

1.	25PR0362	IN THE MATTER OF THE 2016 CHARLES H. CONN REVOCABLE TRUST (AS AMENDED AUGUST 30, 2023)
STATUS CONFERENCE / DISCOVERY MOTIONS		

STATUS COFERENCE

On July 13, 2026, the Court ordered all Parties to participate in mediation pursuant to the *Breslin* Order. A Status Conference was set for October 12, 2026.

Appearances are required at 8:30 a.m. on October 12, 2026, in department nine.

MOTION TO COMPEL FURTHER RESPONSES TO REQUEST FOR ADMISSIONS AND FORM INTERROGATORIES

On June 29, 2026, Petitioner, Deanna Martynse ("Petitioner"), filed a Motion to Compel Further Responses to Requests for Admission, Set One, and Form Interrogatories, Set One; Request for Monetary Sanctions. An Opposition was filed by Respondent/Trustee, Ronald Conn ("Respondent" or "Trustee"), on the same date.

A Proof of Service was filed on June 29, 2026, indicating service was effectuated on July 1, 2026. Trustee asserts on June 22, 2026, the underlying motion was discovered within an envelope left at reception of Trustee's counsel's firm with a hearing date of July 13, 2026. Despite attempts to obtain a proof of service for the motion papers mysteriously dropped off at counsel's office, Trustee has not been successful in confirming the date of service.

On April 29, 2026, Petitioner served Form Interrogatories, Set One and Requests for Admissions, Set One. Trustee's responses were electronically served on May 29, 2026. Petitioner requests further responses to Form Interrogatory No. 17.1 in relation to Requests for Admissions Nos. 1-8, 9-13, 17-18, 19-24, 26-29.

Trustee argues that as the hearing was set for July 13, 2026, Petitioner's moving papers must have been served 16 days prior to the hearing date, which Petitioner failed to do. Trustee further asserts Trustee is unable to provide further information even if compelled to do so and requests the Court deny Petitioner's motion.

Code of Civil Procedure § 1005(b) requires motions be served and filed at least 16 days before the hearing. Code of Civil Procedure § 1011 permits personal service upon an attorney by leaving the notice or other papers in an envelope or package clearly labeled to identify the attorney being served, with a receptionist or with a person having charge thereof. If there is no person in the office with whom the notice or papers may be left for purposes of this subdivision

October 12, 2026
Dept. 9
Probate Tentative Rulings

at the time service is to be effected, service may be made by leaving them between the hours of 9 a.m. and 5 p.m., in a conspicuous place in the office.

The Proof of Service filed by Petitioner on June 29, 2026, indicating service was effectuated on July 1, 2026, is less than 16 days prior to the hearing originally set for July 13, 2026. The Proof of Service further does not indicate how the motion was served on Trustee's counsel, whether it was left with the firm's staff or left in a conspicuous place. Nevertheless, the Court does find Trustee has actual notice which does not warrant denial of the motion.

As to Form Interrogatory No. 17.1 for Requests for Admissions Nos. 1-8, 9-13, 17-18, 19-24, 26-29, because the Requests for Admission were not unqualifiedly admitted, Form Interrogatory 17.1 requires a response concerning the factual basis for Trustee's response. If Trustee does not have personal knowledge sufficient to respond fully to Form Interrogatory 17.1, Trustee shall so state, but shall make a reasonable and good faith effort to obtain the information by inquiry to other natural persons or organizations, except where the information is equally available to Petitioner pursuant to Code of Civil Procedure § 2030.220. Petitioner's Motion to Compel Further Responses to Form Interrogatory No. 17.1 for Requests for Admissions Nos. 1-8, 9-13, 17-18, 19-24, 26-29 is granted. Trustee is ordered to serve verified code-compliant responses within ten (10) days of the Court's order.

