

October 24, 2025, Probate Tentative Rulings

1. **PR0000072 In the Matter of Jessica Taylor Ragan**

No appearances are required. The conservatorship of the person shall continue. The conservatorship still appears to be warranted. The conservators are acting in the best interests of the conservatee regarding the conservatee's placement and quality of care, including physical and mental treatment. The next biennial review is set for October 22, 2027, at 9:00 a.m., in Department 6. The court investigation fee for this biennial review is waived.

2. **PR0000214 Estate of Mathew Jay Forrest**

Appearances are required. Jessica Akin shall show cause why she should not be sanctioned for failing to appear as ordered on May 19, 2025. The court is cognizant that Ms. Akin is represented by new counsel, Carlena Tapella, Esq., as of July 2025.

3. **PR0000367 In the Matter of Leilani Asonia Hollingshead**

The hearing is dropped from calendar. No motion was filed.

4. **PR0000623 In the Matter of Susan Lesley Vega**

No appearances are required. Pursuant to petitioner's request, the court continues this matter to January 9, 2026, at 9:00 a.m., in Department 6. Petitioner shall provide notice of the continued court date.

5. **PR0000729 In the Matter of Elberta Jean Cain**

No appearances are required. The court notes that the inventory and appraisal filed with the court was not signed by probate referee Kevin Eckard, the appointed probate referee. The court continues this matter to December 5, 2025, at 9:00 a.m., in Department 6. Petitioner shall provide an inventory and appraisal signed by the probate referee prior to the continued court date. The court is otherwise favorably inclined to grant the petition as requested. Petitioner shall provide notice of the continued court date.

6. **PR0000783 In the Matter of Brian Bennett**

No appearances are required.

Before the court is respondent's September 2, 2025, demurrer. Respondent, among other things, argues that venue is not proper in Nevada County. The court agrees.

Probate Code section 17005(a)(2) provides that venue for a testamentary trust is either where (1) the trust's principal place of administration is located, or (2) trust property, or some portion thereof, is located. A principal place of administration is "the usual place where the day-to-day activity of the trust is carried on by the trustee or its representative who is primarily responsible for the administration of the trust." Prob. Code § 17002(a) "If the principal place of administration of the trust cannot be determined under subdivision (a), [and if] the trust has a single trustee, the principal place of administration of the trust is the trustee's residence or usual place of business." Prob. Code § 17002(b)(1); see *Estate of Ivey* (1994) 22 Cal.App.4th 873, 880.

It is undisputed that respondent Agee is the sole trustee of the trust. Contrary to the suggestion of petitioner, respondent was served with this petition in the state of Nevada (not in Nevada County). At the time of filing the petition, the trust apparently contained no trust property was located in Nevada County. Moreover, it appears that petitioner presently resides in El Dorado County. Venue is not appropriate in Nevada County; venue is appropriate in El Dorado County.

Pursuant to Probate Code section 17304 and Code of Civil Procedure sections 396 and 3969b, the court orders this matter transferred to the El Dorado County Superior Court. The El Dorado County court has venue; moreover, transfer of jurisdiction to El Dorado County will be in the best interests of the estate and economical and convenient administration of the trust will be facilitated by the transfer. Upon such order, the court clerk shall certify a copy of the order of transfer to the clerk of the court for El Dorado County, together with copies of the instrument creating the trust (if any) and all documents of record filed in this court.

All other requests for relief in the demurrer are denied *without prejudice*. The remaining issues must be addressed in the appropriate venue.

A hearing is set for December 12, 2025, at 9:00 a.m. in Department 6, for status as to the transfer. The parties shall provide a written update no later than two weeks prior.

7. PR0000818 In the Matter of Lawrence Pierce Shangle

No appearances are required. The petition to terminate letters of special administration and withdraw petition for letters of administration is granted as prayed. Petitioner shall submit a proposed order.

8. PR0000880 In the Matter of Jacky Rae Young

No appearances are required. On the court's own motion this matter is continued to November 7, 2025, at 9:00 a.m., in Department 6 to be heard in conjunction with the request to administer filed in PR0000882. All prior orders remain in effect.

9. PR0000881 Estate of Stephanie Jo Kirschbaum

No appearances are required. The petition to administer the estate is granted as prayed. A proposed order has been submitted.