

No. _____

IN THE COURT OF APPEALS
FOR THE FIRST OR FOURTEENTH DISTRICT OF TEXAS
HOUSTON, TEXAS

=====

In Re Candace Louise Curtis

Relator

=====

Original Proceeding from the Harris County Probate Court No. 4

Cause No. 412,249-401 et seq.

=====

RECORD INDEX V4

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FOR RELATOR CANDACE CURTIS

TAB 49

Diane Trautman



No. 412249-404

PLAINTIFF CANDACE LOUISE CURTIS STATUTORY BILL OF REVIEW

	NO. 412,249	
ESTATE OF	§	
	§	
NELVA E. BRUNSTING,	§	
	§	
DECEASED	§	
Lead Case	CLOSED	Consolidated With

	NO. 412,249-401	
CARL HENRY BRUNSTING,	§	IN PROBATE COURT
INDIVIDUALLY AND AS	§	
INDEPENDENT EXECUTOR OF THE	§	
ESTATES OF ELMER H. BRUNSTING	§	
AND NELVA E. BRUNSTING	§	NUMBER FOUR (4)
	§	
vs.	§	
	§	
ANITA KAY BRUNSTING f/k/a	§	HARRIS COUNTY, TEXAS
ANITA KAY RILEY, individually,	§	
as attorney-in-fact for Nelva E. Brunsting,	§	
and as Successor Trustee of the Brunsting	§	
Family Living Trust, the Elmer H.	§	
Brunsting Decedent's Trust, the	§	
Nelva E. Brunsting Survivor's Trust,	§	
the Carl Henry Brunsting Personal	§	
Asset Trust, and the Anita Kay Brunsting	§	
Personal Asset Trust;	§	
AMY RUTH BRUNSTING f/k/a	§	
AMY RUTH TSCHIRHART,	§	
individually and as Successor Trustee	§	
of the Brunsting Family Living Trust,	§	
the Elmer H. Brunsting Decedent's Trust,	§	
the Nelva E. Brunsting Survivor's Trust,	§	
the Carl Henry Brunsting Personal	§	
Asset Trust, and the Amy Ruth Tschirhart	§	
Personal Asset Trust;	§	
CAROLE ANN BRUNSTING,	§	
individually and as Trustee of the	§	
Carole Ann Brunsting Personal Asset Trust;	§	
and as a nominal defendant only,	§	
CANDACE LOUISE CURTIS	§	



Jessica Haddock



	NO. 412,249-402
CANDACE LOUISE CURTIS	§
	§
vs.	§
	§
Anita and Amy Brunsting	§
<hr/>	
	NO. 412,249-403
CARL HENRY BRUNSTING,	§
INDEPENDENT EXECUTOR OF THE	§
ESTATES OF ELMER H. BRUNSTING	§
AND NELVA E. BRUNSTING	§
vs.	§
	§
CANDACE L. KUNZ-FREED AND	§
VACEK & FREED, PLLC f/k/a	§
	§
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ORIGINAL BILL OF REVIEW

TO THE HONORABLE JUDGE OF SAID COURT:

1. The procedure prescribed by Title 2 of the Texas Estates Code governs all probate proceedings.¹ Title 2 contains Subtitles A-P covering sections § 31.001 to § 753.002.

CONTEST TO PROCEEDINGS

2. Title 2 Subtitle A governs contests to proceedings in a probate court. Pursuant to Title 2 Subtitle A § 55.001, a person interested in an estate may, at any time before the court decides an issue in a proceeding, file written opposition regarding the issue. The person is entitled to process for witnesses and evidence, and to be heard on the opposition, as in other suits.²

3. Title 2 Subtitle F governs procedures for the correction of Orders or Judgments in “probate proceedings”.

4. Pursuant to Title 2 Subtitle F § 55.251(a)

An interested person may, by a bill of review filed in the court in which the probate proceedings were held, have an order or judgment rendered by the court revised and corrected on a showing of error in the order or judgment, as applicable.

5. § 55.251 (b) provides that a bill of review to revise and correct an order or judgment may be filed *within two years of the date the order or judgment was entered.*

¹ Tex. Estates Code § 21.006

² Added by Acts 2009, 81st Leg., R.S., Ch. 680 (H.B. 2502), Sec. 1, eff. January 1, 2014





6. The February 14, 2019 Order denying Plaintiff Curtis October 19, 2018 Plea to the Jurisdiction, and denying Plaintiff Curtis' October 8, 2018 Verified Plea in Abatement that incorporated the August 17, 2018 plea and the September 4, 2018 Addendum by reference, is hereby challenged. All Orders entered in 412249-401 are herein challenged as *void ab initio*³ for want of subject matter jurisdiction, as hereinafter more fully appears.

STANDING

7. Petitioner, Candace Louise Curtis, the de jure co-trustee for the sole devisee named in the Wills of Elmer and Nelva Brunsting, is an interested person within the meaning of § 22.018 of Title I of the Texas Estates Code and does herein make timely appearance by Bill of Review for correction of Orders, Rulings and the Docket, as authorized by Tex. Est. Code § 55.251 (a) & (b).

APPLICABLE LAW AND STANDARD OF REVIEW

“A bill of review is a separate, independent suit to set aside a judgment that is no longer subject to a motion for new trial or appealable. Woods v. Kenner, 501 S.W.3d 185, 190 (Tex. App.—Houston [1st Dist.] 2016, no pet.). There are two types of bills of review: equitable and statutory. See id. at 191. Sheilah petitioned for a statutory bill of review. The purpose of a statutory bill of review is “to revise and correct errors, not merely to set aside decisions, orders, or judgments rendered by the probate court.” Nadolney v. Taub, 116 S.W.3d 273, 278 (Tex. App.—Houston [14th Dist.] 2003, pet. denied).

“We review a trial court's ruling on a petition for statutory bill of review for an abuse of discretion, indulging every presumption in favor of the trial court's ruling. Woods, 501 S.W.3d at 190; see also

³ ab initio “before beginning”





*Ablon v. Campbell, 457 S.W.3d 604, 608 n.8 (Tex. App.—Dallas 2015, pet. denied) (concluding that standard of review for trial court's ruling on statutory bill of review is abuse of discretion); Chavez v. Chavez, No. 01-13-00727-CV, 2014 WL 5343231, at *2 (Tex. App.—Houston [1st Dist.] Oct. 21, 2014, no pet.) (mem. op.) (same). A trial court abuses its discretion if it acts in an unreasonable or arbitrary manner, or without reference to guiding rules and principles.” Woods, 501 S.W.3d at 190. In re Ludington, NO. 01-16-00411-CV, at *7-8 (Tex. App. Jan. 19, 2017)*

*“Ordinarily, we review the denial of a bill of review under an abuse of discretion standard. Temple v. Archambo, 161 S.W.3d 217, 224 (Tex. App.—Corpus Christi 2005, no pet.).” Price v. Univ. of Tex. at Brownsville Tex. Southmost Coll., NUMBER 13-16-00351-CV, at *6 (Tex. App. Nov. 16, 2017)*

*“Whether a trial court has subject matter jurisdiction is a question of law that we review de novo. Tex. Dep't of Parks & Wildlife v. Miranda, 133 S.W.3d 217, 226 (Tex. 2004); Tex. Nat. Res. Conservation Comm'n v. IT-Davy, 74 S.W.3d 849, 855 (Tex. 2002).” Price v. Univ. of Tex. at Brownsville Tex. Southmost Coll., NUMBER 13-16-00351-CV, at *6 (Tex. App. Nov. 16, 2017)*

JUDICIAL NOTICE

8. Judicial Notice is governed by Article II of the Texas Evidence Code. Petitioner herein moves the Court pursuant to §§ 201 & 202 of the Evidence Code to take Mandatory Judicial Notice of the relevant portions of the record as follows:

9. First Petitioner moves the court to take judicial notice that no Finding of Fact and Conclusion of Law after Hearing regarding any substantive issue related to the Brunsting Trust Controversy has ever been entered in this court and Petitioner objects to all unsworn testimony and unsupported assertions of any attorney to the contrary. Petitioner further moves the court to take judicial notice of:



Jessica Hight



- A. The docket in 412248, 412249, 412249-401, 412249-402 and 412249-403
 - a. Dockets show the “Estates of *Elmer and Nelva Brunsting*” are “closed”
 - b. No actions seeking to reopen the estates were ever filed and limitations bar such action at this juncture.
 - c. The Docket has Candace Louise Curtis listed as “Defendant”. No claims were filed against PLAINTIFF CURTIS in the seven and one half years between the filing of Curtis’ breach of fiduciary action in the Southern District of Texas February 27, 2012 and Kunz-Freed’s October 16, 2019 Motion to Appoint a Personal Representative in the “Estates of Elmer and Nelva Brunsting”.
- B. The Wills of Elmer and Nelva Brunsting
 - a. Call for independent administration
 - b. Sole devisee is the family trust
 - c. The Wills were not challenged and challenges are now barred by limitations.
- C. The August 28, 2012 Orders admitting the Wills of Elmer and Nelva Brunsting and appointing Carl Henry Brunsting Independent Executor of the Decedents’ Wills and Estates.
 - a. These Orders were not challenged.
- D. The March 27, 2013 Orders approving the Inventory, appraisal and list of claims in each estate.
 - a. These Orders were not challenged and no changes have been made to either inventory.





