

March 3, 2025
Dept. 9
Probate Tentative Rulings

1.	PP20200089	CONSERVATORSHIP OF FOWLER
Accounting Hearing		

See related case, Estate of Fowler PP20210174 (No. 3).

Petitioner was appointed Conservator of the Person and Estate of the Conservatee on August 20, 2020. Letters of Conservatorship were issued on August 27, 2020, and at all times since his appointment Petitioner has been acting as Conservator.

Petitioner filed a First Account and Report on August 10, 2021, and an Amended First Account is being filed along with this Second Account. The Conservatee died on November 9, 2020. Notice of Hearing of this Petition was filed on February 11, 2025.

The Petition requests that:

1. Notice of hearing of this Account, Report, and Petition has been given as required by law;
2. The Court make an order approving, allowing, and settling the attached account and report of the Conservator as filed;
3. The Court authorize payment of \$3,500.00 to Adam Sanders as attorney for the conservator of the person and estate for legal services to the conservatorship during the accounting period and authorized payment of \$1,089.58 to Adam Sanders for costs incurred and anticipated in the conservatorship, and that these fees and costs be paid from the Estate of Carolyn Fowler, as the Conservatorship has transferred all assets to the Estate already;
4. The Court authorize and approve Conservator's delivery of the conservatorship property in his possession to himself as Administrator of the Estate of Carolyn Anne Fowler, subject to a lien for any amounts of the payments herein authorized that remain unpaid, and that the conservator of the person and estate be discharged.

TENTATIVE RULING #1:

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).

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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2.	22PR0201	ESTATE OF PLANT
Status on Mediation		

See related case, Estate of Unruh 22PR0202 (No. 12).

TENTATIVE RULING #2:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE.

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3.	PP20210174	ESTATE OF FOWLER
Final Distribution		

See related case, PP20200089 Conservatorship of Fowler (No. 1)

Letters of Administration were issued on November 5, 2021, granting Petitioner full authority under the Independent Administration of Estates Act.

A Final Inventory and Appraisal was filed on March 1, 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 February 11, 2025. No one has filed a request for special notice in this proceeding.

The proposed distribution of the estate includes: 1/3 to David Fowler; 2/15 to Michael John Colen; 2/15 to Rick Edward Colen; 2/15 to Steven James Colen; 2/15 to Jacqueline A. Belcastro; and 2/15 to Scott Emmet Colen.

The Petition requests:

1. The administration of the estate be brought to a close without the requirement of an accounting;
2. All acts and proceedings of the Administrator be confirmed and approved;
3. The Administrator be authorized to pay himself \$3,577.20 in statutory compensation, plus \$1,141.00 for payments advanced on behalf of the estate;
4. The Administrator be authorized to pay attorney fees in the amount of \$3,500.00 for the Conservatorship proceedings plus \$1,089.58 for costs advanced in those proceedings;
5. The Administrator be authorized to pay statutory attorney fees in the amount of \$3,577.20 plus \$250.24 for costs advanced to the estate;
6. The Administrator be authorized to retain \$1,000.00 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 distributed to the beneficiaries as set forth in the Petition;
8. Upon filing of receipts and Ex-Parte Petition for Discharge that Petitioner may be released from all liability that may be incurred hereafter.

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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).

AN ORDER FOR FINAL DISTRIBUTION HAVING BEEN ENTERED BY THE COURT ON MARCH 3, 2025, THE MATTER IS CONTINUED TO 8:30 A.M. ON MONDAY, MARCH 2, 2026, IN DEPARTMENT NINE, BY WHICH TIME THE COURT EXPECTS RECEIPTS AND AN EX PARTE PETITION FOR FINAL DISCHARGE (JUDICIAL COUNCIL FORM DE-295) TO BE FILED WITH 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.

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4.	22PR0002	ESTATE OF BEEBER JR.
Status of Administration		

At the hearing on this matter held on April 3, 2023, the Court approved the Petition for Final Distribution and Final Account filed by the Administrator, and ordered that counsel submit the mandatory Ex-Parte Petition for Discharge for the Court's approval. Nothing new has been filed since the April 3, 2023, Order and no appearances were made at the March 4, 2024, hearing.

TENTATIVE RULING #4:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE OR THE COURT WILL SET AN OSC HEARING.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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5.	22PR0203	ESTATE OF FERGES
Status of Administration		

TENTATIVE RULING #5:

AN ORDER FOR FINAL DISCHARGE HAVING BEEN ENTERED BY THE COURT ON SEPTEMBER 17, 2024, THE MATTER IS DROPPED FROM CALENDAR.

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6.	23PR0007	ESTATE OF SMITH
OSC, Status Conference, Removal of Administrator		

Letters of Administration were issued to Nathaniel Trevor Moore with full authority on November 7, 2023.

Following trial, on December 15, 2023, the Court issued an oral decision to exclude the Will and bond was waived.

In violation of Probate Code §8800, no Inventory and Appraisal has been filed.

The personal representative failed to appear at the December 9, 2024, hearing. The case was set for an OSC hearing and to address removal of the personal representative.

TENTATIVE RULING #6:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 2, 2026, 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.

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7.	PP20200222	ESTATE OF GORDON
Status of Administration		

At the hearing on this matter held on March 6, 2023, the Court approved the Petition for Final Distribution and Account filed by the Administrator, and ordered that counsel submit the mandatory Ex-Parte Petition for Discharge for the Court's approval.

There were no appearances at the hearing on March 3, 2025, and no additional documents have been filed.

TENTATIVE RULING #7:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE OR THE COURT WILL SET AN OSC HEARING.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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8.	PP20190068	ESTATE OF SHEARER JR.
Status of Administration		

See related case, Estate of Shearer PP20170036 (No. 10).

