

**Tentative Rulings for July 31, 2025 Probate Calendar**

Judge James T. Chou  
Department C

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

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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.

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**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

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**CIV2102573    DR. RICHARD HEAD vs. ABRAHAM MERTENS, ET AL**

- 1) Petition for Approval of Settlement Agreement and Mutual General Releases.
- 2) Amended And Restated First Account And Report Of Successor Trustee, Etc.

Ruling. **The parties are ordered to appear.**

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**PR0000470    IN THE MATTER OF RAYMOND W. ROSS LIVING TRUST DATED MARCH 27, 2006 AS AMENDED**

- 1) Petition to Determine Invalidity of Trust Amendment and to Confirm Beneficiaries of Trust, filed by John Glander and Courtenay Dill Glander on 3/12/24.
- 2) Status regarding consideration of petition re: global settlement

Ruling. **The parties are ordered to appear.**

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**PR0000471    IN THE MATTER OF THE TOTAL AMENDMENT AND RESTATEMENT OF THE RAYMOND W. ROSS LIVING TRUST**

- 1) Petition to determine invalidity of purported trust amendments; and confirm gift to petitioners, filed by Richard Head and Nancy Head on 3/12/24.
- 2) Status regarding global resolution.

Ruling. **The parties are ordered to appear.**

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**PRO2101436    RAYMOND W. ROSS, CONSERVATORSHIP OF THE PERSON AND ESTATE**

- 1) Amended and Restated Second Amended First Account and Second Amended Report of Conservator of the Person and Estate, Petition for Settlement Thereof, for Payment of Fees and Costs to Conservator's Attorney and Statement Regarding Bond, filed by Richard Head on 5/24/24.
- 2) Status regarding consideration of petition re: global settlement

Ruling. **The parties are ordered to appear.**

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**PRO2102980     IN RE: THE TOTAL AMENDMENT AND RESTATEMENT OF THE RAYMOND W. ROSS  
LIVING TRUST, TRUST.**

- 1) Petition to complete return of trust property pursuant to probate code 850.
- 2) Status regarding consideration of petition Re global settlement.

Ruling. **The parties are ordered to appear.**

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**PR0000030     ESTATE OF RONALD D. PAGE**

Second Status Report of Administration and Request for Continued Administration.

Ruling. **The parties are ordered to appear.**

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**PR0000038     IN THE MATTER OF BRADFORD E. THOMSON**

- 1) Petition to appoint successor personal representative.
- 2) Petition regarding report of administration.

Ruling. **The parties are ordered to appear.**

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**PR0000242     IN THE MATTER OF ANN MORAN**

Report of Administrator, on Waiver of Account, for Allowance of Statutory Compensation to Administrator's Attorney, and for Final Distribution.

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

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**PR0000294     IN THE MATTER OF JEAN ANITA SCHUCH**

Petition for Final Distribution, Including Waiver of Accounting, First and Final Account Summary, Administrator's Report, and Proposed Distribution.

Ruling. **The parties are ordered to appear** to discuss the following:

1. Does Arlean have any predeceased children with surviving issue? If so, please provide names and ages for all such issue.
2. If Arlean has any issue other than Rhonda and her children, this matter must be continued to provide them with proper notice.

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**PR0000390      IN THE MATTER OF WILLIAM G. SKARICH**

Verified Petition for Order Approving Waiver of Account and Final Distribution of Estate; and for Allowance of Fees and Costs to Attorney.

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

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**PR0000580      IN THE MATTER OF NATHANIEL J. STEINHART**

Petition for Order Determining Title to Personal Property.

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

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**PR0000654      IN THE MATTER OF ELIE HIMY IRREVOCABLE TRUST**

- 1) Petition for Order: (1) to Invalidate 2010 Elie Himy Irrevocable Trust; etc., filed by Michel Himy and Albert Himy on 1/13/25.
- 2) Petition for Settlement of Trust Account, filed by Curtis John Himy and Deborah Himy Cohen on 6/5/24.
- 3) Status regarding *Breslin* mediation.

