

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: Monday, June 22, 2026
TIME: 8:15 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-00144

CASE NAME: Estate of Bruce Gray

THIS CASE IS SET FOR HEARING ON:

Continued from April 29, 2026 re: Status on Closing of the Estate

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE 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.

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CASE#: 24PR-00315

CASE NAME: Estate of Jerry Wayne David

THIS CASE IS SET FOR HEARING ON:

Petition for Order to Issue Citation to Answer Interrogatories Pursuant to California Probate Code Section 8870

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

None.

TENTATIVE RULING:

Appearance required.

CASE#: 24PR-00345

CASE NAME: Estate of William McNeill

THIS CASE IS SET FOR HEARING ON:

Continued from April 29, 2026 re: First and Final Report and Account; Request for Final Distribution; Request for Payment of Statutory and Extraordinary Fees

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

1. Questions concerning the Petition:
 - a. There appears to contain a typo in paragraph #12 – Summary of Account and reflects the decedent's sons have signed Waivers of Accounting. The decedent does not appear to have been survived by any sons. **Addressed in Declaration filed on 5/22/26*
 - b. Paragraph #17 – reflects the real property was sold on March 4, 2025 with Notice of Proposed Action served on all heirs on March 26, 2025. Were all heirs provided sufficient notice and time to object to the proposed sale of the real property? Prob Code §§10580, 10585, 10586 **Addressed in Declaration filed on 5/22/26*
2. Request for reimbursed expenses include expenses outside the period of time and scope of expenses related to the administration of the decedent's estate. Prob Code §11420 **Addressed in Declaration filed on 5/22/26*
3. Court's discretion concerning reimbursement for travel expenses requested by Alice Davis for herself and Michael Davis.
4. Did the decedent have independent care givers while residing in an assisted living facility? **Addressed in Declaration filed on 5/22/26*
5. Notice has not been provided to all estate heirs. Prob Code §§11000, 1220 **Corrected – POS 5/22/26*

TENTATIVE RULING:

Appearance required.

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CASE#: 26PR-00166

CASE NAME: In re: The Shailesh P. Patel, M.D. and Smita S. Patel 2025 Revocable Trust, Dated July 28, 2025

THIS CASE IS SET FOR HEARING ON:

Petition for Order Determining Trust's Title to Personal Property (Probate Code §850)

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

1. Notice has not been provided to any interested parties utilizing mandatory Judicial Council form *Notice of Hearing on Petition to Determine Claim to Property* (DE-115). Prob Code §851

TENTATIVE RULING:

No appearance required. The hearing is continued to August 5, 2026 at 8:15 a.m. in Courtroom 10 for correction of the notice deficiency.

CASE#: 26PR-00168

CASE NAME: Matter of JoAnne Smith

THIS CASE IS SET FOR HEARING ON:

Petition to Determine Succession to Real Property and Personal Property

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

1. Missing Attachment 8 – An Inventory and Appraisal with an appraisal by the Probate Referee.
2. Attachment 11 is:
 - a. Missing the legal description of the real property
 - b. Does not identify any personal property of the decedent sought to be transferred to the Petitioners.
3. A copy of the most recent vesting deed for the subject real property to be submitted.
4. A proposed Order has not been lodged. MSC 100E.

TENTATIVE RULING:

No appearance required. The hearing is continued to August 5, 2026 at 8:15 a.m. in Courtroom 10. Any corrective pleadings to be filed by July 27, 2026.

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CASE#: PR000578

CASE NAME: Estate of Lorrie Jean Rose-Huitron

THIS CASE IS SET FOR HEARING ON:

Report of Administrator on Waiver of Account and Petition for Its Settlement, For Allowance of Statutory Compensation to Attorneys and Compensation to Attorneys for Extraordinary Legal Services and for Final Distribution.

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

1. No Substitution of Attorney has been filed. CCP §284(1)
2. The Court notes that new counsel was not counsel of record for the entirety of the administration, but seeks the full statutory compensation. The request for the entire statutory compensation remains subject to the Court's discretion.
Prob Code §10814

TENTATIVE RULING:

Appearance required.

(End of Tentative Rulings)