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

This matter was continued from August 10, 2026. The tentative ruling issued on August 10, 2026, remains in effect.

TENTATIVE RULING #1:

THE TENTATIVE RULING ISSUED ON AUGUST 10, 2026, REMAINS IN EFFECT.

2.	26PR0022	ESTATE OF JEFFREY CURTIS WILLIAMS
PETITION HEARING		

On July 6, 2026, Executor, Wells Fargo Bank, N.A. ("Executor" or "Petitioner") filed a Petition for Order Confirming Ownership of Assets and Granting Possession of Assets. Proof of service of notice of hearing was filed on July 21, 2026. No opposition has been filed.

Petitioner seeks the following findings and orders:

1. Notice of the Petition has been given as required by law or otherwise dispensed with;
2. The allegations contained in the Petition are true;
3. JCW Development, LLC is an asset of the Jeffrey C. Williams 2011 Revocable Trust Dated October 21, 2011, as amended, and subject to the possession and control of Wells Fargo Bank, N.A. as Trustee of the Jeffrey C. Williams 2011 Revocable Trust dated October 21, 2011, as amended;
4. Pony Express Estates, LLC is an asset of the Jeffrey C. Williams 2011 Revocable Trust Dated October 21, 2011, as amended, and subject to the possession and control of Wells Fargo Bank, N.A. as Trustee of the Jeffrey C. Williams 2011 Revocable Trust dated October 21, 2011, as amended.; and
5. Placerville Land, LLC is an asset of the Jeffrey C. Williams 2011 Revocable Trust Dated October 21, 2011, as amended, and subject to the possession and control of Wells Fargo Bank, N.A. as Trustee of the Jeffrey C. Williams 2011 Revocable Trust dated October 21, 2011, as amended.

Decedent, Jeffrey C. Williams ("Decedent"), established the Jeffrey C. Williams 2011 Revocable Trust (the "Trust") on October 21, 2011. Decedent Amended the Trust pursuant to the First Amendment to Jeffrey C. Williams 2011 Revocable Trust Dated October 21, 2011, on March 21, 2021. Decedent amended the Trust pursuant to the Second Amendment to Jeffrey C. Williams 2011 Revocable Trust Dated October 21, 2011, on February 8, 2019.

Prior to Decedent's death, he purchased the following real properties: 5195 Deer Valley Road, Rescue, California, El Dorado County ("Deer Valley"), 1751 Lotus Road, Placerville, California, El Dorado County ("1751 Lotus Road"), 1601 Lotus Road, Placerville, California, El Dorado County ("1601 Lotus Road"), and 1631 Lotus Road, Placerville, California, El Dorado County ("1631 Lotus Road") (collectively the "Subject Properties").

On July 30, 2024, Decedent formed and registered JCW Development, LLC. On September 30, 2024, Decedent formed and registered Pony Express Estates, LLC and Placerville Land, LLC. At the time of Decedent's death, title to the LLCs was in his name individually and not the Trust.

On December 22, 2024, Decedent made the following transfers: 1) Deer Valley was transferred to Pony Express, LLC by Grant Deed; 2) 1601 Lotus Road was transferred to

Placerville Land, LLC by Grant Deed; 3) 1631 Lotus Road was transferred to Placerville Land, LLC by Grant Deed; and 4) 1751 Lotus Road was transferred to Placerville Land, LLC by Grant Deed.

Petitioner asserts that at the time Decedent purchased the Subject Properties, he intended and did take title to the assets as Trustee of the Trust. Although the membership interests in the LLCs were titled to and in the possession of Decedent individually, there was never any intent at the time of forming or subsequent funding the LLCs to defund the Trust, but rather the LLCs were created to be a form of management of the Subject Properties.

The Declaration of Michael J. Dalton confirms it was neither intended nor appreciated at the time of transferring the Subject Properties to the LLCs had the effect of defunding the Trust. Had this been understood, the membership interest in the LLCs would have instead been issued to Decedent in his capacity as Trustee 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.

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 #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).

