

1. ESTATE OF JACKSON PP20210165

Petition for Probate

A Petition for Probate of Will and a Petition for Letters of Administration were filed on July 21, 2021.

A Petition for Letters of Special Administration were filed on July 28, 2021 and Gayle Bigler was appointed Special Administrator on July 30, 2021. Amended letters of Special Administration were filed on August 31, 2021.

A Will was lodged on March 16, 2022, and a Notice of Lodging the Will was filed with the court but there is no proof of service on file.

This matter was continued from July 27, 2022 and December 7, 2022, and March 20, 2023 due to defects in the Petition. The court's March 20, 2023 tentative ruling noted that: 1) there are no proofs of service of the notice of the petition on the alternate executor Craig Jackson, 2) there is no Duties and Liabilities statement (Form DE-147/147s) in the court's file as required by El Dorado County Superior Court Local Rules, Rule 10.02.10, and 3) there is no proof of publication in the court's file.

TENTATIVE RULING #1: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

2. ESTATE OF VALENCIA PP20190249

Review hearing – Status of Administration

Letters Testamentary were issued on June 16, 2021.

The Final Inventory and Appraisal was filed on September 15, 2021.

The Order Settling First and Final Report of Executor and for Final Distribution on Waiver of Account was entered on May 15, 2023.

TENTATIVE RULING #2: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

3. ESTATE OF SHELTON PP20180023

Review Hearing – Status of Administration

On September 14, 2021, the court entered an Order Settling 10th Account and Report filed by Brenda Crain. That was the most recent activity in this case.

TENTATIVE RULING #3: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

4. ESTATE OF MILLER 22PR0130

Review hearing – Inventory and Appraisal

Letters Testamentary were issued on August 17, 2022. An Inventory and Appraisal was filed on March 14, 2023.

A Petition and Final Report of the Personal Representative on Waiver of Account and Final Distribution was filed on May 4, 2023. Waivers of Account executed by all Trust beneficiaries were filed with the court on May 3, 2023. Notice of the Petition and of this hearing was filed on May 17, 2023.

The Petition requests:

1. That the administration of the estate be brought to a close;
2. That the Waivers of Accounting by Petitioner as Personal Representative be allowed;
3. That all acts and proceedings of Petitioner as Personal Representative be confirmed and approved;
4. That all creditor claims not properly filed with the court and serve on the estate be barred;
5. That Petitioner be authorized to pay statutory attorney fees in the amount of \$23,335.75;
6. That all estate assets together with any other property of the decedent not now known or discovered be distributed to Joanna M. Fuller as Trustee of the James Hugh Miller, Jr. Revocable Trust.

TENTATIVE RULING #4: ABSENT OBJECTION, THE PETITION GRANTED AS REQUESTED.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

5. ESTATE OF HENNICK PP20210098

**Review Hearing - Status of Administration
(See Related Item No. 15)**

This matter was continued from November 30, 2022 and March 6, 2023.

Letters of Administration were issued on July 7, 2022. The Final Inventory and Appraisal was filed on January 28, 2022. Creditors' claims were filed on August 24, 2021, September 24, 2021, February 24, 2022, July 27, 2022 and April 17, 2023.

To date, there is no final account and request for order of final distribution in the court's file.

A notice of related case, Matter of the Trust of Arthur E. and Elizabeth J. Piper Case No. 22PR0100, was filed on November 18, 2022.

TENTATIVE RULING #5: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

6. ESTATE OF POWERS 22PR0152

Petition for Probate

Decedent died on April 28, 2020. A Petition to be appointed Executor was filed on May 2022, by decedent's son, the only surviving heir of the decedent, who listed a residence address in Connecticut.

A Request for Dismissal of the Petition for Probate was filed on March 13, 2023 by counsel for the Petitioner. A Proof of Service of the Request for Dismissal is on file with the court, but it does not specify any person, address, email or other destination to which it was served.