Regarding the request for monetary sanctions, sanctions are mandatory for one who "unsuccessfully makes or opposes a motion to compel a response...unless [the court] finds that one subject to the sanction acted with substantial justification or that other circumstances make the imposition of the sanction unjust" Cal. Civ. Pro. §2030.300(d) (interrogatories), § 2031.310(h) (requests for production) & § 2033.290(d) (requests for admission). In all other circumstances, the imposition of discovery sanctions is permissive. This includes instances where there has been no opposition and discovery responses were served after the filing of the motion. Cal. Rule of Ct., Rule 3.1348(a).

The Court finds that imposing monetary sanctions would be unjust. Trustee's responses, despite not being qualified admissions, contained partial admissions or valid objections. Petitioner's request for sanctions is denied.

MOTIONS TO QUASH

On June 11, 2026, Trustee, Ronald Conn ("Trustee"), filed: 1) Motion to Quash Deanna Martynse's Deposition Subpoena for Production of Business Records to Trumark Services, Inc.; and 2) Motion to Quash Deanna Martynse's Deposition Subpoena for Production of Business Records to Wells Fargo Bank, National Association. No opposition has been filed.

Petitioner, Deanna Martynse ("Petitioner"), issued a subpoena to Wells Fargo, National Association on May 18, 2026, requesting documentation from January 1, 2020, through Present

October 12, 2026
Dept. 9
Probate Tentative Rulings

(the “Wells Fargo Subpoena”). On May 21, 2026, Petitioner issued a subpoena to TruMark Services, Inc. requesting documentation from January 1, 2025, through present (the “TruMark Subpoena”).

Trustee argues the Wells Fargo Subpoena is overbroad and largely irrelevant, as it seeks thirteen different kinds of bank records from the last six years pertaining to any account associated with Charles H. Conn (“Decedent”), any joint account associated with Trustee, and any accounts payable-on-death to Trustee. Trustee asserts the Petition at issue only argues that Trustee should be removed because of his purported failure to provide information and an accounting. The Wells Fargo Subpoena seeks production of documents that are irrelevant and infringe on Trustee and Decedent’s right to privacy.

Trustee argues the TruMark Subpoena is overbroad and encroaches on Decedent’s privacy rights. Pursuant to Restatement, section 3.G., no beneficiary has a right to information or an accounting until Decedent’s death, which did not occur until February 13, 2026. Petitioner’s request includes records from a year prior to this date. Additionally, as the TruMark Subpoena contains requests for rent payment records, ledgers, payment histories, accounting records, related to rent payments, copies of checks, ACH records, wire records, payment transmittals, and communications relating to changes in ownership, management, or rental payment instructions, it will likely release private financial information of third parties uninvolved in the litigation. The identity and financial accounts of these third parties are irrelevant to the Petition, which requests orders 1) determining and confirming title to trust property, 2) compelling trustee to provide information, 3) compelling accounting, 4) enforcing trustee duties, and 5) removing trustee for breach of trust.

“If a subpoena requires ... the production of books, documents, electronically stored information, or other things ... at the taking of a deposition, the court, upon motion reasonably made by any person described in subdivision (b) [including a party to the action], ... may make an order quashing the subpoena entirely, modifying it, or directing compliance with it upon those terms or conditions as the court shall declare, including protective orders.” Code of Civil Procedure § 1987.1, subds. (a), (b).

The Court finds the requested documents relevant and appear reasonably calculated to lead to the discovery of admissible evidence. The Court grants Trustee’s motions to quash the Wells Fargo Subpoena and TruMark Subpoena in part. Production of the Wells Fargo Subpoena shall be limited to records from January 1, 2025, through present for all documents requested. Production of the TruMark Subpoena containing any third-party financial account numbers and personal identifying information beyond what is necessary to identify the individual’s identities shall be redacted.

**MOTIONS TO COMPEL FURTHER RESPONSES TO REQUEST FOR PRODUCTION OF DOCUMENTS
AND SPECIAL INTERROGATORIES**

On August 24, 2026, Respondent, Ronald Conn ("Respondent" or "Trustee"), filed the following motions: 1) Motion to Compel Further Responses to Request for Production of Documents, Set One; and 2) Motion to Compel Further Responses to Special Interrogatories, Set One. An Opposition was filed by Petitioner, Deanna Martynse ("Petitioner"), on September 28, 2026. Proof of Service for both motions were filed on September 11, 2026, indicating service was effectuated on the same date.

