



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.