

Important notice: Due to the unusually large size of this probate calendar and the fact that this week is a holiday week, this document addresses only a portion of the cases on the calendar. A first set of probate notes was posted one day before this second and final set was posted.

A6505

In the Matter of Trust Estate of Louis B. Price

Hearing types: (1) Further hearing re Petition for Instructions on Correcting Title to Real Property, for Appointment of a Temporary Trustee, and to Redress Breaches of Trust
(2) Further hearing re first and final account and report of trustee; petition for order settling account; and petition for order approving termination of irrevocable portion of trust and proposed distributions

Petitioner/Objector: Lee R. Brooks
Petitioner's counsel: Matthew P. Matiasovich
Respondent/Trustee: Deniece Mailloux
Respondent's counsel: Ann K. Craig

The Court has read and considered the "Status Report" and supporting declarations filed on May 23, 2019, by Lee Brooks. The accompanying proof of service reflects that these documents were not served by regular U.S. mail until May 23, 2019, five court days prior to the hearing. At the time of the Court's review of this case on May 30, 2019, the file did not reflect that Trustee had filed any response to the "Status Report," which is not unexpected given the short notice period. Moreover, the Court notes that the declaration of Miriam Brooks is incomplete; as filed, it appears to be missing the top two inches of each page, including the end of paragraph 2. Appearance required.

A6506

In the Matter of Trust Estate of Louis B. Price

Hearing types: (1) Further hearing re Petition for Instructions on Correcting Title to Real Property, for Appointment of a Temporary Trustee, and to Redress Breaches of Trust
(2) Further hearing re first and final account and report of trustee; petition for order settling account; and petition for order approving termination of irrevocable portion of trust and proposed distributions

Petitioner/Objector: Lee R. Brooks
Petitioner's counsel: Matthew P. Matiasovich
Respondent/Trustee: Deniece Mailloux
Respondent's counsel: Ann K. Craig

The Court has read and considered the "Status Report" and supporting declarations filed on May 23, 2019, by Lee Brooks. The accompanying proof of service reflects that these documents were not served by regular U.S. mail until May 23, 2019, five court days prior to the hearing. At the

PROBATE NOTES: Friday, May 31, 2019

These notes are not updated based on subsequent filings once they are posted.

time of the Court's review of this case on May 30, 2019, the file did not reflect that Trustee had filed any response to the "Status Report," which is not unexpected given the short notice period. Moreover, the Court notes that the declaration of Miriam Brooks is incomplete; as filed, it appears to be missing the top two inches of each page, including the end of paragraph 2. Appearance required.

PR10521

Conservatorship of Ronald Jackson

Hearing type: Further hearing re fifth and final account and report of conservator;
petition for fees and discharge
Conservator: Tuolumne County Public Guardian
Conservator's counsel: County Counsel

The Court has reviewed the second amended corrected supplemental Inventory and Appraisal form filed on March 28, 2019. It is the Court's understanding this form is intended to correct the amended corrected supplemental Inventory and Appraisal form that was filed on February 26, 2019. The newly filed form resolves the issue with the Inventory and Appraisal forms described in the minute order dated March 8, 2019. Appearance not required on this issue.

The Court has read and considered the third amendment filed on May 15, 2019, to the pleading filed on October 4, 2018 (hereafter Third Amendment). The Third Amendment resolves most of the issues addressed at the hearing on March 8, 2019. Although Conservator should have filed a supplemental Inventory and Appraisal form for the cash from the joint bank account once it became an asset of the conservatorship estate and then accounted for it as an other property acquisition rather than as a receipt, the explanation in the Third Amendment of what happened with this asset is sufficiently detailed that the Court will not require further correction. The Court intends to grant Conservator's fee and lien-related requests as set forth in the Third Amendment. The Court also intends to grant Conservator's request regarding distribution of the accrued interest that was inadvertently omitted from the accounting, as well as of the interest that has accrued since the end of the accounting period. The only remaining question concerns Conservator's assertion in the Third Amendment that property described in schedule G as "household goods at 19127 Hillsdale Dr." (see schedule G attached to the second amendment filed on February 21, 2019) "is not intended to be limited to only furnishings and effects located at 19127 Hillsdale Drive." (Third Amendment at 3:19-22.) Appearance required re this last issue.

