

Tentative Rulings for October 22, 2026, 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.

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**.

Judge James T. Chou
Department C
9:00 Calendar

PR0001945 IN THE MATTER OF KIARA ROSEMARY MEZA PARIONA

Petition for Approval of Compromise of Claim or Action or Disposition of Proceeds of Judgment for Minor or Person with a Disability, filed by Evelyn Mora Pariona Cayllahua on 8/21/26 and appoint Guardian Ad Litem

Ruling. Absent objection, the application for appointment of a Guardian Ad Litem and the Petition for Approval of Compromise of Claim or Action or Disposition of Proceeds of Judgment for Minor or Person with a Disability, both filed by Evelyn Mora Pariona Cayllahua on 8/21/26, are **granted**.

PR0000201 IN THE MATTER OF DEIDRA ANN CARSON

Report Regarding Status of Filing Petition for Final Account, filed by Christopher B. Barry on 8/13/26.

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 December 17, 2026**, as required by Probate Code sections 12200-12201.
 - b. A status hearing re filing the Petition or Report **shall be set on January 7, 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 **January 7, 2027, at 9:00 a.m.**

PR0000248 IN THE MATTER OF THE GREGORY JOSEPH SCHOEPP LIVING TRUST DATE JANUARY 10, 2010, BY GREGORY JOSEPH SCHOEPP

Amended Motion to Amend Order to Add Corinne Rees, Individually, as an Additional Judgment Debtor, filed by Samir Rohayem and Zmoonos, LLC on 6/30/26.

Ruling.

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](tel:4154447260).

Samir Rohayem and ZMoonos, LLC as Respondents, bring a motion to amend this Court's March 9, 2026 order awarding attorney fees to add Corinne Rees, individually, as an additional judgment debtor. Having considered the pleading submitted by the parties with respect to this motion, the Court hereby issues this tentative ruling:

Respondents' request for judicial notice of Exhibit A is **GRANTED** as to the record's existence, filing, verification, contents, and requested relief, but not as to the truth of reasonably disputed factual assertions.

Respondents' request for judicial notice of Exhibit B is **GRANTED** as to the record's existence, filing date, contents, and requested relief, but not as to the truth of reasonably disputed factual assertions.

Respondents' motion pursuant to Code of Civil Procedure section 187 to amend the March 9, 2026 order by adding Corinne Rees, individually, as an additional judgment debtor is **DENIED**.

The March 9, 2026 award of \$535,347.50 in attorney's fees and \$30,695.70 in costs, together with the interest previously ordered, remains otherwise unchanged.

BACKGROUND AND PROCEDURE

Gregory Joseph Schoepp established the Gregory Joseph Schoepp Living Trust on January 20, 2010 (the Trust), appointed himself trustee and sole lifetime beneficiary, and died on August 23, 2023. Corinne Rees thereafter became successor trustee because the designated successor trustee, Evelyn Sylvia Schoepp, could not serve following a stroke.

On December 8, 2023, counsel for Rees reported Trust assets of \$5,348,401.53 and Trust debt of \$13,950,652.24.

Rees filed a petition on November 14, 2024, and an amended petition on November 15, 2024, seeking, among other relief, to set aside the Third Amendment to the Lease, the related Performance Deeds of Trust, and the nonjudicial foreclosures on an undue-influence theory.

After Respondents filed a motion for summary judgment, Rees voluntarily dismissed the amended petition without prejudice on September 4, 2025, one day before her opposition was due.

On March 9, 2026, the Court granted Respondents' motion for attorney's fees and denied Petitioner's motion to strike or tax costs. The Court awarded Respondents \$535,347.50 in attorney's fees and \$30,695.70 in costs, together with interest at 10 percent per annum from March 9, 2026, until paid.

Rees appealed the March 9, 2026 order on May 8, 2026, but abandoned the appeal on June 23, 2026.

