

Tentative Rulings for May 15, 2025 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

1. Click on the “Virtual Courtrooms” icon and then on “Zoom Civil / Family / Probate Court Calendar Appearance Information”
2. Scroll down to Department C – Probate for the connection information.

Any interested party who wishes to appear for oral argument on the tentative ruling **must do the following no later than 4:00 PM** one Court day prior to the scheduled hearing date (MCR 6.2.D):

1. Notify all other parties entitled to notice of the underlying petition, including the attorneys for represented parties; and
2. Advise the clerk’s office by leaving a message at **(415) 444-7046, option 5.**

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

PLEASE NOTE: Probate cases that are designated as confidential by California law will not be posted online. For tentative rulings in those matters, please contact the judicial secretary at **(415) 444-7260**. Confidential cases include applications for Special Immigrant Juvenile Status.

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Judge James T. Chou
Department C
9:00 Calendar

**PR0000111 IN THE MATTER OF THE MORTON H. GOTHELF TRUST DATED MAY 22, 2000, AS
AMENDED AND RESTATED THEREAFTER**

Petition to: (1) Determine Validity of 6th Restatement; (2) Preclude the Use of Trust Funds to Defend Trust Contest; and (3) Reclaim Decedent's Property.

Ruling. **Continued to May 22, 2025 at 9:00** for trial setting.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL.

PRO2300998 IN RE THE MORTON H. GOTHELF TRUST DATED MAY 22, 2000, TRUST OF

- 1) Motion to Compel Austin Gothelf to Appear for His Deposition, etc., filed by Juliet McCormick on 2/20/25.
- 2) First Amended Petition for: (1) Damages for Financial Elder Abuse and Imposition of Constructive Trust; etc., filed by Juliet McCormick on 11/6/24.

Ruling. The Motion is ordered **off calendar** pursuant to 5/9/25 Declaration. Petition is **continued to May 22, 2025 at 9:00** for trial setting.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PRO2301051 ESTATE OF MORTON HERBERT GOTHELF

- 1) Petition for Probate of Will and for Letters Testamentary, filed by Carol Gothelf on 4/11/23.
- 2) First Amended Petition to Revoke/Invalidate/Set Aside Charles Schwab IRA Beneficiary Designation, Establish Estate's or Others' Ownership of Assets, and for Constructive Trust, filed by Juliet McCormick on 11/6/24.
- 3) Petition by Special Administrator to Establish Estate's Ownership of Property, filed by Caron Schmierer on 12/13/23.

Ruling. **Continued to May 22, 2025 at 9:00** for trial setting.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0000214 IN THE MATTER OF CAROLYN TUTTLE MEANS

First and Final Report of Executors on Waiver of Account and Petition for Final Distribution.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL.

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First and Final Account and Report of Administrator with Will Annexed and Petition for Settlement Thereof, for (1) Allowance of Statutory Administrator and Attorney's Compensation and Reimbursement of Costs, and (2) Final Distribution.

Ruling. **Continued to June 12, 2025 at 9:00.** Petitioner is ordered to file the following at least 5 court days prior to hearing:

1. File **either**:
 - a. A Third Amendment to First and Final Account that includes the following:
 - i. Schedule of Receipts must show purpose, source, and date **for each individual receipt** (Prob. C. § 1062(a)). Petitioner merely showed the difference between beginning and ending FMV of the mutual fund account as total receipts.
 - ii. Schedule of Gains and/or Schedule of Losses for sales of mutual funds and Toyota RAV4 (Prob. C. § 1062(d)).
 - Or:**
 - b. A Third Amendment requesting that the accounting be waived, with waivers of accounting executed by all beneficiaries attached thereto (Prob. C. § 10954).
2. File a verification to the Second Amendment that includes the required statutory language "under the laws of the State of California" (CCP § 2015.5).
3. File Proof of Service showing that all interested parties received at least 15 days' notice of the Third Amendment.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL.

Petition for Waiver of Account and Report of Administrator; Allowance of Statutory Compensation; Reimbursement of Costs of Administration; Withholding on Reserve; and for Final Distribution.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0000477 IN THE MATTER OF RICHARD MICHAEL KENNEDY

First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance of Administrator's Commission and Attorney's Fees for Ordinary Services, and for Final Distribution.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0000484 IN THE MATTER OF DANIEL FORER

First and Final Report of Executor on Waiver of Account; and Petition for Allowance of Compensation to Executor and to Attorney for Ordinary Services, for Allowance of Reimbursement to Attorney for Costs and for Final Distribution.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0000531 IN THE MATTER OF JOSHUA ARMEL

- 1) Verified Petition for Damages for: (1) Request for Order of Conveyance of Property; (2) Elder Financial Abuse; (3) Breach of Fiduciary Duty; (4) Constructive Fraud; (5) Undue Influence; (6) Cancellation of Instrument – Mohawk Avenue; (7) Cancellation of Instrument – Masonic Avenue; and (8) Rescission.
- 2) Petition for Accounting; Petition to Challenge Ownership of Trust Assets.

