

Tentative Rulings for April 25, 2024 Probate Calendar

Judge James T. Chou
Department C
Judge Mark A. Talamantes
Department L

**APPEARANCES MAY BE MADE
IN PERSON
OR ON ZOOM.**

To Join a Zoom Meeting, please follow this link: www.marin.courts.ca.gov

Click on the “Virtual Courtrooms” icon and then on “Zoom Civil / Family / Probate Court Calendar Appearance Information”

Scroll down to Department C for the connection information.

Any person who wishes to make an appearance to contest the tentative ruling must inform the other parties and the Probate Research Attorney by 4:00 PM on Wednesday (MCR 5.2 D).

There is no need to inform the Court of your intent to appear if the tentative ruling requires an appearance.

Probate Research Attorney:

Trudy Verzosa

E-mail: trudy.verzosa@marin.courts.ca.gov (preferred)

Tel: (415) 444-7315

Judge James T. Chou
Department C
9:00 Calendar

PR0000136 IN THE MATTER OF MANUEL A. RIVERA

- 1) Petition for letters of administration filed by Katty Rodriguez.
- 2) Petition for letters testamentary filed by Christine Gibson.
- 3) Petition for letters testamentary amended by Jose Cea.

Ruling. **Appearance is required.**

**PR0000269 IN THE MATTER OF THE OLAV N. NORMAN AND ANNE G. NORMAN LIVING TRUST
DATED JUNE 26, 2014**

Petition for removal of co-trustee Charles Norman.

Ruling. **Continued to July 25, 2024 at 9:00 to be heard with Counter-Petition.**

**PR0000298 IN THE MATTER OF THE JOAN B. TIEMAN REVOCABLE TRUST DATED MAY 16, 2006, AS
AMENDED**

PC850 trust.

Ruling. **Appearance is required.** Please be prepared to discuss bond pursuant to Prob. C. § 15602(a)(3)-(b)).

PR0000313 IN THE MATTER OF THE CARMEL DEVLIN TRUST, UDT MARCH 13, 1992

Petition for Order Confirming the Validity of the Carmel Devlin Trust and Assets as Belonging as Trust Property.

Ruling. Absent objections, this Petition will be **granted without hearing.**

**PR0000372 IN THE MATTER OF THE TROWBRIDGE TRUST OF 1989 FBO JAMES ANTHONY
TROWBRIDGE UDT DATED JUNE 20, 1989**

Petition to modify trust.

Ruling. **Continued to May 30, 2024 at 9:00** for 30 days' notice of the Amendment to all interested parties.

PR0000394 IN THE MATTER OF ROBERTA RICHARDS 1995 REVOCABLE TRUST

Petition for trust.

Ruling. **Continued to May 9, 2024 at 9:00 for further review.**

PR0000395 MICHAEL ANDERSON LIVING TRUST

Petition for trust to enforce child support.

Ruling. Absent objections, this Petition will be **granted without hearing.**

PR0000396 IN THE MATTER OF THE 2020 KATHLEEN K. WRINKLE TRUST

Petition to modify trust.

Ruling. **Continued to May 9, 2024 at 9:00 to review late-filed documents.**

PR0000409 IN THE MATTER OF THE MEGAN JOY MCGRATH REVOCABLE TRUST DATED MARCH 6, 2019

- 1) Petition for trust.
- 2) Petition to appoint guardian ad litem.
- 3) Petition to appoint guardian ad litem.
- 4) Petition to appoint guardian ad litem.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PR0000410 IN THE MATTER OF THE ROSEMARIE GRAYSON 1992 REVOCABLE TRUST, DATED OCTOBER 13, 1992

PC850 petition.

Ruling. **Continued to May 9, 2024 at 9:00 for further review.**

PR0000428 IN THE MATTER OF DANIEL MICHAEL MILKIER

Petition for letters of administration.

Ruling. Absent objections, this Petition will be **granted without hearing.**

Future dates.

1. Final Inventory and Appraisal.
 - a. A status hearing for the filing of the Final Inventory and Appraisal shall be set on August 29, 2024 at 10:00.
 - b. An appearance will be required on that date if the Final I&A is not filed at least 5 court days prior to hearing.
2. Status on Closing Estate.
 - a. Either: (1) a Petition for Final Distribution; or (2) a Report on Status of Administration shall be filed by April 25, 2025, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on May 15, 2025 at 10:00.
 - i. If neither document has been timely filed, an appearance will be required.
 - ii. If the Petition or Report is timely filed, the hearing will be set on May 15, 2025 at 9:00.

