



Superior Court of California, County of San Diego

Probate Mediator List

The Superior Court of California, County of San Diego maintains this Probate Mediator List to assist litigants and attorneys interested in mediating disputes involving estates, trusts, conservatorships and/or guardianships in the Probate Court. This binder contains individual profiles of mediators who have elected to be included on this list.

****DISCLAIMER: THE INFORMATION CONTAINED WITHIN EACH MEDIATOR PROFILE IS PROVIDED BY THE MEDIATOR. THE SAN DIEGO SUPERIOR COURT DOES NOT GUARANTEE OR WARRANT THE CONTENT OR ACCURACY OF THE INFORMATION, OR THE COMPETENCY OR QUALIFICATIONS OF THE MEDIATOR.***

NOT ALL MEDIATORS ON THIS LIST MAY BE AVAILABLE AT ALL TIMES, AND PARTIES ARE FREE TO USE OTHER MEDIATORS OR ALTERNATIVE DISPUTE RESOLUTION PROFESSIONALS WHO ARE NOT INCLUDED ON THIS LIST.

This binder will be updated periodically. Mediators interested in having their profiles included in the binders should complete the Probate Mediator Packet (PKT-037) available on the court's website, www.sdcourt.ca.gov under Probate forms.

For more information, see the [Probate Mediation Frequently Asked Questions](#) (also available on the court's website, under Probate Mediation). Additional questions regarding the Probate Mediator Binder or Probate Mediator Packet may be directed to Probate.ProTems@sdcourt.ca.gov

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SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: Marc D. Adelman

Organization/Firm/Company: Law Office of Marc Adelman

Address: 2488 Historic Decatur Road, Suite 200

Telephone Number: 619-297-7707

Fax Number: 619-222-1608

Email/Website: AdelmanMD@aol.com

II. EDUCATION / SPECIALIZATION:

Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

Western Illinois University, Bachelor of Arts Political Science (1972)

Western State University/Thomas Jefferson School of Law, Juris Doctorate (1977)

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

American Arbitration Mediator Training (1991) (1994); Superior Court Hearing Officer Training (1992) Creative Probate Mediation Training (1999) University Of San Diego Law School (1994 to present) Adjunct,

III. PROBATE AND OTHER RELEVANT EXPERIENCE:

Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

A good part of my practice over the last 39 years has involved contested Mental Capacity and Undue Influence issues either as a Mediator or Attorney for a party.

Last updated: April 2017

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

American Arbitration Association Mediator Training (1994) San Diego, California
Probate Mediation Training; Creative Mediation (1999) San Diego, California

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 20-25

Number of other mediations conducted: 25-30

Description of mediation experience and style:

Initial sessions involve all parties; Subsequent sessions parties separated; Concluding session involves all parties.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Probate Mediation Panel (2001-2009) San Diego Superior Court; Judge Pro Tem, San Diego Municipal Court (1981-Consolidation) Superior Court Judge Pro Tem (1990-present); Settlement Conference Judge, Arbitrator for SD Superior Court; Arbitrator, American Arbitration Association (1994-present); Kaiser Neutral Arbitrator (1999-present)

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 300.

Cancellation Policy:

No cancellation fees if canceled more than 72 hours of hearing.

Cancellations 24-72 hours before hearing charged at 25%

Day of hearing cancellation or less than 24 hours before hearing charged at 50%.

Deposit Policy:

Each party to deposit their share of fees one week prior to hearing.

Additional Policies or Fees:

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English

BIOGRAPHY

Marc D. Adelman is a former President of the State Bar of California, the largest legal regulatory agency in the world. The organization provides oversight for California's 250,000 attorneys with a budget over \$146 million dollars. He was also elected to serve as President of the San Diego County Bar Association in 1989 and was recently honored by the association by being selected as one of the "Legends of the San Diego County Bar". In addition, he is the principal of his prominent San Diego law firm, where he has gained an excellent reputation over the last 39 years as a skilled, diverse and versatile litigator in the fields of Personal Injury, Insurance, Professional Negligence, Estate and Tort litigation. He is certified as a specialist in Legal Malpractice Law by the California Board of Legal Specialization. His clients consist of insurance companies, major corporations, charitable institutions, small businesses and individuals. In addition, for the last 20 years he has served as a lecturer and Adjunct Professor at the University of San Diego School of Law, California Western and Thomas Jefferson School of Law. He also serves or has served as a panel member of the American Arbitration Association, Kaiser Permanente Neutral Arbitration Program, and the Superior Court's Probate Mediation and Arbitration Programs. He also serves as an expert witness, consultant and lecturer on the appropriate standards of care for solo and small firm practitioners in Legal Malpractice actions. In addition, he has served as a Mediator for the Probate Department of the San Diego Superior Court for the last 25 years hearing matter involving Fraud, Undue Influence and Mental capacity issues.

Mr. Adelman has received numerous awards and honors during his 39 year legal career in San Diego. He was named San Diego's **Legal Professional of the Year** in 1985 and 1999 by the San Diego County Bar Association. He received the prestigious **Bernard Witkin Award** presented by The Law Library Justice Foundation and was chosen Honorary Chairman of the 1998 **Lawyers Have Heart** 5K race sponsored by the American Heart Association and the San Diego County Bar Association. In 1985 he was named one of San Diego's **Citizens of the Year** by the San Diego Jr. Chamber of Commerce. He has also been inducted into the Thomas Jefferson School of Law's Hall of Fame. In addition, he has received numerous service-related awards from the San Diego County Bar Association, American Lung Association, American Heart Association and the Parent Teacher Association.

