



## 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](http://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 the Administrative Clerk at [Probate.ProTems@sdcourt.ca.gov](mailto: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 D. Adelman  
Address: 2488 Historic Decatur Road, Suite 200  
Telephone Number: 619-297-7707; cell: 619-813-7707  
Fax Number: 619-222-1608  
Email/Website: AdelmanMD@abi.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, Juris Doctorate (1977)  
State Bar of California, Board of Legal Specialization, Certified Legal Specialist Legal Malpractice Law

Probate, Trust, and Estate Planning Education, and Other Relevant Education:  
American Arbitration Mediator Training (1994); Superior Court Hearing Officer Training (1992); Creative Probate Mediation Training (1999); University of San Diego School of Law Adjunct Professor (1994 to present)

**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):

Over the last 34 years a significant part of my practice has involved contested Mental Capacity, Undue Influence and Fraud issues where I have served as a Mediator, Arbitrator, or Attorney for a party. Have represented numerous non-profit organizations in contested matters.

Last updated: June 21, 2012

**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 Mediation Training (1994) San Diego, California  
Probate Mediation Training; Creative Mediation (1999) San Diego, California

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 15

Number of other mediations conducted: 20

Description of mediation experience and style:

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

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

Probate Mediation Panel, San Diego Superior Ct. (2001-09); Judge Pro Tem, San Diego Municipal Ct (1981-Consolidation); Judge Pro Tem, San Diego Superior Ct (1990-present); Settlement Conference Judge, Arbitrator for SD Superior Ct; Arbitrator, American Arbitration Association (1994-present); Kaiser Neutral Arbitrator (1999-present).

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 280

Cancellation Policy:

No cancellation fees if cancelled more than 5 business days before date of hearing

Cancellations 1-5 business days before hearing charged at 33%

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

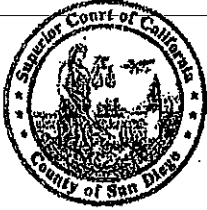
Deposit Policy:

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

Additional Policies or Fees:

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English



SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: Stephen A. Bond
Organization/Firm/Company: Beamer, Lauth, Steinley & Bond, LLP
Address: 401 B Street, Suite 1530, San Diego, CA 92101-4238
Telephone Number: (619) 235-6800
Fax Number: (619) 235-6880
Email/Website: sbond@lawbls.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:
Certified Specialist in Estate Planning, Trust & Probate Law
University of California, Hastings College of the Law - J.D. 1979
Linfield College, McMinnville, Oregon - B. A. 1976

Probate, Trust, and Estate Planning Education, and Other Relevant Education: (select entries)

CEB Program Panelist, 2005, "Estate Litigation: Tactical Issues, Case Studies and Reso-
CEB Program Panelist, "Recent Developments in Estate Planning and Administration;
(various years-1989 to 2002); "Oral Contracts Regarding Wills,"
California Trusts & Estates Quarterly, Summer 1995

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):

Beamer, Lauth, Steinley & Bond, LLP (2002-present) Partner practicing in areas
of estate planning, trust law, & probate administration, with emphasis on related
litigation. Mr. Bond practiced in the same areas of law at:
Duckor, Spradling, Metzger & Wynne, San Diego (1994-2002)
Scalone, Stipanov, Yaffa & Mebane, La Jolla (1993-1994)
Gray, Cary, Ames & Frye, San Diego (1986-1993)
McCuthen, Doyle, Brown & Emerson, San Francisco (1979-1986)

Last updated: 6/10

**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 - Introductory  
Mediation Skills Training completed in October, 1999

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 1

Number of other mediations conducted: \_\_\_\_\_

Description of mediation experience and style:

I have participated in dozens of mediations as an advocate, and have had  
excellent success in settling cases. The most important element is a candid  
assessment of the risks and costs of a litigated result.

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

I served as a referee in a matter involving challenges to a lengthy accounting.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 385.00

Cancellation Policy:

No charge for cancellation at least 5 calendar days in advance of mediation;  
thereafter fee is charged only for time actually expended in preparation for  
mediation.

Deposit Policy:

Anticipated expense of the mediation to be paid in full not less than one week  
prior to mediation.

Additional Policies or Fees:

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

Proficient in English only.



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#### I. CONTACT INFORMATION:

Mediator Name: B. James Brierton

Organization/Firm/Company: Brierton, Jones & Jones, LLP

Address: 1550 Hotel Circle North, Suite 300, San Diego, CA 92108-2911

Telephone Number: (619) 696-7066

Fax Number: (619) 696-6907

Email/Website: jamie@bjlaw.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:

Carson-Newman College (1961-1965), B.A. Degree 1965; University of San Diego School of Law (1969-1971),

Juris Doctor Degree 1971; Certified Specialist, Probate, Estate Planning & Trust Law since 1990, by Board of Specialization, California Bar Association

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

Admitted to practice law in all California/Federal Courts since December 1971; 41 years experience as Attorney;

practice limited to field of Probate, Trust & Estate Planning exclusively since 1990; CEB panelist: Basic Probate,

Probate & Trust Litigation, Conservatorships & Guardianships; Special Needs Trusts, Blended Family Estate Planning

#### 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):

Director, Legal Clinic for Low Income Elders, Downtown Senior Citizen's Center, San Diego (1972-1973); private

law practice 1973-1986; Partner, Brierton Jones 1986-1998; Partner, Brierton, Jones & Jones, LLP (1998-Present).

Focus of law practice has been in field of probate, estate planning & trust law since admission to California Bar in

1971, with emphasis in probate & trust litigation: Special Needs Trusts and Family Estate Planning. Served as

Mediator in contested probate & trust matters since 1995.