Respondents Samir Rohayem and ZMoonos, LLC now move under Code of Civil Procedure section 187 to amend the March 9, 2026 order by adding Corinne Rees, individually, as an additional

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](tel:4154447260).

judgment debtor for the fee-and-cost award. Respondents contend that Rees controlled the underlying litigation, pursued unsupported claims despite knowing that the Trust was insolvent, protected her own compensation interests, and engaged in conduct intended to frustrate enforcement of the award.

Rees opposes the motion. She contends that she acted solely in her representative capacity as trustee, did not commingle her assets with Trust assets, did not use Trust assets for her personal benefit, and pursued the litigation upon advice of counsel in what she believed to be the beneficiaries' best interests.

REQUEST FOR JUDICIAL NOTICE

Respondents request judicial notice under Evidence Code sections 452, subdivision (d), and 453, and California Rules of Court, rules 3.1113(l) and 3.1306(c), of two court records submitted with their request.

Exhibit A

Exhibit A is Rees's verified Petition for Instructions Regarding Proposed Sale of Trust Real Property, Deposit of Proceeds in Blocked Account, and Order for Superior Lien, filed April 23, 2024, in *In re The Gregory Joseph Schoepp Living Trust*, Napa County Superior Court Case No. 24PR000097.

Respondents request notice of the petition's filing, Rees's verification, and the representations and requests concerning the Trust's ability to pay creditors, retention of \$75,000 in sale proceeds, and priority liens securing trustee compensation, administration expenses, and attorneys' fees and costs.

The request is **GRANTED** as to the existence, filing, verification, and contents of the petition, including the fact that Rees made the identified representations and requested the specified relief. A court may notice records of another court under Evidence Code section 452, subdivision (d). The Court does not judicially notice the truth of any reasonably disputed factual allegation contained in the petition. (*Sosinsky v. Grant* (1992) 6 Cal.App.4th 1548, 1564–1565, 1567.)

Exhibit B

Exhibit B is ZMoonos, LLC's Complaint for Judicial Foreclosure of Security Interest, Claim and Delivery, Appointment of Receiver, and Injunctive Relief, filed June 9, 2026, in *ZMoonos, LLC v. Eagle Eye, LLC, et al.*, Contra Costa County Superior Court Case No. C26-01989.

Respondents request notice of the filing date and the relief sought against the Eagle Eye collateral and proceeds, including foreclosure, possession, appointment of a receiver, and injunctive relief.

The request is **GRANTED** as to the complaint's existence, filing date, contents, and requested relief. The Court does not judicially notice the truth of any reasonably disputed factual allegation contained in that complaint. (*Sosinsky v. Grant* (1992) 6 Cal.App.4th 1548, 1564–1565, 1567.)

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](tel:4154447260).

LEGAL STANDARD

Code of Civil Procedure, section 187 authorizes a court to amend a judgment or appealable order to add the real judgment debtor under alter ego principles. (*Dow Jones Co. v. Avenel* (1984) 151 Cal.App.3d 144, 148–149.)

The person to be added must have controlled the underlying litigation and have been virtually represented in it. Alter ego liability additionally requires both a sufficient unity of interest such that the separate personalities no longer exist and an inequitable result if the acts are treated as those of the original judgment debtor alone.

Alter ego is an extreme remedy that courts employ sparingly, and no single factor controls. The Court must consider all relevant circumstances. An inability to satisfy a judgment, standing alone, is insufficient to establish the requisite inequitable result.

Wrongful intent is not an independent prerequisite to an inequitable-result finding when the other alter ego requirements have been established. (*Relentless Air Racing, LLC v. Airborne Turbine Ltd. Partnership* (2013) 222 Cal.App.4th 811, 815–817.)

Probate Code, section 18001 provides that a trustee is personally liable for obligations arising from ownership or control of trust property only when the trustee is personally at fault. The parties agree that personal liability under Probate Code sections 18001 and 18002 requires evidence that the trustee was personally at fault.

ANALYSIS

Control and Virtual Representation

The control requirement is satisfied. Rees initiated the underlying proceeding as trustee, controlled its prosecution, personally participated in discovery, and had the opportunity to litigate the claims that produced the fee award. Her interests concerning the prosecution of that action were therefore virtually represented.