From 1992 through 2005, the Superior Court for the County of San Diego utilized Mr. Adelman as a Superior Court Hearing Officer where he conducted Certification and Medication Hearings. He also served as a Judge Pro Tem for that same and Municipal Courts, having done so since 1981, presiding over Criminal Preliminary Hearings, Traffic and Civil matters. The Court of Appeal, Fourth District affirmed his rulings in Wickware v. Tanner (1997) 53 Cal.App.4th 570, an appeal from a Superior Court jury trial over which he presided.

Prior to his election to the post of President of the State Bar, he served as Vice President and Chair of the Committee on Regulation and Discipline, which oversees responsibility for the attorney discipline system in California. In 1995, he chaired the State Bar's Legal Committee, which provides management for their litigation matters.

In 1989, he served as President of the San Diego County Bar Association, the year their impressive Bar facility was purchased by their Association. That same year he founded the statewide organization of the California Association of Local Bars and directed the implementation of the Civil Litigation Code of Conduct of the San Diego County Bar Association. Mr. Adelman has, or is, currently serving on seven different community and state nonprofit and charitable boards. He has successfully designed major fund-raising campaigns in both legal and nonprofit settings. In 1990, he co-designed and implemented the fund-raising drive which raised more than \$1.1 million for the San Diego County Bar Association's new facility.

For nearly 30 years he produced and moderated for the Judges of the Federal and Superior Courts of San Diego County a two-day program for new attorneys entitled The Judges' Orientation Program/Bridging the Gap. In 1997 he created and implemented, at eight different statewide locations, the Allen J. Broussard Presentation on Professionalism and Civility jointly sponsored by the Supreme Court of California, the Judicial Council and The State Bar of California.

Born July 16, 1950 in Chicago, Illinois, Mr. Adelman holds a Bachelor of Arts degree in Political Science from Western Illinois University; Macomb, Illinois, 1972. He received his J.D. from Thomas Jefferson School of Law in San Diego, California, and was admitted to the California Bar in 1978.



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: B. James Brierton
Organization/Firm/Company: ADR Services, Inc.
Address: 225 Broadway, Suite 1400, San Diego CA 92101
Telephone Number: (619) 233-1323
Fax Number: (619) 233-1324
Email/Website: jbrierton@adrservices.com / http://www.adrservices.com/neutrals/brierton-james/

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:
Please see attached Profile

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Please see attached Profile

Last updated: March 2018

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

Please see attached Profile

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 500

Number of other mediations conducted: 25

Description of mediation experience and style:

Facilitative but will employ evaluative analysis with concurrence of counsel. Joint sessions encouraged but utilized only with consent of parties/counsel and cautiously where sensitive or conflicted relationships.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 425.00

Cancellation Policy:

If the mediation is canceled or postponed within 7 days for half-day matters, and 15 days for full-day matters, on the scheduled date the party requesting the cancellation or postponement is responsible for the entire deposit(not just the cancelling party's share of the deposit), unless Mr. Brierton's time can be rescheduled.

Deposit Policy:

Each participant's share of the total amount due must be deposited within ten days after issuance of invoices in order to guarantee the reservation, unless the date is sooner, in which case the deposit is due immediately.

Additional Policies or Fees:

ADR Services Inc. charges a \$195 administrative fee per party.

VII. LANGUAGE CAPABILITIES OF MEDIATOR:



B. JAMES BRIERTON, ESQ.

Mediator • Arbitrator



Regarded as one of San Diego's preeminent probate specialists, B. James Brierton, Esq. began his legal career in 1972 as Director of a clinic for low-income elderly and has since handled thousands of matters involving probate, trusts, estates, and elder law. In 1997, after completing over 100 hours of extensive mediation training, Mr. Brierton began serving as a mediator and arbitrator in addition to his litigation work. To date, he has mediated and arbitrated more than 500 cases involving disputed litigated and non-litigated matters in his field of law.

Mr. Brierton brings a record of extensive experience and expertise to ADR Services, Inc.:

- ❖ 45 years of experience litigating complex trust, probate and elder law matters
- ❖ 20 years as a distinguished mediator, settling over 500 cases
- ❖ Selected as a San Diego Super Lawyer continuously since 2009
- ❖ Certified Specialist in Trust, Probate and Estate Planning since 1991
- ❖ AV Preeminent rated by Martindale-Hubbell
- ❖ Executive Committee, Trusts and Estates Section of the California State Bar
- ❖ Judge Pro Tem, San Diego Probate Court

The tenacity, impartiality and creativity which Mr. Brierton brings to mediation inspires confidence in the parties to resolve their disputes. His ability to evaluate technical and complex legal issues involved in trust and probate disputes overcomes the stumbling blocks to settlement and fosters confidence in the mediation process.

REPRESENTATIVE MEDIATION CASES

- Conservatorship dispute wherein a son lived with his mother for two years in a part-time caregiver role and took over the managing of finances for his mother. His sister was concerned their mother was not receiving proper care and claimed that their mother was a victim of financial abuse by her brother.
- Dispute regarding financial losses suffered in Trust where trustee was local private fiduciary who refused to account to settlor's adult children. Settlor, while living in his own home, had exhibited behavior of forgetfulness and irrational thinking. Settlor's children had all been estranged from the parent for several years. His children filed a trust petition under Probate Code §17200 to surcharge and remove the trustee. Trustee contended children lacked standing, and settlor hired counsel to also contest the petition.