Trustee provides on May 29, 2026, Request for Production of Documents, Set One, and Special Interrogatories, Set One, were served on Petitioner. Petitioner served responses on July 8, 2026, which Trustee asserts were incomplete and evasive. Trustee attempted to meet and confer with Petitioner regarding the deficiencies. Petitioner served supplemental responses for Special Interrogatories No. 55-57 on August 17, 2026.

Petitioner argues the motions should be denied due to failing to meet and confer in compliance with Code of Civil Procedure § 2016.040. Petitioner further requests denial pursuant to Code of Civil Procedure § 2030.300(c) for being untimely.

Trustee asserts a good faith effort was made to meet and confer regarding the underlying motions. Additionally, Trustee argues the motions are partially timely as Petitioner's August 17, 2026, supplemental responses started a new 45-day period as to Special Interrogatories Nos. 55-57. Trustee filed both motions on August 24, 2026, then Petitioner's counsel provided a ten-day extension on August 25, 2026, *to review the supplemental responses to the interrogatories*.

Code of Civil Procedure §§ 2030.300(c) and 2031.310 require notice of motions to compel be given within 45 days of service of the verified response, or any supplemental verified response, or on or before any specific later date to which the demanding party and the responding party have agreed in writing.

The Court finds Trustee's motions relating to Request for Production of Documents Nos. 1 and 4 and Special Interrogatories Nos. 1-5 and 38-40 untimely. Trustee failed to provide notice of its motions to compel until September 11, 2026, more than 45 days after service of Petitioner's July 8, 2026, responses. Accordingly, Trustee waived his right to compel further responses to Request for Production of Documents Nos. 1 and 4 and Special Interrogatories Nos. 1-5 and 38-40 and the requests are denied.

As to Special Interrogatories Nos. 55 and 56, Petitioner concedes verified supplemental responses should be served stating the presently known facts and identifying the supporting

Wells Fargo statements, transfer entry, account-ownership records, physician letter, contemporaneous communications, Respondent's accounting, trust instruments, pleadings, and discovery responses. Petitioner does not oppose a limited order requiring those corrections identifying actual known facts and documents.

The Court finds Petitioner's supplemental responses to Special Interrogatories Nos. 55 and 56 incomplete and evasive. Trustee's motion to compel as to Special Interrogatories Nos. 55 and 56 is granted. Petitioner is ordered to serve verified code compliant supplemental responses to Special Interrogatories Nos. 55 and 56 within ten (10) days of the Court's order.

TENTATIVE RULING #1:

1. STATUS CONFERENCE

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 2026, IN DEPARTMENT NINE.

2. MOTION TO COMPEL FURTHER RESPONSES TO REQUEST FOR ADMISSIONS AND FORM INTERROGATORIES

PETITIONER'S MOTION TO COMPEL FURTHER RESPONSES TO FORM INTERROGATORY NO. 17.1 FOR REQUESTS FOR ADMISSION NOS. 1-8, 9-13, 17-18, 19-24, AND 26-29 IS GRANTED. RESPONDENT/TRUSTEE IS ORDERED TO SERVE VERIFIED CODE-COMPLIANT RESPONSES WITHIN TEN (10) DAYS OF THE COURT'S ORDER. PETITIONER'S REQUEST FOR SANCTIONS IS DENIED.

3. MOTIONS TO QUASH

RESPONDENT/TRUSTEE'S MOTION TO QUASH THE WELLS FARGO SUBPOENA AND TRUMARK SUBPOENA IS GRANTED IN PART. PRODUCTION OF THE WELLS FARGO SUBPOENA SHALL BE LIMITED TO RECORDS FROM JANUARY 1, 2025, THROUGH PRESENT FOR ALL DOCUMENTS REQUESTED. PRODUCTION OF THE TRUMARK SUBPOENA CONTAINING ANY THIRD-PARTY FINANCIAL ACCOUNT NUMBERS AND PERSONAL IDENTIFYING INFORMATION BEYOND WHAT IS NECESSARY TO IDENTIFY THE INDIVIDUAL IDENTITIES SHALL BE REDACTED.

