

PROBATE NOTES FOR DEPARTMENT 2, OCTOBER 16, 2026

1. **Estate of Brent William Kaiser (PR12770).** Review Hearing – Inventory and Appraisal. Appearances required. Letters of Administration were issued on May 8, 2026. A review hearing was set and the parties were advised that if an Inventory and Appraisal were filed, no appearances would be necessary. Creditors claims have been filed (JP Morgan Chase for unsecured, \$36,253.32; Twining and Hook for installment loan, \$62,994.69 + fees). Attorney Jay Pink was appointed as GAL, with fees set at no more than \$2,000. As of October 8, 2026, an Inventory and Appraisal has not been filed. Notices to public entities have not been filed. The Court requests an update on the status of claims, the status of the inventory and appraisal, and how much additional time is necessary to complete the same. Prob. Code § 8800. Further review hearing will be set. The review on the PC 12200 remains set for June 11, 2027, at 8:30 a.m. in Dept. 2.
2. **Estate of Curtis Wayne Walker (PR12766).** Review Hearing – Inventory and Appraisal. No appearances required. Letters of Administration were issued on June 2, 2026. A review hearing was set and the parties were advised that if an Inventory and Appraisal were filed, no appearances would be necessary. An Inventory and Appraisal was filed on September 3, 2026, within the four-month timeframe set by section 8800 of the Probate Code. Notices to the Franchise Tax Board and to the Department of Health Care Services were filed the same day. No claims have been filed. The status review hearing pursuant to Probate Code section 12200 remains set for June 11, 2027, at 8:30 a.m. in Dept. 2.
3. **Estate of George Russell Morrow (PR12763).** Review Hearing – Inventory and Appraisal. Appearances required. Letters of Administration were issued on June 9, 2026, granting petitioner Susan Morrow limited authority to administer the estate. The Letters were affirmed and filed on August 19, 2026. As of October 8, 2026, an Inventory and Appraisal has not been filed. The Court requests an update on the status of transfer of real property, the status of the inventory and appraisal, and how much additional time is necessary to complete the same. Prob. Code § 8800. Further review hearing will be set. The status review hearing pursuant to Probate Code section 12200 remains set for June 11, 2027, at 8:30 a.m. in Dept. 2.
4. **Estate of Gerald Edward Tufts (PR12671).** Final Distribution Hearing. No appearances required. Petition and related documents are in order; the estate is in a condition to be closed. Cal. Prob. Code § 11640. No accounting is required because beneficiary has waived this requirement. Cal. Prob. Code § 10954(a)(1). The petition will be granted and final order authorizing statutory attorney's fees, reimbursement of costs, and distribution of the estate will issue.

5. **Estate of James Kevin Walsh (PR12267).** Review Hearing – 12200. Appearances required. The subject estate is entitled to receive 25 percent of the Estate of John Leonard Walsh (Case No. PR12140). That estate is involved in litigation. The subject estate has been continued several times awaiting resolution, most recently in April 2026. No documents have been filed in this or the related case since that date. The court requests an update. A further review hearing and a review on the PC 12200 will be set.
6. **Estate of John Leonard Walsh (PR12140).** Appearances Required. Petition Hearing – Attorneys' Fees & Reimbursement of Costs. The subject estate was involved in litigation (CV65497). The civil case was resolved in favor of the estate and dismissed with prejudice on August 28, 2026. However, nothing has been filed in the probate case since April 2026. The court requests an update. A further review hearing and a review on the PC 12200 will be set.
7. **Estate of John Walter Franchi (PR12831).** Letters of Administration. Appearances required. On August 11, 2026, Petitioner Apryl Sisco filed a Petition for Letters of Special Administration with general powers to administer the intestate estate. Bond waivers have been filed. On August 21, 2026, Petitioner's ex parte application for special letters of administration was granted to allow the estate to be secured. Remaining documents appear generally in order, however, notice has not been given. A further review hearing and a review on the PC 12200 will be set.
8. **Estate of Lynn Reed (PR12782).** Spousal Property Hearing. Appearances required. Petitioner seeks to bypass intestate administration as surviving spouse. See Cal. Probate Code § 13500, *et seq.* On September 15, 2026, Petitioner filed a Supplemental Declaration that details the use of community property to acquire and maintain the real property titled solely in Decedent's name. At the hearing on September 18, 2026, the Court noted Exhibit B was too light to read. Additional materials have not yet been submitted. Attorney Jack Klosek submitted a Declaration on that same day to brief the issue of beneficial interest and to provide an update on efforts to locate the residual heirs. The Court requests an update on clearer copies. A further review hearing will be set.
9. **Estate of Matthew David Thomas (PR12469).** Review Hearing – 12200. Appearances required. The Court previously found good cause to extend the period of administration. Petitioner advised the Court of unexpected encumbrances on the real property of the estate, which has complicated the sale of same. Nothing has been filed since June 15, 2026. The Court requests an update. A further review hearing and a review on the PC 12200 will be set.
10. **Estate of Pamela Joan Franciosa (PR12775).** Probate Will/Issue Letters. Appearances required. This matter was previously continued to allow for publication. Proof of publication has not yet been filed. The Court requests an update. A further review hearing and a review on the PC 12200 will be set.