- Settlor, an 80-year-old man, married a 55-year-old woman who was hired as his caregiver through an agency eight months prior to their marriage. Settlor's son filed a petition for conservatorship shortly after the marriage. Settlor hired counsel to vigorously contest the conservatorship. Even though settlor had always enjoyed a loving relationship with all three of his children, he refused to communicate with them, vowing that he did not want to see them again.
- Trust contest wherein an estranged daughter happily reconciled with her parents. Three years after the reconciliation, her parents amended their trust to name the former estranged daughter as trustee, resigning as cotrustees. After the husband died, the mother amended the original family trust, which subdivided into Survivor's and Bypass subtrusts upon death of husband, and under the amendment the entire estate was given to the formerly estranged daughter, disinheriting entirely the parents' two other children. The mother died, and the two disinherited children filed a trust contest in which they contend both parents lacked capacity before father's death and further alleged the amendment was the product of undue influence. They also filed a financial elder abuse complaint against their sister.
- Settlor, a 75-year-old man, remarried after the death of his first wife of 40 years. Settlor created a QTIP Trust for his second wife which gave her an income-only interest in the QTIP on principal of \$10,000,000. After the husband died, his second wife filed a petition to modify the trust to increase the income rights to a unitrust amount of 10% of principal annually based on a claim that her husband assured her the income each year would be a minimum of 10%, and the net income was about 4% annually. Settlor's two adult children contested her petition.
- A 45-year-old woman suffered severe brain injuries in a car accident, rendering her in a vegetative state according to one doctor's opinion. She was placed on a ventilator and feeding tube. The woman's mother filed a petition for conservatorship of both person and estate. The woman's son also filed a competing conservatorship petition. The Court appointed the mother as conservator. The court also appointed a guardian ad litem for the conservatee. The GAL ultimately filed a petition in the conservatorship proceeding seeking whether the consent for life support should be withdrawn. The GAL also discovered information that the conservator had wrongfully disposed of assets of the conservatee.
- Husband and wife were married in 2001, a second marriage for both of them. The husband had substantial assets going into the marriage, and his wife had few assets. During the third year of their marriage, the parties executed mutual wills in which each left their estate to the other on the condition they were living together as Husband and Wife at the time of death. The husband also transferred two parcels of real property worth about \$1,500,000 into joint tenancy with his wife, although the transfer deed did not

specifically state that he was computing his separate property to community property. The parties separated in 2015, and both parties immediately revoked the 2003 wills. However, the husband died in 2016 before the divorce was final. The financial records established approximately \$225,000 in community property earnings had been used to make mortgage payments and pay real property taxes on the two parcels before the separation. After the husband died, his daughter filed a petition under Probate Code §17200 based on various claims that his wife had no interest in the two parcels or in the husband's estate.

MEDIATION TRAINING

- Straus Institute, Seminar, Advanced Mediation of Complex Cases, 2003 (2 hours)
- Creative Mediation Training, Jan Stone & Peggy Williams, 1999 (25 hours)
- National Dispute Resolution Center, Basic Mediation Seminar, 1997 (24 hours)
- National Dispute Resolution Center, Credentials Program, 1997 (34 hours)
- James Melammed & Los Angeles County Bar Association, Mediation Seminar, 1996 (25 hours)
- San Diego County Bar Association, Basic Mediation Training, 1994 (24 hours)

EDUCATION

- J.D., University of San Diego; San Diego, CA, 1971
- B.A., Carson-Newman University; Jefferson City, TN, 1965

SELECTED PROFESSIONAL ASSOCIATIONS, ACTIVITIES AND HONORS

- Member, San Diego County Bar Association, 1972-Present
- Chair, Probate Section of San Diego County Bar Association
- Chair, Probate Mediation Program, San Diego Superior Court
- Judge Pro Tem, Probate Department, San Diego Superior Court
- Member, State Bar Advisory Commission re: ADR Specialization
- Member, Trusts and Estates Executive Committee, State Bar Association
- CEB Continuing Education of the Bar Panels: Conservatorships; Special Needs Trust, Basics of Estate Planning, Basics of Probate; Advanced Trust & Probate Litigation; Blended Family Estate Planning
- AV Preeminent rated with Martindale-Hubbell
- San Diego Super Lawyers, 2009-Present
- 2017 Top Lawyers in San Diego, San Diego Magazine

BACKGROUND

- Analyst, Central Intelligence Agency, Washington, D.C., 1965 and 1968-1969
- United States Navy, Medically Retired Officer, SEAL Team One, 1967-1968



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: JUDITH M. COPELAND
Organization/Firm/Company: WEST COAST RESOLUTION GROUP
Address: 530 B Street, Suite 1700, San Diego, CA 92101
Telephone Number: (619) 238-7282 ask for Kathy Purcell
Fax Number: (619) 238-8041
Email/Website: westcoastresolution.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

UC Berkeley undergrad; UC Hastings School of Law, 1974
~~Certified by State Bar of California as specialist in probate, estate planning and trust law from 1979-2016.~~

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

~~Author, California Will Drafting (CEB); revision author Durable Powers of Attorney (CEB); Strauss Institute for Dispute Resolution at Pepperdine (elder care mediation)~~

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

I represented the County Public Administrator/Conservator in 1976-78; practiced with small firms or solo starting in 1979 focusing solely on probate, trust, conservatorship and elder law through 1996 and then formed Copeland & Tierman in 1996 where I practiced in the same areas of law until my retirement in 2013.

I have taught many probate courses for CEB, the County Bar, State Bar, all three local law schools, PASD, and the California Judges Association.

