

**1. PP20200228 ESTATE OF KAMINE**

**Motion to be Relieved as Counsel**

Counsel for the personal representative of the estate has filed a motion to be relieved as counsel pursuant to Code of Civil Procedure § 284(2) and California Rules of Court, Rule 3.1362.

A declaration on Judicial Council Form MC-052 accompanies the motion, as required by California Rules of Court, Rule 3.1362, stating that there has been an irreconcilable breakdown in the attorney-client relationship that prevents counsel from providing effective representation.

Code of Civil Procedure § 284(2) and California Rules of Court, Rule 3.1362 allow an attorney to withdraw after notice to the client. Proof of service of the motion on the Defendants at their last known address and on counsel for Plaintiff was filed on December 21, 2023.

The motion (Judicial Council Form MC-051), the Declaration supporting the motion (Judicial Council Form MC-052), and the proposed Order (Judicial Council Form MC-053) state that no hearing dates are currently scheduled for the case. However, there is a Status of Administration hearing set for July 8, 2024, which is not listed on those forms.

Counsel must file an amended proposed Order (Judicial Council Form MC-053) specifying the scheduled hearing date in order to comply with California Rules of Court, Rule 3.1362(e).

**TENTATIVE RULING # 1: ABSENT OBJECTION, THE MOTION IS GRANTED. COUNSEL IS DIRECTED TO FILE AN AMENDED PROPOSED ORDER LISTING THE UPCOMING HEARING DATE, AND TO SERVE A COPY OF THE SIGNED ORDER (FORM MC-053) ON THE CLIENT AND ALL PARTIES THAT HAVE APPEARED IN THE CASE IN ACCORDANCE WITH CALIFORNIA RULES OF COURT, RULE 3.1362(e).**

**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. 22PR0329 ESTATE OF WEBB**

**Final Distribution on Waiver of Account**

Letters Testamentary were issued on January 30, 2023, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on March 1, 2023.

Waivers of Account were executed by both heirs entitled to distributions under the estate and are attached to the Petition as Exhibit 3.

Proof of Service of Notice of the hearing on the Petition was filed on November 28, 2023.

The proposed distribution of the estate is 50 percent to Petitioner and 50 percent to the brother Marshall Allen Webb in accordance with the terms of the decedent's Will.

The Petition requests:

1. The First and Final Report of Executor on Waiver of Account and Petition for Allowance of Statutory Compensation to Executor and Attorneys and for Final Distribution be approved as filed;
2. The administration of the estate be brought to a close without the requirement of an accounting;
3. All acts and proceedings of Petitioner as Executor be ratified, confirmed and approved;
4. Petitioner be authorized to pay statutory attorney fees in the amount of \$12,200.00;
5. The Administrator be authorized to pay herself \$12,200.00 in statutory compensation plus \$1,204.58 for costs associated with probate;
6. Petitioner be authorized to retain \$4,000.00 in closing expenses and to pay liabilities, and to deliver the unused part to the beneficiaries of the estate without further court order after closing expenses have been paid.
7. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be made to the beneficiaries as set forth in the Petition.

**TENTATIVE RULING #2: ABSENT OBJECTION THE MOTION 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.**

**3. 23PR0143 ESTATE OF BROWN**

**Petition for Letters Testamentary – Lost Will**

Decedent died testate on December 13, 2022. A Petition to administer decedent's estate was filed on July 6, 2023. Petitioners are decedent's daughters. The Petition requests Petitioner Ivy Goessens-Long be appointed Executor and granted full authority under the Independent Administration of Estates Act.

The Petition indicates that the Will of decedent is lost, and that no Executor was named in the Will.

The Petition requests bond be set at \$5,000.

There is no Duties/Liabilities statement (DE 147/DE 147s) on file with the court.

There is no proof of service of Notice of the Petition on file with the court.

There is no proof of publication on file with the court.

The matter was continued after no parties appeared at the hearing on the Petition held on August 7, 2023.

