Tentative Rulings for November 19, 2026, Probate Calendar

Judge James T. Chou
Department C

APPEARANCES MAY BE MADE IN PERSON OR ON ZOOM.

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1. **Click on the "Virtual Courtrooms" icon and then on "Zoom Civil / Family / Probate Court Calendar Appearance Information"**
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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.

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

PR0000038 IN THE MATTER OF BRADFORD E. THOMSON

1. Petition for Probate of Will and for Letters Testamentary, filed by Lesley L. Bautista on 9/29/25.
2. Order to Show Cause to Lesley Bautista as to why the petition should not be dismissed for failure to appear on 10/29/26 and failure to prosecute.

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

PR0000081 ESTATE OF ANNE WOODWARD ROBERTS AKA ANNE W. ALLEN

Final Report of Successor Administrator on Waiver of Accounting (§ 10500 and § 10450 – IAEA); Statutory Administrator's Fees (§ 10800) and Petition for Final Distribution of Estate, filed by Leslie Roberts on 8/4/26.

Ruling. In light of the substitution of attorney filed on 11/13/26, this matter is now **continued to January 21, 2027, at 9:00 a.m.,** for Petitioner to address the questions raised in the Court's 10/15/26 tentative ruling.

PR0000476 IN THE MATTER OF CLARA BULLOCK

First and Final Account and Report of Personal Representative and for Allowance of Statutory Fees to Personal Representation and Attorney for Personal Representative, and for Final Distribution, filed by Bishlam Bullock on 7/9/26.

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

PR0001021 IN THE MATTER OF JULIE JIZRAWI

Petitioner's Motion to Quash or Modify Deposition Subpoena for Production of Business Records Served on Rocket Companies, Inc., and for Monetary Sanctions, filed by Peter S. Jizrawi on 7/8/26.

Ruling. Pursuant to Marin County Rules (MCR) Probate 6.4 and Civil 2.13B, on October 2, 2026, the Court appointed attorney Robert James Begley to preside as Discovery Facilitator for the above Motion To Quash.

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.

The Court has not received a Declaration of Non-Resolution from any party, in particular *the moving party*, five court days prior to the hearing on the motion set for November 19, 2026, as required by MCR Civil 2.13H. The Court reminds the parties that compliance with MCR Civil 2.13H not only includes the timely filing of the Declaration of Non-Resolution by each party five court days prior to the hearing, but also requires that "[t]he Declaration shall not exceed three pages and ***shall briefly summarize the remaining disputed issues and each party's contentions***." (MCR Civil 2.13H(1), emphasis added.)

The Court concludes and expects that this discovery matter is being resolved by the facilitator. The motion is therefore ordered **OFF CALENDAR**. (MCR Civil 2.13H(2).) Should the parties fail to reach resolution through the facilitator, either party may request (by ex parte application) that the Court re-set the motion for an expedited hearing.

PR0001142 IN THE MATTER OF FRANKLIN D. RAINWATER

First Status Report of Administrator, filed by Grace Rainwater on 9/23/25.

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

PR0001315 IN THE MATTER OF THE JOSEPH ABRAHAM AND ADELAIDA SERBANESCU FAMILY TRUST

1. Petition for Trust Accounting, filed by Tunde Etelka Munz-Abraham on 12/22/25.
2. Motion to Set Aside Judgment Under Code of Civil Procedure § 473(d), filed by Tunde Etelka Munz-Abraham on 11/6/25.
3. Motion for Order Quashing Deposition Subpoenas and Staying Depositions, filed by Ion Cristian Abraham on 1/15/26.

Ruling. In light of the Court of Appeal granting a time extension of 29 days for the filing of Respondent's brief to November 12, 2026, this matter is **continued to January 21, 2027, at 9:00 a.m.**, for status of appeal.

PR0001328 IN THE MATTER OF JEANNE C. MAHON

Petition for Final Distribution; for Order Approving Accounting; for Discharge of Executor's Bond; and for Payment of Statutory Fees to the Executor's Attorney, filed by Christian Parenti on 11/13/26.

