

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. The Probate Examiner's Notes typically will be posted 5 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 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, status of orders, Zoom links or remote appearances 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.

The following cases are not reflected in the Probate Notes and appearances are required unless previously excused by the Court:

- Guardianships and Conservatorships of the Person
- Minor's Compromise cases before the Probate Court for approval
- Petition for Special Immigrant Juvenile Findings

**Questions involving Guardianships (including SIJF) and Conservatorships of the Person should be directed to the Court Investigators Office at (209) 725-4190.*

Please note no legal or procedural advice can be provided by the Court Investigator's Office.

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

DATE: Friday, November 21, 2025
TIME: 8:15 AM and 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.**

8:15 AM CALENDAR

CASE#: 25PR-00124

CASE NAME: Estate of James Blaine Snow, Jr.

THIS CASE IS SET FOR HEARING ON:

1. Continued from October 2, 2025 re: Status of Filing an Inventory and Appraisal
2. Motion to be Relieved as Counsel

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

1. The Administrator has not posted bond as required per the Court's April 24, 2025 order.
Prob Code §8480(c), CCP §995.340

TENTATIVE RULING:

Appearance required.

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CASE#: 25PR-00262

CASE NAME:

In the Matter of the Barbara Ann Huff Trust Created Under the Will of Frank Brindeiro

THIS CASE IS SET FOR HEARING ON:

Continued from October 6, 2025 re: Petition for Modification of Trust with Unanimous Consent of Beneficiaries

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

None.

TENTATIVE RULING:

The *Petition for Modification of Trust with Unanimous Consent of Beneficiaries* is approved.

CASE#: 25PR-00263

CASE NAME:

In the Matter of the Brindeiro Grandchildren Trust Created under the Will of Frank Brindeiro

THIS CASE IS SET FOR HEARING ON:

Continued from October 8, 2025 re: Petition for Modification of Trust with Unanimous Consent of Beneficiaries

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

None.

TENTATIVE RULING:

The *Petition for Modification of Trust with Unanimous Consent of Beneficiaries* is approved.

CASE#: 25PR-00264

CASE NAME: Estate of David Mack Morgan

THIS CASE IS SET FOR HEARING ON:

Continued from August 1, 2025 re: Trial Readiness Conference

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

1. Trial Briefs have not been filed as ordered by the Court on August 1, 2025.

TENTATIVE RULING:

Appearance required.

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CASE#: 25PR-00384

CASE NAME: Estate of Vernon Ray Woods

THIS CASE IS SET FOR HEARING ON:

Petition to Determine Succession to Primary Residence

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

1. The Petition contains the following issues:
 - a. Missing Attachment 8 – Inventory and Appraisal (DE-160) signed by the Probate Referee Michael Wright.
 - b. Attachment 11 does not contain the legal description of the subject real property.
2. Proof of Service is improper as notice was effectuated by the Petitioner who is a party to the action and was provided prior to the filing of the Petition.
CCP §1013a.
3. A copy of the most recent vesting deed to be provided.

TENTATIVE RULING:

No appearance required. The hearing is continued to January 28, 2026 at 8:15 a.m. in Courtroom 10 for correction of the deficiencies.

8:30 AM CALENDAR

CASE#: 22PR-00389

CASE NAME: Conservatorship of Lois Watters

THIS CASE IS SET FOR HEARING ON:

Second Account and Report of Conservator, Petition for Allowance of Fees to Conservator of the Person and Estate and to the Attorney

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

1. The accounting improperly reflects the real property improperly adjusted to reflect the Market Value instead of the “carry value” in the following schedules:
 - a. Schedule E – Non-Cash Assets on Hand at End of Account Period
 - b. Summary of Account - #13b *should reflect “carry value”
 - c. Schedule “null” improperly reflects the depreciated fair market value of real property that has not yet been realized due to any sale during the accounting period.
2. Additional information needed regarding how requested compensation for the Public Defender was calculated.
3. Petition does not include the Court Investigator Fee. Probate Code §1851.5

TENTATIVE RULING:

No appearance required. The hearing is continued to January 9, 2026 at 8:30 a.m. in Courtroom 10 for correction of the deficiencies.

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CASE#: 23PR-00123

CASE NAME: Conservatorship of Otis Lee Morris

THIS CASE IS SET FOR HEARING ON:

Continued from October 3, 2025 re: Status Review Hearing/Closing of the Estate

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

1. An Inventory and Appraisal has not been filed as directed by the Court on February 9, 2024. **Corrected – Filed 6/18/25*
2. An Accounting has not been filed as required per Probate Code 2620(a).
3. Were the Travis Credit Union Checking Account and MMA account solely in the name of the conservatee or jointly held with another party? **Newly noted for the 11/21/25 hearing*

TENTATIVE RULING:

Appearance required.

CASE#: 24PR-00183

CASE NAME: Conservatorship of Sandra Dietrich

THIS CASE IS SET FOR HEARING ON:

First Account and Report of Conservator, Petition for Allowance of Fees to Conservator of the Person and Estate, and to the Attorney

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

1. A proposed Order has not been lodged. MSC 100 E.

TENTATIVE RULING:

No appearance required. The *First Account and Report of Conservator, Petition for Allowance of Fees to Conservator of the Person and Estate, and to the Attorney* is approved. Counsel to lodge a proposed order.

CASE#: 24PR-00259

CASE NAME: Conservatorship of Brenda Faye Merrell

THIS CASE IS SET FOR HEARING ON:

Petition for Substituted Judgment to Create and Fund Revocable Trust and Execute a Pour-Over Will

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

Under review.

TENTATIVE RULING:

No appearance required. The Court on its own motion hereby continues the hearing to be heard with the Annual Review hearing currently set for December 5, 2025 at 8:30 a.m. in Courtroom 10.

(End of Tentative Rulings)