Ruling. **Continued to September 18, 2025 at 9:00** for setting of mediation deadline and trial setting.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0001025 IN THE MATTER OF MICHELE MARIE BERTRAND LIVING TRUST DATED APRIL 5, 2003

Petition for Order Confirming Trust Property.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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**PR0001081 IN THE MATTER OF RICHARD A. NELSON AND SHIRLEY M. NELSON REVOCABLE TRUST
DATED JUNE 3, 2014**

Petition for Approval of Trust Accounting.

Ruling. **Continued to June 5, 2025 at 9:00.** The requested documents were not filed 5 court days prior to the hearing as ordered; additional time for review is required.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

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Trust to determine ownership to property.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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Amended Petition for Probate of Will.

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

Petitioner is ordered to comply with the following 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 18, 2025 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 21, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on June 11, 2026 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 11, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0001092 IN THE MATTER OF CARLA J. ROTH TRUST DATED JANUARY 16, 2017

Petition for Authority to Modify Trust.

Ruling. **Continued to June 5, 2025 at 9:00.** Petitioner is ordered to file at least five court days prior to the hearing, all documents referenced in Exhibit A to the Petition, as set forth in paragraph one of the Petition, including but not limited to the Betty Jane Roth Trust, dated July 19, 1989 as first amended in full, the Fifth Amendment to the Betty Jane Roth Trust, and Order Authorizing Combination of Trusts dated April 18, 2017, as well as a copy of the Carla J. Roth Trust.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

***IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL
JTC***

PR0001120 IN THE MATTER OF CHRISTOPHER MICHAEL KOVACS

Amended Petition Spousal Property Petition.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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Petition for letters of administration.

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

Petitioner is ordered to comply with the following 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 18, 2025 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 21, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on June 11, 2026 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 11, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PR0001163 IN THE MATTER OF DUANE ALLAN NIX

Petition for letters testamentary.

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

Petitioner is ordered to comply with the following 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 18, 2025 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 21, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on June 11, 2026 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 11, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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**PR0001178 IN THE MATTER OF EMIL A. TANAGHO AND MONA F. TANAGHO FAMILY TRUST DATED
APRIL 19, 2019**

- 1) Petition for instructions to trustee.
- 2) Petition for an order to produce the will of the decedent and return of the possession of trust property.

Ruling. Continued to May 29, 2025 at 9:00 for further review.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PR0001209 IN THE MATTER OF CHARLES I WEXLER

Petition for letters testamentary.

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

Petitioner is ordered to comply with the following 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 18, 2025 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 21, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on June 11, 2026 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 11, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0001215 IN THE MATTER OF EDWIN NILS BENSON, JR.

Petition for letters testamentary.

Ruling. **Continued to June 5, 2025 at 9:00.** Petitioner is ordered to address the following at least 5 court days prior to hearing:

1. **File** Proof of Publication; and
2. **Lodge** original Will.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PR0001242 IN THE MATTER OF ROBERT WILLIAM WIDINSKI

Petition for letters testamentary.

Ruling. **Continued to June 5, 2025 at 9:00.** Petitioner is ordered to file a Supplement to Petition that includes the following information at least 5 court days prior to hearing:

1. Who is the Trustee of the Widinski-Oakes Trust?
 - a. If it is Petitioner, who are the beneficiaries, and did they receive proper notice?
 - b. If it is not Petitioner, did Trustee receive proper notice?
2. Due diligence undertaken regarding the search for heirs as defined by Prob. C. § 6501(c).

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0001243 IN THE MATTER OF MOHAMAD KHOSROWPANAH

Petition for letters of administration.

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

Petitioner is ordered to comply with the following 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 18, 2025 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 21, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on June 11, 2026 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 11, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PRO1700557 IN RE THE JOHN STAFFORD AND SUMIKO STAFFORD REVOCABLE TRUST, TRUST OF

Petition for Approval and Settlement of Reserve Accounting; Petition for Payment of Attorneys' Fee and Costs; and Petition to Exonerate Bond.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PRO1802115 ROSEMARY THERESA BOCK, ESTATE OF

Report of Status of Administration and Request for Extension of Time to Administer Estate.

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

Personal Representative is ordered to comply with the following future dates:

1. Status on Closing Estate.
 - a. Either: (1) a Petition for Final Distribution; or (2) a Report on Status of Administration shall be filed by June 19, 2025, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on July 10, 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 July 10, 2025 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PRO1901356 FARZANEH Z. SAFAVI, ESTATE OF

Petition for Approval of Tenth and Final Report; Waiver of Account; Reimbursement of Attorneys' Advanced Costs; and for Final Distribution.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PRO2101245 IN RE THE LOUIS KAHN SPECIAL NEEDS TRUST, TRUST OF

Ninth Account Current and Report of Trustee, Petition for Its Settlement and for Allowance of Attorney's Compensation.

