

**Tentative Rulings for May 16, 2024 Probate Calendar**

Judge James T. Chou  
Department C

---

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

---

To Join a Zoom Meeting, please follow this link: [www.marin.courts.ca.gov](http://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](mailto:trudy.verzosa@marin.courts.ca.gov) (preferred)

Tel: (415) 444-7315

Judge James T. Chou  
Department C  
9:00 Calendar

---

**PR000153     IN THE MATTER OF DURABLE POWER OF ATTORNEY AND ADVANCE HEALTH CARE  
DIRECTIVE FOR MAUREEN A. WHITNEY**

- 1) Petition for powers of attorney.
- 2) Status of settlement conference and to set further proceedings.

Ruling. **Appearance is required.**

---

**PR000294     IN THE MATTER OF JEAN ANITA SCHUCH**

Petition for letters of administration.

Ruling. **Appearance is required.**

---

**PR000401     IN THE MATTER OF ELIZABETH M. SHORE TRUST DATED MARCH 10, 1995**

Petition confirming trust assets.

Ruling. **Continued to June 13, 2024 at 9:00.** Please file the following no later than June 6, 2024:

1. Statements for Fidelity -7001 and -7427 confirming that Trustor owned these assets as of the date of execution of the Second Restatement (7/20/23).
2. Copy of IRA, including the beneficiary designation and default language if there is no designated beneficiary.
3. Please note that this Court will not make any finding re validity of the Trust unless Petitioner provides legal and factual support.

---

**PR000412     IN THE MATTER OF JAMES DIRUSCIO**

Petition for letters of administration.

Ruling. **Continued to May 30, 2024 at 9:00.** The following issue raised in the 4/11/24 tentative ruling has not been addressed:

1. Please file Proof of Publication.

---

**PR0000418     IN THE MATTER OF THE RICHARD OWEN WOLD AND DOLORES TODD WOLD REVOCABLE TRUST DATED OCTOBER 29, 2010**

Heggstad petition.

Ruling. **Continued to June 20, 2024 at 9:00.** Please file the following no later than June 12, 2024:

1. Supplement to Petition, signed and verified by Petitioners, setting forth names and addresses of Trustors' grandchildren.
2. Proof of Service confirming at least 30 days' notice to all interested parties on the mandatory Judicial Council form DE-115.
3. Documentation confirming that Trustors owned the following accounts as of date of execution of the Trust (10/29/10), or that these accounts are traceable to assets held as of 4/5/18:
  - a. Citibank -1925
  - b. Citibank -1917
  - c. Citibank -0771
4. Please note that this Court will not make any finding re validity of the Trust unless Petitioner provides legal and factual support.

---

**PR0000430     IN THE MATTER OF THE CLESS-STUART TRUST DATED APRIL 5, 2018**

Petition regarding PC850..

Ruling. **Continued to June 20, 2024 at 9:00.** Please file the following no later than June 12, 2024:

1. Supplement to Petition, signed and verified by Petitioners, setting forth names and addresses of Ralph's heirs-at-law as defined by the Probate Code.
2. Proof of Service confirming at least 30 days' notice to all parties named in response to Issue 1. For any heir who is not a beneficiary of the Trust, notice (DE-115) must be served in the manner set forth in CCP Sec. 413.10, et seq. (Prob. C. Sec. 17203(b)).
3. Documentation confirming that Trustors owned the following accounts as of date of execution of the Trust (4/5/18), or that these accounts are traceable to assets held as of 4/5/18:
  - a. Pen Fed -2016
  - b. Pen Fed -6026
4. Please note that this Court will not make any finding re validity of the Trust unless Petitioner provides legal and factual support.

---

**PR0000431     IN THE MATTER OF LYNELL WHEELOCK**

Petition for letters testamentary.

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 September 19, 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 May 16, 2025, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on June 5, 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 June 5, 2025 at 9:00.

---

**PR0000460     IN THE MATTER OF TRUST FBO VELA VAUGHN REYNOLDS UNDER THE D'USSEAU LIVING TRUST DATED MAY 26, 1995**

Successor trustee.

Ruling. **Appearance is required.**

---

**PR0000465     IN THE MATTER OF BRUCE M. BREITMAN TRUST 2016, AS AMENDED**

Petition to remove trustee; to appoint successor trustee and surcharge.

Ruling. **Continued to August 22, 2024 at 9:00**, pursuant to stipulated order.

---

**PR0000484     IN THE MATTER OF DANIEL FORER**

Petition for letters testamentary.