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

PR0001390 IN THE MATTER OF ANN B. WEST

Report of Status of Administration of Estate, filed by Douglas C. West and Kathryn West Horn on 10/13/26.

Ruling. Absent objections, the Report of Status of Administration is **accepted and approved**. Personal Representative is **ordered to:**

1. **Submit** a proposed order to the Court within five court days of this order.
2. **Comply** with the following future dates:
    a. Status on Closing Estate.
        i. Either: (1) a Petition for Final Distribution; or (2) a Report of Status of Administration shall be **filed by April 29, 2027,** as required by Probate Code sections 12200-12201.
        ii. A status hearing re filing the Petition or Report **shall be set on May 20, 2027**, **at 10:00 a.m.**
            1. If neither document has been timely filed, an appearance will be required.
            2. If the Petition or Report is timely filed, the hearing **will be set on May 20, 2027**, **at 9:00 a.m.**

PR0001401 IN THE MATTER OF SUSAN K. LOVERIDGE

Petition for Final Distribution Settling First and Final Account and Report of Administrator with the Will Annexed, for Reimbursement of Costs Advanced, for Allowance of Statutory Administrator's Commissions and Attorney's Fees, and for Exoneration of bond, filed by Rachael Hairston on 10/23/26.

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

PR0001404 IN THE MATTER OF JAY DEE WARK CREDIT SHELTER TRUST DATED MARCH 11, 2012

1. Motion to Compel Compliance with Deposition Subpoena for Production of Business Records by Non-Party Renee Ewert, filed by Jana Wark Maloney on 8/10/26.
2. Motion to Compel Compliance with Deposition Subpoena for Production of Business Records by Non-Party Michael Valencia, filed by Jana Wark Maloney on 8/10/26.

Ruling. Pursuant to Marin County Rules (MCR) Probate 6.4 and Civil 2.13B, on October 5, 2026, the Court appointed attorney Steven Perl to preside as Discovery Facilitator for the above Motions To Compel.

The Court has not received a Declaration of Non-Resolution from any party, in particular *the moving party*, five court days prior to the hearing on the motion set for November 19, 2026, as required by MCR Civil 2.13H. The Court reminds the parties that compliance with MCR Civil 2.13H not only includes the timely filing of the Declaration of Non-Resolution by each party five

court days prior to the hearing, but also requires that "[t]he Declaration shall not exceed three pages and ***shall briefly summarize the remaining disputed issues and each party's contentions***." (MCR Civil 2.13H(1), emphasis added). Moreover, the Court has not received a stipulation and proposed order to continue these motions as counsel represented on November 5, 2026.

The Court concludes and expects that this discovery matter is being resolved by the facilitator. The motion is therefore ordered **OFF CALENDAR**. (MCR Civil 2.13H(2).) Should the parties fail to reach resolution through the facilitator, either party may request (by ex parte application) that the Court re-set the motion for an expedited hearing.

PR0001410 IN THE MATTER OF NANCY ELIZABETH SHAVICK

Report of Status of Administration of Estate, filed by Marin County Public Administrator on 10/27/26.

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 of Status of Administration shall be **filed by March 4, 2027,** as required by Probate Code sections 12200-12201.
    b. A status hearing re filing the Petition or Report **shall be set on March 25, 2027**, **at 10:00 a.m.**
        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 25, 2027**, **at 9:00 a.m.**

PR0001425 IN THE MATTER OF JANE SHINGLEDECKER MILLER

Petition for Final Distribution on Waiver of Accounting, filed by Scott Miller on 9/14/26.