- E. The Drop Orders issued April 4, 2013, removing the estates from this Court's active docket.
 - a. These Orders were not challenged, these estates have never been reopened and limitations have long since expired.

- F. The Petition filed by Carl Henry Brunsting Individually and as Independent Executor on April 9, 2013 in 412249-401.
 - a. A challenge to Jurisdiction can be raised at any time, is subject to neither doctrines of laches nor statutes of limitations, does not fall prey to the "*Not Pressed Not Passed upon Below*" rule and can even be raised for the first time on appeal.

- G. The Preliminary Federal Injunction Issued April 19, 2013, that was made a part of this Court's record on February 6, 2015 in Case 412249-402 PBT-2015-42743.

- H. The May 22, 2014 Order granting Plaintiff attorney's motion to remand.
 - a. Mr. Spielman stood before the Court on his client's motion for sanctions June 28, 2019 disingenuously claiming Curtis federal case had been closed and terminated. The record shows the 4:12-cv-592 matter was remanded to this court for "*consolidation*" with the case pending here. Curtis v Brunsting was assigned docket Number 412249-402. (See Local Rules 2 – 2.9)

- I. The February 19, 2015 Resignation of Carl Brunsting.
 - a. After resigning as independent executor Carl has never bifurcated his personal claims as a trust beneficiary from claims alleged to belong to "estate of Elmer and Nelva Brunsting".
 - b. Candace Curtis is not Carl et al.



- J. The March 5, 2015 Case 412249-401 PBT-2015-76288 Agreed Order to Consolidate Cases, entered with no motion and no hearing, with no one representing the “estates of Elmer and Nelva Brunsting”. Curtis v Brunsting thus vanished into “estates of Elmer and Nelva Brunsting”, estates that had been closed more than two years⁴.

THE WILLS OF ELMER AND NELVA BRUNSTING

10. The wills of Elmer and Nelva Brunsting both contain a provision for independent administration:

“I direct that no action be required in the county or probate court in relation to the settlement of my estate other than the probate and recording of my Will and the return of an inventory, appraisement and list of claims as required by law.”

11. This same language is mirrored in the August 28, 2012 Orders appointing Carl Henry Brunsting Independent Executor for both estates.

⁴ See Tex. Est. Code § 55.251 (b)



Defendant Kunz-Freed's Motion to Appoint Personal Representative or Administrator

12. Plaintiff has spent several years in Harris County Probate Court No. 4, with the Honorable Judge Christine Butts failing to rule on anything and then ceasing to appear, handing the reins of Probate Court No. 4 over to Associate Judge Clarinda Comstock.

13. Meanwhile, Vacek & Freed, the estate planning attorney defendants, have been neatly “sequestered” in the Harris County District Court with no one to prosecute the claims against them.

14. A March 4, 2019 decision entered in the Southern District of Texas by Chief Judge Lee Rosenthal in *Johnston v. Dixel* 373 F. Supp. 3d 764, 786 (S.D. Tex. 2019) is relevant here. *Johnston v. Dixel*, *supra*, is a matter arising out of Harris County Probate Court No. 4, in which current Associate Judge **Clarinda Comstock was a Defendant**,⁵ **represented by Thompson Coe attorneys Zandra Foley and Cory Reed.**

15. Zandra Foley and Cory Reed now come before this court representing the estate planning attorney Defendants and seeking appointment of a Personal Representative or Administrator to represent “the estates of Elmer and Nelva Brunsting”, complaining that the case against their client had been pending for an extended period of time (2,448 days), in which Probate Court No. 4 refused or otherwise failed to appoint an estate representative to prosecute their estate planning clients, Candace Kunz-Freed et al., in the Harris County District Court.

⁵ Filed September 27, 2016 in Liberty County





CLOSING THE INDEPENDENT ADMINISTRATION

16. Independent administration of estates is governed by the Texas Estates Code Title 2, Subtitle I Chapters 401-405.

Tex. Est. Code § 402.001

Sec. 402.001. GENERAL SCOPE AND EXERCISE OF POWERS. When an independent administration has been created, and the order appointing an independent executor has been entered by the probate court, and the inventory, appraisal, and list of claims has been filed by the independent executor and approved by the court or an affidavit in lieu of the inventory, appraisal, and list of claims has been filed by the independent executor, as long as the estate is represented by an independent executor, further action of any nature may not be had in the probate court except where this title specifically and explicitly provides for some action in the court.^{6,7}

17. The question of when an independent probate administration closes⁸ was addressed by the Honorable Lee H. Rosenthal in Johnston v. Dexel. It should be noted that there was no pour over will in Dexel, but there are pour over Wills in the Brunsting Trust controversy.

⁶ Independent administration of estates was formerly governed by the Texas Probate Code §§ 145-154A (Vernon 1980 and Vernon Supp. 1991). Section § 402.001 is a restatement of § 151 (b) . . . The filing of such an affidavit shall terminate the independent administration and the power and authority of the independent executor, but shall not relieve the independent executor from liability for any mismanagement of the estate or from liability for any false statements contained in the affidavit.

⁷ The purpose of administration is to satisfy the decedent's debts and to distribute the remainder of the estate in accordance with the testator's wishes. See generally William J. Marschall, Jr., Independent Administration of Decedents' Estates, 33 Tex.L.Rev. 95, 116 (1954).

⁸ "An independent administration is to close, and the authority of the personal representative is to terminate, when the estate has been settled." 1 TEXAS PRACTICE GUIDE PROBATE § 5:59 (2018) The executor may file a formal report or notice to close the administration after: [A]ll of the debts known to exist against the estate have been paid, or when they have been paid so far as the assets in the independent executor's possession will permit, when there is no pending litigation, and when the independent executor has distributed to the distributes entitled to the estate all assets of the estate, if any, remaining after payment of debts.





"Texas law permits a person to state in her will that "no other action shall be had in the probate court in relation to the settlement of the person's estate [other] than the probating and recording of the will and the return of any required inventory, appraisalment, and list of claims of the person's estate." TEX. EST. CODE § 401.001(a). This language creates an independent administration, allowing the estate's executor to take "any action that a personal representative subject to court supervision may take with or without a court order." Id. § 402.002.

After the probate court has entered "the order appointing an independent executor," and "the inventory, appraisalment, and list of claims has been filed by the independent executor and approved by the court," the executor or interested parties may not take further actions in the probate court, "except where this title specifically and explicitly provides for some action in the court." Id. § 402.001.

*The independent administration's purpose is to "free an estate of the often onerous and expensive judicial *29 supervision which had developed under the common law system, and in its place, to permit an executor, free of judicial supervision, to effect the distribution of an estate with a minimum of cost and delay." Corpus Christi Bank & Tr. v. Alice Nat'l Bank, 444 S.W.2d 632, 634 (Tex. 1969); see Eastland v. Eastland, 273 S.W.3d 815, 821 (Tex. App.—Houston [14th Dist.] 2008, no pet.) ("The primary distinction between an independent administration and a dependent administration is the level of judicial supervision over exercise of the executor's power.").*

The independent executor's task is to pay claims against the estate and distribute the remaining assets under the will, a settlement agreement, or the Texas Estates Code. See TEX. EST. CODE § 403.051(a) ; Ertel v. O'Brien , 852 S.W.2d 17, 20–21 (Tex. App.—Waco 1993, writ denied) ("An independent executor is charged with the duty of paying the claims against the estate subject to the order and classification set out in the Probate Code."); cf. In re Roy , 249 S.W.3d 592, 596 (Tex. App.—Waco 2008, no pet.) ("As trustee of the estate's property, the executor is subject to high fiduciary duties."). "An independent administration is to close, and the authority of the





personal representative is to terminate, when the estate has been settled." 1 TEXAS PRACTICE GUIDE PROBATE § 5:59 (2018)."

18. Estates Code § 402.001 is a restatement of § 145(h) of the former Probate Code. This provision forecloses the executor and all interested persons from taking “further action” in the probate court except to the extent the code authorizes the probate court to take cognizance of matters “*incident to an estate*”.

*In re Estate of Aguilar, No. 04-13-00368-CV, at *2-3 (Tex. App. Feb. 19, 2014) (“rejected the argument, asserting, “This section of the code does not deny the probate court’s jurisdiction over a contested claim against an estate served by an independent executor.” Id. Noting a probate court retains general jurisdiction to hear matters incident to an estate, this court held “[t]he probate court has subject matter jurisdiction over independent executors.” Id. at 719; see also Columbia Rio Grande Regional Hosp. v. Stover, 17 S.W.3d 387, 393 (Tex. App.—Corpus Christi 2000, no pet.) (concluding section 145(h) does not deprive a probate court of jurisdiction over an independent administration); In re Estate of Lee, 981 S.W.2d 288, 291-92 (Tex. App.—Amarillo 1998, pet. denied) (rejecting jurisdictional challenge based on section 145(h) and holding probate court had jurisdiction to consider claim filed by independent executrix). ”)*

19. The claims that are authorized and the cases supporting continued action in the probate court, involve claims against the executor and challenges to rights in property within the decedent’s estate, none of which are relevant here. There have been no challenges to the will devising to the trust. There have been no challenges to the inventory or the list of claims nor to the drop order closing the “estates” and all of those things were res judicata and beyond review many years ago. Want of jurisdiction however, is never beyond review, is not subject to the not pressed not passed upon below rule and can be raised for the first time on appeal. *Tex. Ass’n of Bus. v. Tex. Air. Control Bd.*, 852 S.W.2d 440, 445 (Tex.1993).





