

**Placer County Superior Court
10820 Justice Center Drive, Roseville**

**PROBATE CALENDAR NOTES
October 5, 2026, 8:30 AM, Department 2
101 Maple Street, Auburn**

**Published September 30, 2026, 9:45 PM
Updated (final) October 2, 2026, 3:00 PM**

NOTICE: CHANGE OF CALENDAR DAY

Beginning the week of November 2, 2026, the Probate Calendar will be heard Tuesdays, 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 **October 5, 2026, 8:30 AM, in Department 2**, the Hon. Glenn M. Holley, presiding.

Pursuant to Local Rule 80.1.4, these calendar notes are **not** 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.

1. S-PR-0009906 Ty Grimm Special Needs Trust - In re the

4th SNT account is recommended for approval as prayed.

2. S-PR-0012481 In Re the Estate of Stefanski, Michael Anthony

Appearance is required for continued hearing on petition for final distribution.

Petitioner response is needed: petitioner now alleges that there were significant gains on sale of estate assets. The inventory and appraisal shows only personal representative appraisal of accounts, without disclosing the holdings in the accounts. Referee appraisal is required for all non-cash assets, including all securities. The reported gains on sales suggest all assets were securities which required referee appraisal.

3. S-PR-0012624 In Re the Estate of Montgomery, Ann

Petition for final distribution is recommended for approval as prayed.

4. S-PR-0012975 In Re the Gina Patricia Delaca Trust

It is recommended the amended petition to recover trust property and the three discovery motions be dropped from calendar in light of the pending motion to enforce settlement.

5. S-PR-0013181 In Re the Rogers Liv Trust

The motion to compel discovery responses was dropped from calendar by the clerk incident to dismissal of the underlying trust petition by petitioner.

6. S-PR-0013703 In re the Estate of Sanchez, Arthur Richard Jr.

Petition to administer estate (M Sanchez)

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

Petition to administer estate (A Sanchez, A Sanchez, I Sanchez)

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

Missing notice of hearing. Missing service of notice of hearing. Missing proof of publication of notice of hearing.

Missing required allegations at ¶5a(3)–(4) (RDP), (7)–(8) (issue of predeceased child(ren)) & (b) (step- / foster child(ren)).

Clarification is needed: ¶ 6f alleges decedent was not survived by issue, issue of parents, or issue of grandparents (see ¶¶ 6b & 6d). However, ¶¶ 5 & 8 allege decedent was survived by children. Children are issue of decedent, parents of decedent, and grandparents of decedent.

Missing estimated property and income (¶ 3d), and sufficient bond request (¶ 1d).

7. S-PR-0013779 In Re the 1997 Keller Fam Trust

Petition to determine incapacity of settlor, suspend / remove trustee, and for other relief

Appearance is required for continued hearing.

Motion to compel compliance with records subpoenas

Appearance is required for continued hearing. The motion appears to have been granted as to certain subpoenaed persons but not adjudicated as to the remainder.

Motion to quash records subpoenas

Appearance is required for hearing. The motion appears to have been denied as to certain subpoenas, but not adjudicated as to the remainder.

Motion to compel deposition appearance

Appearance is required for hearing on motion to compel deposition appears by Hans Ruedi Keller.

Missing sufficient notice of hearing. Notice included with the motion states the motion will be heard both in Department 2 and Department 40, and fails to state any correct address for the hearing in Department 2. Missing evidence of service of notice of motion and supporting papers. Counsel's reference to "email[ing] a copy of the Ex Parte Application" in her declaration is not sufficient evidence of service of the motion.

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

Appearance is required for hearing on motion to compel further interrogatory responses.

Because this matter is scheduled on the probate calendar, a tentative ruling is not provided. Local Rule 80.1.4.

9. S-PR-0013871 In Re the Saleem & Waqarun Khan Rev Liv Trust

It is recommended the petition to determine trust property be denied.

Missing notice of hearing. Missing service of notice of hearing with copy of the petition. Prob.C. § 851. In addition to any other persons who must be given notice under

Prob.C. § 851, notice appears to be required to the personal representative of the estate of Saleem Khan.

The court has no jurisdiction over real property in Missouri. Civ.C. § 755; see also *In re Conservatorship of Hume* (2006) 139 Cal.App.4th 393, 404-406 (even where the court may have *in personam* jurisdiction over a fiduciary, it does not have *in rem* jurisdiction over property in another state).

The subject properties are not described in the trust or any funding schedule or document. The holding of *Heggstad*—that identifying a real property as a trust asset within the trust may be a sufficient means to create a trust in said property—thus lends no support to the petition.

The subject real properties were acquired after execution of the trust and petitioner does not identify any contemporaneous or later writing by settlors comprising an all-property or all-real-property funding provision. The trust provision at issue in *Ukkestad v. RBS Asset Finance, Inc.* (2015) 235 Cal.App.4th 156 "assigned the ownership of all of [settlor's] real property to the trustees of the Trust *effective immediately*." *Id.* at 159 (emphasis added). *Ukkestad* did not involve after-acquired property and so does not hold that property acquired contrary to the trust after execution of the applicable writing is trust property.