4. MOTIONS TO COMPEL FURTHER RESPONSES TO REQUEST FOR PRODUCTION OF DOCUMENTS AND SPECIAL INTERROGATORIES

RESPONDENT/TRUSTEE'S MOTION TO COMPEL FURTHER RESPONSES TO SPECIAL INTERROGATORIES 1-5 AND 38-40 AND REQUEST FOR PRODUCTION OF DOCUMENTS NOS. 1 AND 4 IS DENIED. RESPONDENT/TRUSTEE'S MOTION TO COMPEL FURTHER RESPONSES TO SPECIAL INTERROGATORIES NOS. 55 AND 56 IS GRANTED. PETITIONER IS ORDERED TO SERVE VERIFIED CODE-COMPLIANT RESPONSES WITHIN TEN (10) DAYS OF THE COURT'S ORDER.

October 12, 2026
Dept. 9
Probate Tentative Rulings

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

October 12, 2026
Dept. 9
Probate Tentative Rulings

2.	23PR0084	ESTATE OF GLENNA M. SMITH
STATUS OF ADMINISTRATION		

At the hearing on September 14, 2026, the Court continued the matter to October 12, 2026. To date nothing, further has been filed.

TENTATIVE RULING #2:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.

3.	26PR0235	IN THE MATTER OF MICHAEL CALLAGHAN
ESTATE HEARING		

On August 7, 2026, Petitioner, Michael Callaghan ("Petitioner" or "Trustee"), filed a Petition for Order Confirming Trust Assets.

On May 16, 2013, Arlene D. Callaghan ("Trustor"), executed The Arlene D. Callaghan Separate Property Trust (the "Trust"). On the same date, Trustor executed the Assignment of Separate Property Assets to Trustee of The Arlene D. Callaghan Separate Property Trust (the "Assignment"). Following Trustor's death, Petitioner discovered that Trustor's Marcus by Goldman Sachs account no. 4519 (the "Goldman Sachs account") was not titled in the name of the Trust.

Petitioner is informed and believes the creation of the Trust was precipitated by the fact that Trustor inherited assets from her parent's trust, which she then moved into her Trust as opposed to the joint trust previously established with her husband. Petitioner is informed and believes the Goldman Sachs account was part of this inheritance and owned by Trustor at the time she executed the Trust and Assignment.

Article II Paragraph 2 of the Trust provides:

Additions to Trust. The Trustor or any other person may assign, transfer and deliver to the Trustee additional property acceptable to the Trustee to be held under the provisions of this Trust Agreement.

Section 1 of the Assignment provides, in part:

Except as provided in paragraph 2 below, Assignor hereby assigns and transfers to Assignee all right, title and interest of Assignor in the following assets to the extent these assets are Assignor's sole and separate property:

- (a) All bank accounts, savings accounts, certificates of deposit, money market accounts, credit union accounts and other financial institution accounts now owned by Assignor.
- (b) All stocks, bonds, mutual funds, brokerage accounts, reinvestment plan accounts, and other marketable or non-marketable securities now owned by Assignor.

Petitioner requests the Court confirm the Goldman Sachs account was part of Trustor's inheritance and owned by Trustor at the time she executed the Trust and Assignment. Additionally, Petitioner requests the Court confirm the Goldman Sachs account is subject to the Trust, and under the control of Petitioner, as sole Trustee of the Trust.

October 12, 2026
Dept. 9
Probate Tentative Rulings

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.

Pursuant to Probate Code §850 and *Estate of Heggstad* (1993) 16 Cal.App. 4th 943, 947-950, the Court finds sufficient evidence that Trustor intended the property be part of the Trust.

TENTATIVE RULING #3:

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

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

October 12, 2026
Dept. 9
Probate Tentative Rulings

4.	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. At the hearing on September 14, 2026, the Court continued the matter to October 12, 2026.

