

June 5, 2026, Probate Tentative Rulings

1. PR0000784 In the Matter of Linda Pepperman

Appearances are required. Before the Court is Petitioner Pepperman and Wilton's petition for removal of the trustee and an accounting opposed by Respondent/Trustee Triano. The Court is favorably inclined to order the parties to attend mediation, with costs of the same to be paid by the trust, pursuant to Probate Code section 17206 and *Breslin v. Breslin* (2021) 62 Cal. App.5th 801, 806 ("The probate court has the power to order the parties into mediation."). The parties are hereby advised:

Mediation may result in a settlement of the matters that are the subject of this case and of any and all interested persons and parties interests therein. Settlement of the matter may result in an agreement for the distribution of assets of the above-referenced trust and of the estates of the settlors therein, however those assets may be held. Settlement of the matter may also result in an award of attorneys' fees to one or more parties under *Smith v. Szeyller* (2019) 31 Cal.App.5th 450, 242. Interested persons or parties who do not have counsel may attend the mediation and participate.

Non-participating persons or parties who receive notice of the date, time and place of the mediation may be bound by the terms of any agreement reached at mediation without further action by the Court or further hearing. Rights of trust beneficiaries or prospective beneficiaries may be lost or forfeited by the failure to participate in mediation. Participation in mediation is a prerequisite to an evidentiary hearing. By failing to participate in mediation, a person or party will waive their right to an evidentiary hearing.

Petitioners and Respondent shall meet and confer regarding selection of a mutually acceptable mediator. The Court continues this matter for review on the status of mediation to September 4, 2026, at 9:00 a.m., in Department 6, and continues to reserve jurisdiction over the pending motions. No later than two weeks prior to the continued hearing date, the parties shall submit a joint statement indicating the status regarding selection of a mediator.

2. PR0000824 In the Matter of Keith Dean Emmerton

No appearances are required. This date was improvidently left on calendar. The Court confirms the August 28, 2026, future hearing date.

3. PR0000884 In re the Estate of Warren Henry Schlieff

No appearances are required. The petition for order confirming sale of real property is granted as prayed. A proposed order has been provided. Additionally, the petition for order approving settlement agreement is granted as prayed. A proposed order has been provided.

4. PR0000933 In the Matter of Jody McCaffree

Appearances are required. Before the Court is the petition of Petitioner McCaffree to

remove Trustee True, for an accounting and for fees. The minutes from May 1, 2026 indicate solely that there was an update by counsel to J. LaPorte and the matter continued. The Court has no knowledge regarding the status of Trustee's license or mediation. The parties shall address the same.

The Court is favorably inclined to order the parties to attend mediation, with costs of the same to be paid by the trust, pursuant to Probate Code section 17206 and *Breslin v. Breslin* (2021) 62 Cal. App.5th 801, 806 ("The probate court has the power to order the parties into mediation."). The parties are hereby advised:

Mediation may result in a settlement of the matters that are the subject of this case and of any and all interested persons and parties interests therein. Settlement of the matter may result in an agreement for the distribution of assets of the above-referenced trust and of the estates of the settlors therein, however those assets may be held. Settlement of the matter may also result in an award of attorneys' fees to one or more parties under *Smith v. Szeyller* (2019) 31 Cal.App.5th 450, 242. Interested persons or parties who do not have counsel may attend the mediation and participate.

Non-participating persons or parties who receive notice of the date, time and place of the mediation may be bound by the terms of any agreement reached at mediation without further action by the Court or further hearing. Rights of trust beneficiaries or prospective beneficiaries may be lost or forfeited by the failure to participate in mediation. Participation in mediation is a prerequisite to an evidentiary hearing. By failing to participate in mediation, a person or party will waive their right to an evidentiary hearing.

Petitioner and Trustee shall meet and confer regarding selection of a mutually acceptable mediator. The Court continues this matter for review on the status of mediation to September 4, 2026, at 9:00 a.m., in Department 6, and continues to reserve jurisdiction over the pending motions. No later than two weeks prior to the continued hearing date, the parties shall submit a joint statement indicating the status regarding selection of a mediator.

5. PR0000955 In the Matter of Joan M. O'Donnell

No appearances are required. The petition for appointment of a conservatorship of the person and estate is granted. Ann Sagerdahl is appointed as Conservator. Bond is set at \$340,000.00. Letters shall issue once proof of bond is provided to the Court. Conservator shall file an inventory and appraisal within 90 days. The Court investigation fee is waived. The Court sets the following future dates in Department 6:

Review Hearing regarding Inventory and Appraisal: August 21, 2026, at 9:00 a.m.
Annual Review: May 21, 2027, at 9:00 a.m.
Annual Accounting: May 21, 2027, at 9:00 a.m.

6. PR0000997 In the Matter of Kelly Powell

No appearances are required. The petition to administer is granted as prayed. Petitioner shall provide a proposed order.