



**Superior Court of California
COUNTY OF ALAMEDA**

September 15, 2026

Notice to Attorneys and to All Interested Parties:

Invitation to Comment on Proposed Amendments to Local Rules and Forms

As required by California Rules of Court, Rule 10.613(g), the Superior Court of California, County of Alameda hereby distributes for public comment the attached proposal to amend its local rule.

The proposal also may be viewed [here](#) or [here](#). In addition, a hard copy of the proposal is available upon request by email at pcomments@alameda.courts.ca.gov or by phone at 510-891-6012.

Important dates:

- The last day to comment is **October 30, 2026, at 5:00 p.m.**
- The proposed amendment takes effect upon approval of the Chair of the Judicial Council or on **January 1, 2027**, whichever is sooner.

Text of Proposed Rules and Amendments: *see attached.*

Comments must be submitted in writing to:

Public Comments
Superior Court of California, County of Alameda
1225 Fallon Street, Room 209
Oakland, CA 94612
E-mail: pcomments@alameda.courts.ca.gov

- Page 1 of 11

ESTATE OF:

CASE NUMBER:

8. Petitioner's Account, or Report, covers the period of (date of death) _____ through (date) _____.
9. a. ☐ **ACCOUNT**
Summary of Account and accounting schedules are attached as *Attachment 9a*.
- b. ☐ **WAIVER OF ACCOUNT**
All persons entitled to account, including beneficiaries or heirs, waive the requirement of an accounting.
Waivers of Account signed by each beneficiary or heir ☐ are submitted herewith ☐ will be filed prior to the hearing.
10. a. ☐ More than four (4) months have elapsed since the issuance of *Letters* (~~JC-F~~form #DE-150) and reasonable efforts were made to identify creditors of the estate. The time for filing and presenting creditor's claims has expired. Notice of the petition to administer the estate and of the death of the decedent has been published for the period and in the manner prescribed by law.
- b. ~~Notice of Administration to Creditors~~*Notice of Administration* (~~JC-F~~form #DE-157) ☐ was given to all known creditors of the estate within four months after the date *Letters* (~~JC-F~~Form #DE-150) were first issued or within 30 days after the personal representative first had knowledge of the creditor ☐ was not required as there were no known creditors.
11. ☐ Other than taxes or creditor claims addressed in this petition, petitioner has no reason to believe that any public entity listed in ~~Probate Code section~~*Prob. Code* § 9201 has any basis for making a claim against the estate.
12. a. ☐ The decedent did not receive and was not the surviving spouse or registered domestic partner of a person who received Medi-Cal benefits. Notice was not required to be sent to the California Department of Health Care Services.
- b. ☐ The decedent received or was the surviving spouse or registered domestic partner of a person who received Medi-Cal benefits. Notice required by ~~Probate Code section~~*Prob. Code* § 9202(a) was sent to the California Department of Health Care Services on (date) _____, with a copy of the decedent's death certificate and/or a copy of the death certificate of the decedent's pre-deceased spouse or registered domestic partner.
13. a. ☐ Petitioner knows of no heir that is or has been confined in a prison or facility under the jurisdiction of the Department of Corrections or the Department of Youth Authority, or is or has been confined in any county jail, road camp, industrial farm, or other local correctional facility to which notice is required under ~~Probate Code section~~*Prob. Code* § 9202(b); therefore, no notice is required to be given to the Director of the California Victim Compensation ~~and Government Claims~~ Board.
- b. ☐ Notice pursuant to ~~Probate Code section~~*Prob. Code* § 9202(b) was given to the Director of ~~The California Victims Compensation and Government Claims~~ Board on (date) _____.
14. Notice pursuant to ~~Probate Code section~~*Prob. Code* § 9202(c) was given to the Franchise Tax Board on (date) _____.
15. a. ☐ The decedent had no child support obligation under an order issued by a court of competent jurisdiction. Notice was not required to be sent to the California Department of Child Support Services.
- b. ☐ Letters were first issued on or after January 1, 2026, and petitioner knows or has reason to believe that the decedent had a child support obligation under an order issued by a court of competent jurisdiction. Notice required by Probate

ESTATE OF:	CASE NUMBER:
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Code section § 9202(e) was sent to the California Department of Child Support Services on (date) _____.

c. ☐ Other allegation(s): _____
_____.

