1.	24PR0172	ESTATE OF DANA WILLIAM PHILEBAR
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 14, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters of Administration were issued on August 12, 2024.

An Inventory and Appraisal was filed on January 7, 2025. At the time the inventory and appraisal was filed, the change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 480 of the California Revenue and Taxation Code, was filed.

A Petition for Final Distribution was filed on June 26, 2025.

An Order for Final Distribution was filed on August 11, 2025.

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**.**

TENTATIVE RULING #1:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 14, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

2.	25PR0352	ESTATE OF LESLIE JAMES MATHERS, III
PETITION TO APPOINT PERSONAL REPRESENTATIVE		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 24, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Petitioner, Anthony Patterson ("Petitioner"), seeks appointment as Personal Representative of the estate of Leslie James Mathers, III ("Decedent"), as a creditor pursuant to Probate Code § 8461(q).

Petitioner and Decedent were involved in a personal injury litigation case wherein Decedent admitted fault for Petitioner's injuries. Decedent and his surviving spouse agreed to transfer their home and only asset upon their deaths to Petitioner, with their heirs receiving 10% of the net sale proceeds. Decedent passed away prior to the signing of the formal agreement. Petitioner asserts surviving spouse has refused to honor the settlement agreement.

Petitioner seeks appointment as Personal Representative in order to enforce his creditor claim before estate assets are sold off. Petitioner alleges that surviving spouse and Decedent's daughters have declined to accept appointment. Surviving spouse previously objected to Petitioner's ex parte request for appointment, asserting that there are no probate assets requiring administration and thus no estate requiring appointment of a personal representative. The Office of the Public Administrator has informed Petitioner it will not accept appointment because there are no known assets of the Estate which the public administrator can marshal.

When a spouse dies intestate leaving property that passes to the surviving spouse under Section 6401, or dies testate and by his or her will devises all or a part of his or her property to the surviving spouse, the property passes to the survivor subject to the provisions of Chapter 2 (commencing with Section 13540) and Chapter 3 (commencing with Section 13550), and no administration is necessary. Probate Code, § 13500.

Petitioner, surviving spouse, and the Office of the Public Administrator have instructed that the only asset is the home, which passed to surviving spouse upon Decedent's death. As Decedent left no assets, there is no estate to administer.

Petitioner's request to be appointed as Personal Representative is denied.

TENTATIVE RULING #2:

ABSENT OBJECTION THE PETITION IS DENIED. 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.

3.	**23PR0084**	**ESTATE OF GLENNA M. SMITH**
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 14, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters Testamentary were issued On July 24, 2023.

An Amended Inventory and Appraisal was filed on July 29, 2025. At the time the inventory and appraisal was filed, the change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 480 of the California Revenue and Taxation Code, was filed.

A Petition for Final Distribution was filed on June 4, 2024.

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

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.

TENTATIVE RULING #3:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 14, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

4.	**25PR0168**	**ESTATE OF LYNDA KATHRYN SHERER**
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 14, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters of Administration were issued on November 14, 2025.

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

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, SEPTEMBER 14, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

5.	**22PR0125**	**ESTATE OF ELLEN NEELY**
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON A SEPTEMBER 21, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters of Administration were issued on November 1, 2022.

A Partial Inventory and Appraisal was filed on October 27, 2022, which is silent as to the requirements 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 #5:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 21, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

6.	24PR0065	ESTATE OF JAMES HAYNES
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 21, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters Testamentary were issued on May 20, 2024.

An Inventory and Appraisal was filed on January 14, 2026. However, the inventory and Appraisal has no values or breakdown. It states nothing other than a total value of the estate without explanation of $263,191.18.

A Declaration Regarding Inventory and Appraisal was filed on July 8, 2026, which clarified that the estate consisted of one savings account held at Golden 1 Credit Union, which had a balance of $263,191.18 at the time of death. An updated Inventory and Appraisal was included within the Declaration. 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.

A Petition for Final Distribution was filed on April 17, 2026. The hearing was continued to August 17, 2026.

TENTATIVE RULING #6:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 21, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.	26PR0190	IN THE MATTER OF HIBBERT JEFF
PETITION TO COMPEL		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 24, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Petitioner, Jeff Hibbert ("Petitioner"), seeks orders compelling Respondent, Roger Bushey ("Respondent" or "Trustee"), to provide notice and information concerning the Lavonne Hibbert Family Trust dated roughly December 2009. There is no opposition on file.