Last updated: July, 2013

**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):

Over 200 hours formal mediation training, including Basic Mediation Training at San Diego Bar, San Diego Mediation Center, Credentials Program at National Conflict Resolution Center, and Strauss Institute ("Mediating the Litigation Case").

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: over 450

Number of other mediations conducted: over 75

Description of mediation experience and style:

Facilitative style but will employ evaluative analysis in appropriate cases with concurrence of counsel. When sensitive and conflicted personal/family relationships involved, joint sessions used cautiously.

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

Served as Arbitrator in about 15 cases including both attorney-client fee disputes and probate & trust litigation matters.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 360.00

Cancellation Policy:

Charged 4 hours (\$1,440) unless 48 hour cancellation notice is received.

Deposit Policy:

Absent a prior arrangement, deposit of \$2,880 (8 hours) is required. Any unused portion of the deposit is refunded and any additional fee is due at conclusion of Mediation unless other arrangement is made.

Additional Policies or Fees:

Administrative Fee of \$100.00. Parking and lunch (where appropriate) covered by administrative fee.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English.





SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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I. CONTACT INFORMATION:

Mediator Name: VIOLA J. CARMONA, NCPM
Organization/Firm/Company: SOCAL MEDIATION CENTER
Address: 6590 ANTIGUA BLVD
Telephone Number: 619-654-2933
Fax Number: N/A
Email/Website: SOCALMEDIATIONCENTERSD.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:
BA AT FLORIDA INTERNATIONAL UNIVERSITY IN ACCOUNTING. MASTERS AT FLORIDA INTERNATIONAL UNIVERSITY IN ACCOUNTING. CPA IN CALIFORNIA. NATIONAL CERTIFIED MEDIATION AND CONFLICT RESOLUTION FROM LAKEWOOD COLLEGE.

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):

I HAVE WORKED AS A CPA IN MY OWN FIRM SINCE 2009. I HAVE HELPED MANY COUPLES AND BUSINESSES IN FINANCIAL MATTERS INCLUDING SEPARATION.

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):

MEDIATION CERTIFICATION FROM LAKEWOOD COLLEGE, 2 YEARS OF TRAINING AND 1 YEAR OF  
INTERNSHIP. I AM A NATIONALLY CERTIFIED PROFESSIONAL IN MEDIATION FROM THE NATIONAL  
ASSOCIATION OF CERTIFIED MEDIATORS.

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 2

Number of other mediations conducted: 16

Description of mediation experience and style:

MY PRIMARY FOCUS IS FAMILY MEDIATION ESPECIALLY THOSE IN THE MILITARY OR NON TRADITIONAL  
RELATIONSHIPS. MY STYLE IS MORE ENGAGED.

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

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 325

Cancellation Policy:

FULL REFUND IF CANCELED 48 HOURS IN ADVANCE

Deposit Policy:

ANTICIPATED FEES DUE 5 CALENDAR DAYS PRIOR TO MEDIATION

Additional Policies or Fees:

ADMINISTRATION FEE OF \$50.00

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

SPANISH, ENGLISH, ITALIAN, AMERICAN SIGN LANGUAGE



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#### I. CONTACT INFORMATION:

Mediator Name: JUDITH M. COPELAND

Organization/Firm/Company: COPELAND & TIERMAN LLP

Address: 1230 Columbia St., Ste 680, San Diego, CA 92101

Telephone Number: (619) 231-0456

Fax Number: (619) 231-0581

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 AB 1970

UC Hastings College of the Law, JD 1974

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

Certified as specialist by State Bar since 1991. Take and teach numerous classes and courses. Author of two chapters in CEB California Will Drafting and edited CEB Powers of Attorney

#### 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):

Represented Public Administrator from 1976-1980 as a deputy county counsel

In private practice since 1980 handling probate, estate planning, trust law and elder law exclusively

Last updated: June, 2013

**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):

~~April 29, May 1 and May 2, 1999- Creative Mediation Training (18 hours)~~  
~~Nov. 29, 2007 - National Conflict Resolution Center: Confidentiality, Culture, Recent Cases (4 hours)~~  
~~June 19, 20, 21, 2013- Pepperdine College, Strauss Institute, Elder Care Mediations (18 hours)~~

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 50+

Number of other mediations conducted: 0

Description of mediation experience and style:

~~Facilitative with a little push when needed. Most of these cases involve family members so some time is devoted to making sure they feel heard and understood. Thereafter they need to understand the "business" aspects of their cases.~~

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

~~Settlement conferences and arbitrations for the San Diego Superior Court~~

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 400

Cancellation Policy:

~~Starting September, 2013, contact the West Coast Resolution Group at (619) 238-7282 for all pricing, policies and to schedule mediations.~~

Deposit Policy:

~~Starting September, 2013, contact the West Coast Resolution Group at (619) 238-7282 for all pricing, policies and to schedule mediations.~~

Additional Policies or Fees:

~~Starting September, 2013, contact the West Coast Resolution Group at (619) 238-7282 for all pricing, policies and to schedule mediations.~~

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English



## SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

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#### I. CONTACT INFORMATION:

Mediator Name: Mary F. Gillick

Organization/Firm/Company: McKenna Long & Aldridge LLP

Address: 600 W. Broadway, Suite 2600 San Diego, CA 92101

Telephone Number: (619) 699-2459

Fax Number: (619) 645-5348

Email/Website: mgillick@mckennalong.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:

B.S. Nursing, University of Maryland, 1972

J.D., University of San Diego, School of Law, 1984

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

Attended multiple hours of CLE in Trust, Probate, Conservatorship; regularly lecture and write professional articles on trust and estate litigation and am a member of the Fiduciary Litigation Committee of the American College

of Trust and Estate Counsel. I have attended numerous continuing education courses in trust and estate litigation

and on mediation skills relating to resolving trust and estate cases.

