

**SUPERIOR COURT, STATE OF CALIFORNIA
COUNTY OF SANTA CLARA**

Department 2, Honorable Amber Rosen, Presiding
Audrey Nakamoto, Courtroom Clerk

191 North First Street, San Jose, CA 95113
Telephone 408-882-2120

**ADVANCE CASE STATUS REPORT (“ACSR”)
(Local Probate Rule 1)**

GENERAL PROBATE CALENDAR – Department 2

DATE: Thursday, March 5, 2026 TIME: 9:00am

*****NOTICE*****

**APPEARANCES MAY BE IN PERSON OR REMOTE THROUGH
UNICORN DIGITAL COURTROOM (UDC)**

**To find the appropriate remote appearance links please go to:
<https://santaclara.courts.ca.gov/online-services/remote-hearings>**

“PREAPPROVED” matters are those reviewed and found satisfactory. Personal appearance by the petitioning party is not required. Pre-approved matters to which objections are made may be continued. Orders for preapproved matters will be signed upon calling of the calendar and may be picked up for filing at that time.

“PROBATE EXAMINER NOTES” - If a matter is not preapproved, then the Probate Examiner will list procedural defects. Parties may file additional documents to correct procedural deficiencies, and the Court, in its discretion, may consider such filings in making its order. The Court may order a matter off calendar, grant it subject to additional filings, or order a continuance.

TROUBLESHOOTING

If you do not see the appropriate ACSR, then it has either not been posted yet or your web browser cache (temporary internet files) is accessing a prior calendar. “REFRESH” or “QUIT” your browser and reopen it, or adjust your internet settings to see only the current version of the web page. Your browser may access old information from old cookies even after the current calendar has been posted.

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LINE #	CASE #	CASE TITLE	ACSR/Examiner notes
LINE 1	20PR189191	<i>Olivia Reyes Revocable Trust</i>	No Examiner Notes; Parties to appear for Court's ruling.
LINE 2	21PR189978	<i>Frank Nelson, Jr. Revocable Living Trust</i>	No Examiner Notes; Parties to appear for Court's ruling.
LINE 3	24PR196409	<i>Roy J. Molinari Trust dated May 17, 2007</i>	Stip/Order already continued this hearing to May 28, 2026, 9:00am, D2
LINE 4	25PR199134	<i>The Hall-Ziock Living Trust</i>	Click line #4 or scroll below to line #4 for probate examiner notes.
LINE 5	1985-1-PR-113228	<i>Conservatorship of Jose S. Martinez</i>	Click Line #5 or scroll below to Line #5 for Examiner Notes.
LINE 6	1993-1-PR-130977	<i>Conservatorship of Mark P. Morley</i>	Click line #6 or scroll below to line #6 for probate examiner's notes.
LINE 7	25PR2000064	<i>Conservatorship of Jann Besson</i>	Per request of attorney, Continue to 5/4/26
LINE 8	25PR201288	<i>In the matter of Joe Pessah</i>	No Examiner Notes; parties to appear for Court's ruling
LINE 9	25PR201511	<i>Trust of Aki King</i>	Missing Proposed Order
LINE 10	25PR201512	<i>Trust of Jean Hanford</i>	Needs proposed order; parties to appear for Court's ruling.
LINE 11	25PR201514	<i>The Edward E. Campbell Revocable Trust dated June 4, 1981, as amended and restated</i>	Click line #11 or scroll below to line #11 for probate examiner notes.
LINE 12	25PR201596	<i>In the Matter of Manuel C. Anaya-Dufresne</i>	Click on lien #12 or scroll below to line #12 for probate examiner's notes.
LINE 13	26PR201785	<i>John Baglin Revocable Living Trust</i>	No Examiner Notes; parties to appear for Court's ruling
LINE 14	1993-1-PR-130977	<i>Conservatorship of Mark P. Morley</i>	No probate examiner's notes. Parties to appear for Court's ruling.
LINE 15			
LINE 16			
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LINE 18			
LINE 19			

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20PR189191 Olivia Reyes Revocable Trust

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25PR199134 The Hall-Ziock Living Trust, as amended and restated on April 21, 2022

1. In the future, it is helpful to caption each of the separately filed pleadings so as to indicate which Exhibits are being filed within each of the separate documents. All four of the separately filed pleadings are captioned identically.
2. Examiner defers to the Court and probate staff attorney whether petitioners should address trust Article 5, section 5.1 re: Disposition of Tangible Personal Property.

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1985-1-PR-113228 Conservatorship of Jose Martinez

- 1.** Disbursement Schedule: Defers to Court if will require further explanation/more information:
 - a.** Personal Expenses of \$1,900 dated 12/20/24 and \$2,000 dated 3/27/24. Account shows, Conservatee received weekly allowance of \$230.00. The sudden increase in expenses is unusual that needs to be explained, but PEX defers. PrC section 1064(a)(2).
 - b.** Credit Card Purchase for T mobile dated 7/2/25 of \$99.00 described as “04’23’25-05/22/25 T-Mobile; duplicated payment? From the description, it seems estate paid twice for the same period. Needs information if this amount is returned or will be returned to the estate given it is a duplicate payment

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1993-1-PR-130977 Conservatorship of Mark P. Morley – 16th accounting petition

1. PG's compensation – Paragraphs #9 of petition and paragraph #4 of the petition's prayer request continued authority to collect Conservator's fees of \$125/month. PG's fees increased to \$325/month in 2025. The Disbursement schedule shows that \$325/month was collected in 2025. Was this a typo? Need clarification.
2. Deferred Court fees- Paragraph #13 of petition and paragraph #8 of the petition's prayer request authorization for payment of deferred Court fees of \$435.00. This amount is not consistent with the deferred Court fees shown in EJ. Amount of fees deferred in this account period is \$441.05.

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25PR201514

The Edward E. Campbell Revocable Trust dated June 4, 1981, as amended and restated

1. Consolidate into the established case number for this Trust instrument: 22PR193026.
All parties should file in the established case number.
2. Petition paragraph 24: “24. No request for special notice has been filed in this matter.”
Request For Special Notice filed 8/22/2025 by Pacific Prime Ventures, LLC and David V. Humphrey, Jr, in the established case number for this Trust instrument: 22PR193026
3. Notice was not on Judicial Council form Notice of Hearing on Petition to Determine Claim to Property (form DE-115). (Prob. Code § 851, subd. (c)).
 - a. POS of DE-120 form and acknowledgment of receipts indicate a copy of the petition was served and received concurrently
4. No proposed order submitted

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25PR201596 In the Matter of Manuel C. Anaya-Dufresne

1. There is an existing probate estate case for decedent Manuel C. Anaya-Dufresne under case number 25PR201041. Why isn't this petition filed under the same case number? Defers to Court if 25PR201596 will be consolidated into 25PR201041.
2. No proposed order submitted.

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1993-1-PR-130977 Conservatorship of Mark P. Morley – petition for substituted judgment

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