Petitioner is under the information and belief that Decedent and Decedent's husband, Tommy Hibbert, established one or more trust instruments during their shared lifetimes, including the Lavonne Hibbert Family Trust in which Respondent was named as Trustee. Despite requests, Respondent has failed to complete notice to all beneficiaries and heirs entitled to receive notice, nor has Respondent identified and notified all persons entitled to notice under applicable law. Petitioner has requested information concerning the identities of the beneficiaries and heirs, whether statutory notice has been provided, and whether proof of service exists; however, Respondent has failed to provide such information.

Petitioner seeks the following requests:

1. Orders compelling Respondent to identify and produce : a) all trust instruments executed by Decedent and Decedent's former husband, Tommy Hibbert, including original trusts, amendments, and restatements; b) all documents identifying trustees, successor trustees, beneficiaries, and contingent beneficiaries; and c) all information necessary to identify persons entitled to notice concerning any such trust(s);
2. Order compelling Respondent to provide all notices required by law, including notice required under Probate Code § 16061.7 where applicable;
3. Order requiring Trustee to file proof of service or other evidence demonstrating compliance with such notice obligations; and
4. Attorney's fees and costs as permitted by law.

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.	**24PR0211**	**ESTATE OF CHAD A. MILLER**
PETITION HEARING		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 24, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Petitioner, Jade Zalewski ("Petitioner"), filed a Petition for Order Requiring Personal Representative to Appear and File Status Report. Petitioner asserts that Letters of Administration were issued to Kevin Miller ("Respondent" or "Personal Representative") on November 13, 2024 and since this time, the estate has not been administered in compliance with the Probate Code.

Petitioner contends that Respondent provided a declaration along with a spreadsheet reflecting that payments totaling approximately $231,685.96 and an ending balance of ($59.38), which Respondent asserts were payments made to legitimate creditors. However, no Inventory and Appraisal has been filed, no creditor claims appear in the court file, no Notice of Administration to Creditors have been filed, no accounting has been filed, and no supporting documentation establishing the validity of the alleged creditor claims or payments have been presented.

Petitioner seeks the following orders:

1. Order requiring Respondent to appear and report on the present condition of the Estate;
2. Require Respondent to explain what remains to complete administration;
3. Set a compliance hearing requiring filing of the Inventory and Appraisal, a status report, and any other required statutory filings.

On August 3, 2026, Respondent filed a Report of Status of Administration. Respondent provides he is awaiting the final accounting and estimates it will take two months to close the administration of the estate.

TENTATIVE RULING #8:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, AUGUST 24, 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.	**25PR0162**	**ESTATE OF MICHAEL ANTHONY MOGLIA**
STATUS OF ADMINISTRATION		

<u>ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 21, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.</u>

Letters of Administration were issued on March 2, 2026.

An Inventory and Appraisal was filed on March 20, 2026. A Supplemental Inventory and Appraisal was filed on July 17, 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.

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

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 21, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

10.	**24PR0061**	**ESTATE OF STEVEN D. MICHOFF**
STATUS OF ADMINISTRATION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 21, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters of Administration were issued on May 6, 2024.

An Inventory and Appraisal was filed on May 13, 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.

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

TENTATIVE RULING #10:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 21, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, AUGUST 9, 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.

11.	**26PR0066**	**IN THE MATTER OF THE ADELHEID HALL 2022 REVOCABLE TRUST**
REMOVAL HEARING		

<u>ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 31, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.</u>

Petitioner, Carl A. Shood ("Petitioner"), filed a Petition: 1) For Remedy for Breach of Trust by Trustee; 2) To Suspend and Remove Trustee; 3) For Appointment of Professional Fiduciary Trustee; 4) For an Order Directing the Distribution of Property; 5) To Enjoin a Sale of Real Property; and 6) Attorney's Fees.

The matter was continued from the hearing on June 1, 2026, as the Parties asserted they were close to a settlement agreement.

TENTATIVE RULING #11:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, AUGUST 31, 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.

12.	**25PR0108**	**ESTATE OF GERTRUDE PEARL JENNER**
FINAL DISTRIBUTION HEARING		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 31, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Letters Testamentary were issued on June 23, 2025, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on July 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.

Waivers of Account were executed by all the heirs entitled to distributions under the estate. No Waivers of Notice were executed.

Proof of Service of Notice of the hearing on the Petition was filed on July 1, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes 100% to Phyllis A. Smith and Stephen M. Jenner as Co-Trustees of the Earle and Gertrude Jenner 1991 Trust.