Probate Code § 8223 provides:

The petition for probate of a lost or destroyed will shall include a written statement of the testamentary words or their substance. If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate.

**TENTATIVE RULING #3: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, 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. 23PR0301 ESTATE OF TRUJILLO**

**Letters Testamentary**

A Petition to administer decedent's estate was filed on November 30, 2023. The Petition requests full authority under the Independent Administration of Estates Act.

Decedent died testate and is survived by two brothers and his nieces and nephews. Petitioners are decedent's brother and sister-in-law.

The Will was lodged with the court on November 30, 2023, and is admitted to probate.

The Will waives bond.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on November 30, 2023.

Proof of Service of Notice of the hearing on the Petition was filed on December 14, 2023.

Proof of publication was filed on January 9, 2024.

Petitioners were both named as Executors in the Will.

**TENTATIVE RULING #4: ABSENT OBJECTION THE MOTION IS GRANTED AS REQUESTED.  
A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 20,  
2025, 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.**

**5. PP20210098 ESTATE OF HENNICK**

**Accounting  
Status of Administration**

Letters of Administration were issued on July 7, 2021. A Corrected Final Inventory and Appraisal and a Petition for approval on an Interim Account were filed on November 6, 2023.

A Final Corrected Inventory and Appraisal was filed on November 6, 2023. Petitioner reports that various items of personal property have been sold and various creditor claims have been filed. The estate is not yet in a condition to be closed because it remains to sell the real property in order to pay expenses of administration and outstanding valid creditor claims, some of which are secured by the real property. Total liabilities to creditors cannot yet be determined.

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. A request for dismissal of that case with prejudice was filed on January 5, 2024 pursuant to a settlement.

Petitioner requests an Order approving, confirming and settling the account and transactions of the personal representative as to all matters disclosed in the Interim Account and Report of Status of Administration.

Proof of service of notice of the hearing to all persons entitled to notice was filed with the court on January 5, 2024.

There is no objection to the Petition for approval on the Interim Account on file with the court.

**TENTATIVE RULING #5: ABSENT OBJECTION THE MOTION IS GRANTED AS REQUESTED.**

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**6. 23PR0285 ESTATE OF HALLIDAY**

**Letters of Administration**

Decedent died intestate on October 26, 2023, survived by two daughters and three minor children of a predeceased child. Petitioner is decedent's daughter.

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

A waiver of bond has been filed with the court by the adult beneficiary, Petitioner's sister. However, no waivers have been executed on behalf of the minor children of Petitioner's predeceased sibling, and there is no guardian ad litem in place to represent the interests of those minor children.

A Duties/Liabilities statement DE 147 was filed on November 13, 2023, but was not signed. A DE 147s form was filed on November 17, 2023.

Proof of Service of Notice of the hearing on the Petition was filed on December 9, 2023.

Proof of publication was filed on January 9, 2024.

**TENTATIVE RULING #6: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, 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. 23PR0307 ESTATE OF MOONEY**

**Petition to Determine Succession to Real Property**

The issue is the intestate succession of a 27.5 percent interest in commercial real property interest belonging to decedent Roger Michael Bickel as his separate property. Petitioner is decedent's mother. Decedent is survived by his parents and by a natural child who was adopted by a third party. Decedent's father has disclaimed his interest in the property (Petition, Exhibit 13.)

Probate Code § 6402(a)-(b) specify the order of intestate succession as to children and parents of the decedent:

Except as provided in Section 6402.5, the part of the intestate estate not passing to the surviving spouse, under Section 6401, or the entire intestate estate if there is no surviving spouse, passes as follows:

(a) To the issue of the decedent, the issue taking equally if they are all of the same degree of kinship to the decedent, but if of unequal degree those of more remote degree take in the manner provided in Section 240.

(b) If there is no surviving issue, to the decedent's parent or parents equally.