Control, however, is not, by itself, sufficient to establish alter ego liability. A trustee necessarily acts for a trust in litigation, and the record must separately establish unity of interest and an inequitable result sufficient to disregard the distinction between Rees’s representative and individual capacities.

Unity of Interest

Respondents rely on Rees’s control of the litigation and Trust finances, liens securing trustee compensation, and treatment of Eagle Eye. The asserted liens secured \$82,677.56 in compensation payable to Rees and \$399,046.57 in counsel’s fees against Trust properties. The judicially noticed Napa petition also requested authority to retain \$75,000 in sale proceeds for trustee compensation, administration expenses, and attorneys’ fees and costs, as well as priority liens securing those obligations.

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](tel:4154447260).

These circumstances establish that Rees controlled Trust administration and sought payment for trustee services. However, these facts do not establish that Rees' individual identity and the Trust's administration had ceased to be separate. Rees declares that she never commingled personal assets with Trust assets and never used Trust assets as her own or for her personal benefit. The present record contains no contrary showing of commingling or personal use sufficient to overcome that evidence.

The Court therefore finds that Respondents have not established the required unity of interest.

Inequitable Results and Personal Fault

Respondents argue that inequity extends beyond noncollection because Rees continued unsupported litigation despite acknowledged insolvency, protected her compensation interests, and controlled a business offered for liquidation while the award remained unpaid. No amount has been paid toward the \$566,043.20 award.

The record supports a finding that Rees knew the Trust's liabilities substantially exceeded its assets before she filed and continued the amended petition. It also shows that the petition was dismissed shortly before the summary-judgment opposition deadline. Those circumstances raise substantial concerns about the litigation decision.

Nevertheless, insolvency and nonpayment alone do not establish an inequitable result. The requests for trustee compensation and administrative expenses were presented to a probate court for approval, rather than accomplished through undisclosed commingling or diversion. The noticed Eagle Eye complaint establishes that ZMoonos sought foreclosure and other relief, but its disputed allegations cannot be accepted as true merely through judicial notice.

Rees states that she filed the amended petition upon advice of counsel because she believed that doing so was in the beneficiaries' best interests and would reclaim assets for the Trust. On the record presented, the Court cannot find that Rees's conduct was intentional or negligent in a manner sufficient to impose individual liability under Probate Code sections 18001 or 18002. Moreover, the evidence does not establish an inequitable result sufficient to invoke the exceptional alter ego remedy.

Because Respondents have not established unity of interest or the requisite inequitable result, the Court need not determine whether the remaining circumstances would independently support amendment.

**PR0000269 IN THE MATTER OF THE OLAV N. NORMAN AND ANNE G. NORMAN LIVING TRUST
DATED JUNE 26, 2024**

1. Petition of Trustee Alan Norman for: (1) Order Confirming Settlement Approval Order Is Not Stayed Pending Appeal and Directing Trustee and Beneficiary Compliance with Settlement Terms; (2) Preliminary Injunction Restraining Charles Norman from Interfering with McGuinn Property/ (3) Order Authorizing Distribution of Settlement Proceeds from Attorney's Trust

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](tel:4154447260).

Account to the Trustee; and (4) Order Confirming Authority of Trustee to Use Settlement Funds for Trust Purposes, and Instructing the Trustee that He Has that Authority Under the Trust, filed by Alan Norman on 3/6/26.

2. Status Conference - Appeal

Ruling. This matter is **continued to February 4, 2027, at 9:00 a.m. in Courtroom C**, re status of appeal and for further setting.

**PR0000354 IN THE MATTER OF THE STEVEN J. KAUFMAN DECLARATION OF TRUST AGREEMENT
DATED OCTOBER 30, 1998, AS AMENDED AND RESTATED**

1. Verified Petition for (1) Order Setting Aside Trust Amendment Due to Incapacity; and (2) Declaratory Relief Regarding Incapacity of Steven Kaufman, filed by Alon Adani on 1/12/24.
2. Order to Show Cause – Dismissal of Outstanding Petition.