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

PR0001451 IN THE MATTER OF ALEXANDRA SOPHIE BEELS

First and Final Report of the Administrator of the Estate on Waiver of Account and Petition for Its Settlement and Approval for Authority to Donate Unselected Tangible Personal Property, for Authority to Sell Newly Received Shares of Stock, for Reimbursement of Costs Advanced by Administrator's Attorney, for Allowance of Statutory Compensation to Administrator and Her Attorney, for Authority to Retain a $1,000.00 Reserve, and for Final Distribution, filed by Constance C. Granger on 10/21/26.

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

PR0001609 IN THE MATTER OF SARA A. LONG

First and Final Account and Report of Executor and Petition for Its Settlement; Petition for Executor's and Attorneys' Fees; Petition for Final Distribution, filed by Peter P. Brown on 9/23/26.

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

PR0001641 IN THE MATTER OF KATHERINE PEARCE

Petitioner for First and Final Report of Administrator on Waiver of Account and for Final Distribution; Petition for Compensation to Attorney for Administrator, filed by Michael Pearce on 9/21/26.

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

PR0001664 IN THE MATTER OF LAUREN A. RENNA

First and Final Report of Executor on Waiver of Account and Petition for Allowance of Compensation to Executor and Attorney, and for Final Distribution, filed by John J. Mancini on 9/17/26.

Ruling. This matter is **continued to January 7, 2027, at 9:00. Petitioner is ordered to file:**

1. Supplement to Petition, signed and verified by Petitioner, explaining why all beneficiaries of the Trust listed in the Petition for Probate did not receive notice of this Petition and/or waive an accounting.
2. All pleadings must be filed at least five court days prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(b), Filing, Hearing, and Continuance Procedures.)

PR0001665 IN THE MATTER OF JEAN CATHERINE GHILOTTI

First and Final Report of Administrator on Waiver of Account and Petition for Allowance of Statutory Compensation to Attorneys, for Reimbursement for Costs Advanced, and for Final Distribution, filed by Anthony Epidendio on 9/15/26.

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

PR0001789 IN THE MATTER OF JONATHAN FELDMAN AND NINA L. POLLINGER MARITAL TRUST

Petition for Order (1) Compelling Production of Trust Documents and Information, (2) Accounting, and (3) Contesting Trust Validity and Preserving Rights, filed by David B. Feldman and Amy Feldman on 4/27/26.

Ruling. The parties are **ordered to appear** to address why this petition should not be dismissed.

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PR0001790 IN THE MATTER OF HANNELORE AND ROBERT ROYSTON IRREVOCABLE TRUST DATED JANUARY 5, 2000

1. Petition for Instructions Regarding Trust Assets; Accounting; Removal of Trustee; and Appointment of Neutral Successor Trustee, filed by Tonia Lee Royston on 4/28/26.
2. Status Conference – re: discovery, informal settlement discussions, and potential setting of evidentiary hearing

Ruling. This matter is **continued to December 17, 2026, at 9:00 a.m.**

PR0001868 IN THE MATTER OF ROBERT ZEMAN SPECIAL NEEDS TRUST

Petition to Terminate the 2025 Robert Zeman Special Needs Trust Due to Changed Circumstances, filed by Alexandra Slaney on 6/22/26.

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

PR0001977 IN THE MATTER OF ROBERT GENTRY

Petition for Order Appointing Successor Co-Trustees and to Change Venue, filed by Robert Gentry on 9/11/26.

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

PR0001981 IN THE MATTER OF CHARLES NORMAN, AN INDIVIDUAL AND BENEFICIARY OF THE SURVIVOR'S TRUST UNDER THE OLAV N. NORMAN AND ANNE G. NORMAN LIVING TRUST AND OF CHARLIE'S TRUST

Verified Cross-Petition of Trustee Alan D. Norman for Orders: (1) Compelling Former Co-Trustee Charles Norman to Comply with Probate Code § 15644; (2) Directing Charles Norman to Instruct His Former Trust Attorneys to Turn Over All Trust Administration and Litigation Materials to the Successor Trustee; (3) Determining that No Attorney-Client Privilege Bars Delivery of the Trust's Files to the Trustee; (4) Compelling Privilege Logs; (5) Surcharging Charles Norman for Breach of Trust, Including the Trust's Attorney's Fees and Costs; and (6) Enforcing Charles Norman's Indemnity and Hold-Harmless Obligations to the Trust, with Surcharge and Charge Against His Beneficial Interest, filed by Alan D. Norman on 9/18/26.

