

Probate Notes for April 25, 2016

Probate notes are a recommendation as to the outcome of the petition. Unlike tentative rulings, they do not automatically become adopted as the order of the court. Unless an appearance at the hearing is otherwise required by law, if petitioner submits a proposed order prior to the hearing and the recommendation is to grant the petition, no appearance is necessary. If you are scheduled to appear and there is no probate note issued in your case, you should appear as scheduled. If you wish to continue a matter, you must contact the civil division at (530) 406-6704, at least two (2) court days before your hearing.

Please note: The Yolo Superior Court is now located at 1000 Main Street, in Woodland.

CASE: Conservatorship of Bugreyev
Case No. CV PC 16-19

It is recommended to appoint legal counsel for the proposed limited conservatee. (Prob. Code, § 1471, subd. (c).)

The parties, including the proposed limited conservatee, are **DIRECTED TO APPEAR**. (Prob. Code, § 1828.5.)

CASE: Conservatorship of Jojo
Case No. CV PC 10-44

The Court notes the following deficiency: Petitioner fails to include a description and/or explanation regarding the distribution that was made on May 1, 2015, in the amount of \$118,455.54, from the Hartford Annuity to a “beneficiary.” (Prob. Code, § 1064, subd. (a)(1), (2).) The last Hartford Annuity statement filed with the Court states the account value was \$178,930.47, as of March 31, 2015. As a final account statement was not filed with the Court, it is unclear if any assets remain in the Hartford Annuity account.

CASE: Estate of Lund
Case No. CV P2 15-34

It is recommended to approve the first and final account and report of executor, and to grant the petition for allowance of statutory compensation to the executor and attorney for ordinary services, for authorization to withhold a reserve fund, and for final distribution and settlement of the estate. (Prob. Code, § 11600 et seq.)

CASE: In re the Joann M. Mahan Trust
Case No. CV P2 15-114

The parties are hereby notified that the Court will issue a tentative ruling no later than 2:00 p.m. on April 22, 2016, pursuant to Local Rule 11.4.