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

PR0000476 IN THE MATTER OF CLARA BULLOCK

1. 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.
2. OSC – to attorney Mr. Kelly and Mr. Bishlam Bullock regarding why sanctions in the amount of \$149 should not issue for each of the following: (1) failure to appear on 10/1/26 and (2) failure to comply with the Court's 8/13/26 order.

Ruling. Personal representative Bishlam Bullock and attorney Mark L. Kelly are **ordered to appear**.

PR0000876 IN THE MATTER OF MARIE-THERESE HYNES HELM

Petitioner's Second Status Report on the Administration of the Administration of the Estate of Marie-Therese Hynes Helm, filed by Edward Hynes on 9/24/26.

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, no later than five court days from the date of this hearing; and
2. Personal Representative is **ordered to 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 December 31, 2026**, as required by Probate Code sections 12200-12201.
 - ii. A status hearing re filing the Petition or Report **shall be set on January 21, 2027, at 10:00 a.m.**

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](tel:4154447260).

- A. If neither document has been timely filed, an appearance will be required.
- B. If the Petition or Report is timely filed, the hearing will be set on **January 21, 2027, at 9:00 a.m.**

PR0001075 IN THE MATTER OF CHRISTOPHER E. GRAINGER

Second Report of Status of Administration, filed by Benedictina Tracy on 10/5/26.

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, no later than five court days from the date of this hearing; and
2. Personal Representative is **ordered to comply** with the following future dates:
 - b. Status on Closing Estate.
 - i. Either: (1) a Petition for Final Distribution; or (2) a Report of Status of Administration shall be **filed by July 1, 2027**, as required by Probate Code sections 12200-12201.
 - ii. A status hearing re filing the Petition or Report **shall be set on July 22, 2027, at 10:00 a.m.**
 - A. If neither document has been timely filed, an appearance will be required.
 - B. If the Petition or Report is timely filed, the hearing will be set on **July 22, 2027, at 9:00 a.m.**

PR0001107 IN THE MATTER OF APRIL MINXIA XIE

Report of Status of Administration of Estate, filed by John Yi Wang on 10/6/26.

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 September 30, 2027**, as required by Probate Code sections 12200-12201.
 - b. A status hearing re filing the Petition or Report **shall be set on October 21, 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 **October 21, 2027, at 9:00 a.m.**

PR0001142 IN THE MATTER OF FRANKLIN D. RAINWATER

1. First Status Report of Administrator, filed by Grace Rainwater on 9/23/25.
2. OSC – Failure to appear on 9/24/26

Ruling. All Orders to Show Cause are discharged. The First Report of Administrator is **continued to November 19, 2026, at 9:00 a.m.** **Petitioner is ordered to:**

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](tel:4154447260).

1. **Mail** notice to all interested parties using the **mandatory Judicial Council Form** “Notice of Hearing – Decedent’s Estate or Trust” **with the box checked** in Item 1 stating this is a report of status of administration. (Judicial Council Forms, form DE-120.)
2. **File** a copy of the DE-120 that was mailed, with the Proof of Service completed on page 2 showing that all interested parties received at least fifteen days’ notice of the Report of Status of Administration. (Prob. C. § 12201(b).)
3. **Submit** a proposed Order to the Court. (Super. Ct. Marin County, Local Rules, rule 6.2(B), Filing, Hearing, and Continuance Procedures.)
4. All documents must be received by the Court at least **five court days** prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(b), Filing, Hearing, and Continuance Procedures.)

PR0001265 IN THE MATTER OF THE PETER R. VINE AND DIANA M. VINE REVOCABLE INTER VIVOS TRUST AGREEMENT

Petition for Order for Payment of Fees to Guardian ad Litem and Request for Attorney’s Fees and Costs, filed by Alice Fishler on 8/20/26.

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

PR0001278 IN THE MATTER RUTH KATHLEEN McCREIGHT

Petition for Letters of Administration, filed by Alexander Henderson on 9/18/26.