Probate Code § 6451(a) addresses the status of an adopted child:

An adoption severs the relationship of parent and child between an adopted person and a natural parent of the adopted person unless both of the following requirements are satisfied:

(1) The natural parent and the adopted person lived together at any time as parent and child, or the natural parent was married to or cohabiting with the other natural parent at the time the person was conceived and died before the person's birth.

(2) The adoption was by the spouse of either of the natural parents or after the death of either of the natural parents.

Decedent's natural child, Olivia Deggennaro, has filed a Declaration opposing the inheritance by decedent's parents. Declaration of Olivia Deggennaro (Bickel), dated January 12, 2024. In her Declaration she states, and attached documentary evidence establishing, that she and decedent lived together as parent and child until she was two years old. (Declaration, Exhibit A.) Subsequently she stayed with decedent during court-ordered visitation periods until she was 9 years old. (Id.; Declaration ¶14.) She was adopted in 2011 after she turned 18 years old. At that time her natural mother and adoptive father were married. (Declaration, ¶15; Exhibit C.) Deggennaro declares that the reason for waiting until she was an adult was because decedent

01-22-24  
Dept. 9  
Probate Tentative Rulings

was not willing to waive his parental rights. (Declaration ¶ 7.) Deggennaro was designated as the beneficiary on decedent's pension plan and 401K plan. (Declaration, Exhibit D.)

The court finds that the conditions of Probate Code § 6451 have been met, and Olivia Deggennaro is entitled to inherit the real property interest from decedent's estate.

**TENTATIVE RULING #7: THE PETITION IS DENIED.**

**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. 23PR0264 ESTATE OF GREGORY**

**Petition for Letters Testamentary – Lost Will**

A Petition to administer decedent’s estate was filed on October 24, 2023. The Petition requests full authority under the Independent Administration of Estates Act.

Decedent died testate on December 21, 2017, survived by Petitioner, his daughter.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on October 24, 2023.

Proof of Service of Notice of the hearing on the Petition was filed on October 26, 2023.

Proof of publication was filed on November 13, 2023.

The Petition explains that decedent’s original Will was lost but a copy of the Will is attached to the Petition. The copy of the Will indicates that it was signed by the decedent on October 26<sup>th</sup>, 2012, with attestations by two witnesses. The Will is further authenticated by the transmittal of the copy to Petitioner by the El Dorado County Health and Human Services Agency on October 29, 2012, indicating that the document is being transmitted to Petitioner at decedent’s request.

Probate Code § 8223 provides:

The petition for probate of a lost or destroyed will shall include a written statement of the testamentary words or their substance. If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate.

The court finds that the Will is proved by the copy of the Will attached to the Petition, and is admitted to probate. Petitioner is named as Executor in the Will. The Will waives bond.

**TENTATIVE RULING #8: ABSENT OBJECTION THE MOTION IS GRANTED AS REQUESTED. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 20, 2025, 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.**

**9. 23PR0290 ESTATE OF MATTHEWS**

**Petition for Letters of Administration**

Decedent died intestate on September 13, 2023. The Petition requests full authority under the Independent Administration of Estates Act.

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

A Duties/Liabilities statement (DE 147/DE 147s) was filed on November 14, 2023.

Proof of Service of Notice of the hearing on the Petition was filed on November 14, 2023.

Proof of publication was filed on December 14, 2023.

**TENTATIVE RULING #9: ABSENT OBJECTION THE MOTION IS GRANTED AS REQUESTED. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 20, 2025, 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. PP20110111 IN THE MATTER OF MCKENNA C. SCHULTZ**  
**Petition for Order Appointing Successor Co-Trustee**

**TENTATIVE RULING #10: ABSENT OBJECTION THE MOTION 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. 23PR0096 MATTER OF THE BURTON A. ZABIN & HENRIETTE L. ZABIN REVOCABLE TRUST**

**Confirm Trust Assets**

This Motion was filed on September 1, 2023, by Jane Flint, the successor trustee of the Burton A. Zabin and Henriette L. Zabin Revocable Trust, dated December 21, 2001 (“Trust”).