#### 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):

Practiced primarily in the field of Trust, Estate and related litigation since late 1980's. Tried at least 15 cases and

mediated hundreds more as attorney for one of the parties. Have been on numerous committees working to draft

related legislation. Represented clients in high profile cases and cases in which confidentiality was a significant

issue. Regularly lecture on trust and estate litigation and on mediation techniques on trust and estate cases.

Last updated: 8/13



**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):

Successfully completed Mediation Skills Training, a 3 day workshop put on by the San Diego Mediation Center, and a number of CLE courses in which mediation is a topic. Taught several continuing education courses on mediation in trust and estate disputes.

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 10-15

Number of other mediations conducted: 2-5

Description of mediation experience and style:

My preferred method of mediation is to encourage the parties to be creative to resolve their dispute in ways not available to them through the trial process, but on occasion I will make a mediator's proposal for resolution or otherwise give some sort of recommendation to the parties when I am asked by all involved parties to do so.

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

I have been asked to be a neutral evaluator on occasion and as an expert witness which I view as a related role to a mediator. I was part of the North County Bar Association's Two Attorney Settlement Panel for Probate and conduct a number of mediations in that context.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 375.00

Cancellation Policy:

None

Deposit Policy:

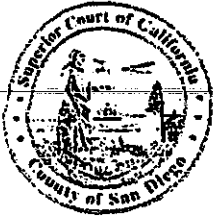
5 days in advance when the documents are sent to me for review.

Additional Policies or Fees:

If I am asked to review a large quantity of documents, I will charge for my review time.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only.



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**I. CONTACT INFORMATION:**

Mediator Name: James R. Goodwin  
Organization/Firm/Company: Goodwin Brown Gross & Lovelace LLP  
Address: 4370 La Jolla Village Drive Suite 220  
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:  
\_\_\_\_\_  
\_\_\_\_\_  
See Attached Curriculum Vitae

Probate, Trust, and Estate Planning Education, and Other Relevant Education:  
\_\_\_\_\_  
\_\_\_\_\_  
See Attached Curriculum 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):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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





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### I. CONTACT INFORMATION:

Mediator Name: Ralph E. Hughes

Organization/Firm/Company: Hughes & Pizzuto

Address: 401 B Street, Ste 2400, San Diego, CA, 92101

Telephone Number: 619-239-1211

Fax Number: 619-239-1719

Email/Website: www.hplawsd.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, Boalt Hall, JD, 1976, Certified Specialist Estate Planning, Trust and Probate Law, 1993 to present.~~

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):

I have practiced with an emphasis on estate planning and on disposition of probate disputes since 1976.

Last updated: Sept 2013

**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 attended the initial probate mediator training in San Diego many years ago. I then shadowed mediator Mike Roberts in a complicated land use mediation. I have attended or conducted more than 100 mediations.~~

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 100 +/-

Number of other mediations conducted: 100 +/-

Description of mediation experience and style:

~~I generally employ the traditional technique with a group meeting then a break out into smaller rooms for discussion and negotiation. The goal is to obtain a signed and complete agreement by the end of the day.~~

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

~~I have worked as a volunteer Settlement Conference Judge through the probate court.~~

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 425

Cancellation Policy:

~~If there is a cancellation, any unused deposit is refunded.~~

Deposit Policy:

~~10 hours (\$4,250)~~

Additional Policies or Fees:

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

~~English~~



## 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: Gary Jander

Organization/Firm/Company: Brierton, Jones & Jones, LLP

Address: 1550 Hotel Circle North, Ste 300, San Diego, CA 92108

Telephone Number: 619 696-7066

Fax Number: 619 696-6907

Email/Website: gary@bjjlaw.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:

California Western SOL Law Degree that included a full semester of advanced mediation training.

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

14 years of continuing legal education on the full scope of all facets of probate, conservatorship, trust administration, litigation, estate planning including tax related issues and fiduciary representation training. I have not only attended these programs but I also regularly teach these 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 14 years of experience in all facets of Probate Trust Administration, Conservatorships / Guardianships, Estate Planning, Tax Planning, Fiduciary Representation, Probate Litigation and Appeals. I have also served as Chair of the Probate Trust and Estate's section, as Chairman of the Probate Bench Bar Committee and as a Probate Pro Tem Judge.

Last updated: June 14, 2012

**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):

California Western Course on Alternative Dispute Resolution which was a 40 hour semester course in law school.

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 3

Number of other mediations conducted: 2

Description of mediation experience and style:

Collaborative and direct. It is important to engage the parties in a collaborative effort to resolve the dispute at hand but at the same time get to the issues and ultimately settlement.

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

I am currently on the Probate Settlement Conference Officer list. The program is in the development stage at this point so I have not yet been assigned as a settlement officer.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 250

Cancellation Policy:

24 hours notice to cancel or reschedule [but flexible]

Deposit Policy:

Fees paid in advance

Additional Policies or Fees:

Administrative fee of \$50 per party which is waivable for cause.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**



## SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

### PROBATE MEDIATOR PROFILE

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#### I. CONTACT INFORMATION:

Mediator Name: Michael D. Jenkins

Organization/Firm/Company: National Conflict Resolution Center

Address: 625 Broadway, suite 1221, San Diego, CA 92101

Telephone Number: 619-238-2400

Fax Number: 619-238-8041

Email/Website: www.ncrconline.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:

~~B.A., Drake University, Des Moines, IA (1964-68), Psychology & Philosophy~~

~~J.D., Southern Illinois Univ. School of Law, Carbondale, IL (1973-1976), Law~~

~~Mediator Certification, National Conflict Resolution Center, San Diego, CA (1995), Mediation~~

