

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: Wednesday, April 15, 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#: 25PR-00034

CASE NAME: Estate of Billie Fay Clark

THIS CASE IS SET FOR HEARING ON:

Continued from August 25, 2025 re: Status Hearing ensuring the Closing of the Estate

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

None.

TENTATIVE RULING:

No appearance required. The First and Final Waiver of Account and Report of Administrator, Petition for Final Distribution and Allowance of Statutory Compensation of Attorney's Fees is approved. A Status Hearing ensuring the Closing of the Estate to be set for July 27, 2026 at 8:15 a.m. in Courtroom 10.

(continued on next page)

CASE#: 16PR-00387

CASE NAME: Estate of Robert Allen Jackson

THIS CASE IS SET FOR HEARING ON:

Continued from April 1, 2026 re: Further Proceedings

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

1. Court's discretion if an unreasonable delay occurred in filing the Final Inventory and Appraisal on March 12, 2026 with purportedly an additional \$115,326.79 in assets that may have resulted in an insufficient bond. Prob Code §§8801, 8804, CRC 7.501(b), CRC 7.204
2. Schedule A-2 reflects life insurance proceeds paid to the estate that have not been included in any Inventory and Appraisal. Prob Code §§8801, 8850
3. The Accounting reflects the Property on Hand at the Beginning of the Account Period comprised of the same assets as reflected in the filed Inventory and Appraisals but with significant discrepancies in the assigned valuations for the decedent's vehicles and jet skis.
4. The Administrator paid out what essentially appears to be a "family allowance" to the heir without the mandatory authority required by Probate Code §6540.
5. Many of the disbursements paid during the accounting period due not appear to be for the benefit of the estate. Prob Code §9820
6. The accounting does not account for any sale proceeds the estate received from the sale of the real property or the vehicles.
7. The accounting reflects expenses for a Corolla that is not included in any Inventory and Appraisal.
8. The Petition does not appear to have been served on the estate heirs.
Prob Code §§11000, 1220
9. Creditor's Claims have not been timely addressed/paid which may have led to possible/pending incurred interest at a detriment to the estate despite the Administrator having full IAEA Authority and sufficient funds to pay the decedent's debts.
Prob Code §§11421, 11423, 11424
10. The time taken for administration of the estate exceeds the time prescribed by the Probate Code. Prob Code §12205
11. Court's discretion if the Administrator has violated the duties and obligations as the personal representative of the estate. Prob Code §9600

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 25PR-00038

CASE NAME: Estate of Darryl Stowe

THIS CASE IS SET FOR HEARING ON:

Continued from September 10, 2025 re: Status Hearing ensuring the Closing of the Estate

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

1. A Petition for Final Account or Status Report has not been filed.
Prob Code §12200-12201

TENTATIVE RULING:

Appearance required. The Administrator to advise the Court on the current case status.

CASE#: 25PR-00436

CASE NAME: In the Matter of the Eva Pruett Pooled Special Needs Trust

THIS CASE IS SET FOR HEARING ON:

Continued from March 2, 2026 re: Petition to Establish, Join, and Fund a Sub-Account for Eva Pruett Into the California Charities Pooled Special Needs Trust; To Set Bond; To Authorize Expanded Investment Powers; to Authorize Interim Trustee Fees; and To Authorize Attorney Fees and Costs

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

1. Regarding Exhibit A – copy of the *Trust Set Up Documents for the Charities*:
 - a. Reflects an incorrect amount of \$95,000 to be deposited. **Corrected*
 - b. Will the new (reduced) amount deposited amount change the amounts/fees requested/charged to the trust/beneficiary? **Corrected*
 - c. Who is the designated beneficiary advocate ? **Corrected*
 - d. Schedule C: Remainder Beneficiary Designation simply states “heirs at law” as the named remainder beneficiary which may conflict with Medi-Cal payback requirements for First Party Special Needs Trust. **Corrected*
 - e. What, if any, are the fees for the following? **Corrected*
 - i. Annual audits
 - ii. Termination
 - iii. Bonding and Accounting fees
2. Is there any other fee schedule for California Charities Pooled Special Needs Trust other than the fees noted in the “California CPT Joinder Agreement”? **Corrected*
3. Is there a required minimum balance to maintain participation in the pooled SNT?
**Corrected*
4. Court’s discretion regarding the request for authority to invest over 5 years.
5. Proposed Order is missing the referenced “ Exhibit A” attachment.

TENTATIVE RULING:

Appearance required.

(continued on next page)

CASE#: 26PR-00076

CASE NAME:

In re: the Georgia Sue Bridgman Revocable Living Trust utd dated October 30, 2025

THIS CASE IS SET FOR HEARING ON:

Petition for Order Confirming Successor Trustee and Confirming Real Property as a Trust Asset

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 Petition for Order Confirming Successor Trustee and Confirming Real Property as a Trust Asset is approved. Counsel to lodge a proposed Order.

CASE#: 26PR-00080

CASE NAME: Estate of Donald M. Tallent

THIS CASE IS SET FOR HEARING ON:

Spousal Property Petition

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

1. Petition does not identify the property that is the subject of this Petition.
2. Additional information is needed to establish the community property claim. (date asset acquired, date of marriage, manner in which asset was acquired and how asset is community property, what were the decedent's assets at the time of marriage, what was the decedent's occupation, how was the down payment made for the real property? Was it made with separate property or community property? Was the real property a gift? How were the mortgage payments made?) Prob Code 13651(a)(3)-(4)
3. Copy of most recent vesting deed to be submitted.

TENTATIVE RULING:

No appearance required. The hearing is continued to May 20, 2026 at 8:15 a.m. in Courtroom 10 for correction of deficiencies. Any corrective pleadings are to be filed with the Court by the close of business on May 11, 2026.

(End of Tentative Rulings)