



## 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: 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

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**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.

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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.

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**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.

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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.

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Additional Policies or Fees:

None

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**VII. LANGUAGE CAPABILITIES OF MEDIATOR:**

English

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