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

~~Trusts & Estates, Southern Illinois Univ. School of Law (1974)~~

~~Continuing Legal Education trainings, San Diego County Bar Ass'n (various dates)~~

#### 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 not practiced law in Probate Court. My prior law practice (I am now inactive) included related areas of Land Use, Real Estate, and Trust preparation.~~

~~As a mediator, I have served on the National Conflict Resolution Center's Probate Panel since 1999 and the San Diego Superior Court Panel (with Probate listed as a practice area) since 2005. I helped to establish and currently serve on the Thomas Jefferson School of Law Civil Commitment and Guardianship Mediation Pilot Project. I also teach Advanced Mediation as an Assistant Trainer for the National Conflict Resolution Center and as an Adjunct Professor at Thomas Jefferson School of Law.~~

Last updated: Nov. 11, 2013

**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):

~~Introduction to Mediation, National Conflict Resolution Center, San Diego, CA (1989 and 1991)~~  
~~Advanced Mediation, Pepperdine School of Law, Malibu, CA (1994)~~  
~~Continuing Legal Education, San Diego County Bar Ass'n (various dates)~~

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 40

Number of other mediations conducted: 500+

Description of mediation experience and style:

~~My mediation style is primarily facilitative, but can be evaluative as needed. I have mediated a broad range of cases ranging from personal injury and corporate shareholder disputes to race discrimination. I currently focus on business, real estate, and environmental disputes, but also accept the interpersonal challenges in Probate cases.~~

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

~~Planning and Land Use Hearing Officer, County of San Diego~~

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ \$350\*

Cancellation Policy:

~~No fee if canceled more than 24 hours prior to scheduled mediation. Otherwise, two hour fee charged.~~

Deposit Policy:

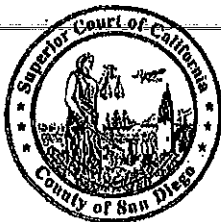
~~Advance payment or credit card must be made at time of scheduled mediation, adjusted at conclusion of mediation.~~

Additional Policies or Fees:

~~For Court referred cases, first two hours are \$150 per hour, \$350 per hour thereafter. \$175 scheduling and administration flat fee.~~

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

~~English~~



## SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

### PROBATE MEDIATOR PROFILE

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#### I. CONTACT INFORMATION:

Mediator Name: Edward F. Kolker

Organization/Firm/Company: ADR Services, Inc.

Address: 225 Broadway, Suite 1400, San Diego, CA 92101; 16870 West Bernardo Drive #400, San Diego 92127

Telephone Number: 858-451-3999 or 619-233-1323

Fax Number: 858-451-1340

Email/Website: kolkermediation@sbcglobal.net; www.adrservices.org

#### 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 Iowa, 1958-1962, B.A. Political Science; University of Iowa, 1965-1968, Juris Doctorate With Distinction;  
National College of Juvenile Justice, 1972, Juvenile Court Judicial Training Certificate.

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

Numerous CEB seminars, courses, workshops covering all aspects of estate/tax planning and probate/trust administration, including will drafting/probate administration, trust drafting and administration, estate and gift tax planning and estate and gift tax return preparation, gifting, Elder Care, estate & trust litigation & 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):

McInnis, Fitzgerald, Rees, Sharkey & McIntyre, San Diego, Estate Planning Partner 1980-1985, advising firm clients on estate and tax planning, drafting all relevant documents (wills, trusts, powers of attorney), probate administration.

LaRocque, Kolker, Wilson, Mitchell & Skola, San Diego, 1985-1989; Sole Practitioner 1990-1996, essentially the same practice areas as above, with additional emphasis on estate and trust litigation and mediation.

In addition, I have over 15 years experience as trustee of substantial multi-million dollar private family trusts, one of which recently distributed, and another which is continuing. As trustee I have been responsible for managing trust businesses, included a large ranching operation, as well as usual accounting and financial administration. A primary responsibility has been maintaining harmony amongst beneficiaries of divergent interests.

Last updated: 6/10

**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 over 500 hours of formal mediation training, including Federal Mediation & Conciliation Service, National Conflict Resolution Center (prev. San Diego Mediation Center); Harvard Law School; Straus Institute For Dispute Resolution (Pepperdine); Center For Mediation In Law; International Academy of Mediators; Academy of Dispute Resolution; American Arbitration Association; NASD; Judicate West

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 40 (est.)

Number of other mediations conducted: 1200 (est)

Description of mediation experience and style:

I have mediated a vast range of subject matter, from personal injury to complex corporate/business litigation, professional negligence, real property, labor/employment; estate and trust disputes, virtually all civil cases except intellectual property/bankruptcy. I employ whatever strategies in the mediation I believe, from over 20 years experience, best suits the parties and the dispute before me. What needs to be done; whatever works.

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

I have conducted mediation training for over 250 attorneys and other professionals through the Academy of Dispute Resolution. As a judicial officer, I conducted numerous settlement conferences. I am a Fellow in the International Academy of Mediators, and a former NASD and National Dakon Shield Trust arbitrator. I also currently arbitrate cases through ADR Services, Inc.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 350

Cancellation Policy:

Cancellations or postponements within 15 days of hearing are subject to a cancellation/postponement penalty. I have discretion in applying the policy; factors include whether I can fill the time vacated with another matter, the reasons for the cancellation/postponement, and if the matter is to be rescheduled.

Deposit Policy:

A deposit equal to the amount of time reserved is to be made 21 days prior to the scheduled hearing, or upon scheduling if scheduled within 21 days prior to hearing.