TENTATIVE RULING #6: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

7. ESTATE OF TINCHER

22PR0145

Spousal Property

The decedent dies intestate on August 13, 2021, and is survived by his spouse and three minor children. This estate was originally the subject of a Petition for Letters of Administration, but defects with the Petition prevented its approval and the matter was continued on August 31, 2022, and March 13, 2023. This Petition for Spousal Property was filed on May 22, 2023.

The principal asset of the estate is residential real property acquired in 2019 with title in the name of the decedent as a single man. The Petition states that the title was held by the decedent alone in order to get a better mortgage interest rate. Petitioner has continued to make the mortgage payments since decedent's death.

The Petition requests that title to the property pass to Tiffany Tincher, decedent's spouse, as community property pursuant to Probate Code § 6401 and § 13500.

Probate Code § 100 provides: "Upon the death of a person who is married. . . , one-half of the community property belongs to the surviving spouse and the other one-half belongs to the decedent." Probate Code § 6401(a) provides that "[a]s to community property, the intestate share of the surviving spouse is the one-half of the community property that belongs to the decedent."

If the real property is determined to be community property, Petitioner would add decedent's share to her own half share and claim an interest by intestate succession to one hundred percent of the property interest without the need for administration. Probate Code § 13500.

However, if the property is determined to be separate property, as might be indicated by the title on the grant deed, then Petitioner would inherit one third of decedent's half interest, and the remaining two-thirds would pass to decedent's three minor children. Probate Code § 6401(c)(3)(A).

The form of title is not determinative; if the real estate was purchased with community property funds then it is held as community property notwithstanding the form of title. In re Marriage of Valli, 58 Cal.4th 1396 (2014). Converting community property to separate property requires an express written declaration that is not in the record in this case. Id. at 1400. However, it is also possible that the property was purchased with decedent's separate funds, which would result in a finding that the real property was decedent's separate property, barring any evidence of transmutation to the community, or of undue influence by decedent. There is insufficient information in the record to make a determination either way.

06-12-23
Dept. 9
Tentative Rulings

In addition, while the Petition for Spousal Property does not identify siblings or parents who survived decedent, the original Petition for Letters of Administration does identify a surviving parent and two siblings. There is no proof of service in the court's file to these individuals for the 2022 Petition for Letters of Administration or for the pending Petition for Spousal Property.

This matter is continued to allow Petitioner an opportunity to provide notice of the Petition to the surviving parents and siblings of the decedent, and to provide additional information as to whether the property at issue was acquired with separate or community funds.

TENTATIVE RULING #7: THIS MATTER IS CONTINUED TO 8:30 A.M., MONDAY, AUGUST 14, 2023 IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

8. ESTATE OF MCDERMOTT 22PR0094

**Review hearing – Status of Administration
Amended Final Distribution**

A Petition for Final Distribution was approved and an Order was entered by the court on February 16, 2023. After the Order was entered, an amended Petition for Final Distribution was filed on February 27, 2023, after Petitioner's counsel discovered that the calculations were incorrect because Petitioner had made an unauthorized preliminary distribution of the proceeds from the sale of a mobile home (\$70,000) based on a specific devise of the mobile home in decedent's will to Petitioner that was omitted from the original Petition. The distribution was proper, if untimely, but the transfer of funds out of the account and the omitted reference in the original Petition changed the calculation of distributions to the other beneficiaries. A corrected distribution is provided in the amended Petition. There are a few other incidental amendments related to costs of administration that are also listed in the amended Petition. Proof of service of the amended Petition to the other beneficiaries was filed on March 20, 2023.

