Placer County Superior Court
10820 Justice Center Drive, Roseville

PROBATE CALENDAR NOTES
November 10, 2026, 8:30 AM, Department 2
101 Maple Street, Auburn

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NOTICE: CHANGE OF CALENDAR DAY

Beginning the week of November 2, 2026, the Probate Calendar will be heard <u>Tuesdays</u>, 8:30 a.m., in Department 2, located at the Historic Courthouse, 101 Maple Street, Auburn. Already scheduled hearings will be moved by the clerk and notices will be sent to petitioners.

These calendar notes are provided pursuant to Local Rule 80.1.4 for the probate calendar set for hearing **November 10, 2026, 8:30 AM, in Department 2**, the Hon. Glenn M. Holley, presiding.

Pursuant to Local Rule 80.1.4, these calendar notes are **<u>not</u>** a tentative ruling on the merits of any matter before the court. Remote appearances are generally available for this calendar, as provided in the Local Rules. Local Rule 10.24(G), governing remote appearances for most probate, conservatorship, and guardianship cases applies to this calendar.

Updated notes may be posted at any time and will generally be updated prior to the hearing. Staff may respond to limited questions concerning calendar notes; however, court staff may not give legal advice to parties or attorneys. Messages may be left for the Office of Legal Research at (916) 408-6119.

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1. S-PR-0009459 Wise, Brenda Kay - In Re Estate of

Appearance is required for continued order to show cause hearing as to status of administration and final distribution.

Missing any response by personal representative.

Missing any final distribution petition.

2. S-PR-0011002 In Re the Raymond Ramos Liv Trust

Appearance is required for hearing on petition to determine validity and effect of later trust; determine omitted spouse interests; to set aside family allowance; and to grant probate homestead.

Missing notice of hearing. Missing service of notice of hearing.

Missing verification to petition. Prob.C. § 1021.

Clarification is needed: petitioner attached approximately 100-page purported 2021 trust to the petition twice, without explanation. Petitioner should identify whether the two copies were attached for some purpose and / or whether they differ in some manner.

Notwithstanding the foregoing notes, it is recommended the petition be denied in part, as follows.

As to Prayer ¶¶ 1–6, it is recommended the petition be denied. At the time decedent purportedly executed the 2021 trust, he had been under conservatorship of the estate and conservatorship of the person for several years. Raymond appears to have been both personally and statutorily unable to execute a complex trust instrument (the 2021 trust is approximately 100 pages long; names at least 38 beneficiaries, including a charitable beneficiary; names at least 6 potential trustees; and purports to reach at least 3 real property interests, deposit accounts at at least 4 financial institutions, as well as insurance, pension rights, vehicles and other valuable personal property, and securities accounts) while under conservatorship. See Prob.C. §§ 1870 & 1871. See also *Andersen v. Hunt* (2011) 196 Cal.App.4th 722, 730–731; *Lintz v. Lintz* (2014) 222 Cal.App.4th 1346, 1351–1353.

Even if the trust were found to be validly executed, the allegations of the petition establish that Raymond could not have funded the trust with any assets. All his property was subject either to the conservatorship of the estate or to the 2016 trust. He had no legal ability to fund any assets to a new trust.

Thus, there is no apparent legal or factual basis on which the court could find the 2021 trust was validly executed or validly funded by purported settlor Raymond Ramos.

As to prayer ¶ 9, no probate homestead can be set aside from a trust. It can only be set aside "during administration of the [decedent's] estate and "upon [or after] the filing of the inventory. Prob.C. § 6520. This is not a decedent's estate proceeding and the request is without legal or factual support.

As to prayer ¶ 10, a family allowance may be awarded only "out of the [decedent's estate] . . . during administration of the estate." Prob.C. § 6520. This is not a decedent's estate proceeding and the request is without legal or factual support.

Points and authorities requested: petitioner is requested to provide legal points and authorities addressing whether the establishment of conservatorship of the estate in 2017 or of the person in 2018 (or both) rendered the 2016 trust irrevocable due to the finding(s)

of incapacity of settlor Raymond Ramos; and, if so, whether that precludes application of the omitted spouse provisions of Prob.C. § 21610 et seq. because the trust falls outside the definitional provisions of of § 21600 & 21601(b).

These calendar notes are not a tentative ruling by the court on the merits of the petition. They are provided to assist the parties and the court to prepare for the hearing.