PR0000429 IN THE MATTER OF LOIS A. MEREDITH

Petition for letters testamentary.

Ruling. Absent objections, this Petition will be **granted without hearing.**

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 - i. If neither document has been timely filed, an appearance will be required.
 - ii. If the Petition or Report is timely filed, the hearing will be set on May 15, 2025 at 9:00.

PR0000467 IN THE MATTER OF MARGARET MAJOR GRADE

- 1) Petition for letters of administration filed by Daniel DeLong.
- 2) Petition for letters of administration filed by Mark J. Rice.

Ruling. **Appearance is required.**

PR0000484 IN THE MATTER OF DANIEL FORER

Petition for letters testamentary.

Ruling. **Continued to May 16, 2024 – please lodge original will and codicil.**

PR0000505 IN THE MATTER OF JOHN EGLI

Petition for letters testamentary.

Ruling. Absent objections, this Petition will be **granted without hearing.**

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 - i. If neither document has been timely filed, an appearance will be required.
 - ii. If the Petition or Report is timely filed, the hearing will be set on May 15, 2025 at 9:00.

PR0000507 IN THE MATTER OF DAVID NATHAN SHORE

Petition for letters testamentary.

Ruling. **Continued to May 16, 2024 at 9:00. Please file Proof of Publication no later than May 9, 2024.**

PRO2100268 AVRIL A. HARRISON, ESTATE OF

Fourth and Final Report of Administrator on Waiver of Account and Petition for Allowance of Statutory compensation to Administrator and Attorneys, and Compensation to Administrator for Extraordinary Services, Reimbursement to Administrator and Attorney for Costs Advanced, and for Final Distribution

Ruling. Absent objections, this Petition will be **granted without hearing.**

PRO2101009 NICHOLAS D. JAMES, ESTATE OF

Petition for instructions.

Ruling. **Continued to May 16, 2024 at 9:00.** Please file the following no later than May 9, 2024:

1. Proof of Service confirming that all interested parties, including Tristan Scaglione, received at least 15 days' notice on the mandatory Judicial Council Form (DE-120)

PRO2102963 CHRISTOPHER GEORGE YOCK, ESTATE OF

Petition for final distribution.

Ruling. **Continued to May 16, 2024 at 9:00.** Please file the following no later than May 9, 2024:

1. Proof of Service confirming that Cayden Yock received direct notice on the mandatory Judicial Council Form (DE-120) (CRC 7.51(d)).

PRO2104167 DAVID LEONARD GEISINGER, ESTATE OF

Petition for reformation of beneficiary designation of decedent's IRA.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PRO2200268 DAVID M. HELLMAN, ESTATE OF

Order to show cause regarding dismissing creditor's claim.

Ruling. **Appearance is required.**

PRO2200430 GERALD HUGH PISANI, ESTATE OF

- 1) Final distribution; first and final account/waiver of account and report of executor.
- 2) Status regarding filing amended petition and identification of counsel.

Ruling. **Appearance is required.**

PRO2201977 CHARLES MALCOLM STEWART, ESTATE OF

Status conference regarding receipt of petition for final distribution or further report on status of administration.

Ruling. **Continued to May 16, 2024 at 9:00.** Please file the following no later than May 9, 2024:

1. Proof of Service confirming that all interested parties received 15 days' notice.

PRO2202009 JAMES GLENN BUTCHER, ESTATE OF

Petition for final distribution.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PRO2202216 PHYLLIS METCALFE, ESTATE OF

Final distribution.

Ruling. **Appearance is required.**

PRO2202220 MARGARETHE ANN WELCH, ESTATE OF

Petition regarding status of administration.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PRO2203293 IN RE THE DEBORAH A. COOPER SPECIAL NEEDS TRUST, TRUST OF

Status hearing re filing petition for tenth account.

Ruling. **Appearance required.**

PRO2204175 DAVID BRAST AKA DAVID E. BRAST AND AS DAVID EARL BRAST, ESTATE OF

Final distribution.

Ruling. Absent objections, this Petition will be **granted without hearing**.

PRO2300175 HARRIS STANLEY CASPER, ESTATE OF

Final distribution.

Ruling. **Continued to May 16, 2024 at 9:00.** Please address the following no later than May 9, 2024:

1. Andrea Karpman assigned a total of \$64,175 to InheritNOW and Inheritance Funding Co.
2. Each heir is entitled to 1/3 of Decedent's estate (\$60,940.17).
3. Please file either:
 - a. An amendment to the Petition that distributes \$60,940.17 to Scott Karpman and Stacey Karpman, and provides for distribution of Andrea's share with legal authority supporting distribution, or
 - b. Consents by all heirs to this non-pro rata distribution.