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 February 25, 2027, at 10:00 a.m.** (Prob. Code, § 8800.)
 - b. An appearance will be required on that date if the Final Inventory and Appraisal is not filed at least five court days prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(B), Filing, Hearing, and Continuance Procedures.)
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 October 28, 2027**, as required by Probate Code sections 12200 and 12201.
 - b. A status hearing re filing the Petition or Report shall be **set on November 18, 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 November 18, 2027, at 9:00 a.m.

PR0001409 IN THE MATTER OF KING ARTHUR HARRINGTON, JR.

Petition to Confirm Asset to Estate, filed by Susan Gambrioli on 8/26/26..

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](tel:4154447260).

Ruling. This matter is **continued to December 3, 2026, at 9:00 a.m.** Petitioner is ordered to:

1. **File** a Supplement to Petition stating whether Annette Harrington died testate or intestate, with a copy of any will attached thereto.
2. **Provide notice** of the Petition to Confirm Asset to Estate 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.) **Note** that any heirs-at-law who are not beneficiaries of the Trust must receive notice on Judicial Council Form DE-115, served in the manner set forth by Code of Civil Procedure, section 413.10, et seq. (Prob. C. § 17203(b).)
3. **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 Petition to Confirm Asset to Estate. (Prob. Code, §§ 851 and 17203.)
4. All documents must be received by the Court at least **five court days** prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(b), Filing, Hearing, and Continuance Procedures.)

PR0001493 IN THE MATTER OF LUZ FRYE

First and Final Report of Personal Representative on Account and Petition for Allowance of Statutory Compensation to Attorneys and for Final Distribution, filed by Richard Frye on 8/31/26.

Ruling. Absent objections, this Petition will be **granted without hearing.** Petitioner is **ordered to submit** a proposed Order to the Court, no later than five court days from the date of this hearing.

PR0001675 IN THE MATTER OF RICHARD VALLS

First and Final Report of Executor and Petition for Settlement and Approval; Allowance of Attorney’s Compensation, and (2) Final Distribution on Waiver of Account, filed by Carol Mantelli Valls on 8/24/26.

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

PR0001712 IN THE MATTER OF JOHN HENRY ROBERTSON

First and Final Report of Executor and Petition for Settlement and Approval; for (1) Allowance of Attorney’s Compensation, and (2) Final Distribution on Waiver of Account, filed by Ronald L. Laubach on 8/24/26.

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.

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](tel:4154447260).

Ruling. This matter is **continued to November 19, 2026, at 9:00 a.m. in Department C**, pursuant to stipulation and the order issued on October 15, 2026.

PR0001900 IN THE MATTER OF MARC E. HOAG

Verified Petition for Breach of Fiduciary Duty and Orders Removing Trustee; Appointing Successor Trustee; and Injunctive Relief, filed by Marc E. Hoag on 7/21/26.

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

PR0001932 IN THE MATTER OF EDWARD J. SLISKY AND IRENE MARTIN SLISKY TRUST DATED 9/17/03

Petition for Order Approving Modification of Trust Terms, filed by Irene Martin Slisky on 8/6/26.

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

PR0001938 IN THE MATTER OF MARGARET LORD

Petition for Confirm (1) Validity of Trust; (2) Successor Trustee; (3) Trust Assets; and for Order Transferring Decedent's Omitted Assets to Trust, filed by Margaret Eileen Lord on 8/13/26.

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

PR0001939 IN THE MATTER OF THE ARLENE KARA TRUST DATED FEBRUARY 4, 2003, AS AMENDED BY THE AMENDMENT TO ARLENE KARA TRUST DATED OCTOBER 13, 2006

Verified Petition to Appoint Successor Trustee and Amend Trust Regarding Trustee Fees, filed by Michael Kara on 8/13/26.

