

**1. CONSERVATORSHIP OF GUADALUPE G., SP20080029**

**Biennial Review of Conservatorship**

**TENTATIVE RULING # 1: THE CONSERVATORSHIP SHALL CONTINUE. THE COURT FINDS THAT ASSESSMENT OF THE COURT INVESTIGATOR FEE WOULD CAUSE A HARDSHIP TO THE CONSERVATORSHIP AND WILL NOT REQUIRE REIMBURSEMENT OF THE FEE. THE COURT SETS THE NEXT BIENNIAL REVIEW OF CONSERVATORSHIP AT 8:30 A.M., WEDNESDAY, JULY 10, 2024, IN DEPARTMENT FOUR.**

**2. CONSERVATORSHIP OF THOMAS G., SP20070042**

**Biennial Review of Conservatorship**

**TENTATIVE RULING # 2: THE CONSERVATORSHIP SHALL CONTINUE. THE CONSERVATOR IS ORDERED TO PAY THE COURT \$350.00 FROM THE CONSERVATEE'S ASSETS AS REIMBURSEMENT FOR THE COURT INVESTIGATOR'S FEE WHEN FUNDS ARE AVAILABLE. SHOULD THE CONSERVATOR WISH TO REQUEST A PARTIAL OR FULL WAIVER OF THE FEE, THE CONSERVATOR NEEDS TO APPEAR AT 8:30 A.M., WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR AND SUBMIT INFORMATION CONCERNING THE CONSERVATEE'S ASSETS AND INCOME FOR THE COURT'S CONSIDERATION. THE COURT SETS THE NEXT BIENNIAL REVIEW OF CONSERVATORSHIP AT 8:30 A.M., WEDNESDAY, JULY 10, 2024, IN DEPARTMENT FOUR.**

**3. MATTER OF EDWARD W. DUNN & MIRA Y. DUNN TRUST, SP20210034****Petition for Surcharge of Prior Trustee**

On June 13, 2022, the Successor Trustee, Robert Huckaby, filed a petition for surcharge of prior trustee, Pat Hansen.

By way of background, on August 11, 2021, the court accepted the resignation of Hansen as Trustee of the Edward W. Dunn and Mira Y. Dunn Revocable Trust, and petitioner was appointed Successor Trustee. Subsequently, the court ordered Hansen to turn over all property and records of the Trust, and Hansen provided several accountings to petitioner.

In the instant petition, petitioner states: the accountings he was provided with are incomplete and disorganized; he was recently given a large box with additional records and statements, but they do not provide a complete and accurate history of the Trust administration; Hansen provided a general ledger dating back to 2003, but it is incomplete and Hansen refuses to turn over the QuickBooks accounting data; and the scattered accountings disclose matters which Huckaby alleges demonstrates a violation of the fiduciary duties of Hansen.

Specifically, petitioner alleges that Hansen paid herself based on a percentage of the Trust's valuation, which petitioner claims is greatly in excess of reasonable compensation, and that Hansen paid the law firm of Cunningham Legal for no apparent reason since the Trust had no legal transactions since 2007. Additionally, Hansen failed to respond to the Social Security Administration regarding a special needs trust for Michael Dunn, which resulted in reduced SSI being received by Dunn. Rather than correcting the error, Hansen increased Dunn's allowance out of the Trust, which improperly depleted the Trust by more than \$100,000 since 2011. Lastly, petitioner alleges that the Trust's brokerage account was mismanaged and/or a significant amount of the funds were squandered by Hansen, and that it appears there is a large sum of funds unaccounted for.

On July 6, 2022, Hansen filed her response and objections to the Successor Trustee's petition. She asserts the petition should be denied pursuant to the doctrine of laches and waiver because Successor Trustee and Dunn have been aware of many of the events for years; Hansen complied with the prudent investor rule in her management of the brokerage account; Hansen's compensation was reasonable and authorized by the terms of the Trust; the exculpatory clause in the Trust bars petitioner's claims as Hansen did not commit any willful misconduct or gross negligence; the Trust gives Hansen sole discretion in making distributions for Dunn's benefit; Hansen paid a portion of attorney fees out of her own pocket and the Trust allows Hansen to charge attorney fees for the protection of the Trustee in the performance of the Trustee's duties; the Successor Trustee was provided all accounting information and backup files; Hansen took action to preserve Dunn's SSI benefits; and Hansen reasonably exercised her authority to make repairs to the home and the repairs were detailed in the accountings.

Because this is a contested matter, appearances are required to set dates for an evidentiary hearing, Issues Conference, and Mandatory Settlement Conference.

**TENTATIVE RULING # 3: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**

**4. ESTATE OF MAZZONI, SP20210030**

**Inventory and Appraisal**

This matter was continued from February 2, 2022, and April 6, 2022.

Letters of Administration were issued on August 11, 2021. To date, the Final Inventory and Appraisal is not in the court's file.

**TENTATIVE RULING # 4: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**

**5. ESTATE OF TREMBLAY, SP20210010**

**Status of Administration**

Letters Testamentary were issued on October 21, 2021. Final distribution was ordered on June 8, 2022. To date, there is no receipt of distribution and no Ex Parte Petition for Final Discharge (Judicial Council form DE-295) in the court's file.

**TENTATIVE RULING # 5: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**

**6. ESTATE OF VEIDMANN, SP20210020**

**(1) Status of Administration**

**(2) OSC Re: Failure to Appear**

This matter was continued from June 15, 2022, due to the personal representative's failure to appear at the hearing.

Letters of Administration were issued on June 16, 2021. The Final Corrected Inventory and Appraisal was filed on December 20, 2021. To date, there is no final account and request for order of final distribution in the court's file.

**TENTATIVE RULING # 6: APPEARANCES ARE REQUIRED AT 8:30 A.M., WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**

**7. ESTATE OF MEYER, SP20210027**

**Status of Administration**

Letters of Administration were issued on July 20, 2021. Final distribution was ordered on April 4, 2022. To date, there is no receipt of distribution and no Ex Parte Petition for Final Discharge (Judicial Council form DE-295) in the court's file.

**TENTATIVE RULING # 7: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**



**8. GUARDIANSHIP OF PRECIOUS C., SP20190026****(1) Annual Status Review Hearing****(2) OSC Re: Failure to Comply With Court Orders**

This matter was continued from January 19, 2022, February 16, 2022, March 23, 2022, April 6, 2022, May 4, 2022, May 18, 2022, and June 22, 2022, due to the guardian's failure to appear for these hearings. The court has continued this matter several times because the court investigator's report has not been filed. The court investigator was appointed on April 6, 2022.

To date, the court investigator's report is not in the court's file.

To date, the annual guardianship status report (Judicial Council Form GC-251) concerning the ward has not been submitted by the guardian.

**TENTATIVE RULING # 8: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, JULY 13, 2022, IN DEPARTMENT FOUR.**