

1. ESTATE OF NIELSEN 21PR0023

Status of Administration

Letters of Administration were issued on January 25, 2022. The Final Inventory and Appraisal was filed May 11, 2022. To date, there is no final account and request for order of final distribution in the court's file.

TENTATIVE RULING # 1: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

2. ESTATE OF SANCHEZ PP-20200103

(1) Inventory and Appraisal

(2) Status of Administration

Inventory and Appraisal

This matter was continued from November 30, 2022.

Letters Testamentary were issued on September 23, 2020. Partial Inventory and Appraisal number one was filed on March 31, 2021. At the hearing on June 23, 2021, co-executor Woodring's counsel stated the March 31, 2021, Inventory and Appraisal is a final inventory and appraisal. Co-executor Covey's counsel disagreed and stated that he believed there were more assets to be inventoried and appraised.

To date, there is no Final Inventory and Appraisal in the court's file.

Status of Administration

This matter was continued from November 30, 2022.

It appears there remain disputes between the two co-executors concerning the assets of the estate and whether co-executor Woodring loaned \$25,000 to decedent to purchase her home in 1999.

At the hearing on July 13, 2022, the court denied the petition for order confirming validity of settlement agreement and directed the parties to comply with the terms of the settlement agreement.

TENTATIVE RULING # 2: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

3. ESTATE OF HOGUE PP-20210209

Status of Administration

TENTATIVE RULING # 3: DISMISSAL WITHOUT PREJUDICE HAVING BEEN ENTERED ON JANUARY 6, 2023, MATTER IS DROPPED FROM THE CALENDAR. ALL FUTURE COURT HEARINGS ARE VACATED. THE ACTION IS CLOSED.

4. ESTATE OF PROTZEL 22PR0308

Petition to Determine Succession to Real Property

Petitioner filed a Final Inventory and Appraisal in which he appraised decedent's real property. Petitioner may appraise decedent's personal property (Prob. Code, § 8901), but a probate referee appointed for El Dorado County must appraise all real property pursuant to Probate Code section 8902 unless the court has granted a waiver of the requirement (Prob. Code, § 8903). Further, item number 11 of the petition requires that petitioner provide a legal description of decedent's California real property and the Assessor's Parcel Number. Petitioner provided only the address of the property. Lastly, petitioner did not complete item numbers 12 through 14 of the petition. The court cannot determine the merits of the petition until petitioner corrects these deficiencies by filing an amended petition.

To provide time for an appraisal and for petitioner to file an amended petition, the court will continue this matter to April 24, 2023.

TENTATIVE RULING # 4: MATTER IS CONTINUED TO 8:30 A.M. ON MONDAY, APRIL 24, 2023, IN DEPARTMENT NINE.

5. ESTATE OF CUFFE 21PR0041

(1) Status of Administration

(2) Petition for Final Distribution on Waiver of Account

TENTATIVE RULING # 5: ABSENT OBJECTION, PETITION IS GRANTED AS REQUESTED. THE HEARING RE: STATUS OF ADMINISTRATION IS CONTINUED TO 8:30 A.M. ON MONDAY, MARCH 27, 2023, IN DEPARTMENT NINE, AT WHICH TIME THE COURT EXPECTS THAT ALL RECEIPTS OF DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITION FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

6. ESTATE OF LAUMBACH 21PR0066

Petition to Waive Appraisal by Probate Referee Pursuant to Probate Code § 8903

TENTATIVE RULING # 6: ABSENT OBJECTION, PETITION IS GRANTED AS REQUESTED. THE PERSONAL REPRESENTATIVE IS TO FILE THE FINAL INVENTORY AND APPRAISAL PRIOR TO THE HEARING RE: INVENTORY AND APPRAISAL AT 8:30 A.M. ON MONDAY, FEBRUARY 6, 2023, IN DEPARTMENT NINE.

7. ESTATE OF KUVAKOS 22PR0247

Petition to Administer Estate

TENTATIVE RULING # 7: ABSENT OBJECTION, PETITION IS GRANTED. LETTERS SHALL ISSUE. THE COURT SETS A HEARING RE: INVENTORY AND APPRAISAL AT 8:30 A.M. ON MONDAY, MAY 29, 2023, IN DEPARTMENT NINE. THE COURT FURTHER SETS A HEARING RE: STATUS OF ADMINISTRATION AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, IN DEPARTMENT NINE.