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

3.	26PR0252	IN THE MATTER OF HAROLD CARPENTER
PETITION HEARING / MOTION HEARING		

On August 26, 2026, Petitioner, El Dorado County Sheriff Jeff Leikauf ("Petitioner"), filed: 1) Petition for Orders and Temporary Order Authorizing Compliance with Inmate's "Do Not Resuscitate" Directive Pursuant to Probate Code Sections 4766 and 4770; and 2) Motion to File Medical Records Under Seal; Declaration of Stephen L. Mansell.

Proofs of service attached to each motion indicate Richard Terry of the El Dorado County Public Defender's Office was served on August 26, 2026. A Proof of Service was filed on August 27, 2026, indicating Harold Carpenter ("Patient") was personally served on the same date.

DNR DIRECTIVE PETITION

Petitioner contends that Patient is an inmate in the custody of the El Dorado County Jail. On April 27, 2026, Patient executed a Physician Orders for Life Sustaining Treatment (POLST) form which contains a Do Not Resuscitate directive ("DNR Directive"). The DNR Directive was signed by Patient and Patient's treating physician, Clay Josephy, M.D.

Petitioner asserts that Patient had the capacity to make health care decisions and understood the nature and consequences of the DNR Directive at the time of execution and continues to possess this capacity while affirming his desire the DNR Directive be honored. The Declaration of Christopher Smith M.D. confirms Patient's medical condition, prognosis, and capacity to execute the POLST form, which contains the DNR Directive, as well as his continued capacity.

Petitioner asserts that given the institutional setting and the involvement of multiple health care providers, jail medical staff, custody staff, and emergency medical personnel, Petitioner seeks a court order to provide clear legal authority and protection for all staff members who may be called upon to honor Patient's DNR Directive, including the jail's contracted third-party medical staff. Without a court order, staff members may face uncertainty regarding their legal obligations and potential liability when implementing the DNR Directive in an emergency situation.

Petitioner seeks the following:

1. Find that Patient executed a valid do not resuscitate directive on April 27, 2026, in accordance with California Probate Code § 4780 and applicable regulations;
2. Find that the DNR Directive remains in effect and has not been revoked or modified;
3. Find that Patient possessed capacity at the time of execution and continues to possess capacity and to affirm his wishes as expressed in the DNR Directive;

4. Authorize and direct all health care providers, jail medical staff including third-party contracted health care providers, custody personnel, emergency medical responders, and outside hospital staff to comply with and honor Patient's DNR Directive;
5. Order that Patient's DNR Directive be prominently noted in Patient's medical records and custody file;
6. Order that a copy of this Court's order and Patient's DNR Directive accompany Patient during any transport to outside medical facilities or hospitals;
7. Find that all health care providers and jail personnel who comply with Patient's DNR Directive in good faith are entitled to protections of California Probate Code §§ 4740 and 4782, and are not subject to civil or criminal liability, disciplinary action, or administrative sanction; and
8. Order that this order remain in effect unless and until Patient revokes the DNR Directive or this Court issues a subsequent order modifying or terminating this authorization.

Probate Code § 4770 provides that the court in its discretion, on a showing of good cause, may issue a temporary order prescribing the health care of the patient until the disposition of the petition filed under Section 4766.

Probate Code § 4766 instructs that a petition may be filed under this part for any one or more of the following purposes:

> (a) Determining whether or not the patient has capacity to make health care decisions.
>
> (b) Determining whether an advance health care directive is in effect or has terminated.
>
> (c) Determining whether the acts or proposed acts of an agent or surrogate are consistent with the patient's desires as expressed in an advance health care directive or otherwise made known to the court or, where the patient's desires are unknown or unclear, whether the acts or proposed acts of the agent or surrogate are in the patient's best interest.
>
> (d) Declaring that the authority of an agent or surrogate is terminated, upon a determination by the court that the agent or surrogate has made a health care decision for the patient that authorized anything illegal or upon a determination by the court of both of the following:
>
>> (1) The agent or surrogate has violated, has failed to perform, or is unfit to perform, the duty under an advance health care directive to act consistent with the patient's desires or, where the patient's desires are unknown or

> > unclear, is acting (by action or inaction) in a manner that is clearly contrary to the patient's best interest.
> >
> > (2) At the time of the determination by the court, the patient lacks the capacity to execute or to revoke an advance health care directive or disqualify a surrogate.
>
> (e) Compelling a third person to honor individual health care instructions or the authority of an agent or surrogate.

