

MARIN COUNTY SUPERIOR COURT

**LOCAL RULE REVISION TABLE
FOR JULY 2019**

NEW / DELETED / REVISED / RENUMBERED / RENAMED

| REV. RULE | PREV. RULE | NEW RULE | PREVIOUS / CURRENT RULE TITLE | NEW RULE TITLE |
|-------------------------------------|------------|----------|--|---|
| CIVIL RULES | | | | |
| 1.14 | | | SETTLEMENT CONFERENCE | N/A |
| FELONY AND MISDEMEANOR RULES | | | | |
| 2.3 | | | SETTING OF ARRAIGNMENT DATES AND FILING OF CRIMINAL COMPLAINTS | N/A |
| 2.4 | | | BENCH WARRANTS | N/A |
| PROBATE RULES | | | | |
| | 5.1 | | CITATION | INTRODUCTION |
| | 5.2 | | CASE ASSIGNMENT FOR ALL PURPOSES | CALENDAR AND PROCEDURAL MATTERS |
| | 5.3 | | COURT HEARING PROCEDURE GENERALLY AND ORDERS | EX PARTE MATTERS |
| | 5.4 | | CONTINUANCES | SETTLEMENT CONFERENCES |
| | 5.5 | | EX PARTE MATTERS | FILING AND CONTENTS OF SPOUSAL PROPERTY PETITION |
| | 5.6 | | QUESTIONS OF PROCEDURE | REQUIRED ALLEGATIONS |
| | 5.7 | | SETTLEMENT CONFERENCES | ELECTION OF SURVIVING SPOUSE TO ADMINISTER |
| | 5.8 | | CONFORMED COPIES | SPECIAL LETTERS OF ADMINISTRATION |
| | 5.9 | | FORMS APPROVED BY JUDICIAL COUNCIL | PETITION FOR PROBATE OF WILL AND LETTERS OF ADMINISTRATION |
| | 5.10 | | DECLARATION | NOTICE REQUIREMENTS OBTAINING LETTERS IN DECEDENT'S ESTATES |
| | 5.11 | | CONTENT OF PROBATE ORDERS | PROOF OF WILLS |
| | 5.12 | | ORDERS FOR CONTINUING PAYMENTS MUST HAVE TIME LIMITS | LOST OR DESTROYED WILLS |
| | 5.13 | | NOTICES | WILL WITH DELETIONS OR INTERLINEATIONS |
| | 5.14 | 5.5 | FILING AND CONTENTS OF SPOUSAL PROPERTY PETITION | N/A |
| | 5.15 | 5.6 | REQUIRED ALLEGATIONS | N/A |
| | 5.16 | 5.7 | ELECTION OF SURVIVING SPOUSE TO ADMINISTER | N/A |
| | 5.17 | 5.8 | SPECIAL LETTERS OF ADMINISTRATION | N/A |
| | 5.18 | 5.9 | PETITION FOR PROBATE OF WILL AND LETTERS OF ADMINISTRATION | N/A |
| | 5.19 | 5.10 | NOTICE REQUIREMENTS OBTAINING LETTERS IN DECEDENT'S ESTATES | N/A |
| | 5.20 | 5.11 | PROOF OF WILLS | N/A |

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| PROBATE RULES cont'd | | | | |
| | 5.21 | 5.12 | LOST OR DESTROYED WILLS | N/A |
| | 5.22 | 5.13 | WILL WITH DELETIONS OR INTERLINEATIONS | N/A |
| | 5.23 | 5.14 | APPLICATION OF BOND SECTION | N/A |
| | 5.24 | 5.15 | REQUIREMENT OF BOND/WAIVER OF BOND | N/A |
| | 5.25 | 5.16 | REDUCING BOND THROUGH USE OF DEPOSITORY FOR BLOCKED ACCOUNT | N/A |
| | 5.26 | 5.17 | BOND MODIFICATION | N/A |
| | 5.27 | 5.18 | NONRESIDENT EXECUTORS | N/A |
| | 5.28 | 5.19 | BOND OF SPECIAL ADMINISTRATORS | N/A |
| | 5.29 | 5.20 | PREPARING INVENTORY AND APPRAISAL | N/A |
| | 5.30 | 5.21 | APPOINTMENT OF REFEREE | N/A |
| | 5.31 | 5.22 | SUFFICIENCY OF BOND | N/A |
| | 5.32 | 5.23 | OBJECTION TO APPRAISED VALUE OF ASSETS | N/A |
| | 5.33 | 5.24 | CLAIMS PROCEDURES | N/A |
| | 5.34 | 5.25 | NOTICE TO CREDITORS | N/A |
| | 5.35 | 5.26 | GENERAL INFORMATION | N/A |
| | 5.36 | 5.27 | SALES OF PERSONAL PROPERTY | N/A |
| | 5.37 | 5.28 | RETURN OF SALE OF REAL PROPERTY | N/A |
| | 5.38 | 5.29 | RETURN OF PRIVATE SALE FOR COURT CONFIRMATION | N/A |
| | 5.39 | 5.30 | BROKER'S COMMISSIONS | N/A |
| | 5.40 | 5.31 | IN GENERAL | N/A |
| | 5.41 | 5.32 | BONDS | N/A |
| | 5.42 | 5.33 | TRUSTEE'S FIRST ACCOUNT | N/A |
| | 5.43 | 5.34 | WAIVER OF ACCOUNT | N/A |
| | 5.44 | 5.35 | NOTICE REQUIREMENTS ON PETITIONS FOR DISTRIBUTION | N/A |
| | 5.45 | 5.36 | PRELIMINARY DISTRIBUTION | N/A |