The amended Petition requests:

1. That the administration of the estate be brought to a close;
2. That the final Petition of Petitioner be allowed and approved;
3. That all acts and proceedings of Petitioner be confirmed and approved;
4. That Petitioner's payment of estate expenses in the amount of \$13,076.30 be approved;
5. That Petitioner be authorized to reimburse counsel for \$782.32 of estate expenses and to pay statutory attorney fees in the amount of \$12,376.25;
6. That Petitioner be authorized to pay Celia Wells statutory fees in the amount of \$12,376.25 for services as Executor to the estate;
7. That Petitioner be authorized to retain \$1,500 in cash for closing expenses and to deliver any unused portion to the beneficiaries as set for the in the amended Petition;
8. That all estate assets together with any other property of the decedent not now known or discovered be distributed to the beneficiaries as set for the in the amended Petition.

TENTATIVE RULING #8: ABSENT OBJECTION, THE PETITION IS GRANTED AS REQUESTED.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

9. FLORENCE TANIS, ET AL v. SCOTT TANIS PC20210251

Status Conference – Contractor Selection

A short cause trial was held in this case on November 29, 2022. The court's ruling was entered on March 10, 2023. The court found that the Defendant is responsible for costs of cleaning and repairing the barn that is the property of the Tanis Living Trust in a manner that is consistent with the terms of the General Power of Appointment documents that were executed on February 8, 2017 and October 3, 2019. The court made the following orders:

1. That Plaintiffs allow Defendant and any potential contractors to access the barn for the purpose of assessing the damage;
2. That each party to select two contractors and provide selected contractor information to the other party by May 12, 2023;
3. That the parties meet and confer to try to reach agreement on selection of a contractor, and that if they cannot agree on a contractor by June 12, 2023, the court would select one of the options or make further orders as appropriate.

TENTATIVE RULING #9: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

**10. IN THE MATTER OF ALLEN DECEMBER 22, 1988 TRUST/DOROTHY DIANNE J. ALLEN
REVOCABLE TRUST 23PR0064**

Petition for Modifying Trust

The Petition requests an order (1) authorizing the modification of the Allen December 22, 1988 Trust/Dorothy Dianne J. Allen Revocable Trust ("Trust") so that income payable to the beneficiary Glory Ann Evans ("beneficiary"), who is reliant on public benefits to pay her nursing home care and housing, be paid into a third party special needs trust to protect those benefits, and (2) confirming her authority to sell real property held by the Trust.

Trustee is the sole trustee of the Trust, which provides that real property located in the State of Washington and \$25,000 cash remain in the Trust following the settlor's death on January 25, 1989. The settlor intended for the beneficiary to live in the property rent-free during her lifetime. If the beneficiary elects to live elsewhere, the property was to be rented with the income to be paid to the beneficiary. Upon the beneficiary's death, the property was to be distributed to Petitioner, who is the beneficiary's daughter. The \$25,000 cash was to be used for property expenses (maintenance, taxes and insurance), but that cash reserve was exhausted ten years ago. The Petitioner has been loaning the Trust money for those expenses, but taxes and insurance costs and the property's maintenance needs have all increased and Petitioner can no longer cover these costs.

The beneficiary is 95 years old and in deteriorating health such that she requires 24-hour care and an assisted living facility, where she has been living for the past year. Her expenses are paid through Medicaid, which has asset sensitive eligibility requirements. Renting the property would require significant repairs for which there is no funding, and if it were rented and the income paid to the beneficiary she might be disqualified from Medicaid eligibility.

The Trust modification requested would allow Petitioner to sell the property and place the proceeds in a special needs trust while protecting the beneficiary's eligibility for public assistance with the housing and assisted living care that she needs. The income from the sale would not be sufficient to cover these lifetime costs. Petitioner asserts that this modification would be consistent with the settlor's intent to provide secure housing for her sister during her lifetime, and that the settlor did not anticipate the current circumstances.

Petitioner proposes that upon the beneficiary's death, the remaining funds in the special needs trust would pass as directed by the beneficiary by exercise of power of appointment, of if there is no exercise of the power of appointment, to the beneficiary's grand-daughter Angela Pritchett, who has been assisting with the beneficiary's care.