On September 28, 2026, Respondent, Margaret A. Jones ("Respondent"), filed a Verified Response to Petition for Removal of Trustee, Accounting, and Appointment of Successor Trustee. Respondent generally denies all allegations in the Petition that are based on information and belief and demands strict proof thereof. Respondent further provides specific responses to Petitioners' allegations, asserts eleven affirmative defenses, and objects to all relief sought.

In part, Respondent asserts accountings, inventories, and documentation has been provided pursuant to the Probate Code. Respondent admits she has proposed purchasing the property located at 5420 Lodestar Lane, Lotus CA, 95651. Respondent has obtained an independent appraisal establishing fair market value, has disclosed the proposed transaction to all beneficiaries, and is prepared to seek Court approval pursuant to Probate Code § 16200 et seq.

Respondent admits that family members and/or beneficiaries have occupied trust property at various times and that said property has been the primary residence of Respondent. Respondent affirmatively states that occupants have contributed to property maintenance, utilities, taxes, and upkeep, and that the value of such contributions equals or exceeds any imputed rental value. Respondent has maintained records of occupancy and is prepared to provide a full accounting related to the occupancy and rental offsets/adjustments.

The Court orders Respondent to provide to Petitioners and the Court a full accounting related to the occupancy of trust property, including any purported rental offsets/adjustments by December 14, 2026. A review hearing is set for December 21, 2026, to determine compliance. The Court grants Petitioners' request to preserve all trust records and assets and to prohibit the transfer or sale of disputed property without Court approval. The Court reserves jurisdiction over Petitioners' remaining requests.

TENTATIVE RULING #4:

RESPONDENT IS ORDERED TO PROVIDE TO PETITIONERS AND THE COURT A FULL ACCOUNTING RELATED TO THE OCCUPANCY OF TRUST PROPERTY, INCLUDING ANY PURPORTED RENTAL OFFSETS/ADJUSTMENTS BY DECEMBER 14, 2026. A REVIEW HEARING IS SET FOR DECEMBER 21, 2026, AT 8:30 A.M. IN DEPARTMENT NINE TO DETERMINE COMPLIANCE.

PETITIONERS' REQUEST TO PRESERVE ALL TRUST RECORDS AND ASSETS AND TO PROHIBIT THE TRANSFER OR SALE OF DISPUTED PROPERTY WITHOUT COURT APPROVAL IS GRANTED. THE COURT RESERVES JURISDICTION OVER PETITIONERS' REMAINING REQUESTS. 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

5.	26PR0233	ESTATE OF JOANNE MARIE WALKER
LETTERS TESTAMENTARY		

Decedent died testate on December 3, 2025, survived by two adult children. Petitioner is decedent's daughter.

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

Robert Bruce Hanna, deceased (12/25/2022), was named as Executor in the Will. Petitioner, Stephanie Lee Hanna, is named as Successor Executor in the Will.

The Will was lodged with the court on August 4, 2026, and is admitted to probate.

The Will waives bond.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on August 4, 2026.

Proof of service of notice of the hearing on the Petition was filed on September 15, 2026.

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

TENTATIVE RULING #5:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.

6.	26PR0021	ESTATE OF GLORIA EVE JOHNSON
FINAL DISTRIBUTION HEARING		

Letters Testamentary were issued on April 13, 2026, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on August 25, 2026. 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.

Proof of Service of Notice of the hearing on the Petition was filed October 7, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes a full distribution to the Trustee of the Glorian Eve Johnson Surviving Spouse's Trust under the Johnson Family Trust dated August 25, 1993, as amended March 30, 2023.