Schedule A of the Trust lists “All banking, investment and brokerage accounts and safe deposit box contents” as part of the Trust estate.

A Petition to confirm that certain financial accounts and other assets are subject to the Trust and under the control of Petitioner as successor trustee was filed on May 3, 2023, with the referenced accounts listed in Exhibit E of that Petition, along with a supplemental Declaration attaching statements showing the current title to those accounts in the name of Henriette Zabin, “HL Zabin”, “Burton A. Zabin & Henrietta Zabin” or “Henriette Lucille Zabin”, and, where an address is listed on the statement, showing the mailing address at the Property.

At the hearing on the Petition to Confirm Trust assets held on July 31, 2023, the court continued the hearing on the matter to October 23, 2023, with a directive for the parties to file supplementary information regarding the financial accounts by specified deadlines, specifically, whether any of the subject financial accounts had beneficiary designations. Trust beneficiary Catherine (Cathy) Hammond<sup>1</sup> issued a Deposition Subpoena for the Production of Business Records on August 11, 2023, to Citibank N.A., Metropolitan Life Insurance Co., Computershare, Inc., Wells Fargo Advisors Financial Network, LLC, Morgan Stanley & Co., LLC and Mechanics Bank, with a response deadline of September 7, 2023. Declaration of Christi M. Raimondi in Support of Motion to Quash Subpoenas, dated September 1, 2023 (“Raimondi Declaration”) Exhibits A-F. The subpoenas request “ALL DOCUMENTS executed or otherwise signed by [the settlors] or anyone acting on [his/her] behalf” and “ALL DOCUMENTS relating to any accounts held in the name of [the settlors], including but not limited to DOCUMENTS RELATING TO the opening of such accounts, the closing of such accounts, beneficiary designations, signature cards and account statements from November 28, 2022 through the present”, as well as “any notes or documents that relate to, concern reflect or regard” the accounts.

Trustee’s counsel sent a letter to those organizations indicating that the trustee intended to object to the subpoenas as overbroad, not reasonably calculated to lead to the discovery of admissible evidence, and violative of the decedent settlors’ privacy. Raimondi Declaration,

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<sup>1</sup> Catherine Hammond is named in the Trust as a beneficiary who is designated to receive a cash gift of \$750,000 and the settlor’s interest in a time share property. Petition for Order Confirming Trust Assets, Exhibit A, Article 7(c)(5).

01-22-24  
Dept. 9  
Probate Tentative Rulings

Exhibit I. The parties exchanged meet and confer correspondence but did not come to agreement on withdrawing or modifying the subpoenas. Raimondi Declaration, Exhibits G-H.

The trustee argues that the subpoenas should be quashed because the information sought is not “reasonably calculated to lead to the discovery of admissible evidence”, Code of Civil Procedure § 2017.010. The trustee represents on information and belief that only one of the referenced accounts has a designated beneficiary who is not the subpoenaing party.

The trustee argues that the subpoenas are overbroad. Code of Civil Procedure § 2020.410(a) (“A deposition subpoena that commands only the production of business records for copying shall designate the business records to be produced either by specifically describing each individual item or by reasonably particularizing each category of item, . . .”) The trustee argues that the subpoenas seek information that invades the settlor’s privacy with respect to their personal financial information.

On October 2, 2023, beneficiary Cathy Hammond filed an Opposition to the motion to quash arguing that the subpoenas are in the best interest of transparency. Hammond argues:

1. That the settlors no longer enjoy a right to privacy that can be enforced by the trustee;
2. That she should not be required to trust the representations of the financial institutions in response to phone inquiries or of the trustee, and that the financial institutions have no obligation to respond to her phone inquiries;
3. That, having filed a response to the trustee’s Petition to confirm Trust assets, she is party entitled to conduct discovery per *Mota v. Superior Court* (2007) 156 Cal.App.4th 351, 355 (“a beneficiary, having filed formal objections to a trustee’s petition, may conduct discovery relevant to those objections.”)
4. That, having raised the matter of the settlor’s Will which has not yet been located, that she is entitled to conduct discovery to determine if the financial institutions at which the referenced account are held possess any information about the location or contents of the Will.

