

1. 22PR0052 ESTATE OF SHANNON

**Status of Administration
Inventory and Appraisal**

A partial Inventory and Appraisal was filed on November 1, 2023. The sole asset of the estate is an unrealized claim in pending litigation in the case of Estate of Brett Shannon, et al v. Apple Mountain, LP (PC20210396). The plaintiffs in that case are in the process of amending the Complaint and a hearing on that motion is scheduled for January 26, 2024.

TENTATIVE RULING #1: A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 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.

2. 21PR0017 ESTATE OF DAYTON-AXLINE

Status of Administration

Following hearing on the Petition for Final Distribution, an Order for Final Distribution was entered on May 15, 2023. To date, there are no receipts for distribution and no Ex Parte Petition for Final Discharge (Judicial Council Form DE-295) in the court's file.

TENTATIVE RULING #2: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 8, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 2025, IN DEPARTMENT NINE, AT WHICH TIME THE COURT ANTICIPATES THAT RECEIPTS OF FINAL DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITIONS FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

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3. 22PR0056 ESTATE OF DAVINO

Status of Administration

Letters of Administration were issued on April 27, 2022. An Inventory and Appraisal was filed on March 13, 2023.

TENTATIVE RULING #3: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 8, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 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.

4. 21PR0026 ESTATE OF MCKENNA

Status of Administration

The Order for Final Distribution was entered on January 30, 2023. To date, there are no receipts for distribution and no Ex Parte Petition for Final Discharge (Judicial Council Form DE-295) in the court's file.

TENTATIVE RULING #4: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 8, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 2025, IN DEPARTMENT NINE, AT WHICH TIME THE COURT ANTICIPATES THAT RECEIPTS OF FINAL DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITIONS FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

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5. 22PR0216 ESTATE OF WHEELER

Status of Administration

The Order for Final Distribution was entered on July 31, 2023. Receipts for distribution have been filed and an Ex Parte Petition for Final Discharge (Judicial Council Form DE-295) was approved by the court on December 19, 2023.

TENTATIVE RULING #5: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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. PP20210110 ESTATE OF POWELL

**Status of Administration
Petition for Final Distribution**

Letters Testamentary were issued on August 3, 2021, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on January 24, 2022.

Proof of Service of Notice of the hearing on the Petition was filed on December 18, 2023.

The proposed distribution of the estate includes:

- Fourteen percent to Animal Outreach;
- Fourteen percent to Sierra Wildlife Rescue
- Seventy-two percent to Jehovah's Witness Worldwide Work-African Continent.

The Petition requests:

1. The Report and Account filed with the Petition be settled, allowed and approved and that the administration of the estate be brought to a close;
2. All acts of the Executor reported to the court be confirmed and approved;
3. The Administrator be authorized to pay himself \$11,743.21 in statutory compensation, plus \$3,829.36 in costs advanced to the estate;
4. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be distributed made to the beneficiaries as set forth in the Petition.

TENTATIVE RULING #6: ABSENT OBJECTION, THE PETITION IS GRANTED AS REQUESTED. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 2025, IN DEPARTMENT NINE, AT WHICH TIME THE COURT ANTICIPATES THAT RECEIPTS OF FINAL DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITIONS FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

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. PP20210048 ESTATE OF JACKSON

Status of Administration

The Order for Final Distribution was entered on September 15, 2022. Receipts for distribution have been filed and an Ex Parte Petition for Final Discharge (Judicial Council Form DE-295) was approved by the court on January 30, 2023.

TENTATIVE RULING #7: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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. 22PR0300 ESTATE OF CAMPAGNA

Petition for Final Distribution

Letters Testamentary were issued on March 1, 2023, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on June 13, 2023.

A waiver of Account was executed by the Petitioner as the sole beneficiary entitled to distributions under the estate.

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

The proposed distribution of the estate is to the Petitioner as the trustee of the Lawrence M. Campagna Revocable Trust, the sole beneficiary of decedent's Will.

The Petition requests:

1. The administration of the estate be brought to a close without the requirement of an accounting;
2. All reported acts and proceedings of Petitioner as Executor be confirmed and approved;
3. Petitioner be authorized to pay statutory attorney fees in the amount of \$15,225.00;
4. Petitioner be authorized to pay himself \$15,225.00 in statutory compensation;
5. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be distributed made to the beneficiaries as set forth in the Petition.