Last updated: _____

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

~~Initial 9 hour training was done with National Conflict Resolution Center about 20 years ago; took a 3 day course at Pepperdine on advanced mediation in June, 2013; have taught several classes and programs on mediation practice.~~

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 100+

Number of other mediations conducted: 2

Description of mediation experience and style:

~~I have mediated disputes involving trust and will contests, accountings, fees, administration, elder care, distributions and related issues.~~

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

~~I have conducted several arbitrations and have several referrals from the court where I served as a referee.~~

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 400

Cancellation Policy:

~~No charge for cancellations~~

Deposit Policy:

~~Pay in advance~~

Additional Policies or Fees:

~~We charge only for the time spent so if the case settles sooner than anticipated we refund the unused fees.~~

~~West Coast charges an administrative fee for each party.~~

VII. LANGUAGE CAPABILITIES OF MEDIATOR:



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: David G. Eisenstein, Esq.

Organization/Firm/Company: Attorney/President, Networks Mediator

Address: P.O. Box 1202, Carlsbad, CA 92018

Telephone Number: (858) 243-1425

Fax Number: (858) 345-6836

Email/Website: Eisenlegal@gmail.com

II. EDUCATION / SPECIALIZATION:

Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

1973, Bachelor of Arts, Government major, Psychology minor--University of Arizona (Tucson) attended 1969-1973

1976, Juris Doctor, University of Arizona College of Law (Tucson) attended 1973-1976

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Over 50 hours in CLE credits taken during the years 1990-present

Probate, Trusts, Real Property, and Tax classes attended at Law School

III. PROBATE AND OTHER RELEVANT EXPERIENCE:

Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

LAW OFFICES OF DAVID G. EISENSTEIN 1990-2002, Scottsdale, AZ, Served Probate, Trusts, and Real Estate clients along with other areas of civil law practice, including commercial litigation and administrative law.

LAW OFFICES OF DAVID G. EISENSTEIN, P.C. 2002-2016, San Diego, Carlsbad, Oceanside. Primarily served Trusts/Trust Administration clients (over 3,000 statewide), including Trust related litigation along with a niche practice in complex commercial litigation. SORENSEN & EISENSTEIN, P.C.--In 2016 I transferred the Trusts/Trust admin. practice duties over to a partner in my practice so that I could concentrate on mediation of cases.

Last updated: April 12, 2017

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

18 Credit Hours of CLE Mediation Courses for the State Bars of California and Arizona Completed in 2017

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 0

Number of other mediations conducted: 0

Description of mediation experience and style:

I am in the midst of transition in my legal career from being in private practice for the past 41 years to being an Attorney-Mediator. As an active lawyer/litigator, I have participated in approx. 20 major mediations.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

I have not been the Arbitrator but I have arbitrated a dozen or more major litigations through the AAA, JAMS and through other arbitrators.

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 250.00

Cancellation Policy:

At least 48 hours notice of any cancellation.

Deposit Policy:

\$250.00 per side (e.g., \$500.00 for mediation involving 2 sides)

Additional Policies or Fees:

1/2 day (4 hours) minimum, with invoices for the balance owed to be paid within 10 days of receipt by the parties.

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English, but some knowledge of Spanish as a result of taking it for 2 years in high school and 2 years in college.



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I. CONTACT INFORMATION:

Mediator Name: James Goodwin

Organization/Firm/Company: Goodwin Brown Gross & Lovelace LLP

Address: 4225 Executive Square, Suite 370, La Jolla, CA 92037

Telephone Number: 858-750-3580

Fax Number: 858-750-3581

Email/Website: jgoodwin@goodwinbrownlaw.com / www.goodwinbrownlaw.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

Please see the attached Currivulum Vitae

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Please see the attached Currivulum Vitae

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Please see the attached Currivulum Vitae

Last updated: _____

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

(1) Bench Conduct for Temporary Judges: 2012 completed the 3 hour program by Superior Court for temporary judges and settlement attorneys. (2) 1999: Completed a 19 hour mediation training for estate planning, trusts and conservatorships by Creative Mediation Training.

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 35-40

Number of other mediations conducted: _____

Description of mediation experience and style:

Follow facilitative style unless parties request case valuations.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 350-425

Cancellation Policy:

Refund any unused time

Deposit Policy:

4 hour minimum plus \$100 administrative fee

Additional Policies or Fees:

N/A

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English only

CURRICULUM VITAE
JAMES GOODWIN, Attorney at Law
4225 Executive Square, Suite 370
La Jolla, CA 92037
(858) 750-3580; (858) 750-3581 (FAX)
jgoodwin@goodwinbrownlaw.com
CA State Bar No. 045248

PERSONAL HISTORY:

Birthdate: August 13, 1944
Spouse: Patricia E. Goodwin
Children: Lisa, Michele and Garrett

EDUCATION:

Whittier College, B.A., 1966
University of San Diego School of Law, J.D., 1969
University of San Diego School of Law Alumni Board, 1972-1975
University of San Diego School of Law Board of Visitors, 2006-2009

ADMITTED TO PRACTICE:

State of California, 1970
United States District Court, Southern District, 1970
United States District Court, Central District, 1976

EXPERIENCE:

Estate and Trust Law, including the administration of Estates, Trusts,
Conservatorships and Guardianships; Estate Planning; and Probate Litigation

San Diego County Probate Section Mediation Panel

Served as referee and expert witness in trust and estate matters

Partner GOODWIN BROWN GROSS & LOVELACE LLP,
4225 Executive Square, Suite 370, La Jolla, CA 92037
January 2011 - present

Partner WINGERT GREBING BRUBAKER & GOODWIN LLP,
600 West Broadway, Seventh Floor, San Diego, CA 92101
January 1991 to December 2010

