

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

**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: Thursday, January 30, 2025
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#: 23PR-00207

CASE NAME: Estate of Gary David Nunes

THIS CASE IS SET FOR HEARING ON:

Petition on First and Final Accounting

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. Counsel to advise the Court on the current case status.

(continued on next page)

CASE#: 23PR-00208

CASE NAME: Estate of Cora Martinez

THIS CASE IS SET FOR HEARING ON:

Continued from August 29, 2024 re: Status on Filing of Inventory and Appraisal

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. Counsel to advise the Court on the current case status.

CASE#: 23PR-00281

CASE NAME: Estate of Teresa C. Carreon

THIS CASE IS SET FOR HEARING ON:

First and Final Account and Report of Administrator, Petition for Final Distribution on Waiver of Account and Allowance of Statutory Compensation

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

1. A proposed Order has not been lodged with the Court. MSC 100 E.

TENTATIVE RULING:

The *First and Final Account and Report of Administrator, Petition for Final Distribution on Waiver of Account and Allowance of Statutory Compensation* is approved. The Administrator to lodge a proposed Order for the Court's signature prior to the hearing. A Status Hearing ensuring the Closing of the Estate is hereby set for April 24, 2025 at 8:15 a.m. in Courtroom 10.

CASE#: 23PR-00467

CASE NAME: Estate of Jesus Melgoza

THIS CASE IS SET FOR HEARING ON:

Continued from October 10, 2024 re: Status on Closing of the Estate

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

1. Distributive Receipts and an Ex Parte Petition For Final Discharge And Order (DE-295) have not been submitted. Prob Code §§11753, 12250

TENTATIVE RULING:

The Status Hearing is continued to April 4, 2025 at 8:15 a.m. in Courtroom 10 to allow counsel additional time to file the appropriate Distributive Receipts and Ex Parte Petition for Final Discharge with the Court.

(continued on next page)

CASE#: 24PR-00111

CASE NAME:

In the Matter of the Robert E & Beatrice Joyce Ellington Family Living Trust,
dated June 5, 2001 Trust

THIS CASE IS SET FOR HEARING ON:

Continued from October 21, 2024 re:

1. Petition for Instructions and to Determine Construction of Trust and to Whom Trust Property Shall Pass
2. Petition for Preliminary Distribution of Trust Estate and For Order Rejecting the Accounting and for Removal of Trustee and Appointment of Interim Trustee filed by Beneficiary Douglas Edward Ellington

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

1. Santa Clara County Superior Court case has not been received by the Merced Superior Court as per the Change of Venue Motion granted on May 16, 2024 in Santa Clara County Superior Court in case #20PR-189202.
2. No Proof of Service reflecting service on the Trustee, counsel representing the trustee or any other interested party of the *Objection filed on May 31, 2024 by Douglas Edward Ellington*. CCP §1005(c) ***Remains deficient as of 1/21/25**
3. *Petition for Preliminary Distribution of Trust Estate and For Order Rejecting the Accounting and for Removal of Trustee and Appointment of Interim Trustee filed by trust beneficiary Douglas Edward Ellington on May 31, 2024:*
 - a. Notice of Hearing with Proof of Service was filed on May 31, 2024 reflects service by mail on May 29, 2023. ***Remains deficient as of 1/21/25**
 - b. No service is reflected on any estate representative, heirs or beneficiaries for deceased beneficiary David Ellington. Prob Code §17203(c) ***Remains deficient as of 1/21/25**

TENTATIVE RULING:

The Santa Clara County Superior Court case to be transferred remains unreceived by the Merced Superior Court. The hearing be continued to April 10, 2025 at 8:15 a.m. in Courtroom 10 to allow sufficient time for notice to be corrected, file to be received from Santa Clara Superior Court and review of the transferred case.

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CASE#: 24PR-00510

CASE NAME: Estate of Jo Ann Williams Perry

THIS CASE IS SET FOR HEARING ON:

Petition for Letters of Testamentary with Full IAEA Authority

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

1. Petition is missing Attachment 3f(2) is missing (copy of will).
2. Mandatory Judicial Council *Duties & Liabilities Acknowledgment* form (DE-147) signed the personal representative has not been filed. Prob Code §8404(a)
3. Notice is improper as it has been effectuated by the Petitioner who is a party to the action. CCP §1013a(1)
4. No Proof of Publication with the corresponding signed affidavit.
Prob Code §8121, §8124
5. Proposed Letters for Probate have not been lodged.
Prob Code §8006, §8400

TENTATIVE RULING:

The hearing is continued to March 7, 2025 at 8:15 a.m. in Courtroom10 for correction of deficiencies. Any corrective pleadings to be filed with the Court by the close of business on February 21, 2025.

(End of Tentative Rulings)