**Ruling. Continued to June 13, 2024 at 9:00.** Please address the following no later than June 6, 2024:

1. The published notice does not include the paragraph re probate of will/codicil:  
    “The petition requests the decedent’s will and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court.”  
    Please republish with complete notice and file Proof of Publication.
2. The Codicil is not self-proving as the witnesses did not sign under penalty of perjury (Prob. C. § 8220(b)). Please file Proof of Subscribing Witness.

---

**PR0000491     IN THE MATTER OF ROBERT BRADLEY BRAZELL**

Petition for letters testamentary.

**Ruling. Continued to June 13, 2024 at 9:00.** Please file the following no later than June 6, 2024:

1. Proof of Service confirming that notice of the Amended Petition was mailed to all interested parties. The box for Item 4 of the Notice must be checked indicating that Petitioner requests that a will be admitted to probate.
2. The published notice does not include the paragraph re probate of will/codicil:  
    “The petition requests the decedent’s will and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court.”  
    Please republish with complete notice and file Proof of Publication.
3. File a Supplement to Petition, signed and verified by Petitioner, that provides the following information:
  - a. Does Decedent have any unsecured creditors in California?
  - b. If so, what is the amount of this debt? Bond may be required in this amount.  
(Prob. C. § 8571)

---

**PR0000503     IN THE MATTER OF THE ESTATE OF CHRISTOPHER SCALES**

Petition for letters testamentary.

Ruling. **Continued to June 13, 2024 at 9:00.** Please address the following no later than June 6, 2024:

1. Lodge original Will with the Court.
2. File Supplement to Petition, signed and verified by Petitioner, that provides the following information:
  - a. Response to Item 3f.
  - b. Relationships of all parties named in Item 8.
  - c. Who is the Trustee of the Christopher Scales Revocable Living Trust?
    - i. If it is Petitioner, who are the beneficiaries and did they receive proper notice?
    - ii. If it is not Petitioner, did Trustee receive proper notice?

---

**PR0000507     IN THE MATTER OF DAVID NATHAN SHORE**

Petition for letters testamentary.

Ruling. **Continued to June 6, 2024 at 9:00.** The following issue raised in the 4/25/24 tentative ruling has not been addressed:

1. Please file Proof of Publication no later than May 9, 2024.

---

**PR0000530     IN THE MATTER OF JOHN DONALD LAMOND**

Petition for letters of administration.

Ruling. **Continued to June 6, 2024 at 9:00.** Please file Proof of Publication no later than May 30, 2024.

---

**PRO1702720     ADONIYA A. DEKELAITA, ESTATE OF**

Motion to relieve counsel.

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

---

**PRO1900520     FREDERIC ALAN PERLEY, ESTATE OF**

First and final account and report of administrator and petition for its settlement; for allowance of administrator's compensation and attorney's fees for ordinary services; and for final distribution.

Ruling. **Continued to June 6, 2024 at 9:00** – please file POS confirming that all interested parties received at least 15 days' notice of the hearing on the Second Amendment.

---

**PRO2100029 IN RE THE 2007 DINO AND JOANNE BERTOLOZZI TRUST, TRUST OF**

- 1) Petition to compel co-trustees to account and distribute and for surcharge.
- 2) Status regarding ruling on petition; potential resolution; and to address surcharge.

Ruling. **Appearance is required.**

---

**PRO2100268 AVRIL A. HARRISON, ESTATE OF**

Amended Petition for final distribution and fourth and final report of administrator.

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

---

**PRO2101009 NICHOLAS D. JAMES, ESTATE OF**

Petition for instructions.

Ruling. **Appearance is required.**

---

**PRO2102394 IN RE THE SANDY FIELDS REVOCABLE LIVING TRUST DTD 12/15/2000, TRUST OF**

- 1) Petition for order confirming trust assets as belonging to another, Johanna Berger, and ascertaining beneficiaries and determining to whom trust property shall pass.
- 2) Petition to approve settlement agreement.

Ruling.

1. Absent objections, the Petition to Approve Settlement Agreement will be **granted without hearing.**
2. The Petition for Order Confirming Trust Assets is **dismissed without prejudice.**

---

**PRO2203041 IN THE MATTER OF THE ESTATE OF SANDY FIELDS**

Petition for letters of administration.

Ruling. **Continued to June 13, 2024 at 9:00**, for status on performance of settlement agreement approved in the Sandy Fields Revocable Living Trust matter (PRO2102394).

---

**PRO2102963 CHRISTOPHER GEORGE YOCK, ESTATE OF**

Final distribution.