A patient is presumed to have the capacity to make a health care decision, to give or revoke an advance health care directive, and to designate or disqualify a surrogate. This presumption is a presumption affecting the burden of proof. Probate Code § 4657.

<u>The Court finds that Patient had the capacity to execute the DNR Directive, which is valid and remains in full force and effect. Absent objection, the Petition is granted as requested</u>.

<u>MOTION TO FILE MEDICAL RECORDS UNDER SEAL</u>

Petitioner moves for an order authorizing the filing under seal of the Declaration of Christopher Smith, M.D., and its attached exhibit consisting of hospital patient progress notes. Petitioner argues that the request is narrow, as it seeks sealing only the confidential medical information, not the entire petition. Further, Patient's medical privacy is an overriding interest, public filing would prejudice that interest, the requested sealing is limited to the records requiring protection, and no lesser measure would adequately protect the information.

California Rules of Court, Rule 2.550 provides that the court may order that a record be filed under seal only if it expressly finds facts that establish:

> (1) There exists an overriding interest that overcomes the right of public access to the record;
>
> (2) The overriding interest supports sealing the record;
>
> (3) A substantial probability exists that the overriding interest will be prejudiced if the record is not sealed;
>
> (4) The proposed sealing is narrowly tailored; and
>
> (5) No less restrictive means exist to achieve the overriding interest.

Privacy is an inalienable right under the California Constitution. (Cal. Const., art. I, § 1; *Lewis*, *supra*, 3 Cal.5th at p. 569, 220 Cal.Rptr.3d 319, 397 P.3d 1011.) It is well established that the right to privacy extends to medical records (*Cross v. Superior Court* (2017) 11 Cal.App.5th 305, 325–326, 217 Cal.Rptr.3d 569 (*Cross*)), which may contain "matters of great sensitivity going to the core of the concerns for the privacy of information about an individual." (*Wood v.*

Superior Court (1985) 166 Cal.App.3d 1138, 1147, 212 Cal.Rptr. 811 (*Wood*).) *Grafilo v. Soorani* (2019) 41 Cal.App.5th 497, 507 [254 Cal.Rptr.3d 149, 157].

The Court finds that the Declaration of Christopher Smith, M.D., and its attached exhibit, contain details concerning Patient's medical information, including diagnosis, prognosis, and treatment information. Such information is inherently private. An overriding interest in Patient's medical records exists that overcomes the right of public access, as such information is not necessary to persons beyond those subject to the underlying Petition, which supports sealing the record.

The Court further finds that a substantial probability exists that the overriding interest will be prejudiced if the record is not sealed, as the records would expose Patient's private medical information to persons with no role or interest in the underlying Petition. The request is narrowly tailored, as it only seeks to protect Patient's medical information and no less restrictive means exist, as redaction would essentially cover the entire document.

<u>Petitioner's request to file the Declaration of Christopher Smith, M.D. and its attached exhibit under seal is granted</u>.

TENTATIVE RULING #3:

ABSENT OBJECTION THE PETITION FOR ORDERS AND TEMPORARY ORDER AUTHORIZING COMPLIANCE WITH INMATE'S "DO NOT RESUSCITATE" DIRECTIVE PURSUANT TO PROBATE CODE SECTIONS 4766 AND 4770 IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

PETITIONER'S MOTION TO FILE MEDICAL RECORDS UNDER SEAL IS GRANTED AS REQUESTED.

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

4.	**PP20200127**	**ESTATE OF MARSECO ARANDA**
STATUS OF ADMINISTRATION		

Letters Testamentary were issued on October 7, 2020.

An Inventory and Appraisal was filed on May 19, 2021.