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

PR0001944 IN THE MATTER OF SURVIVOR'S TRUST, AMENDED ON MARCH 6, 2007, AND AUGUST 28, 2009, U/D/T OF THE OLSON FAMILY TRUST DATED MAY 7, 1993

Petition to Instruct the Trustee on: (1) Consideration of Government Benefits in Making Trust Distributions; (2) Administration of the Drug and Alcohol Distribution Restriction; (3) the Trustee's Authority to Use Trust Assets to Assist in the Purchase of a Residence; and (4) Response to Request for Distribution, filed by Erin Morales on 8/19/26.

Ruling. In light of the objections filed by Beneficiary Laurel Olson on 10/15/26 and 10/19/26, Petitioner is **ordered to file** any response to said objections **by no later than November 12, 2026** or such response is deemed waived. The parties are **ordered to meet and confer** in person, by telephone, or video

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](tel:4154447260).

teleconference **by no later than December 4, 2026** to try to resolve any and all disputes informally. The matter is **now set for December 10, 2026, at 9:00 a.m. in Courtroom C** for status of meet and confer and for further setting.

PR0001961 IN THE MATTER OF JAMES S. TETER

Petition for Probate of Will and for Letters of Administration, filed by Caron Schmierer on 8/31/26.

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 February 25, 2027, at 10:00 a.m.** (Prob. Code, § 8800.)
 - b. An appearance will be required on that date if the Final Inventory and Appraisal is not filed at least five court days prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(B), Filing, Hearing, and Continuance Procedures.)
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 October 28, 2027**, as required by Probate Code sections 12200 and 12201.
 - b. A status hearing re filing the Petition or Report shall be **set on November 18, 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 November 18, 2027, at 9:00 a.m.

PR0001993 IN THE MATTER OF BRET JAY CHAPPELL

Petition for Probate of Will and for Letters Testamentary, filed by Annica Yvonne Menicutch on 9/24/26.

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 February 25, 2027, at 10:00 a.m.** (Prob. Code, § 8800.)
 - b. An appearance will be required on that date if the Final Inventory and Appraisal is not filed at least five court days prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(B), Filing, Hearing, and Continuance Procedures.)
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 October 28, 2027**, as required by Probate Code sections 12200 and 12201.

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](tel:4154447260).

- b. A status hearing re filing the Petition or Report shall be **set on November 18, 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 November 18, 2027, at 9:00 a.m.

PRO1403390 IN RE THE MARY BENNETT McQUINN SURVIVOR'S TRUST, TRUST OF

1. Declaration in Support of Petition for Order Compelling Trust Disclosure and Accounting, filed by Michael McQuinn on 7/1/26.
2. OSC – as to Mr. Michael McQuinn regarding why the Declaration in Support of Petition filed on 7/1/26 should not be dismissed and why failed to comply with the Court's 8/27/26 order.

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

PRO2001545 EDWARD HALL NEWBEGIN II, ESTATE OF

Eleventh Report of Status of Administration, filed by Edward H. Newbegin on 9/30/26.

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, no later than five court days from the date of this hearing; and
2. Personal Representative is **ordered to comply** with the following future dates:
 - c. Status on Closing Estate.
 - i. Either: (1) a Petition for Final Distribution; or (2) a Report of Status of Administration shall be **filed by November 5, 2026**, as required by Probate Code sections 12200-12201.
 - ii. A status hearing re filing the Petition or Report **shall be set on December 3, 2026, at 10:00 a.m.**
 - A. If neither document has been timely filed, an appearance will be required.
 - B. If the Petition or Report is timely filed, the hearing will be set on **December 3, 2026, at 9:00 a.m.**

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. This matter is **continued to November 19, 2026, at 9:00 a.m.** **Petitioner is ordered to:**

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](tel:4154447260).

1. **Mail** notice of the Supplement to Petition filed on 10/14/26 to all interested parties using the **mandatory Judicial Council Form** “Notice of Hearing – Decedent’s Estate or Trust”. (Judicial Council Forms, form DE-120.)
2. **File** a copy of the DE-120 that was mailed, with the Proof of Service completed on page 2 showing that all interested parties received at least fifteen days’ notice of the Report of Status of Administration. (Prob. C. § 12201(b).)
3. All documents must be received by the Court at least **five court days** prior to hearing. (Super. Ct. Marin County, Local Rules, rule 6.2(b), Filing, Hearing, and Continuance Procedures.)