20. The “estate” poured over into the trust under the directive of the will. The rights in said property vested in the trust immediately at the death of the testator and the right of possession was complete with the Order approving the Inventory.

21. It is unnecessary to debate whether the matter filed five days after the estate was dropped from the active docket is a matter “incident to an estate”, as one pivotal issue has received unanimous agreement from all courts of appeal.

*("The pendency of a probate proceeding is a requisite for a court's exercise of jurisdiction over matters related to it."); Garza v. Rodriguez, 18 S.W.3d 694, *5 698 (Tex. App.—San Antonio 2000, no pet.) ("Before a matter can be regarded as incident to an estate ... a probate proceeding must actually be pending."). Lawton v. Lawton NO. 01-12-00932-CV (Court of Appeals For the First District of Texas Mar. 6, 2014)*

22. Filing of a Bill of Review does not, in and of itself, reopen a closed estate. It is unnecessary to look further as no Bill of Review seeking to reopen the estate was ever filed and the closing of the estate at this juncture cannot be disturbed.

“a bill of review seeking to reopen an estate closed long ago does not render the estate "pending" as that word is used in section 5B of the Probate Code. In re Kenedy Mem'l Found., 159 S.W.3d at 143, Id. at 143-46. ” n.21 (Tex. 2010), Frost Nat. Bank v. Fernandez, 315 S.W.3d 494, 505 n.21 (Tex. 2010)

23. No one has challenged the approved inventory and no one has raised claims of adverse interests in rights to property within the inventory of the estate. The controversy among trustees and beneficiaries of the inter vivos trusts is not a probate matter.





24. The law of the case was established with the Findings of Fact and Conclusions of Law after hearing and preliminary injunction entered in the Southern District of Texas⁹ and the unanimous opinion of the Fifth Circuit Court of Appeal published *Curtis v Brunsting* 704 F.3d 406. The doctrine of collateral estoppel precludes re-litigation of those issues.

JURISDICTION OVER TRUST PROCEEDINGS

25. District courts and statutory probate courts are the only courts with jurisdiction over trust proceedings. See Texas Property Code Ann. § 115.001 (West Supp. 2005); Schuele, 119 S.W.3d at 825.

26. The jurisdiction of the District Court over trust proceedings is exclusive except for the authority granted to a probate court by Subsection (d):

§ 115.001 (a) Except as provided by Subsection (d) of this section, a district court has original and exclusive jurisdiction over all proceedings by or against a trustee and all proceedings concerning trusts...

27. The exception to the exclusive jurisdiction of the District Court provided by subsection § 115.001 (d) is limited to matters “*incident to an estate*” and apply only when a probate proceeding relating to such estate is actually “*pending*” in the probate court. See: *Baker v. Baker NO. 02-18-00051-CV (Tex. App. Sep. 6, 2018)(emphasis added)*

⁹ Made a part of this Courts record on 2015-02-06 in Case 412249-402 PBT-2015-42743





*A "probate proceeding" includes an application, petition, motion, or action regarding estate administration, id. § 31.001(4) (West 2014), and a claim "related to the probate proceeding" includes an action for trial of the right to property that is estate property. Id. § 31.002(a)(6), (c); see also Wallace v. Wallace, No. 05-17-00447-CV, 2017 WL 4479653, at *3 (Tex. App.—Dallas Oct. 9, 2017, no pet.) (mem. op.). However, to trigger a statutory probate court's exclusive subject-matter jurisdiction over a cause "related to the probate proceeding," a probate proceeding must already be pending. See Schuld v. Dembrinski, 12 S.W.3d 485, 487 (Tex. App.—Dallas 2000, no pet.) (recognizing that "a court empowered with probate jurisdiction may only exercise its probate jurisdiction over 'matters incident to an estate' when a probate proceeding relating to such matter is already pending in that court" (quoting Bailey v. Cherokee Cty. Appraisal Dist., 862 S.W.2d 581, 585 (Tex. 1993) (op. on reh'g))); Garza v. Rodriguez, 18 S.W.3d 694, 698 (Tex. App.—San Antonio 2000, no pet.) ("[B]efore a matter can be regarded as incident to an estate . . . a probate proceeding must actually be pending.").*

28. Narvaez v. Powell 564 S.W.3d 49 (Tex. App. 2018) (emphasis added)

A probate court may exercise pendent and ancillary jurisdiction as necessary to promote judicial efficiency and economy. TEX.ESTATES CODE ANN. § 32.001(b). In order for a probate court to assert jurisdiction over matters incident to an estate, a probate proceeding must be pending in the court. See Frost National Bank, 315 S.W.3d at 506. That requisite is satisfied here. Typically, probate courts exercise ancillary or pendent jurisdiction when a close relationship exists between the non-probate claims and the claims against the estate. See Shell Cortez Pipeline Co. v. Shores, 127 S.W.3d 286, 294 (Tex.App.—Fort Worth 2004, no pet.), citing Sabine Gas Trans. Co.





v. Winnie Pipeline Co. , 15 S.W.3d 199, 202 (Tex.App.—Houston [14th Dist.] 2000, no pet.) ; Goodman v. Summit at W. Rim, Ltd. , 952 S.W.2d 930, 933 (Tex.App.—Austin 1997, no pet.) (holding that probate court can exercise "ancillary" or "pendent" jurisdiction over a claim only if it bears some relationship to the estate). That is, probate courts exercise their ancillary or pendent jurisdiction over non-probate matters only when doing so will aid in the efficient administration of an estate pending in the probate court. Shell Cortez Pipeline , 127 S.W.3d at 294-95.

29. Valdez v. Hollenbeck 465 S.W.3d 217 (Tex. 2015)

Frost Nat'l Bank v. Fernandez, 315 S.W.3d 494, 506 (Tex. 2010) (acknowledging that a court may exercise its probate jurisdiction over "matters incident to an estate" only when a probate proceeding is already pending in that court (quoting Bailey v. Cherokee Cnty. Appraisal Dist., 862 S.W.2d 581, 585 (Tex. 1993))); In re Sims, 88 S.W.3d 297, 304 n. 3 (Tex. App.—San Antonio 2002, orig. proceeding) (same); Schuld v. Dembrinski, 12 S.W.3d 485, 487 (Tex. App.—Dallas 2000, no pet.) (same).

30. Herring v. Welborn 27 S.W.3d 132 (Tex. App. 2000) (emphasis added)

Once a probate proceeding is under way, the statutory county court's authority to deal with all matters incident to an estate is triggered. See Schuld v. Dembrinski, 12 S.W.3d 485, 487 (Tex.App.-Dallas 2000, no pet.) (allowing a partition proceeding among heirs to proceed in a county court at law because no probate proceeding was pending in the statutory probate court). "In other words, the pendency of a probate proceeding is a requisite for a court's exercise of jurisdiction over matters related to it."

DOMINANT JURISDICTION





31. In Kunz-Freed's March 8, 2016 objection to Plaintiff Curtis' motion to transfer the District Court case to Probate Court 4, Kunz-Freed raises the issue of Dominant Jurisdiction and was correct. Such a transfer was improper and the motion should have been denied. Kunz-Freed argued as follows:

III.

ARGUMENTS AND AUTHORITIES

A. Ms. CURTIS' MOTION TO TRANSFER SHOULD BE DENIED

3.1 The general common law rule in Texas is that the court in which suit is first filed acquires dominate jurisdiction to the exclusion of other coordinate courts. Curtis v. Gibbs, 511 S.W.2d 263, 267 {Tex. 1974}; Cleveland v. Ward, 285 S.W. 1063 (Tex. 1926); Hardy v. McCorkle, 765 S.W.2d 910, 913 (Tex. App.-Houston (1st Dist.) 1989, orig. proceeding). In this case, the first lawsuit was the District Court suit, which would therefore be the court of dominate jurisdiction. Although Carl could have certainly filed similar claims against V&F in the Probate Proceeding, he decided to file separate proceedings. The principle of dominant jurisdiction dictates that this case should not be transferred arbitrarily once a lawsuit has been assigned to a particular court. Republic Royalty Co. v. Evins, 931 S.W.2d 338, 342 (Tex. App.- Corpus Christi 1996, no writ). To allow Ms. Curtis to now obtain a transfer of the legal malpractice suit at this juncture only encourages improper forum shopping."