Ruling. In light of the status report filed on June 30, 2025, – the **parties are ordered to file petition** for approval of settlement agreement by no later than August 28, 2025; the matter will be set for hearing on October 2, 2025 at 9:00 for Petition to Approve Settlement Agreement.

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**PR0000902      IN THE MATTER OF ROBERT MANSI AND ADRIENNE MANSI REVOCABLE LIVING TRUST  
DATED JUNE 6, 2002**

Motion of Petitioner and Settlor Adrienne Mansi for Preference in Setting Trial.

Ruling. The unopposed motion for preference filed by Petitioner Adrienne Manis pursuant to Code of Civil Procedure, section 36(a) and 36(e) is **denied**.

While Petitioner is not required to show that she suffers from a life-threatening condition, the Court finds that she has not established that her health is such that a preference is necessary to prevent prejudicing her interest in the litigation. (Code Civ. Proc., § 36, subd. (a); see also Code Civ. Proc., § 36.5; *Fox v. Superior Court* (2018) 21 Cal.App.5th 529, 534.) Moreover this Court has already set this matter for trial starting on November 11, 2025.

In support of the motion, Petitioner filed a declaration which states “I am fortunate to have a lived a long life, but I am realistic and know that at my age, health issues and illnesses could be life threatening even though they may not be so for a younger person.” (Adrienne Mansi Declaration § 13.) Age, however, is no longer the only requirement to satisfy the standards of a preferential trial date pursuant

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to Section 36(a). In 1991, the statute was changed so that a party 70 years of age or over was no longer automatically granted preference. Rather the showing included that the party be 70 years of age or over AND that the party's health would prejudice the party's interest unless preference was granted. (See Section 36 – DIGEST COMMENT: AB 3811, W. Brown. Courts: calendar preference for aged parties.)

Petitioner further notes in her declaration: "I have lost some of my vision, and as a result I do not drive anymore, even though I still have a license. I have had both my knees replaced, and I had a sister die of breast cancer a few years ago. While I still can do regular daily activities, I have moved to the Continuing Care Retirement Community, Villa Marin, in San Rafael for extra security and ready access to care when I need it." (Adrienne Mansi Declaration, § 14.)

Some showing of age combined with an impaired state of health must be made. And while there is no requirement for the moving party to proffer a doctor's declaration, a declaration in support of the preference is required to provide "the medical diagnosis and prognosis" of the moving party. (Code Civ. Proc. § 36.5.) Petitioner fails to indicate any review of medical records, discussions with her doctors, or any other basis for the conclusion Petitioner has any specific health condition due to her age that may deprive her the opportunity to have her case effectively tried and to recover her just measure of damages or appropriate redress.

The Court declines to exercise its discretion pursuant to Code of Civil Procedure, Section 36(e). This matter is already set for trial on November 11, 2025 and the Court fully expects, barring any unforeseen events, it will commence trial in this matter on that date.

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**PR0001034      IN THE MATTER FRANKLIN BROCK LUTZ**

First and Final Report of Administrator; Waiver of Account; Petition for Final Distribution and for Allowance of Compensation to Attorneys.

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

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**PR0001133      IN THE MATTER OF WINFRED A. LEVINE**

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

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

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**PR0001245      IN THE MATTER OF ROBERTA LESLIE ROSA REVOCABLE TRUST, U/A DATED APRIL 15, 2003**

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Verified Petition for Order Determining Real Property as Trust Asset and Declaratory Relief.

Ruling. **Continued to September 4, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Proof of Service confirming that all interested parties received at least 30 days' notice (Prob. Code Secs. 851(b)(3) and 17203).

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**PR0001247      IN THE MATTER OF JAN D. KELZER**

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Spousal Property Petition.

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

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**PR0001256      IN THE MATTER OF DANIEL JUDAH GARE**

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Petition for Probate of Will and for Letters Testamentary.

