

**1. CONSERVATORSHIP OF BRIAN S., PP20120113**

**Motion for Reconsideration of Court's July 7, 2022, Order**

**TENTATIVE RULING # 1: APPEARANCES ARE REQUIRED AT 8:30 A.M., WEDNESDAY,  
AUGUST 31, 2022, IN DEPARTMENT FOUR.**

**2. CONSERVATORSHIP OF DANIEL F., PP20150007**

**Biennial Review of Conservatorship**

**TENTATIVE RULING # 2: THE CONSERVATORSHIP OF THE PERSON AND ESTATE  
HAVING BEEN TERMINATED IN 2021, MATTER IS DROPPED FROM THE  
CALENDAR.**

**3. ESTATE OF ROBERGE, 22PR0084**

**Inventory and Appraisal**

**TENTATIVE RULING # 3: THE FINAL INVENTORY AND APPRAISAL HAVING BEEN  
FILED ON JULY 12, 2022, MATTER IS DROPPED FROM THE CALENDAR.**

**4. MATTER OF THE HALL TRUST, 22PR0211****Petition for Instructions**

Petitioner, Miles Hall, is a beneficiary and named Successor Trustee of The Hall Trust, created March 14, 2000, executed by Rachel May Hall. (Pet., Ex. 1.) On July 25, 2022, Miles Hall filed a petition for instructions, to confirm removal of Benjamin Hall as Trustee, to confirm Miles as Successor Trustee, and to compel Benjamin to provide an accounting.

Rachel Hall, the initial Trustor, Trustee and beneficiary, died in 2015. Petitioner alleges that since the initial Trustor's death, the current Trustee, Benjamin, has violated the duty owed to petitioner as beneficiary by, amongst other things: (1) failure to provide Notice of Administration of the Trust; (2) failure to distribute the Trust assets to the beneficiaries; (3) failure to communicate with petitioner regarding the preparation and selection of an investment strategy and the administration of the Trust; (4) threatened to charge petitioner for extraordinary fees to provide information that the Trustee is obligated to provide to petitioner as beneficiary; and (5) imprudently managed the Trust, which significantly decreased the market value of the Trust's primary asset.

Accordingly, petitioner contends that Benjamin should be removed as Trustee and petitioner should be named the Successor Trustee. Because of the Trustee's failure to act with care, skill, prudence, and diligence, petitioner has begun to act as Successor Trustee by sending out Notice of Trust Administration.

Petitioner states that, notwithstanding the Trust's arbitration provision, there is a need to obtain court approval of an accounting and to interpret the Trust Agreement. (Pet., Ex. 1, p. 17 ["Application to Court"].) Once petitioner is appointed Successor Trustee and the accounting is approved, petitioner intends to utilize arbitration to resolve disputes. (*Id.*, Ex. 1, p. 1 ["Notice of Arbitration"].)

At the time this tentative ruling was prepared, there is no proof of service in the court's file establishing that the Trustee was served with the notice of hearing and a copy of the petition.

**TENTATIVE RULING # 4: APPEARANCES ARE REQUIRED AT 8:30 A.M.,  
WEDNESDAY, AUGUST 31, 2022, IN DEPARTMENT FOUR.**

**5. ESTATE OF SOUZA, SP20210039**

**Petition for Final Distribution on Waiver of Account**

**TENTATIVE RULING # 5: ABSENT OBJECTION, PETITION IS GRANTED AS REQUESTED.**

**6. ESTATE OF HANAK, SP20210044**

**Petition for Final Distribution on Waiver of Account**

**TENTATIVE RULING # 6: ABSENT OBJECTION, PETITION IS GRANTED AS REQUESTED.**