32. In *Mayfield v Peek* 546 S.W.3d 253 (Tex. App. 2017) it was determined that:

A court exercising original probate jurisdiction also has jurisdiction over "matters related to the probate proceeding" as specified in former Section 4B of the Probate Code. Act of June 19, 2009, 81st Leg., R.S., ch. 1351, § 4A, 2009 TEX.GEN.LAWS 4273, 4275 (formally codified at TEX.PROB.CODE ANN. § 4A, now repealed and replaced with TEX. EST.CODE ANN. § 32.001(a)(West 2014)). § 4B





in turn provided that in a county with no statutory probate court, but a county court at law exercising original probate jurisdiction, one of the matters that can be “related” to a probate proceeding is the “interpretation and administration of an inter vivos trust created by the decedent whose will has been admitted to probate in the court.” Id. at § 4B(3)(now codified at Tex. Est.Code ANN. 31.002(b)(3)). Though the textual grant of jurisdiction is not as broad as that given to a district court, it might fairly encompass Mayfield's claim because the transfer of property is an aspect of administration of a trust.

From these authorities, we discern that the Trust Claim could have been heard by the 271st District Court, or one of the county courts at law for Wise County if they were exercising original probate jurisdiction. As to the Trust Claim, the issue is not one of exclusive jurisdiction, but rather dominant jurisdiction. In re Puig, 351 S.W.3d 301, 305 (Tex. 2011)(“When the jurisdiction of a county court sitting in probate and a district court are concurrent, the issue is one of dominant jurisdiction.”)

The Texas Supreme Court explains dominant jurisdiction this way:

The general common law rule in Texas is that the court in which suit is first filed acquires dominant jurisdiction to the exclusion of other coordinate courts. As a result, when two suits are inherently interrelated, a plea in abatement in the second action must be granted. This first-filed rule flows from principles of comity, convenience, and the necessity for an orderly procedure in the trial of contested issues. The default rule thus tilts the playing field in favor of according dominant jurisdiction to the court in which suit is first filed.

33. Incident to an Estate see Tex. Est. Code § 31.001

An action incident to an estate is one in which the outcome will have direct bearing on collecting, assimilating, or distributing the decedent's estate. English v. Cobb, 593 S.W.2d 674, 676 (Tex. 1979); Falderbaum v. Lowe, 964 S.W.2d 744, 747 (Tex.App.-Austin 1998, no writ). Suits incident to an estate include those seeking to recover possession of or collect damages for conversion of property. Lucik v. Taylor, 596 S.W.2d 514, 516 (Tex. 1980).





34. Sec. § 31.001 SCOPE OF "PROBATE PROCEEDING" FOR PURPOSES OF CODE. The term "probate proceeding," as used in this code, includes:

- (1) *the probate of a will, with or without administration of the estate;*
- (2) *the issuance of letters testamentary and of administration;*
- (3) *an heirship determination or small estate affidavit, community property administration, and homestead and family allowances;*
- (4) *an application, petition, motion, or action regarding the probate of a will or an estate administration, including a claim for money owed by the decedent;*
- (5) *a claim arising from an estate administration and any action brought on the claim;*
- (6) *the settling of a personal representative's account of an estate and any other matter related to the settlement, partition, or distribution of an estate; and*
- (7) *a will construction suit.*

35. In the absence of the Legislature's inclusion of a matter in the types of claims a court exercising probate jurisdiction can hear, we use the "controlling issue test" to determine whether the matter falls within the court's jurisdiction. *See In re Puig*, 351 S.W.3d 301, 304 (Tex. 2011). Under that test, a suit is "incident to an estate when the controlling issue is the settlement, partition, or distribution of the estate." *Id. Dowell v. Quiroz*, 462 S.W.3d 578, 582-83 (Tex. App. 2015)

36. An action incident to an estate is one in which the outcome will have direct bearing on collecting, assimilating, or distributing the decedent's estate. *English v. Cobb*, 593 S.W.2d 674, 676 (Tex. 1979).





37. Closing Procedures are not required of an independent executor, § 405.012. The Order approving the inventories and the Drop Orders issued April 4, 2013 completed the pour over process and the right of possession was vested. That was more than six years ago.

38. The trust does not pour over into the estate but quite the contrary. Settling the Brunsting trust can have no effect on the settlement, partitioning or distribution of the “estates of Elmer and Nelva Brunsting” and by that definition the Brunsting Trust controversy is not a matter “incident to the estate”.

Although courts generally do not lose subject matter jurisdiction once it attaches, a probate court is a specialized court that can lose jurisdiction over matters incident to an estate if it loses jurisdiction over the probate matters. See Goodman v. Summit at West Rim, Ltd., 952 S.W.2d 930, 933 (Tex. App.—Austin 1997, no pet.). In other words, once an estate closes, incident claims are pendent or ancillary to nothing, and the probate court loses jurisdiction. Id.; see also Schuld v. Dembrinski, 12 S.W.3d 485, 487 (Tex. App.—Dallas 2000, no pet.) ("the pendency of a probate proceeding is a requisite for a court's exercise of jurisdiction over matters related to it"); Garza v. Rodriguez, 18 S.W.3d 694, 698 (Tex. App.—San Antonio 2000, no pet.) ("before a matter can be regarded as incident to an estate ... a probate proceeding must actually be pending")

*In Texas, the pendency of a probate proceeding is a requisite for a court's exercise of jurisdiction over matters related to it. In Bailey v. Cherokee County Appraisal District, 862 S.W.2d 581 (Tex. 1993), the Texas Supreme Court stated that a trial court **must have a probate case pending to exercise its jurisdiction over matters "incident to an estate."** See also *In re Estate of Hanau*, 806 S.W.2d at 904 (court lost jurisdiction to remove independent executrix after estate was closed). We hold that the probate court may only exercise "ancillary" or "pendent" jurisdiction over a claim that bears some relationship to the estate. Once the estate settles, the claim is "ancillary" or "pendent" to*





nothing, and the court is without jurisdiction. Goodman v. Summit at West Rim, Ltd. 952 S.W.2d 930 (Tex. App. 1997) (emphasis mine)

39. See *Lee v. Ronald E. Lee Jr., Katherine Lee Stacy, & Legacy Trust Co.* 528 S.W.3d 201 (Tex. App. 2017)

("The trial court has power to hear all matters incident to an estate only in those instances where a probate proceeding, such as the administration of an estate, is actually pending in the court in which the suit is filed, relating to a matter incident to that estate." (emphasis added) (citing Interfirst Bank–Hous. v. Quintana Petroleum Corp., 699 S.W.2d 864, 873 (Tex. App.—Houston [1st Dist.] 1985, writ ref'd n.r.e.))); Pullen v. Swanson, 667 S.W.2d 359, 363 (Tex. App.—Houston [14th Dist.] 1984, writ ref'd n.r.e.) (stating that a statutory probate court's jurisdiction "to hear all matters incident to an estate necessarily presupposes that a probate proceeding is already pending in that court" (emphasis added)).

*The purpose of independent administration is to free the independent executor from judicial supervision by the probate court and to effect the distribution of an estate with minimal costs and delays. Sweeney v. Sweeney, 668 S.W.2d 909, 910 (Tex. App.—Houston [14th Dist.] 1984, no writ); Burke v. Satterfield, 525 S.W.2d 950, 955 (Tex. 1975). **The Estates Code codifies this purpose** by directing that after an independent executor is appointed and the inventory has been approved, "as long as the estate is represented by an independent executor, further action of any nature may not be had in the probate court except where this title specifically and explicitly provides for some action in the court." "TEX. EST. CODE ANN. § 402.001. *In re Estate of Aguilar No. 04-13-00038-CV* (Tex. App. Feb. 19, 2014).*

Texas Estates Code § 34.001

40. Texas Estates Code § 34.001 is referred to as the snatching statute. However, a judge of a statutory probate court "may transfer" to the judge's court from a district... court a cause of action related to a probate proceeding "**pending**" in the statutory probate court. There is no probate proceeding "**pending**" in this court.





THE TESTAMENTARY TRUST OF THE TESTATOR

41. When a person dies without leaving a valid will they are said to have died intestate. Any assets belonging to such individual at the time of death form a testamentary trust which is created by operation of law¹⁰, to be administered and disposed of according to the laws of intestate succession.

§ 101.001(b), Subject to Section 101.051, the estate of a person who dies intestate vests immediately in the person's heirs at law.

42. When a person dies leaving a valid will, the assets belonging to the individual at the time of death are held under a testamentary trust¹¹ and administered and disposed of according to the directives contained in the person's will.

43. Texas Estate Code § 22.012 defines "Estate" to mean a "decedent's property" as it exists originally and as the property changes in form. Subtitle C (§101.001 through §124.006), controls passage and possession of a decedent's estate.

§ 101.001 (a) Subject to Section 101.051, if a person dies leaving a lawful will:

(1) all of the person's estate that is devised by the will vests immediately in the devisees;

44. Tex. Est. Code § 101.051 (a) states that a decedent's estate vests in accordance with Section 101.001 (a) subject to the payment of various debts and

¹⁰ A testamentary trust of the decedent is created by operation of law Tex. Est. Code § 101.003

¹¹ A testamentary trust of the testator is created by operation of law § 101.003



obligations owed by the decedent prior to distributing the residual estate to the heirs or devisees as the case may be.

45. We are not talking about inheritance expectancy. Tortious interference with inheritance expectancy is not a recognized cause of action in Texas¹² and all three of the attorneys who filed such claims in this court know better as a matter of law.

