2. 22PR0201 ESTATE OF ARNOLD PLANT

Review Hearing

See Related Case No. 22PR0202 ESTATE OF UNRUH (#15)

At the hearing on April 15, 2024, the court ordered that no further distributions of the estate be made, and noting that supplement to the accounting is due by April 29, 2024.

The court established a deadline for any additional documents by May 6, 2024.

Since the last hearing, the Administrator filed a proof of service of the First and Final Account and Report ("Account") on April 29, 2024, and filed proof of service of the Account May 6, 2024, indicating that it was served by mail on April 29, 2024, to "attached list," <u>but no list was attached</u>.

Co-Administrator Arnetta Champlain filed a Declaration, dated April 26, 2024 ("Champlain Declaration") with explanations of various issues that had been raised in prior objections.

Co-Administrator Arnold Plant III filed a Supplement to First and Final Report and Account and a Petition for its Settlement and for Final Distribution on April 29, 2024.

Linda Cunningham, granddaughter of decedent and the daughter of Sylvia Plant, an heir to the estate, filed a Declaration, dated May 3, 2024, stating that she is acting on behalf of Sylvia Plant, as well as Ron Unruh and Patricia Neuberger, heirs to the estate of Yvonne Unruh (see related case). The Declaration takes issue with multiple items from the Administrators' Account and Declarations.

Sylvia Plant has requested special notice in this proceeding. Patricia Neuberger has filed a Declaration in this case questioning the distribution of the co-Administrators of her mother's property.

TENTATIVE RULING #2: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

3. 24PR0048 ESTATE OF FRIEDLAND

Letters of Administration

Decedent died intestate on October 1, 2023, survived by a brother and a son. Petitioner is decedent's brother.

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

Waiver of bond has been filed with the court by the heirs.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on March 20, 2024.

Proof of service of notice of the hearing on the Petition was filed on March 29, 2024.

Kazanjian

Proof of publication was filed on March 29, 2024.

TENTATIVE RULING #3: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

4. PP20180090 ESTATE OF BERG

Status of Administration

Letters of Administration were issued on June 20, 2018.

An Inventory and Appraisal was filed on June 12, 2019.

A Petition for Final Distribution was filed on January 4, 2022, and was approved by the court on June 5, 2023.

There are no Receipts of Distribution on file with the court.

TENTATIVE RULING #4: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

5. 23PR0053 ESTATE OF SEARLES

Status of Administration

Decedent died intestate on April 22, 2015, survived by his spouse and three adult children. Petitioner estimates the value of the estate to be \$0.00, but requested Letters of Administration for the purpose of asserting and maintaining a wrongful death lawsuit and potential settlement agreement. In requesting Letters of Administration, the Administrator represented that if she becomes aware of any property that should be included in the estate she will file an ex parte Petition and Order to set bond.

In the Petition for Letters of Administration, the Administrator requested the court to extend the period of time for filing an Inventory and Appraisal beyond the four-month deadline specified in Probate Code § 8800(b), which provides that "the court may allow such further time for filing an inventory and appraisal as is reasonable under the circumstances of a particular case." The Administrator represented that she will file an Inventory and Appraisal within four months of becoming aware of any property to be administered as part of decedent's estate.

No additional petitions to the court have been filed since letters were issued on May 26, 2023.

TENTATIVE RULING #5: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE. A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

6. 21PR0056 ESTATE OF VERRY

Final Distribution on Waiver of Account

Letters of Administration were issued on July 27, 2022, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on January 18, 2024.

Waivers of Account were executed by all of the heirs entitled to distributions under the estate.

Proof of Service of Notice of the hearing on the Petition was filed on May 1, 2024.

The proposed distribution of the estate is set forth in Schedule A of the Petition.

The Petition requests:

- 1. The administration of the estate be brought to a close without the requirement of an accounting;
- 2. Upon filing of receipts that Petition may apply to be discharged and released from all liability that may be incurred hereafter.
- 3. All acts of the Administrator be confirmed and approved;
- 4. The Administrator be authorized to pay statutory attorney fees in the amount of \$\$10,839.50;
- 5. The Administrator be authorized to pay herself \$10,839.50 in statutory compensation, as well as \$43,977.96 for costs advanced to the estate as detailed in the Petition;
- 6. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be distributed to the beneficiaries as set forth in the Petition.

TENTATIVE RULING #6: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

7. 23PR0116 ESTATE OF MARQUEZ

Final Distribution Hearing

Letters Testamentary were issued on September 18, 2023, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on February 6, 2024.

Waivers of account were executed by all heirs entitled to distribution under the estate.

Proof of Service of Notice of the hearing on the Petition was filed on March 15, 2024.

The proposed distribution of the estate to Petitioner, who is decedent's daughter.

The Petition requests:

- 1. The report and waiver of account be approved;
- 2. All acts of Petitioner be confirmed and approved;
- 3. That waiver of statutory compensation to the personal representative be approved
- 4. Distribution of the estate in Petitioner's hands and any other property of the estate not now known or later discovered be distributed to the beneficiaries as set forth in the Petition.

