



## CAROLINE C. VINCENT, ESQ.



### ESTATES/TRUSTS/PROBATE DISPUTE RESOLUTION EXPERIENCE

*“Caroline does not give up, insists upon written settlement agreements at the mediation, and has a unique ability to obtain continuing movement from the parties until closure.” – Counsel who recently mediated with Caroline*

Caroline Vincent has resolved over 2000 disputes, including hundreds of matters involving a wide range of trust and estate related disputes, including Conservatorship, financial and care issues, elder abuse, fraudulent transfer of estate assets, undue influence, caretaker transfers, charitable trusts, accountings, estate preservation and management, appointment disputes, business and property valuation, legal malpractice, and interpretation of trust and will provisions. Her exceptional skills resolving interpersonal conflicts and her wide range of legal knowledge and experience make her especially well suited to resolving these types of disputes.

#### REPRESENTATIVE ESTATES/TRUSTS/PROBATE CASES RESOLVED AS MEDIATOR

- Conservatorship dispute between sisters over home care vs. nursing home care of mother with Alzheimer's disease and use of estate assets for improvements in home of the sister caretaker. *Estate of Hazel Wittenberg*, Los Angeles Sup. Ct. (Central)
- Legal malpractice claim over proper definition and advisement re charitable trust arising from negligent transfer of assets, and subsequent accounting issues brought by State of California on behalf of charitable trust
- Complex trust dispute over management and control of multimillion-dollar business trust, between partner of deceased husband (business trustee) and wife and children of deceased husband's estate, residuary beneficiaries of business trust. *Lloyd v. Faulkner*, Los Angeles Sup. Ct. (Central)
- Dispute between stepmother widow of deceased and children of deceased, to force sale of widow's residence where trust document presented issue of provision of maintenance and care for widow's lifetime.
- Numerous will contests, involving family members and disagreements about the deceased's intent.

#### MEDIATION TRAINING AND EXPERIENCE

- Certified Mediator, DRS, 40 hour training, 1983
- Numerous commercial mediation trainings given and received through JAMS, Pepperdine
- 15 years professional commercial mediation on JAMS and ADR Services panels, emphasizing business, real estate, probate, employment, professional liability, personal injury

#### SUBSTANTIVE EXPERIENCE

##### PROBATE AND RELATED MATTERS HANDLED AS ATTORNEY

- *Estate of Jewell McDonald*, Orange County Sup. Ct. Represented administrator with will annexed, appointee of primary residuary beneficiary of estate, who brought 9860 Petition for fraudulent transfer of real property and other assets against father-in-law (widow of deceased), and petition to remove father-in-law as Executor of estate
- *Estate of Jay Kennedy*, Los Angeles Sup. Ct.(West). Represented primary pecuniary beneficiaries in bringing motions to administer, liquidate and distribute estate, and attempted to remove executor
- 10 years legal experience in planning simple estates, including preparation of wills & trusts, transfer of assets, and business succession planning (family business focus)
- 18 years of law practice in multi-national law firms and sole practice, emphasizing corporate, business and real estate transactional matters of all types.
- Conservator of *Estate of Mary E. McNeece*; Co-conservator *Estate of Paul J. Evans*

#### BACKGROUND AND PROFESSIONAL ACTIVITIES

- J.D., University of Southern California Law Center (*Law Review*), 1978
- Board of Governors, Women Lawyers Association of Los Angeles, 1995-2003
- Executive Committee, ADR Section of Los Angeles County Bar Association, 1992-1994
- Operating Committee of Dispute Resolution Services, Inc., 1984-1991
- Member, ADR Courts Committee, 2007
- Presiding Arbitrator, SMBA Mandatory Fee Arbitration Program, 2007