

Superior Court of California
County of Merced
Probate Department

Probate Notes

Probate Notes for future calendars are available from the time they are created until the morning of the scheduled hearing. Updates to the Probate Examiner's Notes typically will be posted 3 days prior to the hearing. If you are filing documents to cure a technical defect, documents should be filed a minimum of 2 court days prior to the hearing. Documents filed late will not be reviewed except on the date of the hearing at the Judge's discretion and could result in a continuance of your case.

Parties intending to appear in Court regarding their hearing must notify all other parties and call (209) 725-4111 to notify the Court of such intent by 4:00 pm on the day before the hearing.

Contacting the Probate Examiner:

Probate Examiner's email address is: probate.examiner@mercedcourt.org

Emails must have the case identification information and hearing date/time in the subject line. No attachments will be opened. The Probate Examiner can only respond to inquiries regarding the meaning of comments in the Notes. Please do not email to notify that documents have been filed, to request a confirmation whether documents have been received or to request the clearing of notes. No legal or procedural advice may be given by the Examiner in response to your email.

Questions regarding fees, forms or status of orders should be directed to the Probate Unit of the Clerk's Office at (209) 725-4111 between the hours of 8:00 a.m. – 12:00 pm. and 1:00 p.m. – 3:00 p.m., Monday – Friday.

Superior Court of California, County of Merced
PROBATE CALENDAR
HONORABLE: Donald Proietti

DATE: Friday, May 31, 2024
TIME: 8:15 AM & 8:30 AM
Courtroom 10

PROBATE CALENDAR

The following tentative rulings shall become the ruling of the court unless a party gives notice of intention to appear as follows:

1. You must call (209) 725-4240 to notify the court of your intent to appear.
2. You must give notice to all other parties before 4:00 p.m. of your intent to object.

Per California Rules of Court, rule 3.1308(a)(1), failure to do both items 1 and 2 will result in no oral argument. **Parties who contest the tentative ruling or wish to appear remotely at a hearing must contact the clerk of the Court at (209) 725-4111 to provide their contact information for the remote hearing.**

CASE#: 21PR-00052

CASE NAME: Estate of Marcenia Rodgers

THIS CASE IS SET FOR HEARING ON:

Continued from May 3, 2024 re:

1. OSC Re: Sanctions for Failure to Appear
2. Status Hearing ensuring Closing of the Estate

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS WERE PREVIOUSLY NOTED:

1. Distributive Receipts and an Ex Parte Petition For Final Discharge And Order (DE-295) have not been submitted. Prob Code §§11753, 12250

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 23PR-00247

CASE NAME: Estate of Fateh Singh

THIS CASE IS SET FOR HEARING ON:

Continued from March 22, 2024 re: Status Hearing

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. An Inventory and Appraisal has not been filed. Prob Code §8800(b) [*Corrected-I&A filed 5/8/24](#)

TENTATIVE RULING:

An Inventory and Appraisal was filed on May 8, 2024. A further Status Hearing ensuring the closing of the estate is hereby set for October 31, 2024 at 8:15 a.m. in Courtroom 10.

CASE#: 24PR-00043

CASE NAME: Estate of Robert Andrew Potter

THIS CASE IS SET FOR HEARING ON:

Continued from April 19, 2024 re: Spousal Property Petition

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS WERE PREVIOUSLY NOTED:

1. Additional information is needed to establish the community property claim. (date of marriage, manner in which asset was acquired and how asset is community property?) Prob Code 13651(a)(3)-(4)
2. No notice to heirs/beneficiaries. Prob Code 13651(a)(5)

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 24PR-00109

CASE NAME: Estate of Margaret Younce

THIS CASE IS SET FOR HEARING ON:

Petition for Administration with Full IAEA Authority

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

None.

TENTATIVE RULING:

Petition for Administration with Full IAEA Authority is granted. A Status Hearing ensuring the closing of the Estate is hereby set for June 27, 2024 at 8:15 a.m. in Courtroom 10.

CASE#: 23PR-00226

CASE NAME: In Re The Robert and Lois Sparks Revocable Trust dated May 3, 1991

THIS CASE IS SET FOR HEARING ON:

Continued from May 3, 2024 re: Status of Settlement

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. A Dismissal has not been filed.

TENTATIVE RULING:

Appearance required.

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8:30 AM CALENDAR

CASE#: 16PR-00346

CASE NAME: In the Matter of the Isabel E. Moreno Minor's Trust

THIS CASE IS SET FOR HEARING ON:

Continued from April 19, 2024 re: Status Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS WERE PREVIOUSLY NOTED