Additional Policies or Fees:

A minimum deposit equal to four hours of mediation time is required. Except as may be provided by court rules, time will be billed for pre-hearing review of briefs and documents, and substantive telephone conferences. Pre-hearing calls from me are not billed; post-hearing follow-up telephone calls may be billed at my discretion if contributing to a final settlement, or substantial time is spent at the request of the parties.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English





# SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

## PROBATE MEDIATOR PROFILE

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### I. CONTACT INFORMATION:

Mediator Name: Steven H. Kruis, Esq.  
Organization/Firm/Company: Agreement.com  
Address: 550 West "C" Suite 700 City: San Diego, CA 92101  
Telephone Number: 619.239.2020  
Fax Number: 619.702.2030  
Email/Website: kruis@agreement.com / www.agreement.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, Steve Kruis has mediated 1,700+ cases and that include a substantial number of probate and trust  
disputes. He has been a full-time mediator for over 10 years, is listed as one of the top San Diego mediators by San  
Diego Super Lawyers and Best Lawyers in America, and enjoys an "AV" rating from Martindale-Hubbell. A former  
managing partner of Higgs, Fletcher & Mack, his probate experience and education began over twenty 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: July 2, 2013

**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 classroom hours, Feb. 1, 1994).

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 120+

Number of other mediations conducted: 1,700+

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: \$ see below

Cancellation Policy:

If the mediation is canceled or postponed within 21 days of the scheduled date, the party requesting the change is responsible for the entire deposit (not just the canceling party's share of the deposit) unless the time can be rescheduled for another matter.

Deposit Policy:

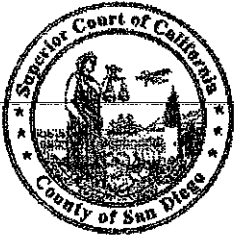
In order to reserve a confirmed mediation date, we must receive the deposit within 21 days before the mediation session, or the date may be offered to other potential mediation participants.

Additional Policies or Fees:

Kruis Mediation charges \$4,200 for full day matters (eight hours of conference time), and \$2,550 half-day matters (four and one-half hours of conference time). For a more detailed summary of our policies, please visit our Website at: [www.agreement.com](http://www.agreement.com). Extra time beyond the per diems is charged at \$500 per hour.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English



**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Julie A Lubitz  
Organization/Firm/Company: Julie A. Lubitz, Mediator  
Address: 274 Sharp Place Encinitas, CA 92024  
Telephone Number: 760-753-5997  
Fax Number: 760-753-7853  
Email/Website: juliealubitz@sbcglobal.net

**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:  
\_\_\_\_\_  
\_\_\_\_\_

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

Licensed as a California Professional Fiduciary (#21) and Certified National Guardian. Receive on going (a minimum of 15) educational credits each year.  
\_\_\_\_\_

**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):

Twenty four years experience as a professional fiduciary acting as court appointed conservator (person and estate), court appointed guardian (estate), trustee of revocable, irrevocable and special needs trusts, and administrator/executor of wills.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Last updated: 9/30/13

**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):

~~NCRC-credentialed mediator (1 year extended court track) - certificate received 11/19/2012.~~

~~Introductory Intensive Skills Training - 32 hours/NCRC - 8/11~~

~~Advanced Mediation Skills Training - 30 hours/NCRC - 8/11~~

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 1

Number of other mediations conducted: 10

Description of mediation experience and style:

~~Trained in the facilitative style of mediation emphasizing face to face communication. Focusing on early mediation in cases involving fiduciaries and family members.~~

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

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ \$150.00 per h

Cancellation Policy:

~~Cancellations less than 48 hours in advance will result in a non refundable fee of \$150.00.~~

Deposit Policy:

~~A deposit of \$600.00 is payable 48 hours in advance of the initial mediation. Overpayment will be refunded if the initial mediation is less than 4 hours.~~

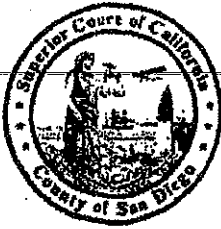
Additional Policies or Fees:

~~Cash, check or credit card.~~

~~For mediations exceeding the initial deposit fee of \$600.00 the remaining fees are due and payable at the close of the mediation. Any returned checks will be assessed at the rate of \$35.00.~~

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English



**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Thomas L. 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: TLMESO@NETHERE.COM: WWW.Attorney Thomas Marwshall.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:  
JD: Pepperdine  
\_\_\_\_\_  
\_\_\_\_\_

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

Approximately 10 hours of related CLE/year  
\_\_\_\_\_  
\_\_\_\_\_

**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):

Numerous probate administration cases from initial filing through discharge. Appointed counsel, conservatorship, limited conservatorship and guardianship. Have prepared numerous estate planning documents.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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):

North County Lifeline-Mediation Training, 2008  
FINRA Arbitrator Training, 2009  
Restorative Justice Mediation Training 2009

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 0

Number of other mediations conducted: 30

Description of mediation experience and style:

I have served as a court mediator and settlement officer for  
at least 10 years. I have been involved in various forms of  
ADR throughout my legal career.

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

Thirty years as a hearing officer with the City and County  
of San Diego. Superior Court Family and Civil Settlement Judge.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 200

Cancellation Policy:

\$400 fee payable if cancellation is less than 48 hours noticed.

Deposit Policy:

\$400 all parites five days before first session.

Additional Policies or Fees:

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**



**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Claudia Powell  
Organization/Firm/Company: Pre-Facto Mediation  
Address: P.O. Box 2321, La Mesa, CA 91943-2321  
Telephone Number: (619) 464-8966  
Fax Number: (619) 668-6270  
Email/Website: Email: csp@prefactomediation.com or csp@powellfiduciary.com Website:prefactomediation.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:  
\_\_\_\_\_  
\_\_\_\_\_  
BA San Diego State University 1977 (Psychology (summa cum laude))

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

Licensed as a California Professional Fiduciary (No. 197) and National Certified Guardian. Attends accredited continuing education courses in excess of 15 hours annually. Presents lectures and workshops on the topic of early mediation in probate.