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

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PR0001986 IN THE MATTER OF THE FOWLER FAMILY TRUST - 1991

Petition for Order Confirming Title to Trust Asset, filed by Marlene F. Fowler on 9/21/26.

Ruling. This matter is **continued to January 7, 2027, at 9:00 a.m. Petitioner is ordered to:**

1. Mail notice to all interested parties using the mandatory Judicial Council Form "Notice of Hearing on Petition to Determine Claim to Property." (Judicial Council Forms, form DE-115.)
2. File a copy of the DE-115 that was mailed, with the Proof of Service completed on page 2 showing that all interested parties received at least thirty days' notice of the Report of Status of Administration. (Prob. C. §§ 851, 17203.)
3. The Proof of Service must be filed at least five court days prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(b), Filing, Hearing, and Continuance Procedures.)

PR0001987 IN THE MATTER OF FROMAN FAMILY TRUST

Petition for Breach of Fiduciary Duty, Imposition of Constructive Trust, Return of Trust Property, Financial Elder Abuse, Imposition of Statutory Penalty, and an Accounting, filed by Sheryl N. Cohen on 9/21/26.

Ruling. This matter is **continued to January 21, 2027, at 9:00 a.m.** Counsel are **ordered to meet and confer** by no later than January 8, 2027 and **submit status reports** re meet and confer results by no later than January 14, 2027.

PR0001992 IN THE MATTER OF JEFFREY GREENBERG TRUST, DATED MAY 19, 2020, AS AMENDED AND RESTATED

Petition for Orders; (1) Affirming Trustee Acts and Exercises of Powers; (2) Directing Banner Life Insurance Company to Disclose Policy Beneficiaries; (3) Affirming Assets as Trust Property; and (4) Affirming Authority Over 529 Plan/Account, filed by Ashley Valentine on 9/23/26.

Ruling. This matter is **continued to January 14, 2027, at 9:00 a.m.** Petitioner is **ordered** to:

1. **File** copies of statements confirming that Trustor owned the accounts at issue as of 2/2/26 (date of execution of the Trust).
2. **File** a copy of the 529 Account.
3. **File** a copy of the Insurance policy.

PR0002021 IN THE MATTER OF LANNIS RAFFAEL

Petition for Probate of Will and for Letters Testamentary, filed by Jana Rachelle Summers on 10/19/26.

Ruling. The parties are **ordered to appear** to explain why this petition should not be dismissed as duplication of the Petition for Probate of Will and for Letters Testamentary filed by Jana Rachelle Summers in case number PR0002037.

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PR0002035 IN THE MATTER OF TRACEY LEE LOWMILLER

Petition for Letters of Administration, filed by Mary J. Firman on 10/28/26.

Ruling. This matter is **continued to December 17, 2026, at 9:00 a.m. Petitioner is ordered to** file Proof of Publication of Notice no later than five court days prior to the hearing. (Prob. Code, § 8120 et seq.)

PR0002036 IN THE MATTER OF JOHN EUGENE CONTE

Petition for Probate of Will and for Letters Testamentary, filed by Jack Zachary Conte and Sarah Linday Conte on 10/28/26.

Ruling. This matter is **continued to December 17, 2026, at 9:00 a.m. Petitioner is ordered to:**

1. **File** Proof of Publication of Notice no later than five court days prior to the hearing. (Prob. Code, § 8120 et seq.)
2. **Lodge** the original will with the Court. The Court notes that the copy attached to the Petition is stamped "Lodged with the Court" as of 1/2/26; however, that is not a Marin County Superior Court stamp.
3. File a Declaration providing the name of the Trustee of the Conte Family Trust. (Prob. C. § 1208(b)).
    a. If Trustee is Petitioner, who are the beneficiaries, and did they receive proper notice?
    b. If Trustee is not Petitioner, did Trustee receive proper notice?