Sole Practitioner 450 "B" Street, Suite 1750, San Diego, CA 92101; January 1989 to 1991

Partner CRABTREE & GOODWIN, 303 "A" Street, Suite 402, San Diego, CA 92101; January 1977 to December 1988

Associate BROOKS CRABTREE, 303 "A" Street, Suite 402 San Diego, CA 92101; January 1970 to December 1977

PROFESSIONAL ORGANIZATIONS:

Member, University of San Diego School of Law, Law Review, 1969

Certified Specialist, Estate Planning, Trust and Probate Law to the State Bar of California, Board of Legal Specialization, 1992 to present

San Diego County Bar Association, 1970 to present:

Member, Ethics Committee 2000 to present
Member, Arbitration Committee 1978 to 1989
Chairman, Probate Section, 1980
Chairman, Client Relations Committee, 1976-1977

State Bar of California, 1970 to present:

Chairman, Committee on Health Care, 1985
Member, Estate Planning, Trust and Probate Law Advisory Commission to Board of Legal Specialization, 1995
Member, 1991 to 1995 (and to Consulting Group, 1984 to 1986);
Chairman, 1994 to 1995
Member, 1980 to 1983; Advisor, 1984 to 1986 to Executive Committee, Estate Planning, Trust and Probate Law Section
Member, American College of Trust and Estate Counsel, 1986 to present
Member, Working Group on Durable Power of Attorney for Health Care Decision, 1983

Member, San Diego County Probate Court Fee Advisory Committee, 1980; 1992

Fellow American College of Trust & Estate Counsel, 1986 - present

Mediator, San Diego County Superior Court Mediation Panel, 2000 to present

HONORS:

Best Lawyers of America, 2005 to present

"Top Attorney"-Estate Planning, Probate and Trust 2008 to present
San Diego Daily Transcript

San Diego Super Lawyers 2011 to present

Martindale Hubbell, AV Preeminent rating

COMMUNITY ORGANIZATIONS:

Member, Board of Directors, Whispering Winds Catholic Camp and Conference Center, 2012 -2014

Member, St. Charles Borromeo Academy School Board, 1991 to 1993

Member, Board of Directors, Noah Homes, 1987 to 1993

Member, Board of Directors, Senior Adult Services, 1989 to 1995

PUBLICATIONS:

"The Durable Power of Attorney: Its Further Consideration as an Estate Planning Device," California Continuing Education of the Bar Program Materials, October/November 1985

"Attorney Fee Problems in Conservatorships", Estate Planning, Trust & Probate News, Fall/Winter 1983

"The Durable Power of Attorney: Definitely Worth Consideration as an Estate Planning Device," California Continuing Education of the Bar Program Materials August/September 1982 and March 1983

INSTRUCTION EXPERIENCE:

Basic Estate Planning for Individuals of Moderate Wealth, San Diego Legal Aid Society, June 2011

Speaker, Estate Planning for the Blended Family, Continuing Education of the Bar, 2008

Speaker, California Trust and Probate Litigation, Continuing Education of the Bar, 1998

Speaker, Estate Planning Seminar for Senior Citizens, San Diego Community College District, 1996

Speaker, "Final Approach" workshop, "Legal Concerns" section, El Camino Memorial Park and Mortuaries, 1996

Panelist, Using California Trusts: Planing and Drafting Revocable Trusts;
Administering and Terminating Living Trusts, Continuing Education of the Bar,
1993

Panelist, Addressing the Needs of the Older Client, Continuing Education of the
Bar, 1993

CURRENT SPECIAL EDUCATIONAL EXPERIENCE:

American College of Trust and Estate Counsel, Western Regional Meeting 2015

American College of Trust and Estate Counsel, Fellows Meeting 2014

American College of Trust and Estate Counsel, Fall Meeting 2013

American College of Trust and Estate Counsel, Annual Meeting, 2013

American College of Trust and Estate Counsel, Fall Meeting, 2012

American College of Trust and Estate Counsel, Fall Meeting, 2011

American College of Trust and Estate Counsel, Rocky Mountain Regional
Meeting, Summer 2011

American College of Trust and Estate Counsel, Annual Meeting, 2011

American College of Trust and Estate Counsel, Annual Meeting, 2009

American College of Trust and Estate Counsel, Fall Meeting, 2008

American College of Trust and Estate Counsel, Fall Meeting, 2007

American College of Trust and Estate Counsel, Annual Meeting, 2007

American College of Trust and Estate Counsel, Annual Meeting, 2006

American College of Trust and Estate Counsel, Annual Meeting, 2005

Notre Dame Tax and Estate Planning Institute, 2005

American College of Trust and Estate Counsel, Annual Meeting, 2004

American College of Trust and Estate Counsel, Annual Meeting, 2002

American Arbitration Association Bias/Ethics Seminar, 2002

American College of Trust and Estate Counsel, New Orleans/Fall Meeting, 2001

Continuing Education of the Bar, Generation-Skipping Transfers, 2001

American College of Trust and Estate Counsel Annual Meeting, 2001

American College of Trust and Estate Counsel Annual Meeting, 2000

American College of Trust and Estate Counsel Annual Meeting, 1999

American College of Trust and Estate Counsel Annual Meeting, 1998

San Diego County Bar Association, Appropriate Contacts Between Judges and Lawyers, 1998

Children's Hospital Foundation, The Generation-Skipping Transfer Tax Drafting and Planning Under the Final Regulations and Planning Opportunities Under the Alaska Trust Act, 1998

San Diego County Bar Association, Estate Planning and Charitable Giving Round tables, 1998

Children's Hospital Foundations, Sophisticated Uses of Life Insurance in Estate Planning, 1997

American College of Trust and Estate Counsel, Western Regional Meeting, Living and Dying, Law of West, Including New Alaska Trust Act, 1997

American College of Trust and Estate Counsel, Annual Meeting, 1997



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

DISCLAIMER: THE INFORMATION CONTAINED WITHIN THIS MEDIATOR PROFILE HAS BEEN PROVIDED BY THE MEDIATOR. THE SAN DIEGO SUPERIOR COURT DOES NOT GUARANTEE OR WARRANT THE CONTENT OR ACCURACY OF THE INFORMATION, OR THE COMPETENCY OR QUALIFICATIONS OF THE MEDIATOR.