8. ESTATE OF CHISHOLM 22PR0159

Inventory and Appraisal

On September 14, 2022, the court granted the petition for probate and set bond at \$412,000. However, it does not appear that the Order for Probate was signed, or that Letters issued, or that bond was posted. The Final Inventory and Appraisal is not due until four months after Letters are issued.

TENTATIVE RULING # 8: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

9. ESTATE OF LAMMA 22PR0151

Inventory and Appraisal

**TENTATIVE RULING # 9: THE FINAL INVENTORY AND APPRAISAL HAVING BEEN FILED ON
DECEMBER 16, 2022, MATTER IS DROPPED FROM THE CALENDAR.**

10. ESTATE OF HILL 22PR0074

1st and Final Account and Report; Petition for Final Distribution

TENTATIVE RULING # 10: ABSENT OBJECTION, PETITION IS GRANTED AS REQUESTED.

THE HEARING RE: INVENTORY AND APPRAISAL ON APRIL 3, 2023, IS HEREBY VACATED

AS THE FINAL INVENTORY AND APPRAISAL HAS BEEN FILED.

11. ESTATE OF PRESCOTT 22PR0039

Inventory and Appraisal

This matter was continued from August 10, 2022.

Letters of Administration were issued on April 6, 2022. To date, the Final Inventory and Appraisal is not in the court's file.

TENTATIVE RULING # 11: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

12. ESTATE OF McCALLISTER 21PR0019

(1) Status of Administration

(2) 1st and Final Account and Report; Petition for Final Distribution

TENTATIVE RULING # 12: ABSENT OBJECTION, PETITION FOR SETTLEMENT, COMPENSATION, AND FOR FINAL DISTRIBUTION IS GRANTED AS REQUESTED. THE HEARING RE: STATUS OF ADMINISTRATION IS CONTINUED TO 8:30 A.M. ON MONDAY, MARCH 27, 2023, IN DEPARTMENT NINE, AT WHICH TIME THE COURT EXPECTS THAT ALL RECEIPTS OF DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITION FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

13. ESTATE OF COOPER 22PR0043

Inventory and Appraisal

Letters of Administration were issued on May 6, 2022. To date, the Final Inventory and Appraisal is not in the court's file. The court notes that a minute order dated November 22, 2022, that was mailed to the personal representative was returned to the court as "not deliverable as addressed" and "unable to forward."

TENTATIVE RULING # 13: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

14. MATTER OF SHARON PHELPS TRUST 22PR0126**Hearing Re: Status of Accounting**

This matter was continued from August 17, 2022. At the last hearing, the court directed former trustee Patricia Jackson to file an accounting no later than November 18, 2022. On November 18, 2022, Jackson filed a declaration in support of the First Account and Report, which is attached to the declaration as Exhibit A and covers the period of February 4, 2021, through May 11, 2022.

On January 18, 2022, objector Anna Ballesteros filed objections to the First Account and Report. The objections were served by mail on Jackson, Sharon Phelps, and the residuary beneficiaries on January 17, 2022.

Objector first asserts a general objection that the account and report does not comply with the requirements of Probate Code sections 16063 and 1060. Further, objector specifically objects to the following: cash withdrawals at a casino; all transactions characterized in the accounting as caregiving compensation to Jackson, which amount to a total of \$85,000; all overdraft fees and ATM surcharges; trustee fees in the amount of \$27,000; a 3 percent commission of sale of property that Jackson paid to herself and \$4,000 paid to her husband; mischaracterization of multiple transactions; caregiving payments and other withdrawals to Jackson's family members; additional withdrawals of cash which have no description; a missing withdrawal of \$5,000 made in May 2022; and other allegedly questionable transactions.

To date, there are no other written objections to Jackson's account and report in the court's file. To date, there is no written response from Jackson to the objections in the court's file.

TENTATIVE RULING # 14: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 23, 2023, IN DEPARTMENT NINE. IF A PARTY WISHES TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.