**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):

Over 25 years of experience in private practice as a professional fiduciary, administering over 200 matters; participant as a stake-holder in numerous probate proceedings in her fiduciary capacity.

Last updated: 10/03/13

**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):

~~Mediator Credential (1 Year - Extended Court Track) - credential awarded 09/28/10 (28 hours / 6 mediations) NCRC -  
Advanced Mediation Skills Training - 02/2010 (30 hrs) NCRC  
Introductory Intensive Skills Training - 08/2009 (32 hrs) NCRC (NCRC: National Center for Conflict Resolution)~~

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 3

Number of other mediations conducted: 6

Description of mediation experience and style:

~~Trained in the facilitative style of mediation which emphasizes face-to-face communication. Specializing in early mediation, especially where fiduciaries are involved, to manage controversies that arise during administration. Emphasis on easing administration through the use of mediation as needed to contain conflict and avoid litigation.~~

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

Acted as court-appointed referee to resolve disputes in trust administration.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 150-\$200

Cancellation Policy:

Cancellation less than 24 hours in advance will result in a non-refundable fee of \$150.

Deposit Policy:

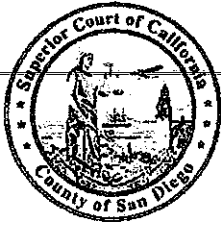
\$500 deposit payable 48 hours in advance of the session. Should the session last less than three (3) hours (\$150/hour for the first two (2) hours, \$200/hour thereafter) the overpayment will be refunded.

Additional Policies or Fees:

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only





SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

PROBATE MEDIATOR PROFILE

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I. CONTACT INFORMATION:

Mediator Name: Timothy G. Riley, Esq.
Organization/Firm/Company: Hughes & Pizzuto, A P.C.
Address: 401 B Street, Suite 2400, San Diego, CA 92101-4200
Telephone Number: (619) 239-1211
Fax Number: (619) 239-1719
Email/Website: triley@hplawsd.com/www.hplawsd.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 Wisconsin - JD, 1984. Admitted to Bar 1984 (WI), 1986 (CA). Certified Specialist - Estate Planning, Trust & Probate Law by California Board of Legal Specialization (1994 to present)

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

National Conflict Resolution Center - Probate Specialty Panel, frequent CEB and SDCBA speaker on various estate planning, probate, trust administration, and related litigation topics.

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):

Extensive experience in wide variety of estate planning, trust administration, estate and gift tax, probate and related contested matters as an attorney with Hughes & Pizzuto, APC. Examples include: trust/will contests; beneficiary/trustee disputes; complex trust/probate administrations; controversies related to closely-held business interests; and estate/gift tax preparation and audits. Judge Pro-Tem - San Diego Superior Court (probate division), hearing all types of probate matters, and serving as judicial officer for Probate Court Mandatory Settlement Conferences.

Last updated: 6/28/13

**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):

NCRC - 25 hour basic mediation training course; various seminars and workshops;  
guest speaker on probate mediation - University of San Diego School of Law and  
Thomas Jefferson School of Law

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 100+

Number of other mediations conducted: 10+/-

Description of mediation experience and style:

Mediated more than 100 probate related controversies, including trust/will contests,  
beneficiary disputes, creditor's claims, real property sales, contested accountings  
and fiduciary appointment/removal. Primarily facilitative style, with evaluative  
approach as appropriate.

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

Represented parties in 50+ probate mediations. Appointed Referee by San Diego  
Probate Court in numerous accounting disputes. Have served as a settlement conference  
officer and neutral evaluator in several cases.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 385.00

Cancellation Policy:

Cancellation/rescheduling with less than five business days notice is subject to  
a charge of \$385.

Deposit Policy:

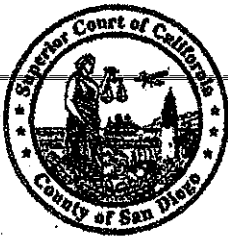
West Coast Resolution Group (a division of the National Conflict Resolution Center)  
requests a deposit of one-half of the estimated fees together with the administrative  
fees, at least two business days before the session. Balance due at conclusion of  
session.

Additional Policies or Fees:

Mediations typically conducted through West Coast Resolution Group - please contact  
Kathy Purcell at (619) 238-7282 or kpurcell@westcoastresolution.com. West Coast  
Resolution Group generally charges an administrative fee of \$150 per party, subject  
to adjustment in appropriate cases.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only.



**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Ona Russell

Organization/Firm/Company: Powell-Russell Associates (Pre-Facto Mediation)

Address: P.O. Box 2321, La Mesa, CA 91943-2321

Telephone Number: 858-793-2518

Fax Number: 619-668-6270

Email/Website: Email: powellrussell@prefactomediation.com or onarussell@gmail.com; Website: prefactomediation.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:

PhD Literature, UC San Diego 1998; Teaching literature and interdisciplinary studies at college level. Developed course, "Literature and the Law" at UCSD, which subsequently was accredited by the Calif. Bar for continuing legal education. Course and expertise involve discovering common ground among disparate entities.