I. CONTACT INFORMATION:

Mediator Name: Steven H. Kruis, Esq.

Organization/Firm/Company: ADR Services, Inc.

Address: 225 Broadway, Suite 1400 City: San Diego, CA 92101

Telephone Number: 619.233.1323

Fax Number: 619.233.1324

Email/Website: skruis@adrservices.org / www.kruismediation.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

University of Notre Dame, B.A., Government and International Studies (cum laude, 1977); 1978-79 Rotary International Scholar, Notre Dame London Law Program, London, England; Notre Dame Law School, Juris Doctor (1980).

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

See Probate Experience below.

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Since 1993, Mr. Kruis has mediated 2,000+ cases that include a substantial number of probate and trust disputes. He has been a full-time mediator since 2002, and is listed as one of the top San Diego mediators by Super Lawyers (San Diego edition) and Best Lawyers in America. He enjoys an "AV" rating from Martindale-Hubbell. A former managing partner of Higgs, Fletcher & Mack, one of San Diego's oldest and largest law firms, his probate experience and education began over twenty-five years ago when the estate planning attorneys at HFM requested him to litigate their contested probate and trust matters, and continues to this day as he mediates many such cases.

Last updated: January 1, 2018

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

Basic Mediator Training, San Diego Mediation Center (25 hour training program, 10 experimental hours, Oct. 22-24, 1992); Advanced Mediator Training, American Arbitration Association (7 classroom hours, 7 experimental hours, Sept. 30, Oct. 2, 1993); Advanced Mediator Training, National Academy of Conciliators (14 hours, Feb. 1, 1994).

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 100+

Number of other mediations conducted: 1,900+

Description of mediation experience and style:

Combination of evaluative and facilitative styles: Mr. Kruis fully explores the parties' underlying interests, needs, priorities, and emotional issues, as well as providing neutral impressions, to help lead the parties to settlement.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Since 1993, Mr. Kruis has served as an arbitrator, party-arbitrator, discovery referee, private mediator, court-appointed mediator, and special master in complex litigation in San Diego and Orange County Superior Court.

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 590 see below

Cancellation Policy:

If the mediation is canceled or postponed within 7 days for half-day matters, and 15 days for full day matters, of the scheduled date, the party requesting the cancellation or postponement is responsible for the entire deposit (not just the canceling party's share of the deposit), unless Mr. Kruis' time can be rescheduled.

Deposit Policy:

Each participant's share of the total amount due must be deposited within ten days after issuance of invoices in order to guarantee the reservation, unless the date is sooner, in which case the deposit is due immediately.

Additional Policies or Fees:

ADR Services, Inc. charges \$5,900 for full day matters (8.0 hours of conference time and 2.0 hours preparation time), and \$3,570 for half-day matters (5.0 hours of conference time and 1.5 hour preparation time). Extra time beyond the per diems is charged at \$590 per hour. In addition, ADR Services charges a \$195 administrative fee per party.

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: Thomas Marshall

Organization/Firm/Company: _____

Address: 7710 Balboa Ave., Ste.216 F, San Diego CA 92111

Telephone Number: 858-292-0478

Fax Number: 858-292-0484

Email/Website: TLMESQ@NETHERE.COM

II. EDUCATION / SPECIALIZATION:

Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

J.D., Pepperdine, 1975

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Probate Appointed Counsel panel, 15 years; PASD annual updates, all years. Numerous related MCLE courses.

III. PROBATE AND OTHER RELEVANT EXPERIENCE:

Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

I have represented personal representatives in estate administration from 1975 to the present. My practice has included estate planning from 1975 to present. Settlement Judge and Judge Pro Tem, San Diego Superior Court, 20+ years.

Last updated: _____

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

I have completed the NCRC and North County Lifeline general mediation courses and numerous related MCLE programs.

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: _____

Number of other mediations conducted: 100

Description of mediation experience and style:

Recommending.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

30 + years as an administrative hearing officer, City of San Diego, Chula Vista, MTS, SDCERA & FINRA. Currently serving as a hearing officer for San Diego County. Mediation volunteer for Restorative Justice Mediation (RJM).

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 250

Cancellation Policy:

2 hour minimum, less than 2 days notice.

Deposit Policy:

2 hour minimum, 5 days before settlement meeting.

Additional Policies or Fees:

VII. LANGUAGE CAPABILITIES OF MEDIATOR:



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: Robert P. Mougín
Organization/Firm/Company: Blue Sky Mediation Center
Address: 111 C Street, Encinitas, CA 92024
Telephone Number: (760) 454 - 7277
Fax Number: n/a
Email/Website: rmougín@blueskymediationcenter.com www.blueskymediationcenter.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

University of California at San Diego, Graduate with Honors 1993, BA Economics
University of San Diego School of Law, Graduate Juris Doctorate 1996
21+ year civil litigator, actively licensed in CA, NV, and AZ

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Superior Court Trials, mediations, motions, hearings in probate litigation, trust litigation, elder law, financial elder abuse, probate and trust administration.