PR0002037 IN THE MATTER OF LANNIS RAFFAEL

Petition for Probate of Will and for Letters Testamentary, filed by Jana Rachelle Summers on 10/29/26.

Ruling. The parties are **ordered to appear** to discuss dismissal of the petition filed in PR0002021. The Court notes that Petitioner has not lodged the original Will with this Court, which will require a continuance to a future date.

PRO2100181 DAVID J. McMAHON, ESTATE OF

First and Final Account and Report of Administrator; Petition for Order: (1) Settling Account and Approving Report; (2) Determining Final Distribution to Creditors; (3) Allowing Statutory and Extraordinary Compensation to Petitioner; (4) Allowing Statutory Compensation to Attorney; (5) Allowing Extraordinary Compensation to Litigation Attorney; and (6) Authorizing Distribution, filed by Kim Schwarcz on 9/1/26.

Ruling. Absent objections, the First and Final Account and Report will be **accepted,** and the Petition for Final Distribution and Supplement thereto will be **granted without hearing.**

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Judge James T. Chou
Department C
10:00 Calendar

PR0001431 IN THE MATTER OF EDWIN NILS BENSON, JR.

Status Conference – Report of Status of Administration – or Petition for Final Distribution

Ruling. Personal representative Jacqueline Benson Dagenais and attorney Amanda L. Ebey are **ordered to appear.**

PR0001766 IN THE MATTER OF ESTATE OF KATE P. MORSE

1. Status Conference - Filing of Final Inventory and Appraisal
2. Order – Show Cause / Other – to attorney Heather Stoneman regarding why sanctions in the amount of $149 should not issue for each of the following:
    a. Failure to file Final Inventory and Appraisal
    b. Failure to Appear on 10/22/2026

Ruling. Personal representative Eric S. Morse and attorney Heather Stoneman are **ordered to appear.**

PR0001769 IN THE MATTER OF MARY ANN LEVITT

1. Status Conference - Filing of Final Inventory and Appraisal
2. Order – Show Cause / Other – to attorney Mr. Brewer regarding why sanctions in the amount of $149 should not issue for Failure to Appear on 10/22/2026
3. Order – Show Cause / Other - Attorney Mr. Brewer is also ordered to show cause regarding why Item 5a contradicts the facts set forth in the Final Inventory and Appraisal

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

PR0001798 IN THE MATTER OF PENNY JEAN WHITE

1. Status Conference - Filing of Final Inventory and Appraisal
2. Order – Show Cause Other – to attorney Anthony Celaya

Ruling. Personal representative Edward Thomas White and attorney Anthony G. Celaya are **ordered to appear.**

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PR0001834 IN THE MATTER OF JUAN A. GARCIA

Status Conference - Filing of Final Inventory and Appraisal

Ruling. This matter is ordered **off calendar;** the Final Inventory and Appraisal has been filed.

PR0001844 IN THE MATTER OF IRA SANDLER

Status Conference - Filing of Final Inventory and Appraisal

Ruling. Personal representatives Jodha Khalsa and Mya Shone, and attorney Chrisopher Cole are **ordered to appear.** The Court notes that 3 Partial Inventory and Appraisals have been filed.