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 the estate be brought to a close;
2. The Waivers of Accounting of Petitioner as Personal Representatives are allowed;

3. All the acts and proceedings of Petitioners as Personal Representatives as alleged in the Petition be confirmed and approved;
4. All creditor claims not properly filed with the court and served on the estate be barred;
5. Personal Representative be authorized and directed to pay her attorney, Clara Yang, $12,412.84 for statutory fees for her legal services to the Personal Representatives and to this estate;
6. Personal Representative be authorized and directed to pay herself $12,412.84 for statutory fees for her services to this estate;
7. The residual property of the estate together with any other property of the decedent not now known or discovered should be distributed as follows: Phyllis A. Smith and Steven M. Jenner as Co-Trustees of the Earle and Gertrude Jenner 1991 Trust; and
8. **Upon filing of receipts and the Ex Parte Petition for Discharge, Petition may be discharged and released from all liability that may be incurred thereafter.**

TENTATIVE RULING #12:

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 9, 2027, IN DEPARTMENT NINE BY WHICH TIME THE COURT EXPECTS RECEIPTS AND AN EX PARTE PETITION FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) TO BE FILED WITH THE COURT. 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

13.	**24PR0084**	**IN RE THE MATTER OF THE VISMAN FAMILY REVOCABLE TRUST**
INSTRUCTION HEARING		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 24, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Petitioners, Brad D. Visman and Brad D. Visman Jr. ("Petitioners"), filed a Petition for Instructions on June 29, 2026. Petitioners allege that Michael Visman and Mark Visman ("Respondents") have demanded distributions from El Dorado Orchards Inc. ("EDO") and have threatened that the current management of will be changed if these distributions are not met, in violation of the Status Quo Order entered by the Court on December 3, 2025. Petitioners request the Court to order Michael Visman and Mark Visman to cease and desist from taking any steps to make management changes that contradict the Status Quo Order.

Petitioners also contend that EDO is unable to pay its ongoing operating expenses this summer without a Line of Credit or other financing. Michael Visman has requested Brad Visman make a loan from his personal funds; however, Michael and Mark are only willing to consent to a loan from Brad if it is in the sum of $300,000 which would permit their requested distribution of $150,0000. Petitioners request the Court permit Brad to make a short-term loan of up to $150,000 to EDO without making any distributions to shareholders until profits are actually realized during the upcoming Apple Hill season.

Respondents do not oppose an order that permits Brad to make a personal loan to EDO, provided that:

1. Any personal loan made by Brad D. Visman to EDO shall not be used for, applied toward, or credited against shareholder distributions of any kind;
2. Any such loan shall be subject to terms approved by, or disclosed to, EDO's Board, and shall be subject to the existing Status Quo Order;
3. The loan terms, including interest rate, repayment schedule, and any security or priority claimed by the lender, shall be disclosed in writing to all parties and submitted to the Board for review prior to disbursement; and
4. Nothing in any such loan arrangement shall be construed to grant Brad D. Visman any additional control over, priority in, or interest in EDO or the Trust beyond what is currently established.

TENTATIVE RULING #13:

ABSENT OBJECTION THE PETITION IS GRANTED CONSISTENT WITH THE TERMS PROVIDED BY RESPONDENTS AS DETAILED IN THE TENTATIVE RULING. 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.	25PR0273	IN THE MATTER OF DONENE VUKOVICH
PETITION HEARING		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON AUGUST 31, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Before the Court are two motions: 1) Petition to Determine Entitlement to Assets of the Vukovich Family Trust; and 2) Petition for 1) Breach of Trust; 2) Surcharge Against Trustees; 3) Removal of Trustees; 4) Recovery of Trust Property and Double Damages for Bad Faith Wrongful Taking; and 5) Compel Information, Books, Records, and Supporting Documentation.

Background

The Vukovich Family Trust (the "Trust") was created by Melvin Vukovich ("Melvin") and Ayriane Vukovich ("Ayriane") on February 28, 1994. The Trust was amended and restated numerous times. The Third Amendment revoked the First and Second Amendments.

Paragraph 10(B) of the Trust instructs (emphasis added):

> B. **The interests of any beneficiary in the principal or income of a trust estate shall not be sold, pledged, encumbered, assigned, hypothecated or in any way alienated by any beneficiary prior to its *actual receipt* by the beneficiary, and such interest shall be immune from seizure or control of creditors of such beneficiary or of creditors of any spouse of any married beneficiary or of creditors of others**. Neither the income nor the principal of the trust estate shall be subject to attachment, garnishment, or claims, through bankruptcy or otherwise, nor be subject to judgment of any court or proceedings in aid of execution thereto before actual receipt by the beneficiary.