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Hearing types: (1) Further hearing re petition to Confirm Irrevocable Burial Trust
(2) Further hearing re fourth account and report of conservator;
petition for fees

Conservator: Tuolumne County Public Guardian

Conservator's counsel: County Counsel

PR11367 Estate of Larry M. Freschi

At the time of the Court's review of this case on May 30, 2019, the file did not reflect that Petitioner had filed proof of service on Administrator of the citation issued on April 24, 2019. The purported proof of service filed on May 10, 2019, does not have attached to it a completed Notice and Acknowledgment of Receipt—Civil. Appearance of Petitioner's counsel required.

PR11422 In the Matter of the Sandra Lee Special Needs Trust

The declaration of Trustee that was filed on May 24, 2019, was not timely filed for a hearing on May 31, 2019. Accordingly, the hearing will be continued to the next available date of June 28, 2019, at 8:30 a.m. Appearance not required on May 31, 2019.

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PR11529 Estate of Ronald D. Jackson

Hearing type: Further review re inventory and appraisal
Administrator: Rona Lynn Jackson
Administrator's counsel: Gary P. Dambacher

Due to clerical error, the minute order dated April 5, 2019, set the instant hearing for May 31, 2019, instead of July 5, 2019. The next review hearing re inventory and appraisal will be set for July 5, 2019, at 8:30 a.m. for the reason stated in the minute order dated April 5, 2019. Appearance not required on May 31, 2019.

PR11533 Estate of Henry G. Neubaumer

Hearing type: Further review re report on status of administration (Prob. Code, § 12200)
Executor: Grace Neubaumer (deceased)
Executor's counsel: Jennifer J. Lothert

The first review hearing pursuant to Probate Code section 12200 was held on April 12, 2019. Executor's counsel did not appear, but counsel for Lisa Elin Neubaumer appeared, stated he was in contact with Executor's counsel, and requested a continuance. The hearing was continued to May 31, 2019.

The death of Executor was reported to the Court by the declaration of Lisa Elin Neubaumer that was filed on May 22, 2019.

The Court is in receipt of a Request for Dismissal (Judicial Council form CIV-110) that was submitted on or about May 22, 2019, by Lisa Elin Neubaumer. Appearance required.

PR11545 Estate of Anthony Buntin

Hearing type: Petition for final distribution, fees, and costs; first and final account
Administrator: Jodi Lynn Trout
Administrator's counsel: Sami Martinez

The pleading filed on April 2, 2019, was set for hearing on May 31, 2019, due to clerical error. The hearing will be continued to June 21, 2019, at 8:30 a.m. Appearance not required on May 31, 2019.

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PROBATE NOTES: Friday, May 31, 2019

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PR11636

In re Patricia B. Brooks 1980 Separate Property Trust

Hearing type: Further hearing re Petition for Instructions on Correcting Title to Real Property, for Appointment of Temporary Trustee, and to Redress Breaches of Trust

Petitioner: Lee Brooks

Petitioner's counsel: Matthew P. Matiasovich

The Court has read and considered the "Status Report" and supporting declarations filed on May 23, 2019, by Lee Brooks, erroneously identified in these documents as "Objector." The accompanying proof of service reflects that these documents were not served by regular U.S. mail until May 23, 2019, five court days prior to the hearing. At the time of the Court's review of this case on May 30, 2019, the file did not reflect that Trustee had filed any response to the "Status Report," which is not unexpected given the short notice period. Moreover, the Court notes that the declaration of Miriam Brooks is incomplete; as filed, it appears to be missing the top two inches of each page. Appearance required.