06-12-23
Dept. 9
Tentative Rulings

Probate Code § 15409(a) provides:

On petition by a trustee or beneficiary, the court may modify the administrative or dispositive provisions of the trust or terminate the trust if, owing to circumstances not known to the settlor and not anticipated by the settlor, the continuation of the trust under its terms would defeat or substantially impair the accomplishment of the purposes of the trust. In this case, if necessary to carry out the purposes of the trust, the court may order the trustee to do acts that are not authorized or are forbidden by the trust instrument.

In addition to requesting court approval of a modification of the terms of the Trust, Petitioner seeks the court's confirmation of the Trustee's powers as set forth in the Trust, paragraph 6(b.(1) "to sell (for cash or on credit), exchange, purchase and retain assets, . . . and otherwise deal with and manage trust property; . . ." as well as the terms of Probate Code § 16226 ("The trustee has the power to manage, control, divide, develop, improve, exchange, partition, change the character of, or abandon trust property or any interest therein").

Venue is appropriate in this court because the day-to-day administration of the trust is conducted in El Dorado County, California, where Petitioner resides. Proof of service of notice of the Petition is on file with the court.

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

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

11. IN THE MATTER OF JAMES MARIO ALLEN 23PR0065

Petition for Probate

Decedent died intestate on March 28, 2023, survived by two adult children. Petitioner is decedent's adult son.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on April 7, 2023.

Notice of the Petition was filed on May 25, 2023. Proof of publication was filed on May 2, 2023.

Petitioner filed a bond waiver on April 7, 2023, but there is no waiver on file from the decedent's other surviving child, who was served notice of the Petition by mail on April 15, 2023. Petitioner filed a declaration on April 7, 2023, requesting waiver of bond and alleging that the assets of the estate are estimated at \$338,000, almost entirely the value of real estate, with no income or estate tax liabilities, no known contingent liabilities and no secured or unsecured creditors.

TENTATIVE RULING #11: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

12. IN THE MATTER OF THE CD AND MA VICKREY TRUST DATED AUGUST 17, 2010

23PR0071

Petition Hearing

This Petition requests an Order determining title to personal property owned by the CD and MA Vickrey Trust Dated August 17, 2020 ("Trust") in the possession of third parties, namely, two financial accounts that were not placed in the name of the Trust during the settlors' lifetimes. The financial institutions have thus far refused to transfer the accounts to Petitioners or to the Trust.

Petitioners are the sole beneficiaries of the residual Trust estate. They argue that two financial accounts (UBS Financial Services Account No. 1A Y5934 and TD Ameritrade Account No. 275-129406) were transferred to the Trust by means of the personal property assignments executed by the settlors on the same day that they created the Trust. These assignments are appended to the Trust as schedules of personal property separately assigned to the Trust by each settlor, including "stocks, bonds, mutual funds . . . and savings accounts." See Schedule A of Trust. The accounts at issue are not specifically identified.

Settlor Marilyn Vickrey died in 2019. The identical Wills of both settlors, executed on the same day as the Trust instrument, provided that any remaining assets that might remain at the death of the settlors which had not been specifically transferred to the Trust prior to their deaths were the assets of the Trust.

Petitioners cite the case Kucker v. Kucker, 192 Cal. App. 4th 90 (2011) for the proposition that it was not necessary for the Trust documents or pour-over wills to specifically name the financial accounts, and that the general assignments of "stocks, bonds, mutual funds . . . and savings accounts" was sufficient to convert them into Trust assets. The court in that case stated:

In construing the General Assignment, we must implement the Trustor's intent. . . . The General Assignment and pour-over will show that the Trustor intended to transfer all of her personal property to the Trust. . . . There is no California authority invalidating a transfer of shares of stock to a trust because a general assignment of personal property did not identify the shares."

Id. at 94-95.

Accordingly, the court finds that the financial accounts in the Trustor's name were intended to be transferred to the Trust, as evidenced by the terms of the General Assignment and pour-over will.