~~14.~~

~~15.~~16. The names and address of all parties entitled to notice, including parties who have submitted a *Request for Special Notice* (~~JC-F~~ form #DE-154/GC-035), are as follows:

Name	Relationship to Decedent	Address

☐ continued on attachment ~~15~~6.

~~16.~~17. Petitioner alleges:

- a. ☐ The Probate Referee's fee was paid on (date) _____.
- b. ☐ All costs of administration incurred to date have been paid, except closing expenses and statutory fees, and the estate is now in a condition to close.
- c. ☐ All debts of the decedent and the decedent's estate have been paid.
- d. Cash in interest-bearing accounts:
- i. ☐ At all times during the period of administration, petitioner has kept all surplus cash in interest-bearing accounts.
- OR
- ii. ☐ There was no cash to keep in interest-bearing accounts.
- e. ☐ No compensation has been paid to the petitioner or attorney without court order.
- f. The estate is ☐ solvent ☐ insolvent.
- g. Other Allegation(s): _____

☐ continued on attachment ~~16~~7.

~~17.~~18. The following *Inventory and Appraisal(s)* (~~JC-F~~ form #DE-160) have been filed with the court:

Date Filed	Type	Amount
	☐ Partial No.: _____ ☐ Final ☐ Supplemental ☐ Corrected/Amended	
	☐ Partial No.: _____ ☐ Final ☐ Supplemental ☐ Corrected/Amended	
	☐ Partial No.: _____ ☐ Final ☐ Supplemental ☐ Corrected/Amended	
	☐ Partial No.: _____ ☐ Final ☐ Supplemental ☐ Corrected/Amended	

☐ continued on attachment ~~17~~8. **Total Inventory and Appraisal Value (as corrected if applicable):**

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~~18.~~19. Surviving spouse:

- a. ☐ There is a surviving spouse (or the personal representative (PR), guardian of the estate (GS), or conservator of the estate (CS) of the surviving spouse):

ESTATE OF:	CASE NUMBER:
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- 1) ☐ A Spousal Election was filed on (date) _____ (within four months after the issuance of Letters pursuant to [Probate Code section PC 13502\(b\)](#)).
- 2) ☐ A Spousal Election will be filed.
- 3) ☐ Not applicable.

b. ☐ There is a surviving spouse who is receiving benefits outside of the estate administration.

c. ☐ There is NO surviving spouse (or [personal representative PR](#), [guardian of the estate GS](#), or [conservator of the estate GS](#) of the surviving spouse).

~~19-20.~~ a. ☐ Petitioner alleges that no family or affiliate relationships exist between petitioner and any agent hired by petitioner during the period of administration.

b. ☐ The following family or affiliates were hired:

Name	Capacity Retained	Relationship

☐ continued on attachment ~~4209.~~

~~20-21.~~ a. ☐ No *Creditor's Claim(s)* (~~JC-Form~~ [#DE-172](#)) has/have been filed with the court.

b. ☐ The following *Creditor's Claim(s)* (~~JC-Form~~ [#DE-172](#)) was/were filed with the court:

Date Claim Filed	Claimant	Amount of Claim	Amount Allowed	Amount Denied	Date Allowed / Denied	Lawsuit filed?

☐ continued on attachment ~~201.~~

~~21-22.~~ ☐ All written demands for payment that were received within four months after *Letters* (~~JC-Form~~ [#DE-150](#)) were first issued or 60 days after the date notice of administration was mailed, were treated as filed claims and paid before the expiration of 30 days after the four-month period, the debts were justly due; the debts were paid in good faith; the amounts paid were the true amounts of the indebtedness over and above all payments and offsets; and the estate is solvent.