Ruling. **Continued to August 21, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Proof of Service confirming that all interested parties named in the Supplement to Petition filed 7/18/25 received at least 15 days' notice on the **mandatory Judicial Council Form DE-120** (CRC 7.101(a)).

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**PR0001284      IN THE MATTER OF BRUCE MANNING WRISLEY**

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Petition for Probate of Lost Will and 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 December 11, 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 July 30, 2026, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on August 20, 2026 at 10:00.
    - i. If neither document has been timely filed, an appearance will be required.

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- ii. If the Petition or Report is timely filed, the hearing will be set on August 20, 2026 at 9:00.

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**PR0001288      IN THE MATTER OF ROBERT A. LAMBERT**

Petition for Probate of Will and for Letters of Administration with Will Annexed.

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 December 11, 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 July 30, 2026, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on August 20, 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 August 20, 2026 at 9:00.

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**PR0001291      IN THE MATTER OF MARGARETHA HOUTZAGER**

Petition for Probate of Will and 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 December 11, 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 July 30, 2026, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on August 20, 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 August 20, 2026 at 9:00.

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**PR0001294      IN THE MATTER OF NICOLLE HENNEUSE AND PETER K. BILLINGTON REVOCABLE TRUST  
DATED JULY 1, 2013, AS AMENDED ON APRIL 11, 2024**

Petition for Order Confirming Trust Assets.

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

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**PR0001295      IN THE MATTER OF FRANCISCO LOMELI**

Spousal Property Petition.

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

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**PR0001296      IN THE MATTER OF RICHARD FRAIGE TRUST**

Petition for Order Confirming Trust Property.

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

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**PR0001297      IN THE MATTER OF SIGVARD SVENSSON**

Petition to Establish Fact, Time, and Place of Death.

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

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**PR0001303      IN THE MATTER OF GREGORY INGRASSIA**

Petition for Probate of Will and for Letters of Administration with Will Annexed.

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

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**PR0001309      IN THE MATTER OF LEIF ERIK WOOLEY AND KAROL D. WOOLEY 2007 TRUST, DATED  
SEPTEMBER 14, 2007**

Petition for Order Confirming Trust Assets.

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

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**PR0001330      IN THE MATTER OF CHESTER KLINGEL**

1. Spousal Property Petition.
2. Status regarding filing of proper petition.

Ruling. **Off calendar.**

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**PR0001332      IN THE MATTER OF LEANNE L. HENDRIX**

Petition for Probate of Will and 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 December 11, 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 July 30, 2026, as required by Prob. C §§ 12200 & 12201.
  - b. A status hearing re filing a Petition or Report shall be set on August 20, 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 August 20, 2026 at 9:00.

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**PR0001333      IN THE MATTER OF EVA CAPRILE**

Petition for Probate of Will and for Letters Testamentary.

Ruling. **Continued to August 21, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Supplement to Petition providing the following information:
  - a. Response to Item 6 re heirs.
  - b. Additional information with regard to the relationships of Decedent's heirs. Ex: John Doe, son of Decedent's predeceased sister, Jane Doe.
  - c. Who is the Trustee of the Eva Caprile 2024 Trust? (Prob. C. § 1208(b))
    - 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?
2. Proof of Service confirming that all interested parties named in the Supplement to Petition received at least 15 days' notice on the **mandatory Judicial Council Form DE-120** (CRC 7.101(a)).

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- 1) Order to show cause for failure to file petition/report, failure to appear on 04/10/25, and why counsel should not be sanctioned for each failure.
- 2) Petition for final distribution.

**Ruling. Continued to August 21, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Proof of Service showing that all interested parties received notice of the Report on Status of Administration (Prob. C. § 12201(b)). Notice must be given on the mandatory form (DE-120) **with the box checked in Item 1** stating this is a report of status of administration.
  2. Attorney's Declaration regarding OSC issued for failure to appear on 4/10/25.
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# Judge James T. Chou

## Department C 10:00 Calendar

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**PR0000552      IN THE MATTER OF ISABEL PONCE FLORES**

Status regarding filing of final inventory and appraisal or status regarding litigation in Santa Clara rendering moot for need for final inventory and appraisal.