TENTATIVE RULING #12: ABSENT OBJECTION, THE PETITION IS GRANTED AS REQUESTED.

06-12-23
Dept. 9
Tentative Rulings

**IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530)
621-5867 AND MEETING INFORMATION WILL BE PROVIDED.**

13. IN THE MATTER OF THE ROBERT SIMAS FAMILY REVOCABLE TRUST 22PR0133

Review Hearing

On May 10, 2022, a Petition to Remove Trustee, to Compel Trustee to Account and to Appoint Successor Co-Trustees was filed by Jean Simas Varozza, a beneficiary and co-trustee of the Robert Simas Family Revocable Trust Dated July 23, 1980. Petitioner alleges that the Trustee has failed to abide by the terms of the Eleventh Amendment to the Trust, that a deed signed by the settlor conveying real property to the Trustee was signed unintentionally, that the Trustee has failed to allow Petitioners to act as co-Trustees as required by the Trust, and that the Trustee has failed to provide any information or accounting to the beneficiaries/co-Trustees. The Petition requests that James Simas be removed as Trustee and that Gail Simas aka Gail Elise be appointed as sole Trustees.

On August 15, 2022, James Simas, Trustee, filed a response to the Petition to Remove Trustee denying the allegations. A hearing set for August 17, 2022, was continued due to insufficient notice. Proof of service and a notice of hearing on the Petition was served on the beneficiaries and other interested persons on December 22, 2022.

On February 6, 2023, this matter was continued to March 13, 2023. On March 13, 2023, the court set a date for Settlement Conference on May 24, 2023, which was later vacated due to unavailability of the court.

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

TENTATIVE RULING #13: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

**14. IN THE MATTER OF THE WILLIAM H. MORGAN AND REXENA W. MORGAN FAMILY
TRUST DATED APRIL 2, 1991 23PR0073**

Petition to Appoint Successor Trustee

The William H. Morgan and Rexena Trust ("Trust") was executed on April 2, 1991. The trust provided for "Trust Services of America" to serve as Trustee upon the death of the last surviving settlor; however, that business is no longer in existence. See Exhibit B to Petition: Certification of Dissolution from California Secretary of State, dated December 17, 1993.

The Trust assets consist of one piece of real property at 2850 Osborne Road, Cameron Park, and such further assets as may be transferred to the Trust through the administration of William Morgan's estate (see Case No. 22PR0277). Petitioner is one of two competing applicants to be appointed Executor to William Morgan's estate. The other is the decedent's spouse, Kimberly Morgan. The hearing on those competing Petitions is scheduled for 1:30 p.m. on June 15, 2023.

Petitioner is one of three beneficiaries named in the Trust, the other two being Tammie Morgan and Kristin Morgan, Petitioner's sisters. There is no proof of service of notice of the Petition in the court's file.

TENTATIVE RULING #14: THIS MATTER IS CONTINUED TO AUGUST 14, 2023, TO ALLOW PETITIONER TO SERVE NOTICE OF THE PETITION ON BENEFICIARIES OF THE TRUST AND INTERESTED PARTIES.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

15. TRUST OF ARTHUR E. AND ELIZABETH J. PIPER 22PR0100

**Accounting
Review Hearing – Status of Administration
(See Related Item No. 5)**

A Petition for an Accounting, for Suspension and Removal of the Trustee, for Surcharge of the Trustee, for Transfer of Property, and for Appointment of a Professional Fiduciary as Successor Trustee was filed On April 7, 2022. Among the allegations of the Petition are that the trustee kept rental income from the trust property, for herself, took out a loan against the Trust's real property and gave it to her boyfriend to buy a house, after which he died holding title, subjecting the interest in the property to his creditors. See Notice of Related Case: PP2021-0098 Further, that the Trustee has failed to provide any accounting.

At a hearing held on July 13, 2022, the court ordered the trustee to file an accounting by September 15, 2022, to cover the period from the date of death to July 2022; the parties were to meet and confer by October 31, 2022, and a hearing was set for November 30, 2022.