Paragraph Two of the Third Amendment provides (emphasis added):

> Paragraph Six, Subparagraph C of the Declaration of Trust is amended to read as follows:
>
> C. The Trustee shall distribute the remaining trust estate, and any property received pursuant to the surviving spouse's Will or otherwise, in equal shares to the Settlors, children, AIMEE L. VUKOVICH, CLAUDIA M. VUKOVICH-PAREDES, MILAN VUKOVICH, and TROY VUKOVICH, by right of representation, **except that the share for MILAN VUKOVICH shall be reduced by Forty-Five Thousand Dollars ($45,000.00) and allocated equally among the other shares**. **The share of any of the Settlors' children who does not survive the surviving spouse, and leaves no living issue, shall be allocated equally to the other shares created pursuant to this Subparagraph C**.

> For purposes of this Declaration of Trust, if any person named herein fails to survive for thirty (30) days following the date of the death of the beneficiary whose death gave rise to that person's having a present interest in a trust, that person shall be deemed to have predeceased that beneficiary.

Melvin passed away on October 6, 2005, and Aryiane passed away on August 22, 2022. Melvin and Aryiane were survived by four children: Aimee, Claudia, Milan, Troy, and Gregory. Pursuant to Paragraph Three of the Third Amendment, Troy was appointed as Co-Trustee and was given the authority to appoint a Successor Co-Trustee should Ayriane be unable to act as Co-Trustee. Upon Ayriane's death, Troy appointed Aimee to serve as Successor Co-Trustee in September 2022.

Although Milan survived Aryiane, he passed away on May 18, 2025. Milan was survived by Demetria Vukovich, Alexa Vukovich, Alex's son Phelan Kirk, and spouse Donene Vukovich. Prior to Milan's death, he and Donene established the Milan Vukovich and Donene Nichelle Vukovich Revocable Family Trust ("Milan's Trust"). Milan also executed a pour over will devising his estate to Milan's Trust.

Petition to Determine Entitlement to Assets of the Vukovich Family Trust

Petitioner, Demetria Vukovich ("Demetria"), seeks an order from the Court confirming Milan's separate property inheritance to be received from the Trust should be distributed according to the laws of intestacy, which would include distribution to his spouse and his children.

Demetria argues that Milan did not receive his distribution from the Trust prior to his death. Although his interest in the Trust vested, it was not distributed to him and was subject to the provisions in Paragraph Ten, subparagraph (B) which provides that the interests of any beneficiary shall not be "sold, pledged, encumbered, assigned, hypothecated or in any way alienated by any beneficiary prior to its actual receipt by the beneficiary…" As such, Milan did not have the ability to direct the distribution of his inheritance through a will or assignment of interest to a trust since he did not receive the distribution prior to his death. Accordingly, the laws of intestate succession apply.

Except as provided in subdivision (b), the share in a decedent's estate of a beneficiary who survives the decedent but who dies before distribution shall be distributed under this chapter with the same effect as though the distribution were made to the beneficiary while living. Probate Code § 11801.

Probate Code § 21102 instructs that:

> (a) The intention of the transferor as expressed in the instrument controls the legal effect of the dispositions made in the instrument.

> (b) The rules of construction in this part apply where the intention of the transferor is not indicated by the instrument.
>
> (c) Nothing in this section limits the use of extrinsic evidence, to the extent otherwise authorized by law, to determine the intention of the transferor.

All parts of an instrument are to be construed in relation to each other and so as, if possible, to form a consistent whole. If the meaning of any part of an instrument is ambiguous or doubtful, it may be explained by any reference to or recital of that part in another part of the instrument. Probate Code § 21121.

Demetria's reliance on Paragraph Ten, subparagraph (B) (i.e., the "spendthrift clause") is unavailing. Considering the Trust as a whole, the Court finds that the Settlors intended their children receive the distribution of the trust estate so long as they survive the surviving settlor by 30 days. The Trust does not contain any provision requiring a beneficiary to survive until the receipt of distribution. The spendthrift clause was meant to protect their children's interest against third-party creditors. Nothing in the spendthrift clause evidences an intent to prevent a vested beneficial interest from passing by operation of law upon the beneficiary's death.

<u>The Court finds that Milan's vested distribution from the Trust was properly devised to Milan's Trust and his pour over will. Accordingly, Demetria's request is denied</u>.