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

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**PR0000553      IN THE MATTER OF EMMA LOU PUDENZ**

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

Ruling. **Off calendar.** Order terminating administration filed 2/13/25.

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**PR0000617      IN THE MATTER OF GORDON JOHN HEDEMARK**

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

Ruling. **Off calendar.** Petition for Final Distribution was filed and set for hearing on 7/31/25 at 9:00.

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**PR0000983      IN THE MATTER OF MARY JANE MARE HARDING**

Status regarding filing of final inventory and appraisal.

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

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**PR0001107      IN THE MATTER OF APRIL MINXIA XIE**

Status regarding filing of final inventory and appraisal.

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

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**PR0001133      IN THE MATTER OF WINFRED A. LEVINE**

Status regarding filing of final inventory and appraisal.

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

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**PR0001139      IN THE MATTER OF DAWN E. RICE**

Status regarding filing of final inventory and appraisal.

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

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**PR0001145      IN THE MATTER OF GIANCARLO SOTIL**

Status regarding filing of final inventory and appraisal.

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

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Judge James T. Chou  
Department C  
1:30 Calendar

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**FL 2203196      Lisa Marie Deane vs. Brian Michael Burdette**

Case Progress Conference - and to re-set motions calendared on 6/5/25 in Dept. L

Ruling. This matter is **continued to September 4, 2025 at 1:30** as previously ordered by the Court on July 17, 2025.

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**PR0000967      IN THE MATTER OF KEVIN E. LEWIS**

Status regarding filing the confidential conservatorship care plan.

Ruling. **Off calendar**; required documents have been filed.

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**PR00001067      IN THE MATTER OF ROSEMARY ANNE SANDERS**

- 1) Petition for change of venue.
- 2) Status conference.

Ruling. **The parties are ordered to appear.**

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**PR0001130      IN THE MATTER OF LUCAS JAMES STISHER**

Petition for Appointment of Limited Probate Conservator of the Person.

Ruling. **The Parties are ordered to appear.** If this Petition is granted, Conservators shall comply with the following future dates:

1. Confidential Conservatorship Care Plan.
  - a. A status hearing for the filing of the Confidential Conservatorship Care Plan shall be set on December 18, 2025 at 1:30.
  - b. An appearance will be required on that date if the Confidential Conservatorship Care Plan is not filed at least 5 court days prior to the hearing.

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**PR0001167      IN THE MATTER OF WYATT MATTHEW SULLIVAN**

Petition for Appointment of Guardian of Estate of Minor.

Ruling. If this Petition is granted, Guardian shall 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 December 11, 2025 at 1:30.
  - 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. First Account.
  - a. A First Account for the period ending 7/30/26 shall be filed by September 24, 2026.
  - b. A hearing shall be set on November 5, 2026 at 1:30 for either: (1) hearing on the First Account; or (2) explanation as to why it was not timely filed.

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**PR0001188      IN THE MATTER OF NEYAT TEFAY**

Amended Petition for Appointment of Limited Conservator of the Person.

Ruling. **Continued to August 21, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Proof of Service showing that all interested parties received at least 15 days' notice of the Amended Petition for Appointment of Conservator on the mandatory Judicial Council Form GC-020.

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**PR0001214      IN THE MATTER OF EFFIE WESTERVELT**

- 1) Amended Petition for Appointment of Conservator of the Person.
- 2) Petition to appoint temporary conservator.
- 3) Status regarding mediation, notice, and capacity declaration.

Ruling. **The parties are ordered to appear.**

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**PRO015083      IN THE MATTER OF TAMARA A. EPP**

Motion for change of venue.

Ruling. **Continued to August 21, 2025 at 9:00. Petitioner is ordered to file the following at least 5 court days prior to hearing:**

1. Proof of Service showing that all interested parties received at least 15 days' notice of the Petition on the mandatory Judicial Council Form GC-020.

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Petition for attorney's fees.

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

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