TENTATIVE RULING #7: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

8. 23PR0020 ESTATE OF HELWIG

Status of Administration

TENTATIVE RULING #8: A PETITION FOR FINAL DISTRIBUTION HAVING BEEN FILED WITH THE COURT AND SCHEDULED FOR HEARING ON JUNE 24, 2024, THIS MATTER IS CONTINUED TO 8:30 A.M. ON MONDAY, JUNE 24, 2024, IN DEPARTMENT NINE.

9. 21PR0066 ESTATE OF LAUMBACH

Status of Administration

Letters Testamentary were issued on February 22, 2022.

An Inventory and Appraisal and Petition for Final Distribution were filed on February 22, 2023.

There is no Order for Final Distribution on file with the Court; however, receipts of distribution have been filed.

There is no ex parte Petition for Final Discharge (Judicial Council Form DE-295) on file with the court.

TENTATIVE RULING #9: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

10. 23PR0323 ESTATE OF MASHBURN

Transfer in From San Bernadino County

TENTATIVE RULING #10: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

11. PP20210037 ESTATE OF STOLP

Status of Administration

A Petition for Final Distribution was granted at the hearing on August 28, 2023.

There is no Order for Final Distribution on file with the court.

There are no Receipts of Distribution on file with the court.

TENTATIVE RULING #11: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

12. 23PR0052 ESTATE OF REES

Status of Administration

Letters of Administration were issued on May 31, 2023.

An Inventory and Appraisal was filed on December 19, 2023.

<u>There is no Petition for Final Distribution on file with the court</u>. The Administrator is the sole heir of the estate.

TENTATIVE RULING #12: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

13. 24PR0067 ESTATE OF RIGOPOULOS

Petition for Letters Testamentary

Decedent died testate on September 15, 2021, survived by a spouse and two adult children. Petitioner is decedent's spouse.

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

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

A Duties/Liabilities statement (DE 147/DE 147s) was filed on March 14, 2024.

Proof of service of notice of the hearing on the Petition was filed on March 18, 2024.

Proof of publication was filed on April 3, 2024.

TENTATIVE RULING #13: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043)

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

14. 23PR0013 ESTATE OF PETERSON

Status of Administration

Letters Testamentary were issued on June 13, 2023.

An Inventory and Appraisal was filed on November 17, 2023.

There is no Petition for Final Distribution on file with the court.

TENTATIVE RULING #14: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

15. 22PR0202 ESTATE OF UNRUH

Review Hearing

See Related Case No. Estate of Plant (22PR0201) (#2)

At the hearing on April 15, 2024, the court ordered that no further distributions of the estate be made, and noting that supplement to the accounting is due by April 29, 2024.

The court established a deadline for any additional documents by May 6, 2024.

Since the last hearing, the Administrator filed a proof of service of the First and Final Account and Report ("Account") on April 29, 2024, and filed proof of service of the Account May 6, 2024, indicating that it was served by mail on April 29, 2024.

Co-Administrator Arnetta Champlain filed a Declaration, dated April 26, 2024 ("Champlain Declaration") with explanations of various issues that had been raised in prior objections.

Co-Administrator Arnold Plant III filed a Supplement to First and Final Report and Account and a Petition for its Settlement and for Final Distribution on April 29, 2024.

Linda Cunningham, granddaughter of decedent and the daughter of Sylvia Plant, an heir to the estate, filed a Declaration, dated May 3, 2024, stating that she is acting on behalf of Sylvia Plant (see related case), as well as Ron Unruh and Patricia Neuberger, heirs to the estate of decedent. The Declaration takes issue with multiple items from the Administrators' Account and Declarations.

TENTATIVE RULING #15: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

16. 24PR0050 IN THE MATTER OF CATHERINE LYNN SARGENT

Letters of Administration

Decedent died intestate on January 8, 2024, survived by two adult children. Petitioner is decedent's son.

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

Waivers of bond have been filed with the court by both heirs.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on February 26, 2024.

There is no proof of service of notice of the Petition on file with the court, as required by Probate Code § 8110.

Proof of publication was filed on April 2, 2024.

TENTATIVE RULING #16: APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MAY 13, 2024, IN DEPARTMENT NINE.

17. 23PR0147 IN THE MATTER OF INGRID HELGA NOBLE

Final Distribution on Waiver of Account

Letters of Administration were issued on September 6, 2023, granting Petitioner full authority under the Independent Administration of Estates Act. Amended Letters were issued on April 18, 2024.

A Final Inventory and Appraisal was filed on January 3, 2024.

Waivers of Account were executed by all the heirs entitled to distributions under the estate.

Proof of Service of Notice of the hearing on the Petition was filed on April 9, 2024.

The proposed distribution of the estate is to the Petitioner as trustee of the Ingrid Helga Noble Revocable Living Trust in accordance with the Will of decedent, which is attached to the Petition for Probate, filed on July 6, 2023.