PRO2200411 PATRICIA JUDITH-LINDSEY-RANZER, ESTATE OF

Status Report of Administration by Personal Representative of the Estate, filed by Kenneth L. Schwartz on 8/27/26.

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, no later than five court days from the date of this hearing; and
2. Personal Representative is **ordered to comply** with the following future dates:
 - d. Status on Closing Estate.
 - i. Either: (1) a Petition for Final Distribution; or (2) a Report of Status of Administration shall be **filed by February 25, 2027**, as required by Probate Code sections 12200-12201.
 - ii. A status hearing re filing the Petition or Report **shall be set on March 18, 2027, at 10:00 a.m.**
 - A. If neither document has been timely filed, an appearance will be required.
 - B. If the Petition or Report is timely filed, the hearing will be set on **March 18, 2027, at 9:00 a.m.**

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](tel:4154447260).

Judge James T. Chou
Department C
10:00 Calendar

PR0001088 IN THE MATTER OF EDWARD LOUIS DeROSIS

1. Status Conference - Filing of Final Inventory and Appraisal
2. Status Conference – Report of Status of Administration – or Petition for Final Distribution
3. OSC as to why attorney Kevin M. Baldwin and personal representative Kim Schwarcz regarding why sanctions in the amount of \$149 should not issue each for the failure to appear on 9/24/26 and the failure to file the required documents.

Ruling. Personal representative Kim Schwarcz and attorney Kevin M. Baldwin are **ordered to appear**. The Court notes that a Partial Inventory and Appraisal and a Supplemental Inventory and Appraisal have been filed.

PR0001256 IN THE MATTER OF DANIEL JUDAH GARE

1. Status Conference – Report of Status of Administration – or Petition for Final Distribution
2. OSC to attorney Ben Gale regarding why sanctions in the amount of \$149 should not issue for each of the following:
 - a. Failure to appear on 10/1/26
 - b. Failure to file the petition or report.

Ruling. Personal representative Jona Starr King and attorney Benjamin W. Gale are **ordered to appear**.

PR0001352 IN THE MATTER OF THEODORE C. McMECHEN

Status Conference - Filing of Final Inventory and Appraisal

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

PR0001386 IN THE MATTER OF MOHOMMAD RIZWAN

Status Conference - Filing of Final Inventory and Appraisal

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

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](tel:4154447260).

PR0001533 IN THE MATTER OF JOSEPH MAXWELL MABELITINI

Status Conference - Filing of Final Inventory and Appraisal

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

PR0001733 IN THE MATTER OF PETER LAD TALLO

Status Conference - Filing of Final Inventory and Appraisal

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

PR0001766 IN THE MATTER OF ESTATE OF KATE P. MORSE

Status Conference - Filing of Final Inventory and Appraisal

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

PR0001769 IN THE MATTER OF MARY ANN LEVITT

Status Conference - Filing of Final Inventory and Appraisal

Ruling. Personal representative Adam Braverman and attorney Brendan P. Brewer are **ordered to appear.**

PR0001798 IN THE MATTER OF PENNY JEAN WHITE

Status Conference - Filing of Final Inventory and Appraisal

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

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](tel:4154447260).

Judge James T. Chou
Department C
1:30 Calendar

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

1. Status Conference - Filing of First Account
2. OSC to attorney Barry Finkelstein and guardian Cathy Klein regarding why sanctions in the amount of \$149 should not issue for each of the following: (1) failure to appear on 10/1/26 and (2) failure to file the first account.

Ruling. Guardian Cathy Klein and attorney Barry W. Finkelstein are **ordered to appear**.

PR0001904 IN THE MATTER OF ATRINA P. ANSARI

Petition for Appointment of Limited Probate Conservator of the Person, filed by Lilian Ansari and Saied Ansari on 7/15/26.