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

5.	**24PR0205**	**ESTATE OF MICHELE LOUISE ROMANINI-POLLARD**
STATUS OF ADMINISTRATION/FINAL DISTRIBUTION HEARING		

Before the Court are two matters: 1) Status of Administration; and 2) Petition for Final Distribution.

STATUS OF ADMINISTRATION

Letters of Administration were issued on October 7, 2024.

An Inventory and Appraisal was filed on April 28, 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 July 27, 2026.

A Status Report was filed on August 10, 2026, indicating that Administrator filed her petition on distribution and the hearing thereof is set on the same date as the review hearing.

FINAL DISTRIBUTION

Letters of Administration were issued on October 7, 2024, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on April 28, 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.

Proof of Service of Notice of the hearing on the Petition was filed on August 10, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes the net remaining reserve funds after all final taxes and expenses are paid should be divided in equal 1/6th shares to the following: Beverly Ann Graham, Lorraine Faye Duprey, Barbara Jean Welz, Robert Eugene Romanini, Cheryl Ann Bath, and Diane Marie George.

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 personal property taxes payable. All California or federal income taxes due and payable by the estate have been provided for.

The Petition requests:

1. Notice of the Petition has been given as required by law;
2. The estate administration be brought to a close;
3. The Court order that all the reported acts and proceedings of Petitioner as Administrator area confirmed, settled, and approved;
4. The Court order that Petitioner shall be authorized and directed to pay herself the sum of $9,995.22, representing statutory compensation for ordinary services rendered;
5. The Court order that Petitioner shall be authorized and directed to pay her attorney the sum of $9,995.22, representing statutory compensation for ordinary services rendered;
6. The Court order distribution of the Estate in Petitioner's hands, and any other property of Decedent or the Estate not now known or discovered, be made to the persons entitled to it as set forth in the Petition;
7. The Court order bond for Administrator Lindsay Bowman be discharged retroactively effective as of the Court filing date of this final Petition;
8. The Court authorize Petitioner to retain $1,500.00 for closing expenses and liabilities and that Petitioner is to deliver the unused part of this reserve without further Court order to the persons entitled to as set forth in the Petition; and
9. **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 #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, SEPTEMBER 6, 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.

6.	25PR0191	ESTATE OF BRANDON DAVID BOYCE
PETITION HEARING / STATUS OF ADMINISTRATION		

Before the Court are two matters: 1) Status of Administration; and 2) Petition for Termination of Further Proceedings and for Discharge of Personal Representative.

STATUS OF ADMINISTRATION

Letters Testamentary were issued on September 15, 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.

PETITION HEARING

Petitioner, Mary Anjuli Boyce ("Petitioner"), declares an Inventory and Appraisal has not been filed because Petitioner could not locate any assets that were subject to estate administration, as majority of Decedent's assets were held in the Boyce Family Trust. At the time the probate proceeding was initiated, Petitioner believed probate administration might be necessary to transfer assets that had not been included in the Trust; however, the minor asset's value which had not been transferred did not exceed the amount of $208,850.00.

Probate Code § 12251 provides:

> (a) At any time after appointment of a personal representative and whether or not letters have been issued, if it appears there is no property of any kind belonging to the estate and subject to administration, the personal representative may petition for the termination of further proceedings and for discharge of the personal representative. The petition shall state the facts required by this subdivision.
>
> (b) Notice of the hearing on the petition shall be given as provided in Section 1220 to all interested persons.
>
> (c) If it appears to the satisfaction of the court on the hearing that the facts stated in the petition are true, the court shall make an order terminating the proceeding and discharging the personal representative.

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Petitioner confirms that she is the sole beneficiary of Decedent's will in her capacity as the Trustee of the Boyce Family Trust and therefore notice is not required. Petitioner requests the Court terminate the proceedings and discharge her as Executor.

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).

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

7.	**23PR0084**	**ESTATE OF GLENNA M. SMITH**
STATUS OF ADMINISTRATION		

This matter was continued from August 10, 2026. The tentative ruling issued on August 10, 2026, remains in effect.