TENTATIVE RULING #8: ABSENT OBJECTION, THE PETITION IS GRANTED AS REQUESTED. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 2025, IN DEPARTMENT NINE, AT WHICH TIME THE COURT ANTICIPATES THAT RECEIPTS OF FINAL DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITIONS FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

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9. PP20200230 ESTATE OF HOFMMAN

Status of Administration

The Order for Final Distribution was entered on following hearing on January 9, 2023. An Order for Final Discharge was entered on April 14, 2023.

TENTATIVE RULING #9: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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. PP20210191 ESTATE OF HAINSWORTH

Status of Administration

The Order for Final Distribution was entered on following hearing on January 9, 2023. An Order for Final Discharge was entered on January 2, 2024.

TENTATIVE RULING #10: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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11. PP20210026 ESTATE OF WARDEN

Status of Administration

The court granted the Petition for Termination of Proceedings and Discharge following hearing on November 6, 2023.

TENTATIVE RULING #11: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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. 22PR0038 ESTATE OF LANNER

Status of Administration

The court granted the Ex Parte Petition for Final Discharge on March 14, 2023.

TENTATIVE RULING #12: THE ESTATE HAVING BEEN DISTRIBUTED AND THE PERSONAL REPRESENTATIVE HAVING BEEN DISCHARGED, THE MATTER IS DISMISSED.

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13. PP20210208 ESTATE OF SIEBENTHAL

Status of Administration

An Order for Final Distribution was entered by the court on October 12, 2022. To date, there are no receipts for distribution and no Ex Parte Petition for Final Discharge (Judicial Council Form DE-295) in the court's file.

TENTATIVE RULING #13: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 8, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, JANUARY 6, 2025, IN DEPARTMENT NINE, AT WHICH TIME THE COURT ANTICIPATES THAT RECEIPTS OF FINAL DISTRIBUTION WILL HAVE BEEN FILED AND AN EX PARTE PETITIONS FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) SUBMITTED TO THE COURT.

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14. 23PR0278 IN THE MATTER OF SIGMOND F. BECK

Petition to Confirm Trust Assets and Validity of Trust

Petitioner is trustee of the Dawson Family Trust, dated November 7, 2001, as amended October 13, 2011 ("Trust"). The last surviving of the two grantors died on May 18, 2023; Petitioner is their son.

Petitioner seeks an Order confirming that the IRA held in the Stifel bank account referenced in the Petition is a Trust asset. There is no designated beneficiary for the account. See Petition, Attachment 4 (monthly account statement).

Trust assets were transferred to the Trust following the death of the surviving grantor by means of a pour-over Will granting the residue of the estate to the Trust. Petition, Attachment 6.

The Trust document, Exhibit A, which is dated September 29, 2017, lists the Trust assets, among them "D.A. Davidson & Co. IRA". Petition, Attachment 5, Section 2.1. According to the Petition, the funds in this account were transferred to the Stifel bank account by the grantor after Exhibit A to the Trust was executed but were not placed in the name of the Trust.

On the same date that they executed the Trust, the grantors executed a "General Transfer and Assignment" which designates the trustee of the Trust as the beneficiary of all retirement benefits of the grantors, expressly including Individual Retirement Accounts (IRAs). Petition, Attachment 7, Paragraph 3.4.

Probate Code § 850 permits a trustee who has a claim to property, the title to or possession of which is held by another, to file a petition requesting that the court make an order pursuant to Probate Code § 856 authorizing and directing the person having title to or possession of real property to execute a conveyance or transfer to a person entitled thereto, or granting other appropriate relief. Probate Code § 851 requires the Petitioner to serve notice of the hearing and a copy of the Petition at least 30 days prior to the hearing to each person claiming an interest in or having title to or possession of the property. When the matter concerns a decedent estate, notice shall also be given to any heir or devisee whose interest may be affected by the Petition in accordance with Probate Code § 1200.

In this case, Petitioner served notice and filed a proof of service of notice of the hearing on the Petition on November 7, 2023, to all of the potential Trust beneficiaries. Petition, Attachment 11, paragraph 4.1.

Probate Code § 857 provides that in the event that the court issues such an Order:

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(a) The order is prima facie evidence of the correctness of the proceedings and of the authority of the personal representative or other fiduciary or other person to make the conveyance or transfer.