11. **Estate of Ramona I Arquilla (PR12844).** Petition Hearing to Admit Will to Probate. No appearances required. Petitioner is the executor named in the will filed with the court. Documents appear to be in order. Unless an objection is stated at the hearing, the Court intends to admit the will and issue letters. Hearing on Inventory and Appraisal will be held on February 5, 2027, at 8:30 a.m. in Dept. 2. The review on the PC 12200 will be held on October 15, 2027, at 8:30 a.m. in Dept. 2.
12. **In Re: Barger Pinecrest Cabin Family Trust dated December 8, 2015 (PR12805).** Petition Hearing – Breach of Trust. Appearances required. On June 4, 2026, Petitioners filed a Petition for Breach of Trust, demanding an accounting, to determine title to personal property, to terminate the trust, and to deny compensation to the trustee. A verified response was filed on July 31, 2026. On August 7, 2026, the parties advised an accounting had not been started and a continuance was granted. Nothing has been filed since then. The Court requests an update.
13. **In Re: The Revocable Trust Agreement for Emily H. Houck (PR12822).** Petition Hearing – Set Aside Irrevocable Trust; Cross-Petition. Appearances required. On August 17, 2026, Petitioner filed an Amended Petition to Set Aside Irrevocable Trust, seeking to reinstate a revocable trust agreement due to alleged undue influence in the creation of the irrevocable trust, and for attorney's fees, pursuant to Probate Code section 17200. On August 19, 2026, Respondent filed a Cross-Petition to Protect the Irrevocable Trust. On September 16, 2026, Petitioner filed an ex parte application to immediately suspend Respondent from exercising authority under the irrevocable trust, to which Respondent filed a response. On September 24, 2026, Petitioner filed an answer to the cross-petition. On October 2, 2026, the Court denied ex parte relief stating an intent to address the issues raised at the next hearing. The Court requests an update regarding status of care being provided for Emily H. Houck, discovery schedule, and need for any further briefing.
14. **In the Matter of Alice C. Hardin Trust (PR12351).** Review Hearing. Appearances required. On July 31, 2026, the Court issued an order after judicial review. On August 21, 2026, the Court issued an order confirming that stands in lieu of versions submitted for consideration by the parties. Various distributions were authorized. The Court requests an update.
15. **In the Matter of Roy Lloyd Twitty (PR12838).** Petition Hearing – Succession of Real Property. Appearances are not required. Petitioner Ryan Earl Twitty petitions to determine succession of a primary residence valued at less than \$750,000 that was owned by Decedent Roy Lloyd Twitty as of his death on May 12, 2026. Decedent died intestate and is survived by no spouse or domestic partner and by four adult sons: Eric, Greg, Ryan, and Devin. Petitioner submitted an Inventory and Appraisal estimating the value of the estate at \$183,000, which is a 50 percent interest in real property. Eric Twitty, Greg Twitty, and Devin Twitty, have all

“assigned” or disclaimed their interests in the real property in favor of Ryan Twitty. Notice was given; no objections or claims have been filed. Documents are in order for intestate succession to surviving children. Cal. Probate Code § 6402. Assuming no objections are made at the hearing, the Court intends to issue an order determining succession to real property.

16. In the Matter of Ruth M Brusseau (PR12849). Review Hearing – Succession of Real Property. Appearances required. Petitioner Robert Marshall petitions to determine succession of a primary residence valued at less than \$750,000 that was owned by Decedent Ruth M. Brusseau as of her death on September 11, 2025. Petitioner filed a holographic will dated “August 6, 14”, which is signed by Decedent. Petitioner has not filed a confirmation that this handwriting is the Decedent’s. See Cal. Probate Code § 6111. Assuming it is valid, this will leaves real property and other assets to Petitioner, Decedent’s “one child”. The property has been valued by a probate referee to be valued at \$385,000. Notice has been given and no objections have been filed. If no objections are made at the hearing and Petitioner can validate the handwriting in the will, the Court intends to issue an order determining succession to real property.

17. In the Matter of the Thomas A. Nelson 2009 Revocable Trust (PR12783). Motion Hearings. On September 11, 2026, the Court held a hearing on these related matters. The parties were ordered to meet and confer regarding special interrogatories prior to the next hearing. Other matters were deferred while awaiting the Court Investigator’s report. On October 14, 2026, the Court Investigator filed a confidential report. To be decided on October 16, 2026, is Petitioner’s unopposed Motion for Leave to File an Amended Petition, visitation, and Respondent’s request for protective order arising from special interrogatories. Petitioner also seeks an informal discovery conference. The Court requests an update regarding meet and confer efforts and whether trial dates should be set.

a. Related Cases:

- i. CV68015, Thomas A. Nelson v. Jancy Harper – trial setting
- ii. CV68075, Thomas Nelson v. William Brown – trial setting
- iii. CV67889, Nelson A Thomas v. Jancey Harper – dismissed

18. The Jacqueline M Antonini Revocable Trust dated August 31, 2023 (PR12846). Petition Hearing – Determine Title to Personal Property. Appearances are not required. Petitioner Ernest Shimer, successor trustee, pursuant to Probate Code section 850(a)(3)(B), seeks an order to transfer financial assets into the trust. Petitioner contends the settlor intended to include these assets in the trust but never updated the accounts to effect the transfer. Notice has been given. No objections have been filed. Documents appear in order. Assuming no objections are made at the hearing, the Court intends to grant the petition and issue the requested order.

19. The Margaret W Focha Living trust dated November 30, 2024 (PR12847). Petition Hearing – Determine Title to Personal Property. Appearances are not

required. Petitioners William A. Focha and Monica K. Focha, co-trustees, pursuant to Probate Code section 850(a)(3)(B), seek an order to transfer personal property located on real property owned by the United States Forest Service into the trust. Petitioner contends the settlor intended to include the “cabin” in the trust, but it remained in her name individually. Notice has been given. No objections have been filed. Documents appear in order. Assuming no objections are made at the hearing, the Court intends to grant the petition and issue the requested order.