TENTATIVE RULING #7:

THE TENTATIVE RULING ISSUED ON AUGUST 10, 2026, REMAINS IN EFFECT.

8.	26PR0237	IN THE MATTER OF THE BARBARA PIACENTINI TRUST
ESTATE HEARING		

On August 10, 2026, Trustee, Kathryn E. Cain ("Trustee" or "Petitioner"), filed a First Account and Report of Trustee; Petition to Settle Account; to Fix and Allow Trustee and Attorney Fees; and to Discontinue Court Supervision. Proof of service of the notice of hearing was filed on the same date.

Petitioner's first account covers the period beginning May 20, 2024 (the date of the Court's Order establishing the Trust) and ending July 12, 2026, the date of death of the beneficiary. Petitioner advises that based on the assets on hand at the end of the accounting period, the bond amount should be increased to $1,741,036.52.

Petitioner provides Trustee mistakenly believed the prior Court Order included court approval to pay from the trust accounts reasonable fees and conservator fees on a periodic basis without court approval, subject to court review at the time of the accounting. Under this belief, Trustee paid from the trust what she believed to be reasonable fees for the services provided, totaling $7,225.50 for June through December 2024, $11,133.25 for 2025, and $3,334.50 for January through June 2026.

Petitioner advises that the Trust was created by a Court Order dated May 20, 2024. As the Trust was created and funded on behalf of a conservatee pursuant to court order, it was required to comply with California Rules of Court, Rule 7.903, which includes the requirement that it remain under court supervision, provide accountings, and require trustee and attorney fees be approved by the court prior to payment. Petitioner contends that as conservatee is deceased, the reasons for the court supervision no longer exist.

Petitioner requests the Court order the following:

1. Settling and allowing this account; and ratifying, approving, and confirming all actions and transactions of Petitioner as Trustee as set forth in the report;
2. Directing that the fiduciary bond be increased so that the total of all bonds on file is $1,741,036.52;
3. Confirming that the fees paid to the Trustee and Conservator from the Trust estate, in the aggregate amount of $21,693.25 were reasonable for the services performed and are approved;
4. Authorizing Petitioner, as Trustee, to pay from the Trust estate, her attorney Jana Ellerman of Ellerman Strand, the sum of $5,685.00 for legal services rendered to the Trustee and costs; and
5. Ordering that this Trust not be required to continue under court supervision, and that ongoing court accountings and court approvals for trustee and attorney fees not be required.

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

This matter was continued from August 10, 2026. The tentative ruling issued on August 10, 2026, remains in effect.

TENTATIVE RULING #9:

THE TENTATIVE RULING ISSUED ON AUGUST 10, 2026, REMAINS IN EFFECT.

10.	26PR0198	ESTATE OF KARLA M. SMART
SPOUSAL PROPERTY HEARING		

This matter was continued from August 17, 2026. The tentative ruling issued on August 17, 2026, remains in effect.

TENTATIVE RULING #10:

THE TENTATIVE RULING ISSUED ON AUGUST 17, 2026, REMAINS IN EFFECT.

11.	**26PR0155**	**IN THE MATTER OF THE WILLIAM A. JONES & MARY H. JONES TRUST DATED MAY 11, 1994**
PETITION HEARING		

On August 7, 2026, Petitioners, Donna Foster and Susan Lewis (collectively "Petitioners"), filed a Second Amended Verified Petition. Proof of Service of the notice of hearing was filed on August 7, 2026. No opposition has been filed.

Petitioners assert that despite repeated requests for accountings, supporting documentation, inventories, appraisals, and clarification regarding trust property and administration, Trustee, Margaret A. Jones ("Trustee" or "Respondent"), has failed to provide such information and documentation. Petitioners allege that Respondent has proposed purchasing trust real property while acting as Trustee and exercising authority over valuation, administration, and proposed sale procedures which have been met by objection by Petitioners and other beneficiaries.

Petitioners contend that Respondent has asserted rights to reimbursements and offsets relating to alleged cleanup and maintenance expenses despite disputes concerning documentation, authorization, valuation, and occupancy benefits. Petitioners believe that occupancy of trust property by family members of Respondent may have occurred without payment of fair rental value.