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Tuerson & Hillyard 1993 - 1996, Probate and Trust Litigation
Lake & Mougín, LLP 1197-2001; Probate and Trust Administration
Kring & Chung, LLP 2001 - 2018; Elder Law, Probate and Trust Administration and Litigation, Financial Elder Abuse.

Last updated: _____

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

Completed Certification and Training, National Conflict Resolution Center, San Diego, 2012.

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 14

Number of other mediations conducted: 49

Description of mediation experience and style:

I provide a very open atmosphere and physical space for authentic and productive communication and active listening. All parties will brief their position one week in advance of our mediation session. I utilize caucus style mediation and I believe very strongly in this process.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Participated in over 900 mediations during 21+ years as a civil litigator. Have served as the managing partner of both the San Diego and Las Vegas offices of Kring & Chung since 2001.

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 475.00

Cancellation Policy:

No fee for cancellations that are communicated via writing more than one week prior to scheduled mediation session. Within one week - 1/2 of the fee becomes nonrefundable. Within 48 hours of the scheduled mediation session, absent special circumstances, full fee becomes due.

Deposit Policy:

Full fee becomes due at the time of production of the mediation briefs by all parties, the deadline for which is one week prior to the scheduled date for the mediation session.

Additional Policies or Fees:

Hourly rate/fee includes the review and analysis of the mediation briefs. Post mediation follow up will be billed out at the hourly rate.

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English, however translators are readily available.



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: Timothy Riley, c/o Kathy Purcell, case manager

Organization/Firm/Company: West Coast Resolution

Address: 530 B Street, Suite 1700

Telephone Number: 619-238-2400

Fax Number: 619-238-8041

Email/Website: kpurcell@westcoastresolution.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

Please see attached.

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Please see attached.

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Please see attached.

Last updated: 5/12/17

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

Please see attached.

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 150+

Number of other mediations conducted: 5

Description of mediation experience and style:

Please see attached.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Please see attached.

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 400.00

Cancellation Policy:

Deposit Policy:

Additional Policies or Fees:

\$175.00 administrative fee per party.

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English



Timothy G. Riley, Esq.

Mr. Riley has more than 15 years of focused experience as a Certified Legal Specialist in estate planning, trust and probate law, with a practice limited to the areas of estate planning, trust and probate administration (including estate, gift and fiduciary income tax matters), and related litigation. Pulling from his specialized background, Mr. Riley is exceptional at resolving complex and highly emotional probate disputes.

Representative Cases:

- Extensive and specialized experience as a neutral in contested probate matters, including:
 - Trust and will contests
 - Disputes between beneficiaries and fiduciaries regarding trust/estate administration, including accountings and distributions
 - Issues regarding characterization and valuation of assets, and allocation of liabilities and expenses
 - Fiduciary and attorney fee disputes
 - Pre-death estate planning controversies
 - Estate/gift tax issues
 - Contested petitions to establish conservatorship or guardianship
 - Creditors' claims disputes
 - Various other petitions brought pursuant to Probate Code sections 850 and 17200

Professional Experience:

- Judge Pro Tem - San Diego Superior Court (Probate Division)
- Court-appointed referee, guardian ad litem and counsel in probate matters

- Successfully mediated dozens of highly emotional and complex probate matters
- Certified Legal Specialist by the California Board of Legal Specialization of the State Bar of California in estate planning, trust and probate law
- Mediation training from the National Conflict Resolution Center
- Frequent CEB and SDCBA speaker on various estate planning and probate topics
- Primarily facilitative approach to mediations, with evaluative analysis applied as appropriate
- Attorney, Hughes & Pizzuto, APC (2011-present);
Branton & Wilson, APC (1994-2010)

Special Honors And Memberships:

- Rated "AV" by Martindale-Hubbell and LexisNexis peer review
- Named San Diego "Super Lawyer" in estate planning (2009-2012)
- Past Co-Chair of SDCBA Estate Planning, Probate and Trust Law section
- SDCBA, Section Committees on Local Probate Court Rules, including new rules governing Probate mediation Program, member since 1991
- State Bar of California (1986); State Bar of Wisconsin (1984)
- Certified Specialist, State Bar of California Board of Legal Specialization, in Estate Planning, Trust and Probate Law (1994)
- Recipient, Wiley W. Manuel Award for pro bono legal services

Education:

- University of Wisconsin, Madison (B.A., 1981; J.D., 1984)

Rates

\$400 per hour,
with a \$175 administrative fee per party

**To schedule a mediation please call Case Manager Kathy Purcell at
619-238-7282**



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: Ana Sambold

Organization/Firm/Company: ADR Services, Inc.