The proof of service, filed with the court on September 19, 2022, states that the account was served by mail on September 15, 2022, to five of the six remainder beneficiaries of the Trust and the trustee/remainder beneficiary of the Trust. There were no objections to the account in the court's file.

This matter was continued from November 30, 2022, and March 6, 2023. The court's tentative ruling for the November 30, 2022, hearing questioned why remainder beneficiary Teresa Piper advanced to herself \$103,918.10 in Trust assets in "her beneficial capacity" between July 23, 2009, and October 8, 2022, as stated in Schedule D Disbursements and Schedule I of the account. There were no such advances to the other five beneficiaries. In addition, the trustee/beneficiary received her equal share of the distributions she made as trustee to all six beneficiaries in 2009 and 2010. (See Schedule F – Distributions). Additionally, she paid herself a \$21,171.37 trustee fee on July 31, 2022, as ten percent of the Trust receipts.

Since the last hearing, no status update about the issues raised in the November 30, 2022, tentative ruling has been provided to the court. There is nothing in the court's file as to whether the parties have met and conferred about the account.

TENTATIVE RULING #15: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

06-12-23
Dept. 9
Tentative Rulings

**IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530)
621-5867 AND MEETING INFORMATION WILL BE PROVIDED.**

16. ESTATE OF FIELDS PP20170176

Accounting Hearing

Letters of Administration were issued to Amy Ward on March 8, 2018. Some of the heirs have filed requested removal of the Administrator and have made allegations that the Administrator has omitted assets from estate inventories, made unauthorized payments and withheld information about Trust assets and accounts from the other beneficiaries.

This hearing was set by Order of the court, dated May 9, 2023, "to ensure progress is being or has been made on the court-ordered accounting." The accounting was ordered at a hearing held on December 7, 2022, during which the Administrator was ordered to produce an accounting and financial account statements to the heirs no later than April 8, 2023 and to be prepared to present accounting information at the next hearing.

On March 24, 2023, the Administrator requested a continuance of a May 8, 2023 status hearing until "after the summer" because she had been involved in a car accident, and the court granted the request, setting a new hearing date of August 7, 2023.

On May 9, heirs Melody Wruble and Sara Singh filed an ex parte motion to advance the August 7, 2023 hearing date because the delay would cause irreparable harm to other heirs of the estate. This motion included continued allegations of the Administrator hiding and selling estate assets, failing to provide accounts and bank statements to other heirs in compliance with court orders, making unauthorized payments, of falsifying the grounds upon which she requested a continuance, of acting in bad faith and breaching her fiduciary duty.

The intestate heirs who have an interest in this estate are Melody Wruble (Fields), Liam Fields, son of Meggan Fields (deceased), Dara Singh (Fields), Amy Ward (Fields) and John Romero. Amy Ward (Fields) is the Administrator of the estate.

There is a related Family Law Court matter (PD-4474) that concluded in July, 2022, in which the court awarded \$45,000 of spousal support due to the estate by decedent's ex-spouse, James Fields, which was to be paid at the rate of \$500 per month.

TENTATIVE RULING #16: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

17. JOAN BROWARD TRUST PP20200096

Accounting Hearing

On July 8, 2022, a Petition for Approval of the Third Account and Report of Trustee was filed, and a hearing was noticed for August 24, 2022. At that hearing the court ordered the cash in the Trust, less \$400,000, be distributed equally to the beneficiaries, and reduced the bond amount to \$400,000. A further hearing was scheduled for December 7, 2022. An objection by Karen Brown was submitted at the hearing of December 7, 2022, and the matter was continued for hearing to February 27, 2023. On February 27, 2023, the parties requested a continuance, and the matter was continued to April 24, 2023, and then again to June 12, 2023.

TENTATIVE RULING #17: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JUNE 12, 2023, IN DEPARTMENT NINE.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.