46. We are talking about vested property interests (§ 101.001) in the corpus of an inter vivos trust (§ 254.001) and that question was already pending before two other courts when the April 4, 2013 drop order closed the “estates of Elmer and Nelva Brunsting” in this court. That was five days before ancillary matter No. 412249-401 was filed “ancillary” or “pendent” to nothing.¹³

DEVISE TO TRUST

47. When a person dies leaving a valid will devising to a trust, property devised to the trust described by Subsection (a) of Tex. Est. Code § 254.001 is not held under a testamentary trust of the testator but immediately¹⁴ becomes part of the corpus of the trust to which the property is devised and must be administered and disposed of according to the provisions of the instrument establishing the trust, including any amendments.

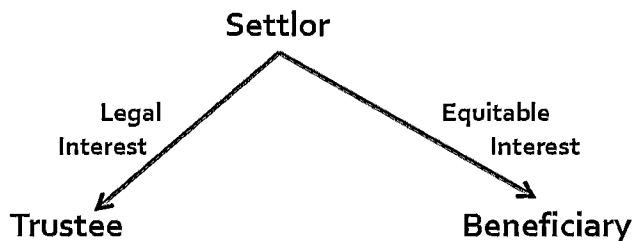
48. According to *Texas. Property Code § 111.004*, The term "trust" refers not to a separate legal entity but rather to the fiduciary relationship governing the trustee with respect to the trust property.

¹² See Neal Spielman’s own admission in Case 4:16-cv-01969 Document 40 Filed in TXSD on 10/03/16 Page 4 of 6

¹³ *Goodman v. Summit at West Rim, Ltd.* 952 S.W.2d 930 (Tex. App. 1997)

¹⁴ The reference dates for determining “immediate” are November 11, 2011 for the vesting of property rights and April 4, 2013 for the closing of the residual estate and vesting of the right of possession. See *Johnston v Dexel et al.*





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49. The fundamental distinction between a trust agreement and an ordinary business contract is in the *separation of legal and equitable title*. The trustee is merely the depository of the bare legal title. The trustee is vested with legal title and right of possession of the trust property (the res) but holds it in a fiduciary capacity for the benefit and enjoyment of the beneficiaries, who are vested with equitable title to the trust property.

As this Court and the Tyler Court have explained, a trustee is merely the depository of the bare legal title. City of Mesquite v. Malouf, 553 S.W.2d 639, 644 (Tex. Civ. App.—Texarkana 1977, writ ref'd n.r.e.); Faulkner v. Bost, 137 S.W.3d 254, 258 (Tex. App.—Tyler 2004, no pet.). "When a valid trust is created, the beneficiaries become the owners of the equitable or beneficial title to the trust property and are considered the real owners." Malouf, 553 S.W.2d at 644. "The trustee is vested with legal title and right of possession of the trust property but holds it for the benefit of the beneficiaries, who are vested with equitable title to the trust property." Faulkner, 137 S.W.3d at 258-59. The trustee has fiduciary duties to hold and manage the property for the benefit of the beneficiaries. TEX. PROP. CODE §§ 113.051, 113.056(a) (West 2007). In general, a trustee "owes a trust beneficiary an unwavering duty of good faith, fair dealing, loyalty and fidelity over the trust's affairs and its corpus." Herschbach v. City of Corpus Christi, 883 S.W.2d 720, 735 (Tex. App.—Corpus Christi 1994, writ denied); see InterFirst Bank Dallas, N.A. v. Risser, 739

¹⁵ Drawing Courtesy of Doctor Gerry Beyer, Regent Professor of Law, Texas A & M University





*S.W.2d 882, 888 (Tex. App.—Texarkana 1987, no writ). Scott argues the trust document excused him from the obligation to perform such duties. Martin v. Martin, No. 06-10-00005-CV, at *8-9 (Tex. App. Mar. 20, 2012)*

50. The Indenture is the instrument that expresses the fiduciary relationship governing the trustee with respect to the trust property. It is the indenture that defines the fiduciary obligations the trustee owes to the beneficiary with respect to the trust property.

DEFENDANTS MOTION TO APPOINT A PERSONAL REPRESENTATIVE

51. Chapter 404 of Subtitle I of Title 2 of the Texas Estates Code governs the question of appointing a successor administrator who succeeds an Independent Executor. Section § 404.004(a) allows the appointment of an administrator to succeed an independent executor only where the independent executor has ceased to serve “*leaving unexecuted parts or portions of the will*”.

52. If assets otherwise belonging to a testamentary trust of the testator immediately vest in the trustees for the trust and become a part of the corpus of the trust at the death of the testator and, if the Order approving the Inventory immediately vests the right of possession in the trustee, what *parts or portions of the pour over will remained unexecuted when the drop order issued?*

POUR OVER PROCEDURES

53. Nelva Brunsting’s Will is a pour over will devising solely to the family inter vivos trust. There are no other specific bequeaths. The pour over procedures are prescribed by Texas Estates Code § 254.001 et. seq.,

Texas Estates Code § 254.001(a) & (c)(1)&(2)



Shirley Hight



§ 254.001(a) *A testator may validly devise property in a will to the trustee of a trust established or to be established (1) during the testator's lifetime by... the testator and another person,...*

§ 254.001(c) *Unless the testator's will provides otherwise, property devised to a trust described by Subsection (a) is not held under a testamentary trust of the testator. The property:*

(1) becomes part of the trust to which the property is devised; and

(2) must be administered and disposed of according to the provisions of the instrument establishing the trust, including any amendment to the instrument made before or after the testator's death.

54. At the time of death, any property belonging to the Decedent forms a testamentary trust¹⁶.

Under Texas law, during the period of administration, the decedent's estate in the hands of the executor or administrator constitutes a trust estate. The executor or administrator is more than a stake-holder, or the mere agent as a donee of a naked power of the heirs, legatees, and devisees. He has exclusive possession and control of the entire estate. He is charged with active and positive duties. He is an active trustee of a trust estate. Jones v. Whittington, 194 F.2d 812, 817 (10th Cir. 1952); see also Morrell v. Hamlett, 24 S.W.2d 531, 534 (Tex.Civ.App. — Waco 1929, writ ref'd) (estate property under administration is held in trust). Bailey v. Cherokee County Appraisal Dist, 862 S.W.2d 581, 584 (Tex. 1993)

55. To argue that the independent executor of the estate is the real party in interest to claims against the estate planning attorneys is the equivalent of arguing that a testamentary trust of the testator was formed. This theory is in direct contradiction to the express language of the statute prescribing the pour over

¹⁶ The executor is trustee for a testamentary trust created by operation of law § 101.003





procedures and defeats the main purposes for the pour over process which is, unified administration and the avoidance of probate.

56. It would make sense that no testamentary trust (decedent's estate) would be created when the will devises exclusively to an existing trust, as any properties belonging to the Decedent at the time of death immediately become a part of the corpus of the trust and are to "*be administered and disposed of according to the provisions of the instrument establishing the trust.*"¹⁷

*The concept of the "pour-over" is not difficult. It is simply a dispositive provision which directs that all or part of an estate is to be added to the corpus of an existing trust, to be administered according to and without the necessity of reiteration of the terms of the trust. The basic goal is to furnish a simple mechanism for adding the poured-over assets to the corpus of the existing trust in order to secure a **unified administration** of assets with whatever minimization of administrative expenses or detail is thus possible. In re Blount, 438 B.R. 98 (Bankr. E.D. Tex. 2010) (emphasis added)*

57. It has been said that there is no shorter interval of time than from when a testator dies and his estate passes to the devisees under his will.¹⁸ Because the property rights, including the right of claims, immediately became a part of the corpus of the trust at the death of the testator, any argument that the claims filed in the District Court belonged to the decedent's estates after the inventory, appraisal and list of claims was approved, would defeat the purpose for this

¹⁷ Formerly Texas Probate Code § 37, section 37 deals with passage of title upon intestacy and under a will. The pertinent part of that section states "When a person dies, leaving a lawful will, all of his estate devised or bequeathed by such will . . . shall vest immediately in the devisees or legatees of such estate . . .; subject, however, to the payment of the debts of the testator. . . . Tex.Prob. Code Ann. § 37 (West Supp. 1996). An ownership interest in property vests in a beneficiary immediately upon the death of the testator. See Kelley v. Marlin, 714 S.W.2d 303, 305-06 (Tex. 1986); Johnson v. McLaughlin, 840 S.W.2d 668, 671 (Tex.App. — Austin 1992, no writ).

¹⁸ Hardy v. Bennefield 368 S.W.3d 643 (Tex. App. 2012); In re Estate of Catlin, 311 S.W.3d 697, 703 (Tex.App.-Amarillo 2010, pet. denied)





estate plan and negate the purpose and effect of § 254.001, the law such plans are made in reliance on. The rules governing statutory interpretation do not allow for prerogatives.¹⁹

CONVERSION IS NOT CONSOLIDATION

58. *Candace Louise Curtis v Amy and Anita Brunsting 4:12-cv-592* is not the “*Estate of Nelva Brunsting*”,²⁰ nor is it a matter incident thereto.

