

Tentative Rulings for February 13, 2025 Probate Calendar

Judge James T. Chou
Department C

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

To Join a Zoom Meeting, please follow this link: www.marin.courts.ca.gov

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

PR000214 IN THE MATTER OF CAROLYN TUTTLE MEANS

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

Ruling. **Continued to March 13, 2025 at 9:00.** The Report of Status of Administration was not timely filed; additional time for review and for proper notice is required.

PR000240 IN THE MATTER OF ROGER EDWARD ROBERTS

First and Final Report of Co-Executors on Waiver of Accounting; Petition for Settlement, Allowance of Statutory Fees, and for Final Distribution.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

PR000565 IN THE MATTER OF JOHN M. LONG

Petition for Final Distribution on Approval of Account and for Allowance of Executor and Attorney Fees.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

PR000577 IN THE MATTER OF TAYLOR COVERDALE

Motion for Order: (1) Compelling Marin County Department of Health & Human Services, Division of Aging & Adult Services: Long Term Care Ombudsman Program to Produce Documents to the Probate Court Pursuant to Subpoena; and (2) Releasing Said Documents to the Parties Following the Probate Court's in Camera Review.

Ruling. **Off calendar** pursuant to stipulated order issued 2/6/25.

PR000640 IN THE MATTER OF THE SIDINSKI-OAKES TRUST

Petition for Order Confirming Asset of Trust Under Cal. Prob. Code § 850.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

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PR0000685 IN THE MATTER OF DONALD KEITH FRASER AND GLORIA M. FRASER REVOCABLE TRUST

Petition to modify trust.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

PR0000718 IN THE MATTER OF PATRICIA MAUREEN GAFFNEY

- 1) Amended Petition to Revoke Revocable Trust and for Attorney Fees.
- 2) Order to show cause why the petition should not be denied for failure to file proper verification and failure to provide the court with proper notice and service.

Ruling. In light of the failure to file proper verification and failure to provide the court with proper notice and proof of service, the **Amended Petition is denied.**

PR0000732 IN THE MATTER OF THE EXEMPTION TRUST UNDER THE BJORKLUND/LIPSON FAMILY TRUST

Petition for Order Terminating Trust Under Probate Code Section 15403.

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

PR0000759 IN THE MATTER OF NATASHA A. POPOVICH

- 1) Petition for Probate of 2010 Will and for Letters Testamentary, filed by Adrienne Tidwell on 8/7/24.
- 2) Contest and Grounds of Objection to Probate of Purported Will Due to Lack of Legitimacy, filed by Janet Bainbridge and Janet Deramo on 9/4/24.

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

PR0000767 IN THE MATTER OF NATASHA ALEXANDRIA POPOVICH

- 1) Petition for Probate of 1994 Will and for Letters Testamentary, filed by Joyce Bainbridge on 8/8/24.
- 2) Contest and Grounds of Objection to Probate of Will Due to Revocation by Subsequent Instrument, filed by Adrienne Tidwell on 8/29/24.

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

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PR0000770 IN THE MATTER OF THE DORENE R. FULLER 2012 REVOCABLE TRUST DATED JULY 10, 2012

Petition to Determine Validity of Trust Instrument.

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

PR0000782 IN THE MATTER OF THE CREDIT SHELTER TRUST CREATED UNDER THE PAUL CAMERA AND BARBARA A. CAMERA 1997 TRUST

- 1) Petition to Appoint Nina Camera Ocio as Successor Trustee of the Credit Shelter Trust, filed by Nina Camera Ocio on 8/13/24.
- 2) Petition to Appoint Raj Kohli as Successor Trustee of the Credit Shelter Trust, filed by Paul Camera, Jr. on 11/6/24.

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

PR0000825 IN THE MATTER OF IRENE KAZAY REVOCABLE LIVING TRUST, DATED APRIL 20, 2018

Petition for an Order to Confirm Validity of Trust; Confirm Trustee; and Confirm Assets to Revocable Trust.

