning.

APN: 071-461-041-000

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.

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 asset be part of the Trust.

TENTATIVE RULING #8:

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

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

9.	26PR0172	IN THE MATTER OF GINGER S. LONG
PETITION HEARING		

On June 9, 2026, Petitioner, Ginger S. Long ("Petitioner"), filed a Petition to Compel Accounting; to Compel Distribution of Trust Assets; to Suspend and Remove Trustee; to Prohibit Kathleen Dolan from Defending the Petition at the Trust's Expense. A Proof of Service was filed on June 16, 2026. No opposition has been received.

Petitioner is one of four remainder beneficiaries of the Clayetta H. Spelt Revocable Family Trust dated April 16, 2015, as amended (the "Trust), and is the daughter of Settlor, Clayetta H. Speltz ("Settlor"), who died on May 11, 2025. Kathleen Dolan ("Trustee") is also a remainder beneficiary of the Trust, Settlor's daughter, and is acting trustee of the Trust.

Petitioner asserts that since approximately June 2025, Petitioner has repeatedly requested that Trustee provide information concerning administration of the trust, including, but not limited to (i) a trust accounting pursuant to Probate Code section 16062; (ii) copies of Settlor's operative estate planning documents, including her last will, trust instrument, and all amendments and restatements thereto; (iii) information regarding the assets, liabilities, and administration of the Trust and the anticipated distribution of trust assets; and (iv) an accounting of transactions undertaken by Trustee while acting as Settlor's attorney-in-fact. Trustee has failed and refused to provide the requested information or accounting, and has failed to provide meaningful information concerning the status of Trust administration in violation of her fiduciary duties.

On October 19, 2025, Trustee transmitted an informal digital binder containing assorted documents, a generalized list of assets, and personal spreadsheets. Petitioner asserts the documents provided did not constitute a formal trust accounting and failed to comply with requirements of Probate Code § 16063.

Petitioner believes that since approximately October 2022, Trustee has sold, transferred, or otherwise disposed of Trust assets without notice, supporting documentation, or meaningful information to the beneficiaries despite repeated requests for such information. Petitioner has not received a distribution of Trust income or principal, nor any meaningful information concerning any proposed plan of distribution. Petitioner believes the Trust's other remainder beneficiaries, Carol Marble and William Long, have not received distributions from the Trust.

On or around May 20, 2026, Trustee notified the beneficiaries of her intention to move administration of the Trust to the State of Colorado notwithstanding the fact that Trustee resides in California and the principal place of administration of the Trust is California. Petitioner does not consent to the removal and believes the remaining beneficiaries do not consent either.

Petitioner seeks the following relief:

1. Suspend and remove Trustee pursuant to Probate Code § 15642 and appoint Petitioner as successor trustee or, alternatively, appoint an independent temporary trustee or professional fiduciary;
2. Order Trustee to prepare and file an account and report concerning her administration of the Trust commencing May 11, 2025 through the date of the Court's Order, and that such account and report be filed within thirty days of the Court's Order;
3. Order Trustee to prepare and file an account and report concerning her actions while acting under Settlor's Durable Power of Attorney commencing with Trustee's appointment as attorney-in-fact through Settlor's death on May 11, 2025, which shall be filed within thirty days of the Court's Order;
4. Order Trustee to provide Petitioner complete copies of all Trust documents and any other estate planning documents executed by Settlor during her lifetime, including, but not limited to, Settlor's: 1) last will and testament; 2) durable power of attorney; and 3) advance healthcare directive;
5. Award Petitioner attorney's fees and costs incurred in bringing this Petition; and
6. Order that Trustee cannot utilize Trust funds in defense of this Petition absent further order of the Court.

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

10.	22PR0061	ESTATE OF NANCY GRISHAM
STATUS OF ADMINISTRATION		

11.	PP20200066	CONSERVATORSHIP OF NANCY GRISHAM
STATUS OF ADMINISTRATION		

At the hearing on July 13, 2026, the Parties updated the Court on the current status. The Court ordered the settlement draft was to be sent to Nicholas Yonano by end of business day Friday, July 17, 2026.

To date, nothing further has been received.

TENTATIVE RULING #10 AND 11:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 2, 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.

12.	**22PR0043**	**IN THE MATTER OF CHERYL ANN COOPER**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on May 6, 2022.

An Inventory and Appraisal was filed on February 6, 2023.

A Petition for Final Distribution was filed on July 3, 2023.

An Order for Final Distribution was filed on September 7, 2023.

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.

On July 28, 2025, the Court removed the Personal Representative as the Administrator of the estate. The Court further relieved Alyssa Bolan as counsel for Gerald Messer. A Review Hearing was set for July 27, 2026. Ms. Bolan was directed to include the next hearing date and the Administrator's removal in the Order Relieving Counsel and serve the Order on the client and all interested parties.