On October 5, 2023, trustee filed a Reply to the Opposition arguing that:

- 1) the subpoenaing party does not have standing to issue the challenged subpoenas because she is not an heir of the decedent or a successor trustee of the Trust;
- 2) the subpoenaing party is a beneficiary of the Trust, but the accounts that are subject to the challenged subpoenas have not yet been declared to be among Trust assets;
- 3) the subpoenaing party has not made any allegations of misconduct by the trustee;

01-22-24  
Dept. 9  
Probate Tentative Rulings

4) the challenged subpoenas are overbroad because while the subpoenaing party may have alleged sufficient facts to warrant being notified if she is a beneficiary to any of the referenced accounts and if so, the balance in that account at the time of the decedent's death, she is not entitled to learn the identity of other individuals who might be named as beneficiary to the subpoenaed accounts;

5) the trustee, on information and belief, has represented that only one of the referenced accounts has a beneficiary designation and the named beneficiary is not the subpoenaing party;

6) the requested information is not likely to lead to the discovery of relevant information and can be acquired by less intrusive means.

At the hearing held on November 27, 2023, the court ordered limitations on the scope of the subpoenas, denied the parties' motions for fees, and directed the parties to meet and confer.

**TENTATIVE RULING #11: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, 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. 23PR0276 IN THE MATTER OF MARGUERITE L. BAILEY REVOCABLE TRUST**

**Petition to Determine Construction of Trust and Determine Beneficiaries**

The Petition requests the court to determine whether the list of beneficiaries set forth in a December 16, 2020, addendum to a trust document (1) replaces or (2) supplements the list of beneficiaries in the original trust document, and thereby to determine the beneficiaries of the trust.

Settlor Marguerite L. Bailey executed a Trust Agreement, titled the Marguerite L. Bailey Revocable Living Trust (“Trust”) on September 18, 2020, which included a notarized acknowledgement of the document. The Trust is attached to the Petition as Exhibit A. The Settlor died on September 18, 2023.

The addendum at issue, attached as Exhibit B to the Petition, includes a handwritten note at the top of the document that states: “Addendum to original trust agreement dated 9/18/2020” followed by the Settlor’s initials. That document was signed by the Settlor and was notarized.

The Settlor acknowledged this addendum in a recital in an amendment to the Trust dated January 11, 2021, attached as Exhibit C to the Petition as follows:

The Trust is dated September 18, 2020. The Settlor has previously amended the Trust, by way of a document referred to as an addendum dated December 16, 2020.

The addendum at issue contains a different list of beneficiaries than the original Trust document.

Petitioner indicates that there are three indicia of the Settlor’s intent that may indicate the intention to replace the original Trust’s list of beneficiaries with the list contained in the addendum.

First, the final line of the addendum states “I have made these changes to my existing trust.”

Second, the January 11, 2021, amendment (Exhibit C) states: “The Settlor has previously amended the Trust, by way of a document referred to as an addendum dated December 16, 2020.”

Third, Petitioner filed a Declaration of Kate Carmer, dated October 31, 2023, who stated that she was present with the Settlor on December 16, 2020 and that the Settlor told her that “the provisions of this document were intended to change the beneficiary provisions of her trust.” However, the court notes that Kate Carmer was added as a beneficiary by the addendum, and was not listed as a beneficiary in the original Trust document.

Additionally, the court notes that several individuals are named in both lists. This supports the conclusion that the Settlor intended to replace the original list of beneficiaries with

01-22-24  
Dept. 9  
Probate Tentative Rulings

the new list in the addendum because there would be no reason to repeat the names of individual beneficiaries if the addendum was merely intended to add to the existing list.