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

If the Petition is granted, Conservator is **ordered to comply** with the following future dates:

1. Confidential Conservatorship Care Plan.
 - a. A status hearing for the filing of the mandatory Confidential Conservatorship Care Plan shall be set on **February 25, 2027, at 1:30 p.m.** (Judicial Council Forms, forms DE-355 and DE-356.)
 - b. An appearance will be required on that date if the Confidential Conservatorship Care Plan is not filed at least five court days prior to the hearing.

PR0001912 IN THE MATTER OF ERWINSON A. RODAS MALDONADO

Petition for Appointment of Limited Probate Conservator of the Person, filed by Edilma Maldonado Rodas on 7/23/26.

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

If the Petition is granted, Conservator is **ordered to comply** with the following future dates:

1. Confidential Conservatorship Care Plan.

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](tel:4154447260).

- a. A status hearing for the filing of the mandatory Confidential Conservatorship Care Plan shall be set on **February 25, 2027, at 1:30 p.m.** (Judicial Council Forms, forms DE-355 and DE-356.)
- b. An appearance will be required on that date if the Confidential Conservatorship Care Plan is not filed at least five court days prior to the hearing.

PR0001996 IN THE MATTER OF MICHAEL TERRENCE McKENZIE

Petition for Appointment of Temporary Conservator of the Person and Estate, filed by Maureen McKenzie on 10/22/26.

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

If the Petition is granted, Conservator is **ordered to comply** with the following future dates:

1. Confidential Conservatorship Care Plan.
 - a. A status hearing for the filing of the mandatory Confidential Conservatorship Care Plan shall be set on **February 25, 2027, at 1:30 p.m.** (Judicial Council Forms, forms DE-355 and DE-356.)
 - b. An appearance will be required on that date if the Confidential Conservatorship Care Plan is not filed at least five court days prior to the hearing.
2. Final Inventory and Appraisal.
 - a. A status hearing for the filing of the Judicial Council Form "Final Inventory and Appraisal" shall be set on **February 25, 2027, at 1:30 p.m.** (Judicial Council Forms, form DE-160.)
 - b. An appearance will be required on that date if the Final Inventory and Appraisal is not filed at least five court days prior to hearing.
3. First Account.
 - a. Conservator is to **file the First Account** for the period ending October 21, 2026 **by January 6, 2028.**
 - b. A hearing shall be set for February 17, 2028, at 1:30 for either:
 - i. Hearing on the First Account; or
 - ii. Explanation as to why it was not timely filed.

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. This matter is **continued to November 19, 2026, at 1:30 p.m.,** pursuant to the 10/20/26 Declaration of attorney Bruce Feder.

PRO2100276 NEIL E. MASON, CONSERVATORSHIP OF THE ESTATE

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](tel:4154447260).

Third Account and Report of Conservator and Petition for (1) Settlement of Account; (2) Ratification of Acts of Conservators; (3) Discharge of Conservator Bond; and (4) Waiver of Final Account, filed by Marc Kleinmaier and Rhian Kleinmaier on 9/10/26.

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

PRO2202297 LUCY ELLEN MITCHELL, CONSERVATORSHIP OF THE PERSON

Petition for Order Discharging Conservatorship Bond and Exonerating Surety Without Accounting, filed by Jason Emery Mitchell and Kathleen A. Eusebio on 9/10/26.

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

PRO39871 SIMA YAMIN, CONSERVATORSHIP OF THE PERSON AND THE ESTATE OF

Status Conference - Filing of Sixteenth Account

Ruling. Conservators Soha Yamin and Issa Yamin and attorney Janet M. Boessenecker are **ordered to appear.**

PRO2001269 LEE SUNG SERGI, CONSERVATORSHIP OF THE PERSON AND ESTATE

Petition to Transfer Proceedings to San Francisco City and County, California, filed by Allison Huegel and James S. Sergi on 8/5/26., filed by Neva M. Oliver on 9/22/26.

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

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](tel:4154447260).