59. *Candace Louise Curtis v Amy and Anita Brunsting* No. 4:12-cv-592, filed Southern District of Texas February 27, 2012, was remanded from the Southern District of Texas to Harris County Probate Court No. 4 in June 2014, to be “*consolidated with the case pending there*”²¹ and was assigned ancillary Cause No. 412249-402.

60. The March 5, 2015 “Agreed Order to Consolidate Cases” is evidence of conversion, which is not a consolidation by any legal standard or measure.²² WHO WAS REPRESENTING estate of Nelva Brunsting when this conversion agreement was signed?

61. *Candace Louise Curtis v Amy and Anita Brunsting* No. 412249-402 is NOT *Carl Brunsting et al.*, No. 412249-401

¹⁹ The seminal rule of statutory construction is to presume that the legislature meant what it said. *Seals v. State*, 187 S.W.3d 417, 421, No. PD-0678-04, 2005 WL 3058041, 2005 Tex.Crim.App. LEXIS 1966 (Tex.Crim.App. Nov. 16, 2005)

²⁰ *Curtis v Brunsting* 704 F.3d 406 (January 9, 2013)

²¹ ORDER OF TRANSFER, SIGNED JUNE 3, 2014 Film code number PBT-2014-184792. There was no case pending in this court to consolidate with and the order accepting remand is void as a matter of law.

²² See Rule 2 - 2.9 of the Local Rules of the Probate Courts





62. *Candace Louise Curtis v Amy and Anita Brunsting* **is** *Candace Louise Curtis v Amy and Anita Brunsting* **and no other cause!**

DEFENDANT ANITA AND AMY BRUNSTINGS RESPONSE TO MOTION TO APPOINT PERSONAL REPRESENTATIVE

63. There is no core “estate” pending in this court and matters relating to the Brunsting trust were not properly brought before this court.

64. On May 19, 2019 alleged trustee Amy Brunsting’s attorney Neal Spielman filed a motion for sanctions seeking a judgment of contempt “due to the conduct of Candace Louise Curtis” and alleging that:

“Curtis is in contempt of this Court's Order Denying Plea and Motions filed by Candace Curtis dated February 14, 2019. Curtis has ignored this Court's findings and orders as to her meritless jurisdictional arguments.”

Curtis' dogged pursuit of these meritless claims, both before and after entry of the Order Denying Pleas and Motions filed by Candace Curtis reveals a disrespect for judicial authority; evidences an intent to exacerbate an already emotionally-charged matter; and continues a pattern of behavior that is either intentionally designed to harass, to waste Estate/Trust assets, and/or is recklessly pursued without regard to the law or the facts.

65. In Mr. Spielman’s motion for sanctions he says of Plaintiff Curtis: “*At best, she fails to comprehend the legal process*”²³.

ADMISSIONS

²³ It should be noted that Pro Se Plaintiff Curtis obtained a unanimous opinion from the federal Fifth Circuit Court of Appeal **in this case**, published *Curtis v Brunsting* 704 F.3rd 406 (Jan. 9, 2013), wherein the Fifth Circuit Court of Appeal held that there was subject matter jurisdiction in the Southern District of Texas.



Harris County



66. Mr. Spielman argued at the hearing on his motion for sanctions that he was forced to waste valuable time reading Plaintiff Curtis’ “frivolous pleadings” and yet on Monday November 4, 2019, Spielman and Mendel filed Defendants Amy and Anita Brunsting’s untimely response to Kunz-Freed’s motion to appoint a personal representative, in which they adopt a Plaintiff Curtis argument.

“Because both Wills gift, devise and bequeath all property and estate to the Brunsting Family Living Trust, there is no need for such an appointment. As a result, Kunz-Freed's Motion to Appoint Personal Representative of Administrator should be denied...”

“A "Successor Executor" is not required.

The claims against Kunz-Freed are assets of the Brunsting Family Living Trust, and therefore are subject to the control of the Co-Trustees.”

67. Unfortunately, counsel has failed to follow this reasoning through to the unyielding deductions that flow therefrom and, thus, fail to perceive how their new found revelation raises problems of substantial significance.

68. If there was an “estate pending” in this court the appointment of a representative would be necessary and would have been necessary several years ago, but has not been necessary since the administrative closing of the “estate” April 4, 2013 vested the right of possession of those claims in the trustees.

69. Defendants do not cite to any authority for their sudden realization that the claims belong to the trustees and not the estate. Thus, while adamantly calling Plaintiff Curtis’ pleadings “frivolous”, they fail to realize the unavoidable conclusion that flows from page one paragraph two of Plaintiff Curtis’ June 6,





2019 reply²⁴ to Defendant Amy Brunstings May 5, 2019 Motion for Sanctions. Paragraph 2 cites to Texas Estates Code § 254.001 which contains the pour over procedures.

70. The rights of claims belong to the trustees and not a testamentary trust of the testator (estate).

Temporary Administrator Gregory Lester

71. Mr. Lester’s January 14, 2016 “*Report of Temporary Administrator Pending Contest*” never even mentions the pour over wills or the drop orders. However, Mr. Lester did have the following to say about the vacancy in the office of executor in regard to the District Court suit:

“A Notice of Vacancy of Party and Motion to Abate Proceeding was filed by counsel for Carl Henry Brunsting. Carl Henry Brunsting has filed a resignation as executor of the aforementioned estates. Until a successor executor is appointed, there is no plaintiff to pursue the action against Defendants and no plaintiff to respond to Defendants’ summary judgment motions. The issue of who will serve as the successor executor of the Estate of Nelva E. Brunsting and the Estate of Elmer Brunsting must be resolved prior to resolving the claims against Defendants”

72. While Mr. Lester never mentioned the pour over, will he did spend a great deal of time focusing on the **no contest clause** in the alleged August 25, 2010 “*Qualified Beneficiary Designation and Exercise of Testamentary Powers of Appointment under Living Trust Agreement*” (8/25/2010 QBD/TPA) containing corruption of blood provisions.

²⁴ The title to this instrument is an explanation of the proper direction in which fiduciary obligations flow





73. The Brunsting Trust is not an asset within the inventory of any decedent's estate and is not "incident" to any estate. *A Temporary Administrator's fiduciary authority and obligations do not extend to non-probate assets.* See *Punts v. Wilson*, No. 06-03-144-CV, 2004 WL 1175489, at *3 (Tex. App.-Texarkana May 28, 2004, no pet.) (holding independent executor owed no fiduciary duty to residuary beneficiary concerning accounts not included in decedent's estate)." In re *Harden*, No. 02-04-122-CV, at *1 (Tex. App. Jul. 15, 2004).

74. Looking back at the September 28, 2017 Fee Application of Temporary Administrator Gregory Lester we see that Mr. Lester spent more time with Defendants' attorneys than with all the other parties combined.

75. Mr. Spielman followed up the Temporary Administrator's report at the "status conference" before Associate Judge Clarinda Comstock on March 9, 2016, making a big deal out of what Mr. Lester said in his report and, as can be seen in the opening lines, Defendants clearly have their fiduciary obligations flowing in the wrong direction.

"Neal Spielman" March 9, 2016 Hearing Page 15:

*6 But the point here, Judge, is **there seems**
7 to be no accountability on Ms. Curtis' behalf for the
8 amount of money that is being spent in this case.
9 Parties have, in the past, suggested, oh, let's not
10 worry about the attorneys fees because that will all
11 even out at the end of the story when everybody decides
12 to divide by five, the corpus of the trust, and the
13 winning parties or the prevailing parties can --
14 everything can be adjusted through the division of that
15 estate.*





16 But, Your Honor, if you look at what Mr.
17 Lester recommended/suggested/reported in his report,
18 there's now the very real possibility that there isn't
19 going to be a divide-by-five scenario because of the
20 no-contest clauses that are recognized as being properly
21 drawn by the Vacek & Freed Law Firm. And if that
22 happens, Judge, then the trust is now spending its own
23 money from those people, whether it be three or four,
24 that are still going to get a portion of the estate, a
25 portion of the trust proceeds when this is all said and
Page 16

1 done.

2 I'm rambling just a bit only because it's
3 such a circular discussion - is how do we get this case
4 finished, given, given the backtracking from everybody's
5 willingness to vest Mr. Lester with the authority to
6 proceed, and now the one person who doesn't like what he
7 said, after she filed motions for summary judgment that
8 are direct contradiction to the conclusions that he
9 reached. The very constant of having to come down here
10 and respond to those, to those motions for summary
11 judgment, the amount of money that that will waste is
12 insulting, is offensive to the parties.

13 I'd love to come up with a creative idea
14 to create some accountability, perhaps, if it comes in
15 the form of a sanction or perhaps it comes in the form
16 of some kind of bond being posted so that if it turns
17 out that one of the parties who is blowing things up as
18 it were and creating this increased attorneys fees, no
19 longer has an interest in the estate with which we can
20 even that out by the end of the day. Perhaps if Ms.
21 Curtis is ordered to post a bond against her claims or
22 to protect against the ability -- our ability to recover
23 fees from her if, as and when she loses her case,
24 perhaps then we can move forward with additional
25 hearings, additional motions and so forth.

1 Keep in mind, Judge, that it's not

2 simply -- it's not as simple as getting a date for Ms.