Petitioners believe neutral administration is necessary due to family conflict, disputed transactions, disputed asset classification, disputed occupancy issues, and concerns regarding impartiality.

Petitioners request the following:

1. Remove Margaret A. Jones as Trustee and/or Co-Trustee;
2. Appoint John DePiazza as neutral successor fiduciary and trustee;
3. Order a full accounting;
4. Require preservation of all trust records and assets;
5. Prohibit transfer or sale of disputed property without court approval;
6. Determine ownership and classification of disputed assets and claims; and
7. Determine whether occupancy, rental value, reimbursement, offsets, or surcharge claims exist relating to occupancy of trust property by beneficiaries, family members, non-beneficiaries, or third parties.

TENTATIVE RULING #11:

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

12.	**25PR0184**	**ESTATE OF RONALD RAY PASSARINO**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on September 25, 2025.

An Inventory and Appraisal was filed on April 28, 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.

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

TENTATIVE RULING #12:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

13.	**25PR0176**	**IN THE MATTER OF PHILLIP GERARD HENRY**
STATUS OF ADMINISTRATION / ACCOUNTING HEARING		

Before the Court are two matters: 1) Status of Administration; and 2) First Account and Status Report of Administration.

STATUS OF ADMINISTRATION

Letters of Administration were issued on September 8, 2025.

An Inventory and Appraisal was filed on February 19, 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.

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

ACCOUNTING

On August 31, 2026, Petitioner, Tasha Renea Henry ("Petitioner"), filed a First Account and Status Report of Administration; Petition. Proof of Service was filed on the same date.

Petitioner's First Account covers the period from October 1, 2025, through July 4, 2026. Petitioner advises the estate is not in a condition to be closed and distributed, as Petitioner is in the process of confirming Decedent's tax debts.

Petitioner requests the following:

1. The First Account of the estate be allowed and approved as filed;
2. All acts and transactions of Petitioner as Administrator, to the extent set forth in the First Account and Status Report, be ratified, confirmed and approved.

TENTATIVE RULING #13:

1. STATUS OF ADMINISTRATION

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

2. ACCOUNTING

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.	25PR0188	ESTATE OF HAZEL MARIE JOHNSON
STATUS OF ADMINISTRATION		

Letters of Special Administration were issued on October 29, 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.

A Status of Administration and Request to Extend Time was filed on August 31, 2026. Petitioner advises that the estate is currently solvent with no outstanding creditor claims. Petitioner is working on completing an Inventory and Appraisal. Petitioner requests a continuance to investigate and retrieve the financial records needed to complete the Inventory and Appraisal.

TENTATIVE RULING #14:

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

15.	**24PR0198**	**ESTATE OF DAVID SHUI-LUNG CHAU**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on September 9, 2024.

An Inventory and Appraisal was filed on April 2, 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 Aril 21, 2026.

An Order for Final Distribution was filed on June 5, 2026.

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

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

TENTATIVE RULING #15:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

16.	**25PR0332**	**MATTER OF WINTERS FAMILY TRUST DATED 12-15-1996**
PETITION HEARING		

On August 31, 2026, the Court continued the matter to September 14, 2026. Nothing further has been filed since this time.

TENTATIVE RULING #16:

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

17.	**23PR0259**	**ESTATE OF JIMMY R. FOX**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on March 21, 2024.

An Inventory and Appraisal was filed on March 17, 2025. A Reappraisal for Sale Inventory and Appraisal was filed on December 11, 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 May 8, 2026.

An Order for Final Distribution was filed on June 22, 2026.

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

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

TENTATIVE RULING #17:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

18.	**24PR0260**	**ESTATE OF SUSHANNA BELEW NEUNER**
STATUS OF ADMINISTRATION		

Letters Testamentary were issued on July 21, 2025.

An Inventory and Appraisal was filed on March 3, 2025. A Supplemental Inventory and Appraisal was filed on November 11, 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.