Judge James T. Chou
Department C
1:30 Calendar

PR0000453 IN THE MATTER OF ANDREW M. TOMASINI

Status Conference – Filing of Second Account or Request for Waiver

Ruling. Conservator Sacha Tomasini and attorney Christine Ann Doehle are **ordered to appear.**

PR0000968 IN THE MATTER OF BIVONA MARIA KLEIN AND TAYA SALINA KLEIN

Status Conference – Filing of First Account

Ruling. The First Account was filed on 11/2/26 but was inadvertently not assigned a hearing date. The First Account will be set for hearing on **December 17, 2026, at 1:30 p.m.**

PR0001842 IN THE MATTER OF JACK KOH GOLDSTEIN

1. Petition for Appointment of Temporary Conservator of the Person and Estate, filed by Kristen Koh and Athena Goldstein on 6/3/26.
2. Petition for Appointment of Probate Conservator of the Person and Estate, filed by Kristen Koh and Athena Koh Goldstein on 6/3/26.
3. Order to Show Cause: Dismissal

Ruling. Absent objections, these petitions will be **dismissed without prejudice.**

PR0001975 IN THE MATTER OF KATYA LAUREL KUDRYA

Petition for Appointment of Temporary Guardian of the Person, filed by Claudia G. Garcia Padilla on 9/15/26.

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

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PR0002007 IN THE MATTER OF DIDIER ALONSO ARDON CHAVEZ

Petition for Appointment of Temporary Conservator of the Person, filed by Norma Esmeralda Chavez Pena on 10/29/26.

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

PRO040422 IN THE MATTER OF CHRISTIAN KAIKINGER

Ninth Account and Report of Successor Conservator; Petition for Approval and Settlement of Ninth Account, for Allowance of Successor Conservator's Fees and Costs; for Attorney's Fees and Costs; and, for Increase of bond, filed by Denise Rooke on 11/12/26.

Ruling. This Account and Petition was not timely filed by 10/8/26, as ordered by the Court on 4/10/25. This matter is **continued to December 10, 2026, at 1:30 p.m.** for review and notice.

PRO1901309 ELIZABETH ANNE BEISENSTEIN, CONSERVATORSHIP OF THE PERSON AND THE ESTATE

Fourth Account and Report of Conservator; Petition for Its Settlement; for Approval of Conservator's Fees and Periodic Payments, for Approval of Attorneys' Fees and Costs Advanced; and for Reduction of Bond, filed by Jewish Family and Children's Services on 9/10/26.

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

PRO2101712 IN THE MATTER OF YOUNG PARK

Third Account and Report of Conservator and Petition for Settlement; for Reduction of Bond; for Confirmation of Delegation Authority to Conservator; for Approval of Conservator's Fees and Periodic Payments; and for Approval of Attorneys' Fees and for Reimbursement of Costs Advanced, filed by Jewish Family and Children's Services on 10/14/26.

Ruling. Absent objections, this Third Account and Report will be **granted without hearing. Conservator is ordered to comply with the following future dates:**

1. Conservator's Fourth Account and Report for the period 8/1/26 – 7/31/28 shall be filed by **October 12, 2028**.
2. A status hearing re filing the Fourth Account and Report shall be set on **November 30, 2028, at 1:30 p.m.** for either:
    a. Hearing on the Fourth Account; or
    b. Explanation as to why it was not timely filed.

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PRO2102273 IN RE THE CHRISTIAN KAIKINGER TRUST, TRUST OF

Eighth Account and Report of Trustee; Petition for Approval and Settlement of Eighth Account; for Allowance of Trustee's Fees and Costs; for Attorney's Fees and Costs; and, for Increase of Bond, filed by Denise Rooke on 11/12/26.

Ruling. This Account and Petition was not timely filed by 10/8/26, as ordered by the Court on 4/10/25. This matter is **continued to December 10, 2026, at 1:30 p.m.** for review and notice.

PRO993025 KRISTIN M. BACCIOCCO, LIMITED CONSERVATORSHIP OF THE PERSON AND ESTATE

Fourteenth Report by Limited Conservators; Petition for Approval of Fourteenth Account, for Allowance of Attorney's Fees, and for Continued Authorization to Expend Funds to Support Conservatee, field by Louis F. Bacciocco and Robin M. Bacciocco on 8/25/26.

Ruling. This matter is **continued to December 3, 2026, at 1:30 p.m.** for further review.

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