~~22-23.~~ a. ☐ Petitioner did not take any action without prior court approval under the Independent Administration of Estates Act for which a *Notice of Proposed Action* (~~JC-Form~~ [#DE-165](#)) was required.

b. ☐ Petitioner took the following action(s) without prior court approval under the Independent Administration of Estate Act for which a *Notice of Proposed Action* (~~JC-Form~~ [#DE-165](#)) was required.

Nature of Action	Date Action was Taken	When & to Whom Notice was Given (Name & Date)	Notice Waived (Name & Date)	Objections Received (Name & Date)

ESTATE OF:	CASE NUMBER:
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☐ continued on attachment 223.

23.24.

No federal or state estate taxes are due or payable from the estate or by Decedent. All taxes, if any, have been paid.

24.25.

No personal property taxes are due or payable from the estate. All taxes, if any, have been paid.

25.26.

. ☐ No California or federal income taxes are due or payable from the estate. All taxes, if any, have been paid.

b. ☐ A final income tax return will be filed ☐ and any taxes due will be paid from the reserve requested at item 2730.

26.27.

. Statutory fees are calculated as follows:

(1) Total Inventory & Appraisal Value	_____	4% of the first \$100,000	_____
(2) Receipts*	_____	3% of the next \$100,000	_____
(3) Gains on Sales*	_____	2% of the next \$800,000	_____
(4) Losses on Sales**	_____	1% of the next \$9,000,000	_____
		½ of 1% of the next \$15,000,000	_____
Total Calculation of Estate			
(1+2+3-4)	_____		

Total Statutory Compensation _____

* If including receipts or gains in fee calculation, schedules must be attached. (California ~~Cal.~~ Rules of Court, rule 7.550(b)(6))

** Losses, if any, must be included in fee calculation and schedules attached, even if account herein is waived.

b. Statutory fee due to petitioner as personal representative is ☐ (amount) \$ _____ ☐ WAIVED.

ESTATE OF:	CASE NUMBER:
------------	--------------

c. Statutory fee due to petitioner's attorney is ☐ (amount) \$ _____ ☐ **WAIVED**.

~~27-28.~~ a. ☐ Petitioner requests payment of extraordinary fees in the amount of \$ _____.
A Fee Declaration ☐ is submitted herewith ☐ will be submitted prior to the hearing.
(Superior Court of ~~Super. Ct.~~ Alameda County, Local Rules, rule 7.410-; California ~~Cal.~~ Rules of Court, rule 7.702)

b. ☐ Attorney requests payment of extraordinary fees in the amount of \$ _____.
A Fee Declaration ☐ is submitted herewith ☐ will be submitted prior to the hearing.
(Superior Court of ~~Super. Ct.~~ Alameda County, Local Rules, rule 7.410-; California ~~Cal.~~ Rules of Court, rule 7.702)

c. ☐ Extraordinary Fees pursuant to the Superior Court of Alameda County, Local Rules, rules 7.420 and 7.430 are applicable. Allegations and requests are included in attachment ~~27~~8.

~~28-29.~~ a. ☐ Petitioner requests reimbursements for _____
in the amount of \$ _____. All reimbursements are itemized in Attachment ~~28~~9a.

b. ☐ Attorney requests reimbursements for _____
in the amount of \$ _____. All reimbursements are itemized in Attachment ~~28~~9b.

~~29-30.~~ a. ☐ Petitioner requests (amount) \$ _____ to be reserved for ☐ taxes and tax preparation fees, ☐ closing expenses, ☐ County Recorder fees, ☐ other: _____.

Note: If the account herein is not waived and the amount withheld is more than \$5,000, a supplemental accounting for the amount withheld will be required prior to the discharge of the personal representative.

~~30-31.~~ ☐ The following **preliminary** distribution(s) has/have been made:

Date of Order Authorizing Distribution	To Whom Made	Amount/Asset Distributed	Receipts Filed (Date)

☐ continued on attachment ~~30~~1.

~~31-32.~~ All assets on hand at the end of the report period are listed in Attachment ~~31~~2, including street address, legal description & Assessor's Parcel Number ~~APN~~ for real property; specific dollar amounts for cash; and complete description of each individual security/stock, if applicable, in compliance with California Rules of Court, rule 7.651.