The pourover will does not support the requested relief. "In the absence of any transfer to [a] trust *prior to* [decedent's] death," assets become part of the decedent's estate despite will language expressing decedent's desire that assets be held in trust. *Placencia v. Strazicich* (2019) 42 Cal.App.5th 730, 735 & 743-744 (emphasis added). "It [is] error for the court to award [such property] directly to [a] trust in the absence of a probate proceeding." *Id.*, citing *Estate of Hart* (1957) 151 Cal.App.2d 271, 280-281. See also Prob.C. § 7001. "[A] probate court ha[s] no power to consider the legality of a will until it [is] regularly brought before it by a petition for its probate." *Estate of Burnett* (1935) 6 Cal.App.2d 116, 123.

In light of the foregoing observations, it is again recommended the petition be denied.

These calendar notes are not a tentative ruling by the court on the merits of the petition. They are provided to assist the court and the parties to prepare for the hearing. Local Rule 80.1.4.

10. S-PR-0014222 In Re the Estate of Tenney, Barbara Helen

Missing sufficient notice of hearing for petition to administer estate. Notice, as filed, served, and published, omits ¶ 5 concerning IAEA powers requested in the petition.

Clarification is needed: notice was served to 3 persons not identified in the petition (S Smith, E Smith, T Clayton), without explanation.

Missing required allegations at ¶ 5a(3)-(4) (RDP).

Clarification is needed: petitioner alleges decedent was survived by issue of predeceased spouse (¶¶ 6e & 8), but also no issue of predeceased spouse (¶ 7b(2)(e)).
Missing requested bond amount (¶ 2d).

11. S-PR-0014226 In Re the matter of Martin, Kenneth Earl

Appearance is required for hearing on petition to determine invalidity of AHCD and for other relief.

Missing notice of hearing. Missing proof of service of notice of hearing with copy of petition to Kenneth Martin, Patrick Martin, Michael Martin.

12. S-PR-0014227 In Re the Estate of Arbaugh, Jacqueline

Spousal property petition is recommended for approval as prayed.

13. S-PR-0014228 In Re the Estate of Dewan, Anup

Missing 15 days' mailed or personal service of notice of hearing for petition to administer estate to Madhvi Gupta. Electronic service is prohibited unless Gupta has executed a consent to service as required by Prob.C. § 1215(c)(1); see § 8110.

Missing 15 days' service of notice of hearing to Perna Dewan.

Missing sufficient publication of notice of hearing. Publication was in the Auburn Journal, a newspaper circulated in Auburn CA, apparently in derogation of Prob.C. § 8121(b). Decedent died a resident of Rocklin CA.

14. S-PR-0014229 In Re the Estate of Knudstrup, Eric

Missing sufficient service of notice of hearing. Original notice did not include required ¶ 4 concerning admission of a will to probate. Revised notice of hearing was served September 21, which was not timely for an October 5 hearing. Missing service to Linda Knudstrup.

Court determination is needed as to sufficiency of evidence to overcome Prob.C. § 6124 lost will presumption.

15. S-PR-0014230 In Re the Estate of Finn, Carole Anne

Petition to administer estate is recommended for approval as prayed.

16. S-PR-0014231 In Re the Estate of Clyde, Timothy Scott

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

It is recommended this matter be continued to October 26, 2026, 8:30 a.m., in Department 2, to be heard with S-PR-0014117, *Estate of Clyde*, and S-PR-0014251, *Estate of Clyde*, both of which are administration proceedings for the same decedent.

At the next hearing, it will be recommended that all matters be consolidated with S-PR-0014117 as the lead case number, consistent with the Rules of Court. Until the court orders consolidation, all filings, notices, etc., should use the separate case numbers.

17. S-PR-0014233 In Re the Estate of Giordano, Rocco M. JR.

Clarification or revised petition is needed: the petition identifies the sole petitioner as "The Capital Group Companies, Inc." Capital Group cannot appear without an attorney.

Clarification or revised petition is needed: proposed executor Susan Morgensen does not identify herself as an attorney or as associated with Capital Group in any way. Because no representative of petitioner Capital Group signed the petition, it is unverified in derogation of Prob.C. § 1021.

Missing notice of hearing for petition to administer estate.

Missing sufficient publication of notice of hearing. Notice as published states incorrect location information for Department 2. Department 2 is located at Historic Courthouse, 101 Maple Street, Auburn, and not at the Hon. Howard G. Gibson Courthouse in Roseville.

Missing original will. Prob.C. § 8200(a). Missing copy of will attached to petition.

18. S-PR-0014239 In Re the Estate of Okamoto, Catherine Susan

Missing sufficient publication of notice of hearing. Publication was in the Placer Herald, a newspaper circulated in Rocklin CA, apparently in derogation of Prob.C. § 8121(b). Decedent died a resident of Lincoln CA.