On August 18, 2025, the Court entered the Order Granting Attorney's Motion to be Relieved as Counsel. A Proof of Service was filed on November 5, 2025, indicating service was effectuated on Earnest Delbert Gordon III, Gerald Louis Messer III, Christopher Lee Messer, Katrina Marie Messer, and Gerald Louis Messer Jr.

To date, nothing further has been filed.

TENTATIVE RULING #12:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 2, 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.

13.	21PR0038	ESTATE OF DAN'L G. ROEDIGER
STATUS OF ADMINISTRATION		

On July 28, 2025, the Court set a Review Hearing – Status of Administration for July 27, 2026. The Court ordered the Personal Representative or their counsel to appear at the Status of Administration Hearing or file a Status Report with the Court at least two weeks in advance of the hearing.

On July 17, 2026, Petitioner, Teri C. Petersen ("Petitioner") filed a Status Report. Petitioner informed the Court that since the last status hearing, additional work has been completed toward preparation of the First and Final Account and Report of Administration. During the review of the estate's financial records, it was determined that additional estate assets may need to be included in a Supplemental Inventory and Appraisal.

Additional information and financial records are being obtained to prepare the Supplemental Inventory and Appraisal, as well as the First and Final Account and Report of Administration for submission to the Probate Referee.

As the completion of the First and Final Account and Report of Administration is dependent upon completion of the Supplemental Inventory and Appraisal, receipt of the Probate Referee's valuation of the additional assets, and completion of the review of the estate's financial records, Petitioner requests the Status Hearing be continued for approximately 90 to 120 days to allow sufficient time to complete the Supplemental Inventory and Appraisal process, obtain the Probate Referee's valuation, complete the review of the estate's financial records, and prepare and file the First and Final Account and Report of Administration together with the Petition for Final Distribution.

TENTATIVE RULING #13:

PETITIONER'S REQUEST FOR A CONTINUANCE IS GRANTED. THE HEARING IS CONTINUED TO NOVEMBER 9, 2026, AT 8:30 A.M. IN DEPARTMENT NINE.

14.	24PR0152	ESTATE OF STEVEN W. BRAMMER
STATUS OF ADMINISTRATION		

Letters Testamentary were issued on July 29, 2024.

A Partial Inventory and Appraisal was filed on December 4, 2024. The real property was sold on February 12, 2025. This is supplemented by an Accounting included as Exhibit A to the Petition for Final Distribution.

A Petition for Final Distribution was filed on September 4, 2025.

An Order for Final Distribution was filed on November 24, 2025.

Receipts of Distribution have been filed.

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

TENTATIVE RULING #14:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 2, 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.

15.	26PR0176	IN THE MATTER OF THOMAS SANDY
LETTERS OF ADMINISTRATION		

Decedent died intestate on April 20, 2026, and has no survivors. Petitioner, Jill Sandy Sirois, is decedent's niece.

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

The Petition states that bond be fixed at $3,252,000.00.

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 15, 2026.

Proof of publication was filed on July 6, 2026.

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).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 2, 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.

16.	26PR0044	ESTATE OF STEVEN MICHAEL HUIZENGA
PETITION HEARING		

Before the Court are two Petitions: 1) Petition to Determine Succession to Primary Residence; and 2) Petition to Determine Validity of Will; Will Contest.

Petition to Determine Succession to Primary Residence

A Petition to Determine Succession to Primary Residence was filed by Lorraine Claire Tassi, on February 11, 2026. An Objection of Lori Huizenga-Young to Petition to Determine Succession to Primary Residence; Request for Continuance was filed on April 3, 2026. The matter was continued to July 6, 2026, and was thereafter continued to July 27, 2026.

Petitioner, Lorraine Claire Tassi ("Petitioner Tassi") requests a determination that the real property at 3735 Springer Road, Placerville, CA 95667 was Decedent's, Steven Michael Huizenga ("Decedent") primary residence and is property passing to Petitioner Tassi.

Petitioner declared that Decedent died testate on December 9, 2025, and attached a copy of the purported Last Will and Testament of Steven Michael Huzienga (the "Will"). An Inventory and Appraisal was attached to the Petition, which shows the gross value of the real property is $432,000, which does not exceed the limit pursuant to Probate Code § 13152(a)(2). The Petition indicates Decedent is survived by two adult children, Lori Huizenga and Aaron Keith Huizenga.

The Will provides that all real and personal property ("Residual Estate") is to be distributed to Petitioner Tassi. The Will identifies Decedent has two children, Lori Huizenga and Aaron Keith Huzienga. The Will contains an "Exclusions" provision that states that "It is my intention under this Will to specifically exclude the following individuals from receiving any portion of my Residual Estate: Lori Huizenga [and] Aaron Keith Huizenga." The Will was signed by Decedent and two witnesses on November 2, 2025.

Lori Huizenga-Young objects to the Petition on the grounds that the validity of the purported Will is disputed, a will contest petition is being filed, and granting the Petition would be irreversible and prejudicial.