At the hearing on July 20, 2026, the matter was continued to September 14, 2026. Nothing further has been filed since this time.

TENTATIVE RULING #18:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

19.	**26PR0042**	**IN THE MATTER MARIAN RENDELL FAMILY TRUST, DATED SEPTEMBER 14, 2017**
REVIEW HEARING / OSC		

On July 13, 2026, the Court found Trustee, Jason S. O'Neil ("Trustee"), of the Marian Rendell Family Trust failed to render, file, and serve the Inventory and Accounting ordered by the Court on April 13, 2026. The Court ordered Trustee to comply with the April 13, 2026, Order and set a review hearing for September 14, 2026.

Nothing further has been filed since this time.

TENTATIVE RULING #19:

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

20.	**25PR0175**	**ESTATE OF REGGIE WAYNE PATTON**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on September 8, 2025.

An Inventory and Appraisal was filed on March 3, 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.

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

TENTATIVE RULING #20:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

21.	**24PR0050**	**ESTATE OF CATHERINE LYNN SARGENT**
STATUS OF ADMINISTRATION		

Letters of Administration were issued on May 13, 2024.

An Inventory and Appraisal was filed on October 17, 2024. A Supplemental Inventory and Appraisal was filed on July 10, 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 July 10, 2025.

An Order for Final Distribution was filed on September 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 #21:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

22.	PP20210078	ESTATE OF DIANA JOY SCHOTT
STATUS OF ADMINISTRATION		

On April 16, 2021, Letters of Administration were issued under Case No. PP20210078; however, the Petition for general administration of the estate was filed under Case No. PP20210134. Letters Testamentary were filed in Case No. PP20210134 on August 25, 2021.

An Inventory and Appraisal was filed on March 11, 2022, in consolidated case number PP20210134. 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. 26CV2271

A Petition for Final Distribution was filed on July 25, 2024.

An Order for Final Distribution was filed on September 9, 2024.

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 #22:

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, SEPTEMBER 6, 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 REMOTELY, INSTRUCTIONS FOR REMOTE APPEARANCES CAN BE FOUND ON THE COURT'S WEBSITE.

23.	**26PR0133**	**IN RE: THE PARKER FAMILY TRUST U/A/D OCTOBER 16, 1989**
PETITION HEARING		

On May 11, 2026, Petitioner, Victoria Vivar ("Petitioner") filed a Petition to Compel Trustee; for Removal of Trustee; for Elder Financial Abuse; for Return of Trust Property; for Damages for Breach of Fiduciary Duty; for Double Damages; and for Attorney's Fees and Costs. At the hearing on June 29, 2026, counsel requested a continuance to file a written objection. The hearing was continued to August 3, 2026. Respondent, Karen Morgan ("Respondent" or "Trustee") filed an Objection and Response on July 16, 2026. At the hearing on August 3, 2026, the Court continued the matter to perfect notice. Proof of service of the notice of hearing was filed on August 14, 2026.

The Parker Family Trust was executed by Settlors, Thelma Jo Parker and Warren Parker (collectively "Settlors") on October 16, 1989, and amended on June 13, 2013. Surviving Settlor, Warren Parker, passed away on November 6, 2014, and was survived by his children Dennis Parker, Sheryl Ary, and Respondent. Sheryl passed away on August 26, 2020, who was survived by her five daughters, including Petitioner. Petitioner asserts that as Sheryl survived Warren by more than a period of thirty days, the share owed to her from the Trust rightfully passes to her estate.

Upon Warren's death in 2014, Respondent became the sole acting Trustee. Pursuant to Article 2.6 of the Trust, Respondent was required to make specific distributions to each beneficiary and to distribute, in equal shares, the rest, residue and remainder of the Trust to the Settlors' children. Petitioner contends that despite repeated requests to Respondent regarding information pertaining to the administration of the Trust and proposed plan for distribution, Respondent failed to provide the requested information. In addition, Respondent failed to provide the full Trust documents and a code-compliant accounting despite repeated requests.