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

PR0000845 IN THE MATTER OF THE 2015 JACK W. PETERSON TRUST DATED APRIL 27, 2015

Verified Petition for Termination of the 2015 Jack W. Peterson Trust, Dated April 27, 2015.

Ruling. The Court notes that Trustee already has authority to terminate the trust and pay legal and trustee fees. In light of this authority, this Petition is unnecessary and is **denied**.

PR0000846 IN THE MATTER OF THE 2015 LOUIS W. PETERSON TRUST DATED APRIL 27, 2015

Verified Petition for Termination of the 2015 Louis W. Peterson Trust, Dated April 27, 2015.

Ruling. The Court notes that Trustee already has authority to terminate the trust and pay legal and trustee fees. In light of this authority, this Petition is unnecessary and is **denied**.

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PR0000848 IN THE MATTER OF WAYNE-GOODIN 2015 FAMILY TRUST DATED FEBRUARY 25, 2015

Petition for Order Determining Title to Personal Property.

Ruling. **Continued to March 13, 2025 at 9:00.** Petitioner is to file the following no later than March 6, 2025:

1. Proof that the Schwab account was in existence as of the date of execution of the Trust.

PR0000849 IN THE MATTER OF THE DAROLD E. SIMS TRUST

Petition to Invalidate Trust and Donative Transfers to Care Custodian, for Imposition of Constructive Trust.

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

PR0000851 IN THE MATTER OF SERGEY BIKOWSKY

Spousal Property Petition.

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

PR0000852 IN THE MATTER OF ERIC BOARD HEITZ

Petition regarding PROB C850.

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

**PR0000891 IN THE MATTER OF THE GOODY FAMILY TRUST DATED APRIL 27, 1988, AS AMENDED
AND RESTATED ON DECEMBER 29, 1999**

Petition to modify trust.

Ruling. **Continued to April 17, 2025 at 9:00.** No Proof of Service or Waivers of Notice have been filed. The Court confirms the Motion to Seal Action set for hearing on April 17, 2025 at 9:00 and expects that the appropriate document(s) will have been filed at least 5 court days prior to that date.

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

Petition for Modification of Trust.

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

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PR0000904 IN THE MATTER OF PETER STOVALL COOK LIVING TRUST DATED JANUARY 21, 1999 AS AMENDED AND RESTATED ON OCTOBER 21, 2021

Petition for Order Confirming Trust Assets.

Ruling. Continued to March 6, 2025 at 9:00 for further review.

PR0000905 IN THE MATTER OF MCGUIRE FAMILY REVOCABLE TRUST FBO RICHARD P. MCGUIRE

Petition for Order Appointing Successor Trustee.

Ruling. Continued to March 6, 2025 at 9:00 for further review.

PR0000949 IN THE MATTER OF BONNIE FRANK

Status conference and expiration of Special Letters.

Ruling. Continued to May 8, 2025 at 9:00, pursuant to ex parte order issued 2/6/25.

PR0000951 IN THE MATTER OF EMIL A. TANAGHO

Petition for letters testamentary.

Ruling. Continued to March 13, 2025 on an OSC as to why this Petition should not be denied based on failure to comply with the 1/9/25 ruling.

PR0000955 WYATT FAMILY TRUST

Petition (1) to Remove Trustee; (2) to Compel Trustee to Account; (3) for Surcharge of the Trustee; (4) to Void Deed or Compel Return of Trust Real Property; and (5) for Instructions.

Ruling. Continued to March 6, 2025 at 9:00 for further review.

PR0000987 IN THE MATTER OF MERLE J. ONGARO TRUST, DATED JANUARY 28, 2015

Petition for Instructions.

Ruling. The parties are ordered to appear.

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PR0001011 IN THE MATTER OF PATRICK J. GALLAGHER AND LUCILLE S. GALLAGHER REVOCABLE TRUST DATED DECEMBER 4, 1998

First Amended Petition to Determine Terms of Lost Trust; for Breach of Trust; to Confirm Trust Property; and for Constructive Trust.

Ruling. The parties are ordered to appear.