Ruling. **Continued to June 12, 2025 at 9:00.** Petitioner is ordered to file the following at least 5 court days prior to hearing:

1. Financial statements confirming ending assets on hand as of 12/31/24.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PRO2201677 IN RE THE PAMELA URI REVOCABLE TRUST, TRUST OF

Second Supplemental Account and Report.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PRO2203243 PHILIP ROBINSON, ESTATE OF

Petition regarding status report of administration.

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

Personal Representative is ordered to comply with the following future dates:

1. Status on Closing Estate.
 - a. Either: (1) a Petition for Final Distribution; or (2) a Report on Status of Administration shall be filed by February 19, 2026, as required by Prob. C §§ 12200 & 12201.
 - b. A status hearing re filing a Petition or Report shall be set on March 12, 2026 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 March 12, 2026 at 9:00.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

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PRO27151 LOUIS KAHN, CONSERVATORSHIP OF PERSON AND ESTATE OF

Ninth Account Current and Report of Co-Conservators, Petition for Approval, Petition for Allowance of Fees to Attorney.

Ruling. **Continued to June 12, 2025 at 9:00.** Petitioner is ordered to file the following at least 5 court days prior to hearing:

1. Financial statements confirming ending assets on hand as of 12/31/24.
2. Supplement to Petition explaining why it is appropriate to hold assets in the Conservatorship Estate when Conservatee is subject to the terms of the Special Needs Trust for his benefit.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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Judge James T. Chou
Department C
10:00 Calendar

PR0000344 IN THE MATTER OF DOLORES HEEB

Status report of administration or petition for final distribution.

Ruling. Personal representative and attorney are ordered to appear.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0000429 IN THE MATTER OF LOIS A. MEREDITH

Status regarding filing of final distribution or report on status of administration.

Ruling. Personal representative and attorney are ordered to appear.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PR0000911 IN THE MATTER OF LLOYD GEORGE SCOTT, JR.

Status regarding filing of final inventory and appraisal.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0000972 IN THE MATTER OF DAVID SOLOMON MEHDY

Status regarding filing of final inventory and appraisal.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0001034 IN THE MATTER OF FRANKLIN BROCK LUTZ

Status regarding filing of final inventory and appraisal.

Ruling. **Personal representative and attorney are ordered to appear.**

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PR0001036 IN THE MATTER OF RICHARD JOSEPH MELNICK

Status regarding filing of final inventory and appraisal.

Ruling. Personal representative and attorney are ordered to appear.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0001039 IN THE MATTER OF ROBERT S. SPATZ

Status regarding filing of final inventory and appraisal.

Ruling. Personal representative and attorney are ordered to appear.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PR0001043 IN THE MATTER OF JIALING MIRIAM YU

Status regarding filing of final inventory and appraisal.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PRO2200267 IN THE MATTER OF THE ANDERSON FAMILY TRUST

Status regarding confirmation of funds in escrow account and sale has been finalized.

Ruling. The hearing on the Order for Sale is ordered **off calendar**.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 9:00 A.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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Judge James T. Chou
Department C
1:30 Calendar

PR0001006 IN THE MATTER OF PAMELA SUE NEAL

Status regarding review of conservatorship.

Ruling. **Off calendar.**

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 1:30 P.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

PRO2102438 ELKE ASPEN OSWEILER, GUARDIANSHIP OF THE ESTATE OF

Second accounting for period 01/01/23-12/31/24.

Ruling. **Guardian and attorney are ordered to appear.**

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 1:30 P.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL

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PRO2104179 JO ANN KERN, CONSERVATORSHIP OF THE PERSON AND ESTATE

Second Account and Report of Conservator.

Ruling. **Continued to June 12, 2025 at 1:30.** Petitioner is ordered to file the following at least 5 court days prior to hearing:

1. Financial statements confirming ending assets on hand as of 9/30/24.

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 1:30 P.M.

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PRO35684 EDWIN J. WALTER, II, CONSERVATORSHIP OF THE PERSON AND ESTATE

Seventeenth and final accounting.

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

ANY PARTY WISHING TO CONTEST THE TENTATIVE RULING MUST GIVE NOTICE TO THE COURT AND TO OPPOSING COUNSEL BY 4:00 P.M., MAY 14, 2025.

ARGUMENT WILL OCCUR ON THURSDAY, MAY 22, 2025 AT 1:30 P.M.

IF NO ARGUMENT IS REQUESTED, THE TENTATIVE RULING WILL BE ADOPTED AND MADE FINAL