Petitioner asserts that prior to Scheryl Ary's death, she was a dependent adult for purposes of Welfare and Institutions Code § 15610.60. In addition, Dennis Parker presently has dementia and is a dependent adult for purposes of Welfare and Institutions Code § 15610.60. Petitioner argues Respondent's failure to make a distribution during the lifetime of Scheryl Ary constitutes Elder and Dependent Adult Financial Abuse as defined by Welfare and Institutions Code § 15610.60, and Wrongful Taking as defined by Probate Code § 859.

Petitioner alleges Respondent has been negligent and has breached fiduciary duties in failing to marshal assets of the Trust, including but not limited to assets that have since been transferred to the California State Controller Unclaimed Property.

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Petitioner seeks the following orders:

1. Compel Respondent to provide a Probate Code § 16061.7 Notification by Trustee;
2. Compel Respondent to produce any and all information related to the Trust, including, but not limited to, a full and complete copy of the Trust, including the Schedule A of Trust assets pursuant to Probate Code §§ 17200(b)(7)(A) and 17200(b)(7)(B);
3. Compel Respondent to provide Petitioner with a complete and formal accounting pursuant to Probate Code § 17200(b)(7)(C) from November 6, 2014 to present, including all bank documents and records related to the cash and significant number of properties held by the Trust, all accounting information required under the terms of the Trust, including complete copies of federal and state fiduciary income tax returns, a detailed list of assets, a schedule of all fees and expenses, and other significant transactions;
4. Immediately distribute Sheryl Ary's entire beneficial interest in the Trust to Petitioner on behalf of the beneficiaries of the estate of Scheryl Ary pursuant to Probate Code § 17200;
5. Remove Respondent as Trustee for breach of fiduciary duty and naming Petitioner as Successor Trustee;
6. Return Trust funds held by the California State Controller Unclaimed Property in an amount subject to proof and no less than $23,799.34 pursuant to Probate Code § 850, as well as double damages under Probate Code § 859;
7. Return property of Warren Parker and the Trust that has been wrongfully taken and withheld by Respondent to the Trust in an amount subject to proof and no less than $1,500,000.00 pursuant to Probate Code §§ 17200 and 850, as well as double damages under Probate Code § 859; and
8. Attorneys' fees and costs pursuant under Elder or Dependent Adult Financial Abuse provisions and under Wrongful Taking provisions in an amount subject to proof.

Respondent objects to the Petition and asserts sixteen affirmative defenses. Respondent requests the following:

1. Deny the relief as prayed on the face of the Petition in its entirety;
2. Judicially determine that Petitioner has violated, without probable cause, the no-contest clause appearing in in Section 6.6 – Disinheritance of Contesting Beneficiaries showing at pages 16 and 17 of the Fourth Amendment and Restatement of the Parker Family Trust;
3. Judicially determine that, pursuant to the express terms of the no-contest clause appearing in Section 6.6 of the Trust, Petitioner and her issue are disinherited and have forfeited, as though they had predeceased the settlors without issue, all legacies, bequests, devises, and interests given under the Trust;
4. Instruct the Trustee of the Trust to augment Petitioner's share proportionately to the shares of the Trust for the benefit of the other devisees, legatees and beneficiaries of

the Trust, nonexclusively inclusive of Petitioner's siblings, who do not join in pursuit of the relief as prayed by the Petition;

5. Award attorney fees and costs against Petitioner and in favor of Respondent; and
6. Orders that Petitioner's beneficial share of the Trust be surcharged in the amount of reasonable attorney fees and costs incurred by the Trust to defend against the Petition.

TENTATIVE RULING #23:

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

24.	**25PR0063**	**ESTATE OF ROBERT DOUGLAS WORRELL**
PETITION FOR DETERMINATION OF HEIRSHIP AND PERSONS ENTITLED TO DISTRIBUTION		

This matter was continued from August 10, 2026. The tentative ruling issued on August 10, 2026, remains in effect.

TENTATIVE RULING #24:

THE TENTATIVE RULING ISSUED ON AUGUST 10, 2026, REMAINS IN EFFECT.