On January 30, 2023, the matter was continued at Petitioner's request to allow time for filing of a Final Account and Petition for Final Distribution. At the hearing held on March 6, 2023, the Petitioner requested a continuance, and the hearing date was continued to March 4, 2024. No appearances were made on March 4, 2024.

Nothing new has been filed since the prior hearing.

TENTATIVE RULING #8:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE OR THE COURT WILL SET AN OSC HEARING.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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9.	21PR0010	ESTATE OF MURPHY
Status of Administration		

Letters of Administration were issued on February 9, 2022. The Final Inventory and Appraisal was filed on June 2, 2022. To date, there is no Final Account or Petition for Final Distribution on file with the Court.

There were no appearances at the hearing on March 6, 2023, or March 4, 2024.

TENTATIVE RULING #9:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE OR THE COURT WILL SET AN OSC HEARING.

IF A PARTY OR PARTIES WISH TO APPEAR BY ZOOM, PLEASE CONTACT THE COURT AT (530) 621-5867 AND MEETING INFORMATION WILL BE PROVIDED.

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10.	PP20170036	ESTATE OF SHEARER
Status of Administration		

See related case, Estate of Shearer Jr. PP20170068 (No. 8).

On January 30, 2023, the matter was continued at Petitioner's request to allow time for filing of a Final Account and Petition for Final Distribution. At the hearing held on March 6, 2023, the Petitioner requested a continuance, and the hearing date was continued to March 4, 2024. No appearances were made on March 4, 2024.

Nothing new has been filed since the prior hearing.

TENTATIVE RULING #10:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE OR THE COURT WILL SET AN OSC HEARING.

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11.	22PR0057	ESTATE OF MORRIS
Status of Administration		

Letters of Administration were issued on April 27, 2022. An Inventory and Appraisal was filed on March 6, 2023. There is an outstanding creditor's claim in the amount of \$28,535 that was filed on October 12, 2022.

Aside from a substitution of attorney filed on behalf of Use Credit Union and a request for their remote appearance, nothing new has been filed since the prior hearing on March 6, 2023.

TENTATIVE RULING #11:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE.

A STATUS OF ADMINISTRATION HEARING IS SET FOR 8:30 A.M. ON MONDAY, MARCH 2, 2026, 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.

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12.	22PR0202	ESTATE OF UNRUH
Status on Mediation		

See related case, Estate of Plant 22PR0201 (No. 2).

TENTATIVE RULING #12:

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13.	25PR0010	MATTER OF HEWITT
Petition for Letters Testamentary		

Decedent died testate on December 16, 2024, survived by his spouse and three adult children. Petitioner is decedent's surviving spouse.

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

Petitioner was named as Executor in the Will and the Will waives bond.

The Will was lodged with the court on January 23, 2025, and is admitted to probate.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on January 16, 2025.

Proof of service of notice of the hearing on the Petition was filed on January 30, 2025.

Proof of publication was filed on February 7, 2025.

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, MARCH 2, 2026, IN DEPARTMENT NINE.

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14.	25PR0011	MATTER OF WEISHAR
Petition for Letters of Administration with Will Annexed		

Decedent died testate on December 20, 2024, survived by a sister, who is the Petitioner.

The Petition requests full authority under the Independent Administration of Estates Act, with bond fixed at \$35,000.

There is a holographic Will attached to the Petition. It is not self-proving.

No Executor was named in the Will.

A Duties/Liabilities statement (DE 147/DE 147s) was filed on January 16, 2025.

Proof of service of notice of the hearing on the Petition was filed on January 21, 2025.

Proof of publication was filed on February 7, 2025.

TENTATIVE RULING #14:

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, MARCH 2, 2026, IN DEPARTMENT NINE.

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15.	25PR0003	HUBBARD LIVING TRUST
Objection & Petition		

Petitioner Macha Bennet-Shephard (“Petitioner”) is a beneficiary of The Marion B. Hubbard Living Trust (the “Trust”) and brings this Objection to the accounting provided by the Respondent and Trustee, Roger E. Hubbard III. Petitioner also petitions the Court for Instructions and for an Order to Compel an Accounting pursuant to Probate Code §§ 16062 and 17200.

The Trust was executed on June 6, 2014, and became irrevocable upon the passing of the Settlor Marion B. Hubbard (“Settlor”) on March 20, 2024. The named beneficiaries of the Trust are– Petitioner, Respondent, and Rachel B. Hubbard (Respondent’s wife). The named successor Trustee is Respondent, followed by his wife.

Petitioner requests that the Court deny Respondent’s informal accounting and require Trustee to make a formal Accounting pursuant to Probate Code §17200(b)(7) and to provide complete and accurate information concerning the Trusts’ affairs. Based on the Court’s review, the Accounting served on Petitioner on September 12, 2024 is a formal Accounting.

According to Exhibit B of the Petition, the Trustee is represented by counsel. However, on the Notice of Hearing, only the Respondent/Trustee and his wife were served.

TENTATIVE RULING #15:

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16.	PP20210130	SADDLE ROAD TRUST
Status Conference		

TENTATIVE RULING #16:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE.

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17.	22PR0037	MCGHIE TRUST
Petition to Confirm Title to Trust Property		

On April 6, 2022, an Order Confirming Title to the Trust was granted. On December 13, 2024, a Substitution of Attorney was filed, indicating the Petitioner has obtained new counsel. At the hearing on January 13, 2025, counsel indicated that a Petition had been filed, but there is nothing in the Court's system.

TENTATIVE RULING #17:

APPEARANCES ARE REQUIRED AT 8:30 A.M. ON MONDAY, MARCH 3, 2025, IN DEPARTMENT NINE.

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