PR0001020 IN THE MATTER OF JULIE JIZRAWI

Petition for letters testamentary.

Ruling. The parties are ordered to appear.

PR0001070 IN THE MATTER OF DOUGLAS KANG

Petition for letters testamentary.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

PR0001073 IN THE MATTER OF LEE DIANE LITTLE

Petition for letters of administration.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

PR0001074 IN THE MATTER OF SYLVIA STEVENS JONES

Petition for letters of administration.

Ruling. **Continued to February 27, 2025 at 9:00 for further review.**

PR0001075 IN THE MATTER OF CHRISTOPHER E. GRAINGER

Petition for letters testamentary.

Ruling. **Continued to March 6, 2025 at 9:00 for further review.**

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PR0001077 IN THE MATTER OF FRANK SALVESTRIN

Petition for letters of administration.

Ruling. **Continued to February 27, 2025 at 9:00 for further review.**

PR0001088 IN THE MATTER OF EDWARD LOUIS DEROSIS

Petition for letters of special administration.

Ruling. **Denied.** In order to transfer estate assets to Decedent's Trust, Petitioner must file either an 850 petition or a petition for probate of the will and letters testamentary.

PRO2202479 SEAN THACKREY, ESTATE OF

- 1) Petition for attorney's fees.
- 2) Petition regarding status report of administration.
- 3) Petition for removal of personal rep.
- 4) Status regarding filing of final inventory and appraisal.
- 5) Motion regarding application to file under seal.
- 6) Status regarding mediation.

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

PRO1501502 THE DOMINIC VELETZOS SPECIAL NEEDS TRUST, TRUST OF

Fifth Account and Report of Trustees; Petition to Settle Account; to Increase Bond; and to Fix and Allow Attorneys' Fees and Costs.

Ruling. Absent objections, this Petition will be **granted without hearing**. Trustee is ordered to comply with the following future dates:

1. Trustee is to file the Sixth Account for the period 6/1/24 – 5/31/26 by August 13, 2026.
2. A status hearing re filing the Sixth Account shall be set on September 3, 2026 at 10:00.
 - a. If not timely, an appearance will be required.
 - b. If the Sixth Account is timely filed, the hearing will be set on September 3, 2026 at 9:00.

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PRO1901893 IN RE THE STEPHEN PELAEZ SETTLEMENT TRUST, TRUST OF

Fourth Account and Report of Trustee; Petition for Settlement of Accounts; for Approval of Trustee's and Attorney's Fees; for Increase of Bond; to Change Venue; and to Confirm Appointment of Co-Trustee and Nomination of Successor Trustee.

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

PRO2203964 IN RE THE MASON P. KREIS SPECIAL NEEDS TRUST, TRUST OF

Petition to Approve Second Account and Report of Trustee from 10/2/22 through 9/30/24, to Confirm Resignation and Appoint Successor Trustee, to Transfer Venue, and to Approve Trustee's and Attorney's Fees.

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

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Judge James T. Chou
Department C
10:00 Calendar

PR000239 IN THE MATTER OF PHYLLIS MICHEL

Status regarding report of administration or petition for final distribution.

Ruling. **Appearances is required** to address personal representative's to address failure to comply with the court's order issued on 1/25/24.

PR000260 IN THE MATTER OF JAMES W. PETERSON

- 1) Status regarding report of administration or for final distribution.
- 2) Order to show cause regarding failure to file report/petition and failure to appear on 01/16/2025.

Ruling. **Appearance is required to address the OSC re filing the Final Report of Status or Petition for Final Distribution and to address the Declaration related to the OSC for failure to appear.**

PR000618 IN THE MATTER OF PETER B. HIRSHFIELD

- 1) Status regarding filing of final inventory and appraisal.
- 2) Order to show cause regarding failure to file final inventory and appraisal and failure to appear on 12/19/24.

Ruling. **Appearance is required** to address OSC for failure to appear on December 19, 2024 and why sanctions should not issue.

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PR0000736 IN THE MATTER OF RITA DEMPSEY

- 1) Status regarding filing of final inventory and appraisal.
- 2) Order to show cause regarding failure to file final inventory and appraisal and failure to appear on 01/16/2025.