3 Curtis' summary judgment motions. There's been no
4 discovery, in terms of depositions done in this case,
5 not the least of which will be depositions from,
6 perhaps, even from the lawyers in the other district
7 court case who drafted the documents that can explain
8 what all went into those documents, what Nelva
9 Brunsting's state of mind was at the time. There's no
10 way to respond to those summary judgment motions right
11 now without the full weight of the discovery process
12 moving forward and all of the money that that's going to
13 cost.

76. In Defendant Amy Brunsting's Response to Defendant Candace Kunz-Freed's Motion to Appoint Personal Representative we find the following commentary on the Temporary Administrator's Report:

"The Temporary Administrator was charged with evaluating the merits of various claims, including the claims asserted against Kunz-Freed. The Temporary Administrator prepared a Report for the Court, as instructed. However, since that Report was submitted, there has been no further indication from the Court as to its ultimate use or purpose.

Without a clearer understanding as to its ultimate use or purpose, it would appear that the expenditure of the associated funds was nothing more than a "waste" of Trust funds. Regardless of how many beneficiaries remain, and who they may be, The Brunsting Family Living Trust should not be further burdened by the costs of an appointed, third-party successor executor."

77. Tex. Est. Code § 404.004(a) only allows the appointment of an administrator to succeed an independent executor where the independent executor has ceased to serve "**leaving unexecuted parts or portions of the will**". The estates are closed and have been closed. The Temporary Administrator's Report fails to identify any "unexecuted portions of the will".



78. The trust is not the estate, is not liable to the estate and, should have never been depleted to pay a temporary administrator that cannot even properly determine that his role as temporary representative for the “decedent’s estate” is defined by the will.

79. While Plaintiff Curtis’ reply to Amy Brunsting’s motion for sanctions only cited Estates Code § 254.001, it is clear from the Defendant’s statements that they have not followed through to the inescapable conclusions that follow.

Catch-22²⁵

1. Under the un-ruptured law of the trust Amy and Anita are not trustees.

The Trust Code provides that, in an action by or against a trustee and in all proceedings concerning trusts, the trustee is a necessary party "if a trustee is serving at the time the action is filed." In re Webb, 266 S.W.3d 544, 548-49 (Tex. App.-Fort Worth 2008, pet. denied); see Tex. Prop. . §§ 111.004, 115.011.

80. Not only has Amy argued that the instruments drafted by Vacek & Freed are valid, but in order *for Amy to have standing* to sue V&F for malpractice as the representative of “the trust”, Amy would have to be a trustee. However, in order to prevail on those claims Amy would have to show that the instruments drafted by Vacek & Freed after Elmer became NCM are invalid, which in turn would show that Amy is not a trustee and has no standing to prosecute those claims from the onset. This is not to say that Anita and Amy do not have their own individual malpractice claims against the Vacek and Freed attorneys. They most certainly do, but not as trustees.

²⁵ A paradox or problematic situation for which the only solution is denied by a circumstance inherent in the problem itself. (See “Paradox of the Court”, a.k.a. *the counter dilemma of Euathlus*)





81. The recent admission by Defendants Amy and Anita Brunsting in their answer to Defendant Kunz-Freed's motion, calls for a quote from Plaintiff Curtis' June 12, 2019 RESPONSE TO THE FIDUCIARY'S APPLICATION FOR THE BENEFICIARY TO BE HELD IN CONTEMPT:

Page 6 Para. 17

"At this juncture, regardless of the way they are styled, the theories pled or the parties named, lawsuits arising from a common nucleus of operative facts have been filed in three separate courts. Whether or not either state court action properly involved the Brunsting Trusts when filed, and whether or not either state court can render a binding judgment under the conditions present here, is a valid inquiry better had before trial than after."

82. The conclusion that the "*Estates of Elmer and Nelva Brunsting*" are not proper party plaintiffs to claims belonging to the trustees for the devisee invariably invokes jurisdictional questions. It should be clear from Defendants' own claims that Plaintiff Curtis' pleadings raising questions of who owns the rights of claims and what court should hear them²⁶ are not as frivolous as Defendants would have the court believe. They certainly were not questions raised with the intention to harass or delay.

The Drop Orders

83. Defendants have never mentioned the Drop Orders. The Drop Orders that were issued the day the inventories were approved are conclusive evidence that the

²⁶ 2018-08-17 Plea in Abatement page 4 "*Public policy does not favor the wasting of judicial or private resources. Permitting a case to proceed in the wrong court necessarily "costs private parties and the public the time and money utterly wasted enduring eventual reversal of improperly conducted proceedings"* Prudential, 148 S.W.3d at 136





delay between the vesting of property rights (§ 101.001) and the right of possession had transpired with the approval of the inventory (§ 402.001) and that the estate was administratively closed with the drop order.

The "general rule is that a remainder vests when there is a person in being who has an immediate right to possession of property upon termination of an intermediate estate with only the right of possession postponed" and observing that "vested remaindermen are 'interested persons' under the Trust Code and can bring a cause of action for breach of fiduciary duty" against trustee. Summary of Snyder v. Cowell, No. 08-01-00444-CV (Tex. App. Apr. 10, 2003) from Aubrey v. United Heritage Credit Union, NO. 03-16-00233-CV TEXAS COURT OF APPEALS, THIRD DISTRICT, AT AUSTIN Apr 12, 2017

84. Defendants Amy and Anita Brunsting **claim to be co-trustees** for the devisee trust, but those claims have never seen a hearing in this or any other court and are based upon the argument that improperly made changes to an irrevocable trust are valid.

85. The estate closed more than seven years ago. The period in which a competent trustee could have substituted as a plaintiff for claims belonging to the devisee trust have long since expired and clearly have not been pursued due to the alleged co-trustees own malfeasance and/or incompetence. Thus again we are presented with the same issue confronting the court *In Re XTO Energy Inc.* 471 S.W.3d 126 (2015).

Texas courts have held that a trust beneficiary may enforce a cause of action that the trustee has against a third party "if the trustee cannot or will not do so." See, e.g., In re Estate of Webb, 266 S.W.3d 544, 552 (Tex.App. — Fort Worth 2008, pet. denied); Interfirst Bank-Houston, N.A. v. Quintana Petroleum Corp., 699 S.W.2d 864, 874 (Tex.App. — Houston [1st Dist.] 1985, writ ref'd n.r.e.). Despite this



broad language, a beneficiary may not bring a cause of action on behalf of the trust merely because the trustee has declined to do so. To allow such an action would render the trustee's authority to manage litigation on behalf of the trust illusory.

Even Goebel concedes that the trustee's refusal to bring suit must be wrongful for her to be allowed to step into the trustee's shoes and maintain a suit on the Trust's behalf. See RESTATEMENT (SECOND) OF TRUSTS § 282 (AM. LAW INST. 1959) (if trustee improperly refuses or neglects to bring an action against a third person, beneficiary can maintain suit in equity against trustee and third person). What is less clear is the standard applied to determine whether the trustee's action is wrongful.

*We have found no Texas cases addressing the right of a beneficiary to enforce a cause of action against a third party that the trustee considered and concluded was not in the best interests of the trust to pursue. Generally, when a trustee is given discretion with respect to the exercise of a power, a court may not interfere except to prevent an abuse of discretion. See RESTATEMENT (SECOND) OF TRUSTS § 187. A power is discretionary if a trustee may decide whether or not to exercise it. See *Caldwell v. River Oaks Trust Co.*, No. 01-94-00273-CV, 1996 WL 227520, at *12 (Tex.App. — Houston [1st Dist.] May 2, 1996, writ denied) (not designated for publication). When a trustee is granted the authority to commence, settle, arbitrate or defend litigation with respect to the trust, the trustee is authorized, but not required, to pursue litigation on the trust's behalf. See *DeRouen v. Bryan*, No. 03-11-00421-CV, 2012 WL 4872738 at *4 (Tex.App. — Austin Oct. 12, 2012, no pet.) (mem.op.); see also RESTATEMENT (SECOND) OF TRUSTS § 177 cmt c ("It is not the duty of the trustee to bring an action to enforce a claim which is a part of the trust property if it is reasonable not to bring such an action, owing to the probable expense involved in the action or to the probability that the action would be unsuccessful or that if successful the claim would be uncollectible owing to the insolvency of the defendant or otherwise."). Based on the language of the trust code and the trust indenture in this case, we conclude Bank of America's authority to determine whether to file suit on behalf of the Trust was discretionary.*





86. Defendant Amy Brunsting's assertions that she should prosecute the claims against Defendant Kunz-Freed certainly appear to indicate Amy's agreement that prosecuting the claims would not be unreasonable.

"B. If a successor executor is required, it must be Amy Brunsting.

Because all estate assets "pour-over" into the Brunsting Family Living Trust, there is no need for a successor executor."

87. However, Amy's expressed desire to be appointed executrix falls a little short of explaining how the conflicting interests involved in her request for appointment fails to be dispositive of that motion. Unsurprisingly, all of the alternatives presented in Defendants "PRAYER", assume subject matter jurisdiction in the probate court.

In Terrorem

88. While Defendant's solution involves diminishing the number of trust shares by eliminating beneficiaries' property interests, they claim to base this theory on the notion that the elimination of beneficial interests is for the protection of beneficial interests and is the trustee's duty. This theory is based upon very vague assertions of...