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. Closing the administration of this estate without an account;
2. Confirming, ratifying, and approving all the acts and proceedings of Petitioner, as personal representative, as set forth in this Petition;
3. Authorizing and directing Petitioner to pay himself the sum of \$9,970.00 as compensation for ordinary services to the estate;

October 12, 2026
Dept. 9
Probate Tentative Rulings

4. Authorizing and directing Petitioner to pay to attorney Laura Nelson-Becker the sum of \$9,970.00 as compensation for ordinary services to Petitioner and to the estate;
5. Authorizing and directing Petitioner to make distribution of the estate in Petitioner's hands, and any other property of the Decedent or the estate not now known or discovered that may belong to the estate or in which the Decedent of the estate may have any interest to the trustee of the Glorian Eve Johnson Surviving Spouse's Trust under the Johnson Family Trust dated August 25, 1993, as amended March 30, 2023;
6. Discharging Petitioner upon the filing of receipts; and
7. **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 #6:

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

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

7.	26PR0222	IN THE MATTER OF ARMANI E. LAGUNAS IRREVOCABLE SPECIAL NEEDS TRUST
TRANSFER IN		

On March 3, 2026, the Santa Barbara County Superior Court transferred the matter to the El Dorado County Superior Court. This court is in receipt of the certified copy of the case file from Santa Barbara County.

TENTATIVE RULING #7:

**APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.**

October 12, 2026
Dept. 9
Probate Tentative Rulings

8.	26PR0172	IN THE MATTER OF THE CLAYETTA H. SPELTZ REVOCABLE FAMILY TRUST DATED APRIL 16, 2015, AS AMENDED
PETITION HEARING		

At the hearing on September 28, 2026, the Court continued the matter to October 12, 2026. To date, nothing further has been filed.

TENTATIVE RULING #8:

**APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.**

October 12, 2026
Dept. 9
Probate Tentative Rulings

9.	24PR0211	ESTATE OF CHAD A. MILLER
PETITION HEARING		

At the hearing on August 24, 2026, the Court continued the matter to October 12, 2026. On the same date, the Declaration of Diana Redding Regarding Scheduled Appearance for Hearing on August 24, 2026, was filed explaining her absence from the hearing.

On October 8, 2026, a Final Inventory and Appraisal was filed. Administrator provides Decedent's 401K funds were distributed to Decedent's estranged wife and the estate has outstanding debts that are significantly greater than Decedent's remaining account balance. Administrator asserts his work is complete due to the estate's lack of funds.

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

10.	26PR0241	ESTATE OF GAY H. PATRIDGE
LETTERS TESTAMENTARY		

Decedent died testate on June 29, 2026, survived by two adult children. Petitioner is decedent's son.

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

Robert L. Patridge, deceased, was named as Executors in the Will. Petitioner, Daniel W. Patridge, is named as Successor Executor in the Will.

The Will was lodged with the court on August 12, 2026, and is admitted to probate.

The Will waives bond.

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

Proof of service of notice of the hearing on the Petition was filed on September 8, 2026.

Proof of publication was filed on September 10, 2026.

TENTATIVE RULING #10:

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

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

11.	22PR0235	ESTATE OF ANN PEAK
ACCOUNTING HEARING		

On August 4, 3036, Petitioner, Stephen W. Peak ("Petitioner" or "Executor"), filed a First and Final Account and Report of Executor and Petition for its Settlement; Request for Finding that the Estate is Insolvent; Request for Authorization to Abandon Estate Property, and Petition to Close Insolvent Estate. No opposition has been filed.

Letters of Administration/Letters Testamentary were issued on March 13, 2023, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on March 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.

Proof of Service of Notice of the hearing on the Petition was filed on August 11, 2026. No one has filed a request for special notice in this proceeding.

Petitioner asserts that after the sale of the real property located at 3714 Homestead Rd., Rescue, CA 95672 (the "Subject Property"), the sale would produce \$560,000.00, which is more than \$60,000.00 less than the loan amount. The estate lacks assets to pay off the mortgage and any administration fees, rendering the estate insolvent. Accordingly, there is no property on hand for distribution.

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.

Petitioner contends that the only asset is the Subject Property, which has a reverse mortgage greater than the value of the house. As the sale will not produce a profit to the estate, Petitioner requests authority to abandon the Subject Property and close the estate.