Address: 225 Broadway, Suite 1400, San Diego CA 92101

Telephone Number: (619)233-1323 Case Manager Kelsey Carroll

Fax Number: (619)233-1324

Email/Website: sambold@sambold-law.com / www.sambold-law.com

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

Harvard Law School - Program on Negotiation, "Advanced Mediation Workshop" (2016); Pepperdine University School of Law - Strauss Institute for Dispute Resolution, "Mediating the Litigated Case" (2012); University of San Diego (USD) School of Law, Masters in Comparative Law (2009)

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

San Diego County Bar "Nuts & Bolts - Estate Planning Probate 101" (2017); San Diego County Bar "Settlement Issues in Probate/Trust Litigation" (2017); San Diego County Bar "Family Law Mediations - Dealing with Emotions and Relationships" (2015); Continuing Education of the Bar, The Basics 2015: Family Law"

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

Ms. Sambold is a full time mediator and lawyer specialized in alternative dispute resolution. Since 2012, she serves as a mediator for the San Diego Superior Court Civil Mediation panel and the National Conflict Resolution Center. She has successfully conducted over 700 mediations involving a broad range of disputes: family, consumer, real estate, personal injury, business, and a substantial number of probate and estate and trusts, particularly, cases related to instrument validity and interpretation, disputes between beneficiaries, trusts and wills contests, fraud, revocation of testamentary instruments, caretaker and competency issues, alleged financial elder abuse, and conservatorships.

Last updated: 11/07/2017

IV. MEDIATION TRAINING: Describe your mediation training (*specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training*):

Harvard Law School - Program on Negotiation, "Advanced Mediation Workshop" (Boston, June 2016); Pepperdine University School of Law - Strauss Institute for Dispute Resolution "Mediating the Litigated Case" (L.A. June 2012); National Conflict Resolution Center (NCRC) "Mediator Credentialing Program" (San Diego, Sept. 2011) and others.

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 30+

Number of other mediations conducted: 670+

Description of mediation experience and style:

Her approach to each mediation changes according to the nature of the dispute and the personalities involved but she is always fully committed to assist the parties in finding a successful and satisfactory outcome. Dedicated & persistent.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Currently serve as an arbitrator for the American Arbitration Association (AAA) and for the Better Business Bureau (BBB) and used to be a Neutral Observer for Mediation Works Incorporated (MWI) (2015-2016)

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 400

Cancellation Policy:

A half-day mediation (2-4 hrs) requires rescheduling/cancellation notice of 7 days or more, and full day mediation (5-8 hrs) requires rescheduling /cancellation notice of 15 days or more, otherwise, the party requesting the change will be responsible for the nonrefundable cancellation fee of \$400.

Deposit Policy:

Deposit equivalent to the estimated time to be expended in mediation and it's due prior to commencement of the mediation.

Additional Policies or Fees:

None

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

Fully bilingual (English - Spanish)



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: Boris Siegel

Organization/Firm/Company: Law Office of Boris Siegel

Address: 630 Alta Vista Drive, Suite 203, Vista, CA 92084

Telephone Number: (760) 407-6394

Fax Number: (760) 407-6388

Email/Website: lobs@lobs.legal; www.lobs.legal

II. EDUCATION / SPECIALIZATION: Describe your relevant education and specialization(s) (specify the name(s) and location(s) of the institution(s) attended, the dates of attendance, and the specific degree(s) and/or certifications conferred):

Education/Specialization:

Aug 1981-July 1983: Univ. of Arizona; BS in General Business Administration

Aug 1983-May 1986: UC Berkeley School of Law; Juris Doctorate

Certified Specialist in Estate Planning, Trust, and Probate Law since 2002

Probate, Trust, and Estate Planning Education, and Other Relevant Education:

Awarded Certificate of Appreciation as a Probate Settlement Officer by the San Diego Superior Court for 1999/2000

III. PROBATE AND OTHER RELEVANT EXPERIENCE: Describe your probate and other relevant experience (for each legal practice or employer, specify the relevant dates, practice/employer name and location, and the specific practice areas and/or types of relevant experience such as real estate or tax):

July 2016-to present: Sole Practitioner, Law Office of Boris Siegel in Vista, CA-trusts, estates, civil litigation

Jan 2003-July 2016: Partner of Siegel & Wolensky LLP in Vista, CA-tax, trusts, estates, civil litigation

Oct 1990-Jan 2003: Sole Practitioner in Vista, CA-tax, trusts, estates. Feb 1989-Oct 1990: Associate Attorney with

Law Firm of David S. Zweig in San Diego, CA-international and general transactional practice with an emphasis in

international estate planning. Aug 1987-Aug 1988: Trial Attorney for Office of the Chief Counsel, IRS-litigation in U.S.

Tax Court. Jul 1986-Aug 1987: Associate Attorney with Gray, Cary, Ames & Frye in San Diego, CA-estate planning,

probate, and tax.

Last updated: _____

IV. MEDIATION TRAINING: Describe your mediation training (specify the name(s) and location(s) of the training provider(s), the dates of the training(s), the number of hours of classroom training, experiential training, and specialized training):

San Diego Mediation Center: May 20-22, 1999, 24 hours of classroom training

V. MEDIATION EXPERIENCE / STYLE:

Number of probate mediations conducted: 20+

Number of other mediations conducted: 5+

Description of mediation experience and style:

Evaluative style mediation: assists the parties in reaching a resolution by pointing out the strengths and weaknesses of their cases. The main focus is on the legal rights of the parties, rather than needs and interests. Evaluation is based on legal concepts of fairness.

Additional ADR experience (e.g., experience as an arbitrator, settlement conference officer, neutral evaluator):

Experience as a settlement conference officer for the San Diego Superior Court.

VI. MEDIATOR FEE INFORMATION:

Hourly rate: \$ 350.00

Cancellation Policy:

If cancellation is at least 24 hours prior to mediation, full refund of deposit to the extent that no services have been rendered. If cancellation is within 24 hours of mediation, deposit is forfeited.

Deposit Policy:

Payment for half of the reserved time is due upon reservation; full payment is due at least two weeks prior to the scheduled mediation.

Additional Policies or Fees:

None

VII. LANGUAGE CAPABILITIES OF MEDIATOR:

English