(b) After entry of an order that the personal representative, other fiduciary, or other person execute a conveyance or transfer, the person entitled thereunder has the right to the possession of the property, and the right to hold the property, according to the terms of the order as if the property had been conveyed or transferred in accordance with the terms of the order.

There is no objection to the Petition on file with the court. In accordance with the rule enunciated in the case of Est. of Heggstad, 16 Cal. App. 4th 943 (1993), the court finds that the grantors sufficiently manifested their intention to convey the IRA account to their Trust in writing. Further, absent objection, the court finds that the Dawson Family Trust, as amended November 7, 2001, is valid.

TENTATIVE RULING #14: ABSENT OBJECTION, THE PETITION IS GRANTED AS REQUESTED.

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

Petition for Accounting

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.

On October 11, 2023, a Notice of Settlement was filed which conditions final settlement upon the completion of specified terms within 45 days of the settlement and indicating that a request for dismissal will be filed no later than December 31, 2023.

Nothing new has been filed with the court since the hearing on October 23, 2023, at which the matter was continued to January 8, 2024.

TENTATIVE RULING #15: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, JANUARY 8, 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.

16. 22PR0112 ESTATE OF WILLIAMS

Objection to Petition for Final Distribution

Letters of Administration were issued on November 30, 2022, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on March 14, 2023.

Proof of Service of Notice of the hearing on the Petition was filed on October 30, 2023.

The proposed distribution of the estate includes distribution in equal shares to each of the four surviving adult children. From these shares Petitioner proposes to deduct amounts from two of the heirs who remained resident on decedent's property for the fair market value of back rent since decedent's death in 2015, utilities, legal fees for eviction and the cost of removal of junk cars after one of the heirs was evicted. Allison Williams share will be reduced by \$22,971.37 and Terry Williams share will be reduced by \$38,481.79 to cover these outstanding debts and expenses to the estate.

Petitioner requests reimbursement of \$5,851.00 for costs of work performed for the estate to prepare the real property for sale. This is in addition to \$26,131.34 in costs for such work that has already been reimbursed to Petitioner from estate assets. Much of this work was required to restore the property to a saleable condition after two of the beneficiaries moved out nearly eight years after decedent's death. Because the principal asset of the estate was the real property, there were no estate funds available to cover these costs.

The Petition requests:

1. The administration of the estate be brought to a close;
2. The First and Final Account filed with the Petition be settled, allowed and approved;
3. All acts, transactions and proceedings of the Personal Representative be confirmed and approved;
4. The Personal Representative be authorized to pay statutory attorney fees in the amount of \$9,810.42;
5. The Personal Representative be authorized to pay himself \$9,810.42 in statutory compensation;
6. The Personal Representative be authorized and directed to reimburse himself \$5,851.00 for costs advanced to and work performed on behalf of the estate.

At the hearing on December 11, 2023, Terry Williams objected to the Petition being granted. The court ordered that any objection to the Petition be filed by December 22, 2023 and continued the matter to January 8, 2024.

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On January 3, 2024, Terry Williams filed a proof of service, dated December 22, 2023, of an Objection to the Petition and Final Account with the court; however, the attachment was not included with the filing and it is not possible to determine upon whom the objection was served.

The Objection raises the following issues:

1. Requests receipts for any funds that James Williams has reimbursed to himself for funds advanced to the estate.
2. Given that the personal representative proposes to charge Terry Williams for rent for living on the property, rent should also be charged to Chrys Gwinn, who also lived on the property for four months.
3. Terry Williams should be credited with improvements that he made to the property, as detailed in the Objection (\$18,840)
4. The combined rental income for three tenants who lived on the property after the decedent's death was \$1,200 per month, \$500 more than the monthly mortgage, which income is not reflected in the accounting.
5. Chrys Gwinn was not charged storage fees for items stored on the property, and the trailer, labor and dump fees between January and March 2023 were for disposal of Chris Gwinn's property and should not be paid out of estate funds.

The Objection further alleges breach of fiduciary duty for increasing rent to two of the heirs without notifying them of a rent increase, while not charging rent to another heir who also lived there; and reimbursing himself from estate funds without court approval and then charging the estate interest.

Objector requests the court to deny the Petition require receipts for all amounts reimbursed to the personal administrator, deny the Petition's request to deduct rent from Terry and Allison Williams' share of the estate, and approve reimbursement to Terry Williams for costs and labor associated with maintaining decedent's property.

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

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