October 12, 2026
Dept. 9
Probate Tentative Rulings

The Petition requests:

1. Notice of the hearing has been given as required by law;
2. Notice of administration has been given as required by law;
3. The First and Final Account of Petitioner as Executor, is settled, allowed, and approved;
4. All reported acts and proceedings of Petitioner as Executor are confirmed and approved;
5. No California and federal estate taxes are due and payable by the estate;
6. All California and federal income taxes have been paid by the estate;
7. There are no personal property taxes due and payable by the estate;
8. The time period for all creditor claims has run barring any future claims;
9. The Executor Statutory Commission is waived;
10. The Estate is insolvent;
11. The Estate cannot pay the Statutory Attorney fees in the amount of \$15,760.00;
12. The Extraordinary Executor and Extraordinary Attorney fees are waived;
13. Linda Molinari, the California Probate Referee, has been paid \$663.62 for the appraisal performed by her on the Inventory and Appraisal;
14. The Executor is authorized and directed to abandon the residential real estate located at 3714 Homestead Rd., Rescue, CA 95672, and further described as follows: PARCEL 1, AS SAID PARCEL IS SHOWN ON THAT CERTAIN PARCEL MAP FILED FOR RECORD ON MAY 16, 1988 IN BOOK 38 OF PARCEL MAPS, AT PAGE 148. APN: 102-231-022-000;
15. The Executor is authorized and directed to distribute any assets discovered or acquired after the time of this Petition, if any, equally to the children of the decedent, namely, Stephen W. Peak, Melinda A. Peak, Terrance D. Peak, and Timothy R. Peak;
16. The administration is closed without further order and the Administrator is relieved; and
17. **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 #11:

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).

October 12, 2026
Dept. 9
Probate Tentative Rulings

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

12.	26PR0067	IN THE MATTER OF THE WILLIAM R. GROOME AND DANA V. GROOME REVOCABLE TRUST DATED DECEMBER 27, 2013
ESTATE HEARING / TRANSFER IN		

At the hearing on August 24, 2026, the Court continued the matters to October 12, 2026.
To date, nothing further has been filed.

TENTATIVE RULING #12:

**APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.**

October 12, 2026
Dept. 9
Probate Tentative Rulings

13.	24PR0236	ESTATE OF RONALD LEE EVANS III
STATUS OF ADMINISTRATION		

Letters of Administration were issued on October 22, 2024.

An Inventory and Appraisal was filed on January 3, 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 #13:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

14.	26PR0236	ESTATE OF THERESA BUSTAMANTE
LETTERS TESTAMENTARY		

Decedent died testate on November 2, 2025, survived by issue of deceased parents.
Petitioner is decedent's sister.

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

Petitioner, Constance Reynolds, is named as Executor in the Will.

The Will was lodged with the court on July 27, 2026, and is admitted to probate.

Waivers of bond have been filed with the court by the beneficiaries.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on August 7, 2026.

Proof of service of notice of the hearing on the Petition was filed on August 28, 2026.

Proof of publication was filed on September 10, 2026.

TENTATIVE RULING #14:

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, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

15.	26PR0232	ESTATE OF MARIAN ANN SOLDANO
LETTERS OF ADMINISTRATION		

Decedent died intestate on September 18, 2025, survived by one child. Petitioner is decedent's daughter.

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

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

A Duties/Liabilities statement (DE 147/DE 147s) was filed on August 4, 2026.

Proof of service of notice of the hearing on the Petition was filed on August 17, 2026.

Proof of publication was filed on September 3, 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, OCTOBER 11, 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.	25PR0098	ESTATE OF BRENDA SUE PIGNATA
OSC HEARING / FINAL DISTRIBUTION HEARING		

OSC HEARING

At the hearing on August 3, 2026, the Court found that neither the personal representative nor their counsel have appeared or filed a status report for the hearing. An OSC hearing was set for removal or suspension of and/or sanctions on October 12, 2026.

Since this time, a Petition for Final Distribution, Inventory and Appraisal, and other related pleadings were filed on August 26, 2026.

FINAL DISTRIBUTION HEARING

Letters Testamentary were issued on June 9, 2025, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on August 24, 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.