3. S-PR-0012965 In Re the Estate of Donaire, Mark

Petition for final distribution is recommended for approval as prayed.

4. S-PR-0013025 In Re the Andrew Bauer Rev Trust

Appearance is required for continued hearing on petition to suspend and remove cotrustee and for other relief.

Missing service of notice of hearing to THD Enterprises, Inc.

The petition does not appear to adequately distinguish between Melanie Hirsch; Melanie Hirsch, cotrustee; Melanie Hirsch, president of THD Enterprises, Inc.; and THD Enterprises Inc. itself. For example, the sale contract and promissory note were entered into between trustee Andrew Bauer and THD Enterprises, Inc.; it does not appear Hirsch individually is a party to either agreement.

Status of mediation / settlement is needed.

In light of the failure of any party to file any substantive filing in this matter in nearly 2 years, it is recommended this matter be dropped from calendar.

5. S-PR-0013228 In Re the Estate of Meinzer, Lance

Appearance is required for continued hearing on petition to determine estate property, recover estate property, and for damages.

Current status is needed.

6. S-PR-0013594 In Re the Estate of Meador, Robert C

Missing notice of hearing for November 10 hearing. Notice filed August 12, 2026, is for a November 9 hearing. By order filed October 5 the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been filed or served.

Clarification is needed: estate has insufficient cash assets to pay the executor and attorney fees requested in the petition. Executor should show how fees are to be paid. The court will not ordinarily approve fees where there is no means to pay fees.

7. S-PR-0013763 In Re the Estate of Wade, Ronald Kent

Petition for final distribution is recommended for approval as prayed.

8. S-PR-0013767 In Re the Waltraud Trust

Petition to determine trust property

Appearance is required for continued hearing on petition to determine trust property.

Petition to determine invalidity of trust

Appearance is required for continued hearing on petition to determine invalidity of trust.

Missing notice of hearing. Missing service of notice of hearing.

9. S-PR-0013833 In Re the Yellow Dog Trust

Petition to determine CP interests, instructions, accounting, imposition of constructive trust, dec relief (M Bastedo; FD 9-30-2025)

Appearance is required continued hearing on petition to determine petitioner and trust property interests and for other relief.

Petition to compel account, suspend / remove trustee, recover property (J Bastedo, K Bastedo; FD 3-4-2026)

Appearance is required for continued hearing on petition to suspend and remove trustee, to compel trustee account, and for other relief.

1st trustee account (G Richter; FD 5-11-2026)

Appearance is required for continued hearing on 1st trustee account.

10. S-PR-0013960 In Re the Joseph & Doris B Moreno Fam Trust

Petition to compel trustee account

Appearance is required for continued hearing on petition to compel trustee account.

Although an unverified account is attached to trustee's prior opposition, trustee asserted that he "is presently preparing and compiling the accounting," suggesting the

attached is a draft or preliminary account. The account has not been filed with a petition for approval.

Amended petition to remove trustee

Appearance is required for hearing on amended petition to remove trustee.

11. S-PR-0014004 In Re the Timothy and Carolyn Riolo Fam Liv Trust

Appearance is required for hearing on 1st / final trustee account.

Missing notice of hearing for November 10 hearing. Notice filed June 24, 2026, is for a November 9 hearing. By order filed October 6 the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been filed or served.

Trustee should be prepared to address why a non-professional, non-institutional trustee should be granted fees associated with institutional trust administration rather than a reasonable hourly rate of compensation.

Clarification is needed as to February 24, 2026, distribution to Brielle Croake for "Car for Namoa for assisting Timothy Riolo" in the amount of $16,000.

Clarification is needed as to March 7, 2025, disbursement to QuickBooks for "Payment in error" in the amount of $14,231.

12. S-PR-0014071 In Re the Estate of Lear, Tammy C.

Appearance is required for continued hearing on spousal property petition.

Missing Attachment 7 (factual basis for relief) to spousal property petition. See ¶ 7.

Petitioner response is requested: the petition request determination of succession to and ownership of certain LLC interests "including" certain real property interests of the LLCs. LLC members do not own LLC assets. *CSHV 1999 Harrison, LLC v. County of Alameda* (2023) 92 CalApp.5th 117, 139. Ownership or succession to properties owned by the LLC is not justiciable in a spousal property petition. The only assets of decedent and survivor identified in the petition are the LLC membership interests themselves.