PRO2300199 DANIEL JOSEPH CHRYSTALINE AKA DANIEL J. CHRYSTALINE, ESTATE OF

Petition for final distribution.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PRO2300225 BRENDAN A. WARD, ESTATE OF

Final distribution.

Ruling. Absent objections, this Petition will be **granted without hearing.**

PRO2301051 ESTATE OF MORTON HERBERT GOTHELF

- 1) Petition to set aside/vacate.
- 2) Petition to establish ownership.

Ruling. **Continued to May 2, 2024 at 9:00** for review of late-filed document.

PRO2301334 JACK HAMPTON THOMAS, III, ESTATE OF

Petition for final distribution.

Ruling. **Continued to May 2, 2024 at 9:00 for further review.**

PRO2301798 IN THE MATTER OF MICHAEL A. FERRELLI, ESTATE OF

Final distribution.

Ruling. Absent objections, this Petition will be **granted without hearing.**

Judge James T. Chou
Department C
10:00 Calendar

PRO2002254 IN RE THE YAEL ILINETSKY SPECIAL NEEDS TRUST, TRUST OF

Status regarding filing second account.

Ruling. **Appearance is required.**

PRO2002255 IN RE THE YOEL ILINETSKY SPECIAL NEEDS TRUST, TRUST OF

Status regarding filing second account.

Ruling. **Appearance is required.**

PRO2301025 ESTATE OF EUGENIA G. KEFALIDES

Status regarding filing of final inventory and appraisal.

Ruling. **Off calendar** – Final I&A has been filed.

Judge James T. Chou
Department C
1:30 Calendar

PR000229 IN THE MATTER OF JAMES G. GILLAM

First accounting.

Ruling. **Continued to May 9, 2024 at 1:30 for further review.**

PR000245 IN THE MATTER OF KYAAN J. SMOYER

Petition to appoint conservator.

Ruling. **Appearance is required.**

PRO1202726 JORDAN WILLIAMS, CONSERVATORSHIP OF THE ESTATE

Petition - Other - Unblock Account

Ruling. **Appearance is required. Please be prepared to discuss amount of Trustee's bond if this Petition is granted.**

PRO1802944 DAVID ROBERT W. MILLER, LIMITED CONSERVATORSHIP OF THE PERSON

- 1) Status conference regarding receipt of conservator's declaration on the condition/status of the estate whether additional accounting should be dispensed.
- 2) Order to show cause regarding failure to appear on 03/21/24 and to determine if entitled to a waiver of an accounting.

Ruling. **Appearance is required.**

PRO2001039 DORALIZA ANGULO, CONSERVATORSHIP OF THE PERSON AND ESTATE

Accounting; second and final account, and for discharge.

Ruling. **Continued to May 9, 2024 at 1:30 for further review.**

PRO2101436 RAYMOND W. ROSS, CONSERVATORSHIP OF THE PERSON AND ESTATE

- 1) Second amended first accounting, filed on 8/14/23 by Richard Head.
- 2) Status conference regarding further status on second amended fist account.

Ruling. Continued to June 20, 2024 at 1:30; Guyette objections are sustained.

1. Conservator is to file a Third Amended First Account and Report of Conservator and Petition for Settlement Thereof (“Third Amended Petition”) no later than May 24, 2024. This Third Amended Petition will completely restate and supersede the previous petitions it amends for all purposes (CRC 7.3(3)).
2. The Third Amended Petition shall include a complete accounting and a full and complete log of Head’s fees and his attorney’s fees related to Head’s role as conservator, in compliance with CRC 7.751(b).
3. All objections to the Third Amended Petition are to be filed by June 7, 2024.
4. Hearing on Third Amended Petition and any objections thereto shall be set on June 20, 2024 at 1:30.

PRO32053 KIMBERLY MARIE HELMS, CONSERVATORSHIP OF ESTATE OF

Petition for consolidated seventeenth account and report of successor conservator, etc.; and consolidated sixth account and report of trustee of discretionary special needs trust and petition, etc.

Ruling. Continued to May 2, 2024 at 1:30 for further review.

PRO36840 CONSERVATORSHIP OF CAROLE CULVER

Petition for fifteenth account.

Ruling. Continued to May 2, 2024 at 1:30. The Court requires additional time to review the pleadings after receipt of the Amended Court Investigator Report.
