

## ADDENDUM TO RESUME

### RELEVANT EXPERIENCE

#### CALIFORNIA SUPERIOR COURTS

I have been appointed by or acted in trust and probate matters and before Superior Courts throughout California including the counties of Los Angeles, Fresno, Alameda, Riverside, San Diego, and Contra Costa. I have included representative matters below.

<b>Estate of Postuma, LASC GP015997</b>
Served as litigation trustee in petition to compel accounting and to surcharge co-trustee. Involved forensic accounting issues. Interim administration also required management of ten parcels of income producing real estate. Resulted in stipulated \$1 million surcharge.
<b>Estate of Eccles, LASC BP142943</b>
Appointed administrator in contested estate pursuant to stipulation of the parties. Complex matter involving a will contest as well as management, consolidation, and liquidation of two operating businesses belonging to decedent.
<b>Estate of Hagali, LASC BP158434</b>
Appointed trustee at request of charitable remainderman following declination to act by named successor trustee. Administered trust and filed petition for probate to administer assets not inside trust.
<b>Estate of Kavanaugh-Lee, LASC BP150103</b>
Appointed administrator of estate pursuant to stipulation of parties. Duties required tracing of lost assets and intentionally concealed, unauthorized distributions by heirs. Resulted in a stipulated \$65,000 surcharge to family member's share.
<b>Estate of Taylor, LASC EP005785</b>
Appointed Special Administrator at request of charitable remainderman following suspension of incompetent executor. Duties involve marshalling of assets of probate estate still open after fifteen years. Administration of probate required tracing sixty-five escheated properties totaling over \$360,000. Efforts included tracing and recovery of \$150,000 in assets comingled by suspended administrator. Required reconstructed accounting of almost 20 years of conservatorship and probate assets.

<b>Conservatorship of Alfred Funk, Riverside Superior Court INP1600017</b>
Intervened as 850 claimant seeking return of estate funds improperly placed in name of conservatee who was former administrator of the Estate of Taylor. (See above)
<b>Estate of Anastasiou, LASC BP138885</b>
Appointed as administrator of basic estate in contested matter pursuant to stipulation of parties. Family members objected to all family nominees. Stipulated to appointment of “neutral” administrator.
<b>In Re Albina Badalich Revocable Trust, LASC 17STPB11143</b>
Appointed by court as successor trustee at request of three charities who sought removal of trustee for delay and mismanagement of estate. Objection to accounting and alleged improper and excessive fees.
<b>Estate of Abrams, LASC BP127615</b>
Appointed successor trustee of Irrevocable Life Insurance Trust where office of trustee was vacant. Trust administration not judicially supervised.
<b>Tia L. Seidenschur Trust, BP 137790</b>
Appointed as successor trustee following resignation of corporate trustee. Trust administration not judicially supervised.
<b>Charles W. and Ursula Johnson Family Trust LASC BP120601</b>
Appointed pursuant to stipulation of parties as successor trustee following resignation of corporate trustee. Trust administration not judicially supervised.
<b>Slocum Family Trust, Fresno Superior Court 17CEPR 00678</b>
Appointed as successor trustee on application of charitable foundation. Trust administration not judicially supervised.
<b>Valley View Trust LASC Space 16STPB05440</b>
Appointed as “neutral trustee” pursuant to stipulation of the litigating parties.
<b>Norma Jean Evans Trust LASC GP 010535</b>
Appointed as successor trustee pursuant to stipulation of parties and litigated matter. Responsible for ongoing, long-term administration of spendthrift trust estate.

<b>Estate of Takae Kamino, LASC 18STPB08742</b>
Appointed to serve as administrator where all heirs were foreign residents. Involved transfer of real property, research, certification, and translation of Japanese documents establishing distribution.
<b>In Re the Matter of Helen Brastoff Trust Dated June 5, 2014 Orange County Superior Court 30-2021-01205839-PR-TR-CJC</b>
Appointed as Temporary Trustee in a highly contested litigation matter requiring a \$30-million-dollar bond and the liquidation of commercial residential real estate holdings valued at \$26-million-dollars.
<b>Estate of David Joseph Block, Riverside Superior Court PRR12001905</b>
Appointed to serve as administrator of intestate decedent's estate with no next of kin residing in California.
<b>Estate of Nyles Woodall Ryan, Alameda County Superior Court RP20068516</b>
Appointed to serve as administrator of intestate decedent's estate with no next of kin residing in California.
<b>Estate of Michael G. Cushen, Alameda County Superior Court RP20063249</b>
Appointed to serve as administrator of intestate decedent with no next of kin residing in California.
<b>Estate of Nora Bell Demerson, Alameda County Superior Court RP20069121</b>
Appointed to serve as administrator of intestate decedent with no next of kin residing in California.

## OTHER LITIGATION AND SIGNIFICANT EXPERIENCE

### FORENSIC REVIEW

- Prepared investment analysis documenting approximately \$25-million-dollar investment loss in breach of fiduciary duty claims against corporate trustee.
- Prepared and presented forensic accounting tracing over \$5 million in disputed cash flows in action for accounting and breach of fiduciary duty against constructive trustee.
- Prepared and presented review of problematic trust accounting dealing with \$14 million of complex, multistate assets. Accounting period covered at least 15 years.

### ESOP – BUSINESS VALUATIONS

- Currently serving as administrative and transaction trustee for Employee Stock Ownership Plans. Includes valuation of companies ranging in size from \$5 million to over \$150 million.

### TRUST AND PROBATE MANAGEMENT

- Currently serving as trustee of complex family trust. Liquidated over \$120 million of residential income property in Los Angeles County. This included complex funding as well as several 1031 exchanges to complete transactions. Represented by Marcus Millichap. Other duties for this same trust include oversight of investments exceeding \$50 million as well as management of financial affairs of a surviving spouse.
- Currently advising and managing a rolling caseload of approximately thirty-five trust and probate matters involving a wide range of assets including deposits, investments, operating companies, and real estate. Recently completed valuation of \$200 million operating company. Includes oversight and participation in corporate governance.
- Named as future successor trustee in estates totaling in excess of \$100 million.