<u>Petition for 1) Breach of Trust; 2) Surcharge Against Trustees; 3) Removal of Trustees; 4) Recovery of Trust Property and Double Damages for Bad Faith Wrongful Taking; and 5) Compel Information, Books, Records, and Supporting Documentation</u>

Petitioner, Donene ("Donene"), is the surviving spouse of Milan Vukovich and Trustee of Milan's Trust. Donene alleges that following Milan's death, his vested beneficial interest in the Trust passed to Milan's Trust, of which she is the acting trustee and successor-in-interest. As such, Petitioner asserts that she is entitled to enforce the fiduciary obligations owed by Respondents in connection with the administration of the trust estate.

Donene argues that Respondents, Troy Vukovich and Aimme L. Vukovich (collectively "Respondents"), failed to provide any formal accounting for years until compelled to do so through court proceedings initiated by her. Additionally, Respondents failed to complete administration or distribute the remaining trust estate over three years after Ayriane's death. Donene contends that during this time, Respondents caused the Trust to incur substantial expenditures relating to parcel merges, lot-line adjustments, surveying, title work, county approvals, and related property work over an extended period of time.

Donene believes that Respondents used the exploration of subdivision and development opportunities as justification for prolonging administration of the trust estate, retaining control over assets, delaying liquidation and distribution, and continuing to charge substantial ongoing expenditures to the Trust. As a result of Respondents' conduct, the trust estate incurred substantial unnecessary expenditures, depletion of liquid assets, carrying costs, and other damages to be proven at trial.

Donene further asserts that the accounting produced by Respondents reveals extensive insider transactions and non-arm's length dealings which benefited Respondents as opposed to the Trust. Donene is under the information and belief that one or more Respondents and/or related family members occupied the property located at 3301 Meder Road in Shingle Springs, which accumulated substantial recurring expenditures while receiving rental income in the amount of $400-$500/month.

Additionally, Donene contends that the accounting reflects numerous personal, family, and discretionary expenditures were improperly charged to the trust and that Respondents failed to segregate legitimate trust administration expenses from personal or family expenses. The accounting itself is inadequate, as it contains numerous vague, conclusory and inadequately documented entries.

Further, Donene alleges that Respondents have failed to produce the underlying financial records necessary to permit beneficiaries to meaningfully evaluate the propriety of Respondents' conduct and the accuracy of the accounting and requests the Court compel Respondents to produce all supporting books, records, and financial documentation relating to the administration of the trust estate.

Donene seeks removal of Respondents as Trustees for breaching their fiduciary duties and to ensure the remaining trust assets are protected while completing the trust administration. Donene seeks recovery under Probate Code § 850 of all trust property funds, expenditures, benefits, use value, and other assets wrongfully taken, used, retained, transferred or disposed of by Respondents, as well as double damages pursuant to Probate Code § 859.

<u>The Court orders all Parties to appear at the hearing on August 31, 2026, at 8:30 a.m. in department nine</u>.

TENTATIVE RULING #14:

1. **<u>PETITION TO DETERMINE ENTITLEMENT TO ASSETS OF THE VUKOVICH FAMILY TRUST</u>**

   PETITIONER DEMETRIA VUKOVICH'S REQUEST IS DENIED.

2. **<u>PETITION FOR 1) BREACH OF TRUST; 2) SURCHARGE AGAINST TRUSTEES; 3) REMOVAL OF TRUSTEES; 4) RECOVERY OF TRUST PROPERTY AND DOUBLE DAMAGES FOR BAD FAITH WRONGFUL TAKING; and 5) COMPEL INFORMATION, BOOKS, RECORDS, AND SUPPORTING DOCUMENTATION</u>**

   APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, AUGUST 31, 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.

15.	**25PR0063**	**ESTATE OF ROBERT DOUGLAS WORRELL**
PETITION FOR DETERMINATION OF HEIRSHIP AND PERSONS ENTITLED TO DISTRIBUTION		

ON THE COURT'S OWN MOTION DUE TO LACK OF JUDICIAL COVERAGE, THE COURT WILL HEAR THIS MATTER ON SEPTEMBER 14, 2026, AT 8:30 A.M. IN DEPARTMENT NINE. THERE WILL BE NO HEARING ON AUGUST 10, 2026.

Petitioner, Christina Kaui Hayes ("Petitioner"), filed a Petition for Determination of Heirship and Persons Entitled to Distribution. At the hearing on July 6, 2026, the Court ordered the Parties to meet and confer on choosing a mediator. A hearing was set for August 10, 2026.

On July 27, 2026, Decedent's son, Stephen A. Flores-Worrell, filed a Statement in Support of Petitioner's Petition for Determination. A Supplemental Declaration of Stephen A. Flores-Worrell was filed on August 4, 2026.

TENTATIVE RULING #15:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, SEPTEMBER 14, 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.