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| PROBATE RULES cont'd | | | | |
| | 5.46 | 5.37 | FINAL DISTRIBUTION IN GENERAL | N/A |
| | 5.47 | 5.38 | ADDITIONAL REQUIREMENTS RE: PETITION FOR FINAL DISTRIBUTION | N/A |
| | 5.48 | 5.39 | AGREEMENTS FOR DISTRIBUTION; ASSIGNMENTS; DISCLAIMERS | N/A |
| | 5.49 | 5.40 | DISTRIBUTION TO PERSONS UNDER CONSERVATORSHIP OR GUARDIANSHIP | N/A |
| | 5.50 | 5.41 | DISTRIBUTION TO MINORS | N/A |
| | 5.51 | 5.42 | DISTRIBUTION TO TRUSTEES | N/A |
| | 5.52 | 5.43 | DISTRIBUTION TO REPRESENTATIVE OF DECEASED HEIR OR BENEFICIARY | N/A |
| | 5.53 | 5.44 | DISTRIBUTION TO INTESTATE HEIRS | N/A |
| | 5.54 | 5.45 | DISTRIBUTION TO "MISSING" HEIRS | N/A |
| | 5.55 | 5.46 | INTEREST ON GENERAL PECUNIARY LEGACIES | N/A |
| | 5.56 | 5.47 | FAMILY ALLOWANCE | N/A |
| | 5.57 | 5.48 | STATUS REPORTS | N/A |
| | 5.58 | 5.49 | OBTAINING FINAL DISCHARGE | N/A |
| | 5.59 | 5.50 | PROCEEDINGS TO ESTABLISH FACT OF DEATH | N/A |
| | 5.60 | 5.51 | PETITION TO ESTABLISH IDENTITY OF HEIRS | N/A |
| | 5.61 | 5.52 | TRANSFER OF ESTATE PLANNING DOCUMENTS TO CLERK | N/A |
| | 5.62 | 5.53 | TEMPORARY GUARDIANSHIPS AND CONSERVATORSHIPS | N/A |
| | 5.63 | 5.54 | GUARDIANSHIP AND CONSERVATORSHIP ACCOUNTING STATEMENTS | N/A |
| | 5.64 | 5.55 | GUARDIANSHIPS | N/A |
| | 5.65 | 5.56 | ORDERS FOR WITHDRAWALS OF FUNDS IN BLOCKED ACCOUNTS | N/A |
| | 5.66 | 5.57 | DISPOSITION OF MINOR'S FUNDS | N/A |
| | 5.67 | 5.58 | CONSERVATORSHIPS | N/A |
| | 5.68 | 5.59 | NOTICE OF CONSERVATORSHIP PROCEEDINGS | N/A |
| | 5.69 | 5.60 | MEDICAL AUTHORIZATION FOR CONSERVATORS | N/A |
| | 5.70 | 5.61 | ACCOUNTS REPORTS | N/A |

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| PROBATE RULES cont'd | | | | |
| | 5.71 | 5.62 | SALE OF RESIDENCE BY CONSERVATOR | N/A |
| | 5.72 | 5.63 | TERMINATION OF CONSERVATORSHIP | N/A |
| | 5.73 | 5.64 | COURT APPOINTED ATTORNEYS FOR (PROPOSED) CONSERVATEE | N/A |
| | 5.74 | 5.65 | FILING OF ACTIONS CONCERNING TRUSTS | N/A |
| | 5.75 | 5.66 | NOTICE REQUIREMENTS CONCERNING TRUSTS | N/A |
| | 5.76 | 5.67 | PETITIONS FOR TRANSFER OF PROPERTY TO TRUST ("HEGGSTAD PETITIONS") | N/A |
| | 5.77 | 5.68 | WAIVER OF ACCOUNT BY TRUSTEE | N/A |
| | 5.78 | 5.69 | TRUSTEE'S FIRST ACCOUNT | N/A |
| | 5.79 | 5.70 | DISTRIBUTIONS TO TRUSTEE | N/A |
| | 5.80 | 5.71 | SUBSTITUTED JUDGMENT | N/A |
| | 5.81 | 5.72 | STATUTORY COMPENSATION IN DECEDENT'S ESTATE | N/A |
| | 5.82 | 5.73 | EXTRAORDINARY COMPENSATION IN DECEDENT'S ESTATES | N/A |
| | 5.83 | 5.74 | PARTIAL ALLOWANCE OF COMPENSATION | N/A |
| | 5.84 | 5.75 | COMPENSATION FOR TRUSTEES AND THEIR ATTORNEYS | N/A |
| | 5.85 | 5.76 | COMPENSATION TO CONSERVATORS AND GUARDIANS AND THEIR ATTORNEYS | N/A |
| | 5.86 | 5.77 | PROCEDURE FOR OBTAINING COMPENSATION | N/A |
| | 5.87 | 5.78 | NOTICE OF EX PARTE APPLICATION FOR TEMPORARY CONSERVATORSHIP | N/A |
| MISCELLANEOUS RULES | | | | |
| 8.17 | | | JUROR QUALIFICATION AND SELECTION | N/A |
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