Petitioner response is requested: the petition appears to request reformation of two deeds granting certain real properties to two LLCs. The forms of relief available through a spousal property petition do not include reformation of deeds.

13. S-PR-0014081 In Re the Estate of Dutt, Brahm

Petition to administer estate is recommended for approval as prayed.

14. S-PR-0014165 In Re the Estate of Unhassobiscay, Jean

Petition to administer estate (Public Administrator)

Appearance is required for continued hearing on petition to administer estate.

Missing notice of hearing for petition to administer estate. Missing service of notice of hearing. Missing proof of publication of notice of hearing.

Missing allegations at ¶ 5a(5)–(6) (child(ren)) and 6 (successors where no spouse / child(ren)).

Petition to administer estate (Z Young)

Appearance is required for hearing on petition to administer estate.

Missing notice of hearing for November 10 hearing. Notices filed July 2 and August 26, 2026, and proof of publication filed September 19 are for a November 9 hearing. By order filed October 2 the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been filed, served, or published.

Missing service to consular or diplomatic official of France, which may be required by Prob.C. § 8113.

15. S-PR-0014283 In Re the Estate of Manzinali, Robert Paul

Missing notice of hearing for petition to administer estate. Missing service of notice of hearing.

Clarification is needed: proceedings in S-PR-0008076, *In re the Anna M Manzinali Trust* included verified allegations that decedent was survived by sibling Christina M Manzinali, who is not identified in this petition as decedent's sibling. See Exhibit A to petition filed June 17, 2019, in said action.

Missing sufficient information to fix bond. The court should take judicial notice that the final account in S-PR-008076, *In re the Anna M Manzinali Trust*, alleged that the trust was holding $487,100.25. See Exhibit 6 to petition filed March 18, 2026, in said action. It is further recommended the court take judicial notice that the court determined that "the entirety of the trust corpus consists of . . . property [which] was unequivocally gifted to Robert" Manzinali. See Order filed April 24, 2026, in that action. It is recommended bond be fixed at an amount no less than $488,000.

This is the third estate petition filed for the estate of Robert Manzinali. This matter should be continued to December 22, 2026, to be heard with S-PR-0014373, *Estate of Manzinali*. The court should consider whether both that action and S-PR-0014373 should be consolidated with S-PR-0009945, *Estate of Manzinali*, with S-PR-0009945 to be the lead case number (see C.R.C. 3.350(b)).

16. S-PR-0014286 In Re the Estate of Palmer, James E

Missing notice of hearing for November 10 hearing. Notice filed August 10, 2026, and proof of publication filed October 2 are for a November 9 hearing. By order filed October 5 the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been filed, served, or published.

Missing service to consular or diplomatic official of Canada, which may be required by Prob.C. § 8113.

17. S-PR-0014287 In Re the Frances I. Zamora Rev Trust

Missing notice of hearing for petition to appoint successor trustee. Missing service of notice of hearing.

It is recommended the petition be dismissed under Prob.C. § 17202 for the reasons set forth in the court's order filed August 19.

18. S-PR-0014288 In Re the Estate of Hay, Steven Brinkman

Missing notice of hearing for November 10 hearing. Notice filed July 14, 2026, is for a November 9 hearing. By order filed October 5 the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been filed, served, or published.

Missing sufficient publication of notice of hearing. Publication was in the Placer Herald, a newspaper circulated in Rocklin CA, without explanation. Decedent died a resident of Kings Beach.

19. S-PR-0014289 In Re the Robert Arnold Bernier Rev Trust

Missing notice of hearing for petition to compel trustee account and for surcharge. Missing 30 days' service of notice of hearing.

Missing any copy of the subject trust. Exhibit 1 to the petition is a certification of trust, a summary document describing some trust terms (Prob.C. § 18100.5(b)), but which is not a copy of the trust. Note that the certification of trust states the trust was created in 1999, not 2007, and that settlor Robert Bernier, not Briand Bernier, was trustee.

20. S-PR-0014290 In Re the Lowella A. Tapia Trust

Missing notice of hearing for November 10 hearing. Notice filed September 30 is for a November 9 hearing date. By order filed October 5, the court rescheduled this matter to be heard November 10, 2026. No notice for November 10 has been given.

Missing 30 days' personal service of notice of hearing with copy of the petition to Cory Tapia. Prob.C. § 851(a)(2).