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

Work and train with Claudia Powell, Professional Fiduciary, for 2 years as mediator  
Co-founder of Powell-Russell Associates--"Pre-facto Mediation"  
Completed San Diego Conservatorship Course

**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):

Educated by Claudia Powell on variety of probate matters

Received accreditation by Calif. Bar on self-developed course, "Literature and the Law" (see onarussell.com for more info)

Presented accredited course to bar associations statewide and to the American Judges Association Annual Conference

Published novelist--works focus on celebrated Probate court judge. Published articles in numerous literary and legal journals including Orange County Lawyer and Dispute Resolution Journal

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):

Mediator Credential (1 Year-Extended Court Track - credential awarded 9/28/10 (28 hours / 6 mediations) NCRC  
Certificate of Completion, "Mediating the Litigated Case," (48 hours) 05/10, Pepperdine University  
Advanced and Introductory Mediation Skills Training - 02/2010 and 05/2009 (60 hours total) NCRC

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 2

Number of other mediations conducted: 20

Description of mediation experience and style:

Trained in the facilitative style of mediation which emphasizes face-to-face communication. Specializing in early mediation for use by or to include fiduciaries as a means of managing the controversies that arise during administration. Emphasis on using mediation to ease administration and based upon short sessions as needed to contain conflict and avoid litigation.

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

Observed and co-mediated 2 cases with Max Factor (designated "Super Lawyer" and "Super Mediator" in Los Angeles)  
Published article "Mediating by the Book" in Dispute Resolution Journal, May-Oct. 2010

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ \$150-200

Cancellation Policy:

Cancellation less than 24 hours in advance will result in a non-refundable fee of \$150.00

Deposit Policy:

\$500 deposit is payable 48 hours in advance of the scheduled session. should the time required for the session be less than three (3) hours (\$150 / hour for each of the first two hours, \$200 / hour thereafter) the overpayment will be refunded.

Additional Policies or Fees:

I typically mediate probate matters as a team, co-mediating sessions with credentialed mediator and professional fiduciary, Claudia Powell. The hourly fees quoted above are the same whether mediating alone or co-mediating with Ms. Powell.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only.



# SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

## PROBATE MEDIATOR PROFILE

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### I. CONTACT INFORMATION:

Mediator Name: Boris Siegel  
Organization/Firm/Company: SIEGEL & WOLENSKY LLP  
Address: 380 S. Melrose Drive, Suite 209, Vista, CA 92081  
Telephone Number: (760) 643-4166  
Fax Number: (760) 643-4188  
Email/Website: bsiegel@siegelwolensky.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:

Bachelor of Science (University of Arizona - 1983); Juris Doctorate Degree (University of California at Berkeley - 1986)

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

Certified Specialist in Estate Planning, Trust and Probate Law by the California Board of Legal Specialization of the State Bar of California - April 1, 2002

### 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):

Sole practitioner - October 1990 to December 2001;  
Partner - Siegel & Wolensky LLP - January 2002 to present  
Practice areas as sole practitioner and as partner in Siegel & Wolensky LLP include Tax and trusts & estate practice with emphasis in tax litigation, trusts & estates litigation, probate litigation, guardianships, conservatorships, fiduciary representation and estate planning;

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):

Mediation Skills Training (25 hours) San Diego Mediation Center - May 1999

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 5 - 10

Number of other mediations conducted: 0

Description of mediation experience and style:

In most cases, I use an evaluative model

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

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 300.00

Cancellation Policy:

48 hours

Deposit Policy:

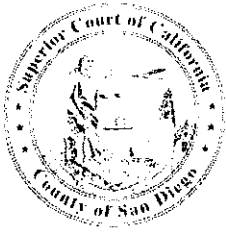
Full hourly rate for number of hours anticipated should be paid one week in advance of the mediation

Additional Policies or Fees:

None

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only



**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Hon. James A. Steele (Ret.)  
Organization/Firm/Company: ADR Services, Inc.  
Address: 1900 Avenue of the Stars, Ste 250, LA, Ca 90067 (\*AVAILABLE FOR MEDIATIONS IN SAN DIEGO)  
Telephone Number: (310) 201-0010  
Fax Number: (310) 201-0016  
Email/Website: www.JudgeSteele.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:  
1987 Diploma/Tax Law; Univ. San Diego Law School, San Diego, CA  
1986 MBA (Real Estate); Univ. of Southern California, Los Angeles (1984-1986)  
1977 JD; California Western Law School (1974-1977); 1974 BA/Econ. SDSU (72-74)/ C.U.N.Y. (70-72)

Probate, Trust, and Estate Planning Education, and Other Relevant Education:  
Numerous classes including teaching Probate Judges on a Statewide Basis - Faculty: Probate Institute (2013 w/Judge Kelety); LACBA Trusts & Estates Symposium 2013; CJER 2011 Faculty Member; others available upon request. Also see website for full resume: www.JudgeSteele.com

**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):

Judge of the Superior Court 3/2007 - 9/2014; Probate Assignment 6/09 - 9/14 (P/T 1/09 - 6/13; F/T 6/13-9/14)  
Numerous classes including teaching Probate Judges on a Statewide Basis - Faculty: Probate Institute (2013); LACBA Trusts & Estates Symposium 2013; CJER 2011 Faculty Member (w/Judge Kelety); others available upon request. Teach State Bar Qualified MCLE Elimination of Age Bias Program ("Ageism")  
Developed Construction Law Program for The Rutter Group (Thomson Reuters Publishing) 2014 and acted as author, moderator and lead panelist (San Francisco and L.A. and avail. through Rutter on line); Numerous publications.  
Total of 29 years experience in private sector (10 yrs. corporate practice; 19 yrs. in law practice). See resume on line.

Last updated: 1/25/15

**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):

Through the Superior Court: Judge's College 2007; Conducted numerous MSC's; Chairperson of the LASC Pro Bono Probate Settlement Conference Program Committee (designed and implemented Program for LASC)  
Taught 100 Settlement Officers Mediation Skills Workshop (developed training program) and supervised program

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 75+

Number of other mediations conducted: 75+

Description of mediation experience and style:

Extensive MSC's while on the bench incl. @ request of other judges.

Joined ADR Services 10/1/14 and conducted numerous mediations, primarily in Probate, Trust, C'ship area.