The Petition requests:

- 1. The report of Petitioner's administration of the estate be allowed and approved;
- 2. All acts and proceedings of Petitioner be confirmed and approved;
- 3. The Administrator be authorized to pay statutory attorney fees in the amount of \$18,085, plus costs advanced to the estate in an amount not to exceed \$2,000;
- 4. Approval of distribution of the estate as specified in the Petition for Final Distribution.

TENTATIVE RULING #17: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

18. 24PR0049 IN THE MATTER OF RUTH E. KIDDER

Petition for Letters Testamentary

Decedent died intestate on December 11, 2023, survived by two adult children. Petitioner is decedent's daughter.

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

Petitioner is named as Executor in the Will.

The Will was lodged with the court on February 26, 2024, as an attachment to the Petition, and is admitted to probate.

The Will waives bond.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on February 26, 2024.

Proof of service of notice of the hearing on the Petition was filed on April 16, 2024.

Proof of publication was filed on April 26, 2024.

TENTATIVE RULING #18: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MAY 12, 2025, IN DEPARTMENT NINE.

19. 24PR0122 IN THE MATTER OF SHARLEEN ELEN HUNTER

Petition to Establish Fact of Marriage

The Petition to establish the fact, date and place of marriage of Petitioner on March 14, 1998, in Meyers, El Dorado County, California is requested because there is no official record. The Petition is supported by an executed and notarized Certificate of Marriage and a Declaration by Petitioner dated May 2, 2024.

TENTATIVE RULING #19: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED.

20. 24PR0051 IN THE MATTER OF WILLIAM RYAN EASTERBROOK

Petition for Letters of Administration

Decedent died intestate on October 23, 2023, survived by his spouse and four minor children. Petitioner is decedent's spouse.

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

The Petition requests that bond be set at \$725,000.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on February 26, 2024.

Proof of service of notice of the hearing on the Petition was filed on February 29, 2024.

Proof of publication was filed on March 20, 2024.

TENTATIVE RULING #20: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).

21. PP20180099 THE AIDNIK FAMILY 2014 TRUST

Petition for Order Allowing Attorney's Fees

The two Petitions before the court, submitted by Haylee Aidnik and Aileen Aidnik, respectively, both of whom are co-trustees of the Aidnik Family Trust ("Trust"), are petitions to the court concerning the internal affairs of the Trust pursuant to Probate Code § 17200. Specifically, the both Petitions seek court approval for attorney's fees for legal services rendered to the Trust.

Each co-trustee has filed a consent to and requests the court's approval of the other co-trustee's Petition.

According to the Declaration of Todd Murray, dated April 11, 2024, attorney Todd Murray has represented Petitioner Aileen Aidnik since March, 18, 2018 in her capacity as cotrustee of the Trust, which has included trust administration, distribution of assets, drafting and filing multiple petitions and oppositions, coordinating with the counsel for the other co-trustee, discovery, court appearances in an evidentiary hearing held on November 12, 2020, a follow-up hearing on April 21, 2021, and a long-cause hearing on January 19, 2019, correspondence, research and analysis and settlement discussions in contested proceedings involving animosity and distrust between the parties. These services have resulted in securing and preserving assets of the Trust and clarifying the terms of the Trust. The total size of the Trust estate is \$230,000 and its administration has been ongoing for more than six years, since March, 2018. The total amount of fees requested for those services is \$36,184.39 at \$350 per hour for Todd Murray's time and \$125 per hour for a certified paralegal, which amount includes costs in the amount of \$2,643.14, as detailed in Exhibit A to the Declaration.

According to the Declaration of Bryan Phipps, dated March 28, 2024, attorney Bryan Phipps has represented Petitioner Haylee Aidnik in her capacity as co-trustee of the Trust, which has included determining the present beneficiaries, confirming assets of the Trust, clarifying Trust terms, trust administration, drafting and filing multiple petitions and oppositions, coordinating with the counsel for the other co-trustee, discovery, court appearances in and evidentiary hearing held on November 12, 2020, a follow-up hearing on April 21, 2021, and a long-cause hearing on January 19, 2019, correspondence, research and analysis and settlement discussions in contested proceedings involving animosity and distrust between the parties. These services have resulted in securing and preserving assets of the Trust and clarifying the terms of the Trust. The total size of the Trust estate is \$230,000 and its administration has been ongoing for more than six years, since March, 2018. The total amount of fees requested for those services is \$50,670.25 at \$350 per hour (discounted from the current rate of \$535 per

hour) for Bryan Phipps' time, and associate attorneys' time at rates between \$\$250-300 per hour, and \$150-\$200 per hour for a certified paralegal, and costs in the amount of \$2,048.96, as detailed in Exhibit A to the Declaration.

TENTATIVE RULING #21: ABSENT OBJECTION THE PETITION IS GRANTED AS REQUESTED. ANY PERSON WHO HAS AN OBJECTION MAY MAKE IT ANY TIME, EVEN ORALLY AT THE HEARING (PROBATE CODE § 1043).