~~32-33.~~ Assets available for distribution:

Total Value of Non-Cash Assets on Hand
as listed on Attachment ~~32~~3: _____

ESTATE OF:	CASE NUMBER:
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Total Value of Cash Assets on Hand
as listed on Attachment 323:

Less:

Statutory Personal Representative Fees:

Statutory Attorney Fees:

Extraordinary Personal Representative Fees:

Extraordinary Attorney Fees:

Personal Representative Reimbursements:

Attorney Reimbursements:

Reserve:

Miscellaneous Items:

a.

b.

Remaining Assets for Distribution:

☐ A more comprehensive Distribution Plan, in the same format, is included in attachment 332.

~~33~~34. a. ☐ Petitioner alleges distribution of the estate should be made by intestate succession. The names, relationships to decedent, and proposed distributions to all heirs are as follows:

ESTATE OF:

CASE NUMBER:

☐ continued on attachment 334a.

- b. ☐ Petitioner alleges distribution of the estate should be made **pursuant to decedent's Will/Codicil(s)**. The dispositive provisions are as follows (*must be verbatim*), including the specific distributions to all beneficiaries:

☐ continued on attachment 334b.

ESTATE OF:

CASE NUMBER:

~~34.35.~~ ☐ Other allegations:

☐ continued on attachment ~~345.~~

WHEREFORE, Petitioner prays for an order that:

1. The report and ☐ account ☐ waiver of account of the personal representative be approved;
2. All acts of the petitioner as personal representative, as reported to the court, be confirmed and approved;
3. Petitioner be authorized and directed to
 - a. ☐ Pay petitioner \$_____, representing statutory fees;
 - b. ☐ Pay petitioner's attorney (name) _____
the amount of \$_____, representing statutory fees;
 - c. ☐ Pay petitioner \$_____, representing extraordinary fees;
 - d. ☐ Pay petitioner's attorney (name) _____
the amount of \$_____, representing extraordinary fees;
 - e. ☐ Pay petitioner \$_____, representing reimbursements;
 - f. ☐ Pay petitioner's attorney (name) _____
the amount of \$_____, representing reimbursements; and
 - g. Withhold ☐ no reserve ☐ a reserve in the amount of
 - i. ☐ \$_____, **equal to or less than \$10,000.00.**
 - ii. ☐ \$_____, **more than \$10,000.00:** ~~An accounting of the reserve will be required prior to discharge.~~

ESTATE OF:	CASE NUMBER:
------------	--------------

4. Distribution of the assets of the estate is approved as follows: (Include name and relationship of each heir/beneficiary and description of each asset being distributed. If there is real property, include the address, legal description, and Assessor's Parcel Number.)

☐ continued on attachment A.

5. Omnibus Clause: Distribution of any property of the estate acquired or discovered after the court order for final distribution is made, including any unused portion of the reserve, if any, is approved as follows:

☐ continued on attachment B.

ESTATE OF:	CASE NUMBER:
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6. ☐ Other orders:

☐ continued on attachment C.

7. ☐ Petitioner was ordered to file a bond: Upon the filing of receipts on distribution and *Ex Parte Petition for Final Discharge and Order* (~~JG-F~~ form #DE-295/~~GC-395~~), the Petitioner's surety bond will be discharged.

Date: _____

Type or print name of Attorney

Signature of Attorney

VERIFICATION

Verification of Pleading ([Code of Civil Procedure](#)~~Code Civ. Proc.~~ section, § 446)
Declaration under Penalty of Perjury Form ([Code of Civil Procedure](#)~~Code Civ. Proc.~~, sections §§ 446, 2015.5)

I, (Name) _____, declare:

I am the _____ (capacity) in the above-entitled matter.

I have read the foregoing Petition and know the contents thereof.

The same is true of my own knowledge, except as to those matters which are therein stated on information and belief, and, as to those matters, I believe it to be true.

Executed on _____, 20____, at _____ (County, State).

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____

Type or print name of Petitioner

Signature of Petitioner

Type or print name of Petitioner

Signature of Petitioner