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

Member of LASC's ADR Committee for 5 years.

Developed Pro Bono Probate Settlement Program for LASC

Currently serve as Arbitrator as well as CCP 638 General Referee (and 639 Discovery Referee)

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 500

Cancellation Policy:

Per ADR Services, Inc.'s policy: Cancellation must be received in writing 15 days prior to hearing (any admin fees not refundable). See ADR Policies at [www.ADRServices.org](http://www.ADRServices.org)

Deposit Policy:

Admin fees and Neutral Fees to be deposited in advance per ADR Services, Inc.'s Policies as further set forth at [www.ADRServices.org](http://www.ADRServices.org)

Additional Policies or Fees:

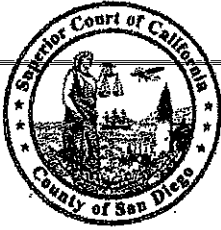
Per ADR Services, Inc.'s policies as further set forth at [www.ADRServices.org](http://www.ADRServices.org)

Travel time/charge negotiable depending upon case if out of LA County (prefer SD County cases on Mondays or Fridays if possible). No hotel or similar lodging charge if in San Diego. ADR Services' S.D. Offices available for use.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English





**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

**PROBATE MEDIATOR PROFILE**

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**I. CONTACT INFORMATION:**

Mediator Name: Joseph L. Stine

Organization/Firm/Company: Law Office of Joseph L. Stine

Address: 380 S. Melrose Dr. #306

Telephone Number: (760) 643-4150

Fax Number: (760) 643-4160

Email/Website: lstine@melroselawcenter.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 San Diego, School of Law, 1974-77, J.D.

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

Mediation Presenter: San Diego County Bar Association, Estate Planning, Trusts, & Probate Section  
North County Bar Association, Trusts & Estates Section

**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 been an attorney since 1979 and have a very broad base of civil litigation experience, including some involvement in probate litigation and conservatorship proceedings.

Since August 2000, I have maintained a hybrid law/ADR practice in North County with special focus on real estate and business litigation. My ADR practice combines periodic private retentions with a steady stream of mediation appointments from the San Diego Superior Court on a wide variety of cases. Retentions have included numerous trust disputes.

Since the mid-1990s, I have mediated every type of superior court civil dispute with the lone exception of family law.

I have written a dozen published articles on ADR and spoke at over 25 Bar forums on the strategic use of mediation.

Last updated: 6/28/12

**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 (now NCRC) - Introductory Mediation Skills Training (1991)  
Pepperdine University, School of Law - Advanced 3-Day Mediation Training (2001)  
Over a dozen supplemental 1-3 hour mediation skills training workshops sponsored by or through local Bars (2000 - )

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 30-40

Number of other mediations conducted: 500

Description of mediation experience and style:

I use a combination of facilitative and evaluative styles to maximize the opportunity for settlement. Different cases demand different styles. Probate mediations often require sensitivity to intrafamily tensions and long-standing internal dysfunctions that create as well as fuel the continuing conflict. They call for both utmost patience and extraordinary persistence.

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

San Diego Superior Court - civil action mediation panelist, settlement officer, discovery referee, judge pro tem  
Public entity hearing officer - disability retirement issues, parking citations  
Arbitrator - real property, business, attorney fee disputes

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 300

Cancellation Policy:

24 hours prior notice

Deposit Policy:

Three hour minimum prior deposit

Additional Policies or Fees:

Mediation preparation fee - one hour maximum (subject to possible waiver)

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English only



# SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

## PROBATE MEDIATOR PROFILE

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### I. CONTACT INFORMATION:

Mediator Name: Nickie White  
Organization/Firm/Company: \_\_\_\_\_  
Address: 401 W. A Street, Suite 1100, San Diego, CA 92101  
Telephone Number: (619) 786-2883  
Fax Number: (858) 822-6016  
Email/Website: nwmail@cox.net

### 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:  
Mediator Credential: National Conflict Resolution Center, 625 Broadway, San Diego, CA 2004-2005.  
Specialization: San Diego Superior Court Mediation.

Probate, Trust, and Estate Planning Education, and Other Relevant Education:  
Paralegal Degree: Southwestern College, San Diego, CA 2003.  
Completed courses in Probate Law, Wills, Trusts & Estates, Family Law. Continuing education credits: Mediation seminar, Earl Gilliam Bar Association, 2013.

### 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):

Experience conducting over 1,000 mediations at San Diego Superior Court, South Bay and Kearny Mesa from 2005 to 2013. Ability to handle disputes involving complex fact patterns and multiple parties.

Member: Mediator panel, San Diego Superior Court, Hall of Justice, 2014.

Last updated: 04/02/2014

**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-Basic Mediation Training, 32 hours. 2003

**V. MEDIATION EXPERIENCE / STYLE:**

Number of probate mediations conducted: 0

Number of other mediations conducted: 1,000

Description of mediation experience and style:

Experience as a Superior Court mediator from 2005 to 2013. Presented mediation option to litigants pre-trial.

Settlement of court cases and agreement writing for judicial review. Mediation style utilizes active listening skills to ascertain key issues.

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

Background supervising and mentoring law students from Thomas Jefferson and University of San Diego School of Law in advanced mediation practice.

**VI. MEDIATOR FEE INFORMATION:**

Hourly rate: \$ 150.00

Cancellation Policy:

Please cancel scheduled mediations at least 24 hours prior to mediation date.

Deposit Policy:

\$150.00 deposit due within five days of scheduled mediation. Refundable if mediation is cancelled at least 24 hours prior to mediation date.

Additional Policies or Fees:

Payment of fees due at conclusion of mediation. The parties may split the costs of mediation.

**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English speaking.