Probate Code § 15401(a) provides that “A trust that is revocable by the settlor or any other person may be revoked in whole or in part by any of the following methods: (1) By compliance with any method of revocation provided in the trust instrument.”

Probate Code § 15402 provides: “Unless the trust instrument provides otherwise, if a trust is revocable by the settlor, the settlor may modify the trust by the procedure for revocation.”

Article III provides that “During the lifetime of the Settlor, this trust may be revoked, in whole or in part, by an instrument in writing, signed by the Settlor, and delivered personally or by certified mail to the Trustee. . . .”

Article IV of the Trust further provides: “The Settlor may, at any time, amend any of the terms of this instrument in writing signed by the Settlor and delivered personally or by certified mail to the Trustee.”

The Settlor executed an amendment to the Trust on January 11, 2021, designating Kathryn Cain as trustee. Until that date, and at the time that the “addendum” at issue was executed, Settlor remained the trustee of the Trust.

Accordingly, by the terms of the Trust, the Settlor did have the power to modify the Trust at the time the addendum was executed.

Proof of service of notice of the Petition was filed with the court on January 4, 2024, indicating that notice was served on December 21, 2023, but it was only served on Dale Dumolt, and not on any of the beneficiaries listed in either the Trust or in the addendum to the Trust.

While it may be possible to ascertain the Settlor’s intent from the documents on file, appearances are required to explain service of the notice of the hearing on a single individual who is not named in either document as a Trust beneficiary.

**TENTATIVE RULING #12: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, IN DEPARTMENT NINE.**

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**13. PP20210122 MATTER OF THE ALOHA JUNE SAUNDERS TRUST**

**Review Hearing**

This action relates to the Aloha June Saunders Living Trust (“Trust”). As part of his authority to defend against any contest of any Trust provisions pursuant to the terms of the Trust, the successor trustee propounded multiple discovery requests on Trust beneficiaries Teri Stevens and Andrea Stevens (“Petitioners”), in response to their June 1, 2021, Petition for Instructions to set aside the January 20, 2020, Fourth Amended and Restated Trust as invalid and to have the trustee removed.

At hearings held on October 20, 2023 and November 27, 2023, the court made orders granting the motions to compel discovery and imposing sanctions for the misuse of the discovery process.

This hearing is to review the status of compliance with the court’s previous Orders.

**TENTATIVE RULING #13: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, 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. PP20190250 MATTER OF THE GRUBER TRUST**
- (1) Petition to Determine Existence of Trust**
  - (2) Petition for Instructions**

**TENTATIVE RULING #14: THIS MATTER IS CONTINUED TO 8:30 A.M. ON FRIDAY, FEBRUARY 5, 2024, 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.**

**15. 23PR0284 IN THE MATTER OF TRAELYNN LEWIS**  
**Petition for Removal of Trustee and to Compel Accounting**

**TENTATIVE RULING #15: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, IN DEPARTMENT NINE.**

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**16. 23PR0026 HADDON A. FRANKLIN & JOANNE F. FRANKLIN 1995 REVOCABLE TRUST**

**Accounting**

At the hearing held on December 4, 2023, Respondent was ordered to file and serve an accounting by December 8, 2023, with objections to be filed by January 12, 2024, and a new hearing date was set on January 22, 2024.

An accounting was filed on January 5, 2024, and an objection was filed on January 12, 2024. The Objection requests the court:

1. To order Respondent to account for \$400,000 that was deposited to her personal account on December 12, 2022;
2. Award Petitioner reasonable costs incurred in filing the Petition;
3. Grant Petitioner attorney's fees incurred to be paid personally by Respondent or out of her share of Trust assets, or alternatively, to be paid by the Trust as an administrative expense and shared equally by Trust beneficiaries;
4. To charge the current trustee's (Mia Ehsani) attorney's fees to Respondent personally or out of her share of Trust assets;
5. Deny Respondent's request for Trustee fees in the amount of \$32,850.

**TENTATIVE RULING #16: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 22, 2024, IN DEPARTMENT NINE.**

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