Petition to Determine Validity of Will; Will Contest

On June 10, 2026, a Petition to Determine Validity of Will; Will Contest was filed by Lori Huizenga-Young ("Petitioner Huizenga-Young"). A Response to Will Contest was filed by Lorrain Claire Tassi ("Ms. Tassi") on June 30, 2026.

Petitioner Huizenga-Young requests the Court declare the purported Last Will and Testament of Steven Michael Huizenga (the "Will") invalid in its entirety on the grounds of: 1) lack of testamentary capacity; 2) undue influence; 3) failure of execution formalities; and 4) fraud. Upon a finding of invalidity, Petitioner Huizenga-Young asserts she and Aaron Keith Huizenga are entitled to receive Decedent's estate in equal shares under California intestate succession law.

Petitioner Huizenga-Young asserts at the time the purported Will was executed, Decedent was suffering from physical and/or cognitive impairment that deprived him of the capacity to execute a valid testamentary instrument. Petitioner Huizenga-Young is under the information and belief that Ms. Tassi was providing personal, health, or caretaking services to Decedent in the period preceding his death, and Decedent was a dependent adult as defined under Welfare and Institutions Code § 15610.23, which if established, triggers the statutory presumption of undue influence under Probate Code § 21380.

The circumstances of the purported Will also support a finding of undue influence: 1) Decedent disinherited both of his natural children in favor of a non-family friend; 2) the purported Will appears to have been prepared without independent legal counsel representing Decedent's interests; and 3) the nature and duration of the relationship between the Decedent and Ms. Tassi, the degree of her access to him in his final months, and her role in procuring the purported Will are all facts bearing on undue influence.

Petitioner Huizenga-Young contends the purported Will may not have been executed in compliance with Probate Code § 6110. The identity, competence, and availability of the witnesses, and whether they were present at the same time and understood what they were witnessing, are matters of fact to be established at trial.

Petitioner Huizenga-Young argues that Ms. Tassi, or others acting in concert with her, may have made false representations to Decedent concerning the nature, effect, or consequences of the document he executed, or may have concealed information from him, in order to induce Decedent to execute the purported Will.

Ms. Tassi asserts that Petitioner Huizenga-Young did not see or speak to Decedent in 30 years and accordingly has no knowledge of Decedent's physical or mental condition in his last months, nor does she know Ms. Tassi or the nature of her relationship with Decedent. Ms. Tassi believes that Decedent drafted his Will on his personal computer in early October 2025 before he was hospitalized, despite it not being signed until November 2025.

The Joint Declaration of Lois Gorman and Michael Gorman provides that Decedent requested they witness his signing of the Will, and that Ms. Tassi was not in the room when they signed as witnesses. However, the witnesses did not see Decedent sign the Will himself. Ms. Tassi and the witnesses contend that Decedent was competent to sign a Will.

In September 2025, Decedent was diagnosed with a cancerous mass in his brain and surgery was performed. Ms. Tassi contends that she was a friend of Decedents for at least 20 years and did not provide any health or social services to Decedent during his time; however, she did assist him in cleaning/decluttering his home to make it safe for his return home from the hospital. She also purchased food for him which he could microwave and visited him intermittently, all without charge.

TENTATIVE RULING #16:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JULY 27, 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.

17.	**22PR0208**	**ESTATE OF SHARON STONER**
ATTORNEY WITHDRAWAL		

Counsel for Personal Representative, Pam Weick, has filed a motion to be relieved as counsel pursuant to Code of Civil Procedure § 284(2) and California Rules of Court, Rule 3.1362.

A declaration on Judicial Council Form MC-052 accompanies the motion, as required by California Rules of Court, Rule 3.1362, stating that there is a breakdown of attorney/client communications that has made it unreasonably difficult to effectively represent the client and the client is in breach of the written contract for fees.

Code of Civil Procedure § 284(2) and California Rules of Court, Rule 3.1362 allow an attorney to withdraw after notice to the client. Proof of service of the motion on the Personal Representative at their last known address and Janice Galin Eaton, Philadelphia Indemnity Insurance Company, and Phillips Bonding Insurance Agency Inc. was filed on June 10, 2026.

No hearing dates are currently scheduled for the case.

There is no proposed Order on file with the Court as required by California Rules of Court, Rule 3.1362(e).

TENTATIVE RULING #17:

ABSENT OBJECTION, THE MOTION IS GRANTED, CONTINGENT ON COUNSEL'S FILING OF A PROPOSED ORDER (FORM MC-053) THAT MEETS THE REQUIREMENTS OF CALIFORNIA RULES OF COURT, RULE 3.1362(E). COUNSEL IS DIRECTED TO SERVE A COPY OF THE SIGNED ORDER ON THE CLIENT AND ALL PARTIES THAT HAVE APPEARED IN THE CASE IN ACCORDANCE WITH CALIFORNIA RULES OF COURT, RULE 3.1362(e).

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.