

1       **Rule 26.4. Provisions governing disclosure and discovery in contested proceedings under**  
2 **Title 75 of the Utah Code.**

3       (a) **Scope.** This rule applies to all contested actions arising under Title 75 of the Utah Code.

4       (b) **Definition.** A probate dispute is a contested action arising under Title 75 of the Utah Code.

5       (c) **Designation of parties, objections, initial disclosures, and discovery.**

6           (c)(1) **Designation of Parties.** For purposes of Rule 26, the plaintiff in probate proceedings is  
7 presumed to be the petitioner in the matter, and the defendant is presumed to be any party filing an  
8 objection. Once a probate dispute arises, and based on the facts and circumstances of the case, the  
9 court may designate an interested person as plaintiff, defendant, or non-party for purposes of  
10 discovery. Only an interested person who has appeared will be treated as a party for purposes of  
11 discovery.

12       (c)(2) **Objection to the petition.**

13           (c)(2)(A) Any oral objection must be made at a scheduled hearing on the petition and then  
14 reduced to writing within 7 days, unless the written objection has been previously filed with the  
15 court.

16           (c)(2)(B) A written objection must set forth the grounds for the objection and any supporting  
17 authority, must be filed with the court, and must be mailed to the parties named in the petition and  
18 any interested persons as provided in Utah Code § 75-1-201(24), unless the written objection has  
19 been previously filed with the court.

20           (c)(2)(C) If the petitioner and objecting party agree to an extension of time to file the written  
21 objection, notice of the agreed upon date must be filed with the court.

22           (c)(2)(D) In the event no written objection is timely filed, the court will act on the original  
23 petition upon the petitioner's filing of a request to submit pursuant to Rule 7 of the Utah Rules of  
24 Civil Procedure.

25       (c)(3) **Initial disclosures in guardianship and conservatorship matters.**

26           (c)(3)(A) In addition to the disclosures required by Rule 26(a), and unless included in the  
27 petition, the following documents must be served by the party in possession or control of the  
28 documents within 14 days after a written objection has been filed:

29           (c)(3)(A)(i) any document purporting to nominate a guardian or conservator, including a  
30 will, trust, power of attorney, or advance healthcare directive, copies of which must be served  
31 upon all interested persons; and

32           (c)(3)(A)(ii) a list of less restrictive alternatives to guardianship or conservatorship that the  
33 petitioner has explored and ways in which a guardianship or conservatorship of the  
34 respondent may be limited.

35       This paragraph supersedes Rule 26(a)(2).

36 (c)(3)(B) The initial disclosure documents must be served on the parties named in the  
37 probate petition and the objection and anyone who has requested notice under Title 75 of the  
38 Utah Code:

39 (c)(3)(C) If there is a dispute regarding the validity of an original document, the proponent of  
40 the original document must make it available for inspection by the contesting party within 14 days  
41 of the date of referral to mediation unless the parties agree to a different date.

42 (c)(3)(D) The court may modify the content and timing of the disclosures required in this rule  
43 or in Rule 26(a) for any reason justifying departure from these rules.

44 (c)(4) **Initial disclosures in all other probate matters.**

45 (c)(4)(A) In addition to the disclosures required by Rule 26(a), and unless included in the  
46 petition, the following documents must be served by the party in possession or control of the  
47 documents within 14 days after a written objection has been filed: any other document purporting  
48 to nominate a representative after death, including wills, trusts, and any amendments to those  
49 documents, copies of which must be served upon all interested persons. This paragraph  
50 supersedes Rule 26(a)(2).

51 (c)(4)(B) The initial disclosure documents must be served on the parties named in the  
52 probate petition and the objection and anyone who has requested notice under Title 75 of the  
53 Utah Code.

54 (c)(4)(C) If there is a dispute regarding the validity of an original document, the proponent of  
55 the original document must make it available for inspection by the contesting party within 14 days  
56 of the date of referral to mediation unless the parties agree to a different date.

57 (c)(4)(D) The court may modify the content and timing of the disclosures required in this rule  
58 or in Rule 26(a) for any reason justifying departure from these rules.

59 (c)(5) **Discovery once a probate dispute arises.** Except as provided in this rule or as otherwise  
60 ordered by the court, once a probate dispute arises, discovery will proceed pursuant to the Rules of  
61 Civil Procedure, including the other provisions of Rule 26.

62 (d) **Pretrial disclosures, objections.** No later than 14 days prior to an evidentiary hearing or trial, the  
63 parties must serve the disclosures required by Rule 26(a)(5)(A).

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