Ruling. **Appearance is required** to address OSC for failure to appear and why sanctions should not issue.

PR0000739 IN THE MATTER OF MARY CATHERINE EGAN

Status regarding filing of final inventory and appraisal.

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

PR0000753 IN THE MATTER OF NELSON GEORGE GORDY

Status regarding filing of final inventory and appraisal.

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

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Judge James T. Chou
Department C
1:30 Calendar

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

- 1) Status conference.
- 2) Motion to quash subpoenas; discovery facilitator program.
- 3) Modify trust.

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

PR0000873 IN THE MATTER OF ERIC LONGAN BELMONT

Petition to appoint limited conservator.

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

PR0000884 IN THE MATTER OF JACOB EGAN

Petition to appoint conservator.

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

PR0000885 IN THE MATTER OF JOHN ALDERETE

Petition to appoint conservator.

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

PR0000971 IN THE MATTER OF WANDA K. KUNSTLER

Petition to appoint conservator (third amendment estate only).

Ruling. The parties are ordered to appear to address the issues raised on 1/23/25.

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PR0001006 IN THE MATTER OF PAMELA SUE NEAL

Petition accepting transfer.

Ruling. The parties are ordered to appear to confirm the following:

1. Confidential Conservatorship Care Plan.
 - a. A status hearing for the filing of the Confidential Conservatorship Care Plan shall be set on June 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 days prior to the hearing.
2. Final Inventory and Appraisal.
 - a. A status hearing for the filing of the Final Inventory and Appraisal shall be set on June 18, 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.
3. First Account.
 - a. A First Account for the period ending 2/12/26 shall be filed by April 23, 2026.
 - b. A hearing shall be set on June 4, 2026 at 1:30 for either: (1) hearing on the First Account; or (2) explanation as to why it was not timely filed.

PR0001086 IN THE MATTER OF SUNSHINE SHERRY LYNN BRADLEY

Petition to appoint temporary guardian.

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

PRO1702640 IN THE MATTER OF GERMAINE A. BOURGEOIS

Petition for change of venue.

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

PRO1903570 MARJORIE A. SNOW, CONSERVATORSHIP OF THE ESTATE

Status regarding third accounting and report of conservator for period 11/1/22-10/31/24 or explanation as to why it was not timely filed.

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

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PRO39861 NICOLA PAGANINI, CONSERVATORSHIP OF

Petition to terminate conservatorship.

Ruling. **Continued to February 27, 2025 at 1:30** to allow time for Conservatee's court-appointed attorney to review the file and meet with Conservatee.

PRO2003412 PATRICIA RAISER, CONSERVATORSHIP OF THE PERSON AND ESTATE

Final accounting.

Ruling. **Continued to April 17, 2025 at 1:30.** Conservator failed to address all requirements of 11/21/24 ruling. Conservator is to file the following no later than April 10, 2025:

1. Second Amended Final Accounting and Petition that includes the following:
 - a. Names, relationships, addresses and ages of Conservatee's successors in interest (beneficiaries of will, executors named in will).
 - b. Proposed distribution of Conservatee's assets; if to a probate estate please provide case number and name of the personal representative (this must be in the prayer for relief).
 - c. Request for termination of Conservatorship of the Estate (must be in the prayer for relief).
 - d. All requested relief must be included in the title to the pleading.
2. Proof of Service confirming notice of the Second Amended Final Accounting and Petition to all interested parties.
3. Note that Conservator may not be discharged until receipts on distribution of the assets and an ex parte petition for final discharge have been filed.

PRO31686 ROBERT A. ILG, III, CONSERVATORSHIP OF

Petition regarding fifth account.

Ruling. **Continued to March 13, 2025 at 1:30.** Conservator is to file the following no later than March 6, 2025:

1. Reconciliation of the Bank of Marin account balance of \$29,659.67 on 9/30/24 with the ending balance of \$16,117.75 reported in Schedule E to the Accounting