Waiver of Account was executed by the heir Erik Pignata. The Petition indicates a Waiver of Account was filed concurrently for Petitioner; however, the Court is not in receipt of Petitioner's Waiver.

Proof of Service of Notice of the hearing on the Petition was filed on August 26, 2026. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes the proceeds of account 4852 distributed equally between Petitioner, Michael Smith, and Erik Pignata. Petitioner shall be distributed the residence located 2369 Pinon Way, Rescue, CA. The Declaration of Erik Pignata contains a Limited Disclaimer of Interest in Real Property wherein all interest in the residence located at 2369 Pinon Way, Rescue, CA passed to Petitioner.

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

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

October 12, 2026
Dept. 9
Probate Tentative Rulings

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.

Petitioner advises a creditor claim was received on July 15, 2026, in the amount of \$100.00, from the 76 gas station located in Cameron Park that claims to have repaired Decedent's car prior to her death, which Petitioner disputes. Absent direction from the Court, Petitioner intends to deny the claim. The creditor has not filed the claim with the Court as required by Probate Code § 9150(d), thereby rendering the claim invalid.

The Petition requests:

1. The Court find and confirm that Decedent, Brenda Sue Pignata, died testate, a resident of El Dorado County, California, and that the Last Will & Testament entered herein validly expresses her wishes regarding the distribution of her estate;
2. That Petitioner's and heir Erik Pignata's Waiver of Accounts filed herewith be accepted and entered by the Court;
3. That the Court authorizes and Order the Executor to retain \$500.00 in the estate checking account to pay anticipated closing and other routine costs of closing the estate, and to distribute the remainder, if any, equally among the decedent's surviving siblings without further Account or Order;
4. That the Court find that Erik Pignata's Limited Disclaimer in Real Property is a validly executed disclaimer resulting in the transfer of his interest in the real property of the estate of Brenda Sue Pignata to Michael Smith as the other remaining heir to the estate;
5. That the Court Order that the Executor is authorized to reimburse himself the sum of \$1,428.00 for estate expenses paid out of pocket;
6. That the Court authorize and Order the Executor to pay Graham McDougal, Attorney at Law (McDougal Law), the sum of \$15,605.87 as ordinary attorney fees pursuant to Probate Code §§1081;
7. That the Court authorize and confirm the Executor's distribution of the real property and residence located at 2369 Pinon Way, Rescue CA (El Dorado County APN 069-083- 001-000) to Michael Smith, as his sole and separate property, pursuant to the valid Limited Disclaimer of Interest in Real Property executed by Erik Pignata;

October 12, 2026
Dept. 9
Probate Tentative Rulings

8. That the Court Order the Executor to pay and distribute the residue of the estate, after fees and costs are deducted, equally between Michael Smith and Erik Pignata, heirs of the Estate of Brenda Sue Pignata, their respective testate one- half shares per the terms of the Last Will & Testament executed on 7 April 2010 by decedent Brenda Sue Pignata, in the amounts of \$ 25,973.28 to Michael R. Smith and \$ 25,973.28 to Erik S. Pignata; 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 #16:

1. OSC HEARING

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 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.

2. FINAL DISTRIBUTION HEARING

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, OCTOBER 11, 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.

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October 12, 2026
Dept. 9
Probate Tentative Rulings

17.	22PR0081	ESTATE OF FRANK PHILLIP TAYLOR
STATUS OF ADMINISTRATION		

Letters of Administration were issued on May 18, 2022.

An Inventory and Appraisal was filed on March 23, 2022, which is silent as to the requirements provided in section 480 of the California Revenue and Taxation Code. It further does not indicate whether it is the partial or final version.

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

TENTATIVE RULING #17:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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.

October 12, 2026
Dept. 9
Probate Tentative Rulings

18.	25PR0204	ESTATE OF LEONARD SEELEY
STATUS OF ADMINISTRATION		

Letters of Administration were issued on October 13, 2025.

An Inventory and Appraisal was filed on September 18, 2026, 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 #18:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, OCTOBER 12, 2026, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, OCTOBER 11, 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