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

---

**PRO2201912 IN RE THE ALFRED J. VILLA 2002 SEPARATE PROPERTY TRUST, TRUST OF**

- 1) Petition for probate code 17200 regarding trust distribution and for surcharge and removal of trustees filed by Gwen Villa.
- 2) Status regarding potential resolution.

Ruling. **Appearance is required.**

---

**PRO2201977 CHARLES MALCOLM STEWART, ESTATE OF**

Petition regarding status report of administration.

Ruling. Absent objections, the Second Report of Status of Administration is **accepted and approved**.

Future Dates.

1. Status on Closing Estate.
  - a. Either: (1) a Petition for Final Distribution; or (2) another Report of Status of Administration shall be filed by September 26, 2024, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on October 17, 2024 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 October 17, 2024 at 9:00.

---

**PRO2300175 HARRIS STANLEY CASPER, ESTATE OF**

Final distribution.

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

---

**PRO2300831 IN THE MATTER OF THE MANTEGANI SURVIVORS TRUST, AS AMENDED AND RESTATED IN 2005**

- 1) Petition for order removing trustee and appointing successor trustee filed by Rita Murphy and Pamela Love.
- 2) Further status and possible evidentiary hearing setting.

Ruling. **Appearance is required.**

Judge James T. Chou  
Department C  
10:00 Calendar

---

**PR000038 IN THE MATTER OF BRADFORD E. THOMSON**

Status regarding filing of final inventory and appraisal.

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

---

**PR0000190 IN THE MATTER OF CATHERINE EBERHARD JACOBSON**

Status regarding filing of final inventory and appraisal.

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

---

**PR0000234 IN THE MATTER OF GARY WINFIELD HOLBROOK**

- 1) Status regarding filing of final inventory and appraisal.
- 2) Order to show cause for failure to file final inventory and appraisal and failure to appear on 04/18/2024.

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

---

**PR0000238 IN THE MATTER OF ISAIAH NENGO**

- 1) Status regarding filing of final inventory and appraisal.
- 2) Order to show cause for failure to file final inventory and appraisal and failure to appear on 04/18/2024.

Ruling. **Appearance is required for the OSC.** The Court notes that the Final I&A has been filed.

---

**PRO2202681 ARMAN DAVE SINGH SIBIA, ESTATE OF**

Status report of administration or petition for final distribution.

Ruling. **Appearance is required.** Appearance may be made by zoom.

---

---

**PRO2300610 IN THE MATTER OF BARBARA J. TERRIS, ESTATE OF**

Status regarding filing petition for final distribution or report of status of administration.

Ruling. **Appearance is required.**

---

**PRO2203945 ESTATE OF DINAH ISABELLE FUENTES**

1. Status Conference - Filing of Final Inventory and Appraisal
2. Order - Show Cause - Other - Failure to appear on 04/04/2024
3. Status regarding filing petition for final distribution or report of status of administration.

Ruling. **Appearance is required.**

---

Judge James T. Chou  
Department C  
1:30 Calendar

---

**PR000166 IN THE MATTER OF TAYLOR AVILA**

Petition to appoint guardian of the person.

Ruling. **Appearance is required.**

---

**PR000241 IN THE MATTER OF JAISHAUN MALEEK FELDER**

Amended Petition to appoint guardian of the person.

Ruling. **Continued to June 27, 2024 at 1:30.**

---

**PRO1403391 KRONKAEW HUWYLER, CONSERVATORSHIP OF THE PERSON AND ESTATE**

Status hearing re filing fifth accounting.

Ruling. **Off calendar** – Fifth Account was filed on 5/13/24 and set for hearing on 8/29/24.

---

**PRO1704652 DAXTON WEST PHILIPS, GUARDIANSHIP OF THE ESTATE**

Status regarding possible settlement and to set further proceedings; second and third accountings (Courtney Collier's accountings).

Ruling. **Appearance is required.**

---

**PRO2001702 JILL W. PENHALIGON, CONSERVATORSHIP OF THE ESTATE**

Second accounting.

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

1. Conservator is to file the Third Account for the period 1/1/24 – 12/31/25 by March 12, 2026.
2. A status hearing re filing the Seventh Account shall be set on April 23, 2026 at 1:30.
  - a. If not timely filed, an appearance will be required.
  - b. If the Third Account is timely filed, the hearing will be set on April 23, 2026 at 1:30.

---

PRO39871      SIMA YAMIN, CONSERVATORSHIP OF THE PERSON AND ESTATE OF

Status hearing re filing fifteenth account.

Ruling. **Appearance is required.**

---