1. Submitted Accounting does not include a Petition Prob Code §17200 (a)(b)(5), CRC 7.902
2. Notice of the hearing and a Petition to approve the Second Accounting has not been provided to the Co-Trustee, Guardian Ad Litem and the trust beneficiary. Prob Code §17203
3. Request for any and all Pacific Life Insurance monthly and annual annuity payments information for the minor Isabel E. Moreno, including any lists of annuity payment schedules and all annuity payments previously distributed, from inception date to October 31, 2023. [*Document regarding Annuity Contact filed on 1/23/24](#)
4. The accounting reflects the trust is paying over \$700 monthly for the beneficiary's 1/3rd interest in the family residence located at 3168 Kirk Drive, Merced, CA. An Amended Petition filed on November 21, 2016 reflected the monthly mortgage payments were \$800.00. Per the Court's order dated December 19, 2016 the trust was allowed to distribute a proportional share of home mortgage and tax obligations of the family residence in which the beneficiary holds a 1/3rd interest. This accounting and the related accounting of Anthony Moreno (Case #16PR-00347) both reflect monthly mortgage payments of more than \$700 being paid by each trust for each beneficiary's proportional share of approximately \$266.66.
5. Clarification needed regarding the Inventory Adjustments reflected in Schedules G and H regarding the funds transferred to Anthony Moreno's trust and multiple erroneously transferred funds by the trustee to himself.
6. Clarification of issuance of Check no. 508 for \$1,000 on April 2, 2018 of Isabel E. Moreno Minor's Trust Chase Bank Checking Account ending 3674.
7. Copy of Order re Minor's Compromise for Isabel Moreno's San Francisco case no. CGC-14-542890. [*Filed 1/23/24](#)

TENTATIVE RULING:

Appearance required.

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CASE#: 16PR-00347

CASE NAME: In Re: The Anthony C. Moreno Minor's Trust

THIS CASE IS SET FOR HEARING ON:

Continued from April 19, 2024 re: Status Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS WERE PREVIOUSLY NOTED:

1. Submitted Accounting does not include a Petition Prob Code §17200 (a)(b)(5), CRC 7.902
2. Notice of the hearing and a Petition to approve the Second Accounting has not been provided to the Co-Trustee, Guardian Ad Litem and the trust beneficiary. Prob Code §17203
3. Request for Any and all Pacific Life Insurance monthly and annual annuity payments information for the minor Isabel E. Moreno, including any lists of annuity payment schedules and all annuity payments previously distributed, from inception date to October 31, 2023. [*Document regarding Annuity Contact filed on 1/23/24](#)
4. The accounting reflects the trust is paying over \$700 monthly for the beneficiary's 1/3rd interest in the family residence located at 3168 Kirk Drive, Merced, CA. An Amended Petition filed on November 21, 2016 reflected the monthly mortgage payments were \$800.00. Per the Court's order dated December 19, 2016 the trust was allowed to distribute a proportional share of home mortgage and tax obligations of the family residence in which the beneficiary holds a 1/3rd interest. This accounting and the related accounting of Isabel Moreno (Case #16PR-0034) both reflect monthly mortgage payments of more than \$700 being paid by each trust for each beneficiary's proportional share of approximately \$266.66.
5. Clarification needed regarding the Inventory Adjustments reflected in Schedules G regarding the funds transferred to Isabel Moreno's trust and multiple erroneously transferred funds by the trustee to himself.
6. Clarification of issuance of Check no. 507 for \$1,000 on May 2, 2018 of Anthony C. Moreno Minor's Trust Chase Bank Checking Account ending 3682.
7. Copy of Order re Minor's Compromise for Anthony Moreno's San Francisco Case No. CGC-14-542890. [*Filed 1/23/24](#)

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 20PR-00309

CASE NAME: Estate of Anne Pyke

THIS CASE IS SET FOR HEARING ON:

Continued from March 1, 2024 re: Status Hearing re: Closing of the Estate

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. A Distributive Receipt for Bradley Pyke has not been filed.

TENTATIVE RULING:

Hearing is continued to June 28, 2024 at 8:30 a.m. for a further Status on the Closing of the estate.

CASE#: 21PR-00183

CASE NAME: Conservatorship of Donald Bonillas

THIS CASE IS SET FOR HEARING ON:

1. Second Accounting
2. Third and Final Accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

Second Accounting:

1. The Petition and Summary of Account do not reflect the receipts received in Schedule A and are incorrectly identified as Gains in the Summary of Schedules.
2. Accounting continues to reflect the trust owned Mi Wuk Village cabin expenses paid by the conservatee.
3. A proposed Order has not been lodged with the Court.

Third Accounting:

1. Accounting continues to reflect the trust owned Mi Wuk Village cabin expenses paid by the conservatee.
2. A proposed Order has not been lodged with the Court.

TENTATIVE RULING:

Appearance required.

(continued on next page)

Superior Court of California, County of Merced
PROBATE CALENDAR
HONORABLE: Mark Bacciarini

DATE: Friday, March 22, 2024
TIME: 8:30 AM
Courtroom 10

PROBATE CALENDAR

Special Set

The following tentative rulings shall become the ruling of the court unless a party gives notice of intention to appear as follows:

1. You must call (209) 725-4240 to notify the court of your intent to appear.
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CASE#: 23PR-00054

CASE NAME: Conservatorship of Michael Mason

THIS CASE IS SET FOR HEARING ON:

1. Continued from March 22, 2024 re: Status Hearing
2. Annual Review
3. First Account and Report of Former Conservator and Petition for Its Settlement; For Allowance of Fees and Reimbursement of Costs to Former Conservators and for Attorneys' Fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Missing bank and investment statements from time immediately preceding appointment of probate conservator and statements up to the closing period of accounting. Prob. C. 2620(c).
2. **The Accounting remains under review. Probate Notes will be updated upon completion of the review.**

(End of Tentative Rulings)