"a number of different terms, conditions and instructions to be implemented and followed by the trustees and beneficiaries. Included among these terms, conditions and instructions were rules intended for the "protection of beneficial interests", including without limitation rules dictating that the Founders' instructions were not to be contested²⁷.

²⁷ Amy Brunsting's & Anita Brunsting's November 4, 2019 Original Counterclaim page 2 of 8





89. Amy and Anita’s claims that “*Carl and Curtis have taken actions*” that trigger the forfeiture provisions, and that “*Carl and Curtis’ actions*” in triggering the forfeiture provisions were without just cause and were not in good faith” and claims that “*By their actions*”, Carl and Curtis have forfeited their interests in the trust, is the same vague general language used throughout their dialog.

90. Allegation of a violation of a forfeiture clause requires a specificity these claims appear to be oblivious to.

Ard v. Hudson NO. 02-13-00198-CV (Tex. App. Aug. 20, 2015)

*In terrorem [or forfeiture] clauses are intended to dissuade beneficiaries under a will or trust from filing vexatious litigation, particularly as among family members, that might thwart the intent of the grantor by making the gifts under the instrument conditional on the beneficiaries not challenging the validity of the instrument. In terrorem clauses are strictly construed to avoid forfeiture when possible. Thus, courts have enforced in terrorem clauses only when the intention of a suit is to thwart the grantor's intention. In re Estate of Boylan, No. 02-14-00170- CV, 2015 WL 598531, at *2 (Tex. App.—Fort Worth Feb. 12, 2015, no pet.) (mem. op.) (citations and internal quotation marks omitted).*

91. Bringing legal action to enforce the trust and protect beneficial interests is not the type of action that seeks to thwart the grantor's intention, but is the exercise of the beneficiary’s right and a fiduciary obligation of the Plaintiff in the case in point.

"An action to remove a trustee, like an action to remove an executor, is not an effort to vary the grantor's intent. Conte v. Conte, 56 S.W.3d 830, 833 (Tex. App.—Houston [1st Dist.] 2001, no pet.).





"We join our sister courts in holding that a beneficiary has an inherent right to challenge the actions of a fiduciary and does not trigger a forfeiture clause by doing so.

*But that inherent right would be worthless absent the beneficiary's corresponding inherent right to seek protection during such an ongoing challenge of what is left of his or her share of the estate or trust assets, and any income thereon, that the testator or grantor, as the case may be, intended the beneficiary to have. We therefore also hold that a beneficiary exercising his or her inherent right to challenge a fiduciary may seek injunctive and other relief, including the appointment of a receiver, from the trial court to protect what the testator or grantor intended the beneficiary to have without triggering the forfeiture clause. *See, e.g., Lesikar v. Moon, 237 S.W.3d 361, 370-71 (Tex. App.—Houston [14th Dist.] 2007, pet. denied); McLendon v. McLendon, 862 S.W.2d 662, 679 (Tex. App.—Dallas 1993, writ denied), disapproved on other grounds, Dallas Mkt. Ctr. Dev. Co. v. Liedeker, 958 S.W.2d 382 (Tex. 1997), overruled on other grounds, Torrington Co. v. Stutzman, 46 S.W.3d 829, 840 & n.9 (Tex. 2001).*

Forfeiture provisions, or in terrorem clauses, in wills and trusts are to be strictly construed, and forfeiture is to be avoided if possible. In re Estate of Schiwetz, 102 S.W.3d 355, 365 (Tex.App. — Corpus Christi 2003, pet. denied).

*A breach of a no contest clause should be declared only when the acts of the parties come within the express terms of the clauses. Id. A lawsuit challenging the testamentary capacity of the testatrix is a type of contest that will result in forfeiture. See In re Estate of Hammill, 866 S.W.2d 339, 343 (Tex.App.-Amarillo 1993, no pet.). In re Montez, No. 04-07-00089-CV, at *1 (Tex. App. Dec. 12, 2007)*

Second, we question whether a forfeiture clause that prohibited a trust beneficiary from suing the trustee for fraud and intentional self-dealing would be valid. The right to challenge a fiduciary's actions is inherent in the fiduciary/beneficiary relationship. McLendon v. McLendon, 862 S.W.2d 662, 679 (Tex.App.-Dallas 1993, writ denied) (trial court erred in failing to grant declaratory judgment that in





terrorem clause did not apply to beneficiary's action against executors of estate for fraud and breach of fiduciary duty). Texas Commerce Bk. v. Wood, 994 S.W.2d 796, 805 (Tex. App. 1999)

92. There is substantial question as to what instruments constitute “the trust” as clearly noted by the Honorable Judge Kenneth Hoyt in his April 19, 2013 Findings of Fact and Conclusions of Law after Hearing and Order for Preliminary Injunction.²⁸ However, questions surrounding the devisee are not properly before this court, as these are not issues incident to settling estates that were closed long ago and this is not the dominant court to assert original jurisdiction over those matters.

SANCTIONS

A void judgment does not create any binding obligations

93. This Court’s Orders in the -401 proceeding are *void ab initio* for want of subject matter jurisdiction. Although a party may appeal a void judgment, he or she is not required to do so.

"It is one thing to say that a void order may be appealed from but it is another thing to say that it must be appealed from for it would be anomalous to say that an order void upon its face must be appealed from before it can be treated as a nullity and disregarded. An order which must be appealed from before it is ignored can hardly be characterized as 'void' and binding on no one." Fulton v. Finch, 162 Tex. 351, 346 S.W.2d 823, 830 (1961).") *Metro. Tra. Aut. v. Jackson, 212 S.W.3d 797, 803 n.3 (Tex. App. 2007).*

94. *Leedy v. Leedy, 399 S.W.3d 335, 340 (Tex. App. 2013)*

²⁸ Made a part of this Courts record on 2015-02-06 in Case 412249-402 PBT-2015-42743





“A judgment is void only when the issuing court had no jurisdiction over the parties or property, no jurisdiction over the subject matter, no jurisdiction to enter the particular judgment, or no capacity to act as a court.” *Browning v. Placke*, 698 S.W.2d 362, 363 (Tex.1985). As *Kedren* points out, there is authority indicating that estoppel cannot prevent a party from challenging subject matter jurisdiction. See *Shirley v. Maxicare, Tex., Inc.*, 921 F.2d 565, 568–69 (5th Cir.1991) (holding accepting benefits under judgment did not bar party from challenging subject matter jurisdiction); *Rhodes v. State*, 240 S.W.3d 882, 891 (Tex.Crim.App.2007) (“ ‘One who accepts the benefits of a judgment, decree, or judicial order is estopped to deny the validity or propriety thereof, or of any part thereof, on any grounds; nor can he reject its burdensome consequences.’ The only exception to this principle is for challenges to the subject-matter jurisdiction of the court rendering the judgment.”) (quoting *Corpus Juris Secundum*); *Ex parte Williams*, 65 S.W.3d 656, 658–59 (Tex.Crim.App.2001) (Keller, P.J., concurring) (examining civil authority and concluding that void judgments are not immune from estoppel considerations unless the invalidity of the judgment is due to a lack of subject matter jurisdiction); *31 C.J.S. Estoppel and Waiver* § 172. *Leedy v. Leedy*, 399 S.W.3d 335, 340 (Tex. App. 2013)

Void for Vagueness

95. Even if the Court had subject matter jurisdiction, as a point of clarification, there were three different movants to three different motions to improperly transfer the District Court docket to probate Court 4. This Court’s February 14, 2019 Order did not specifically identify which of the three movants was the particular “movant” the Order was addressing with its command to transfer that docket and bear the costs.

96. Reason would dictate it would be the party responsible for filing portions of the same suit in separate courts and then moving to have them consolidated in the wrong court. That would not be Plaintiff Curtis.



97. That would be attorney Bobbie G. Bayless' July 14, 2015, Motion to Transfer the District Court case to Probate Court Four (4) in which she herself admitted the actions she filed in divergent courts were related:

"The District Court Case is related to the probate proceedings and indeed to this cause of action. The issues in the District Court Case and this case are related and the damages sought in each action are potentially impacted by the other. Many of the same witnesses and some of the same evidence will also be used in both cases."

98. This clearly raises a question. Why would counsel seeking remedy for a client file related causes of action in separate courts where the damages sought in each action would be potentially impacted by the other and, where the same witnesses and some of the same evidence would be relevant to both causes? The answer appears to be abundantly obvious. Both state court actions were legally invalid lawsuits preemptively filed for the purpose of interfering with the real party's traditional right to choice of forum, an unethical tactic well known to Thompson Coe attorneys.²⁹

99. Bobbie G. Bayless had no business dragging the Brunsting inter vivos trusts into a probate court under any theory.³⁰ In discussing the federal policy of abstention in regard to applications for anti-suit injunctions seeking to enjoin state court proceedings, the Fifth Circuit Court of Appeal had this to say: (*emphasis mine*)

²⁹ Thompson Coe attorneys were chastised by the Texas Supreme Court for this same conduct on January 25, 2019, *In re Houston Specialty Ins. Co.* 569 S.W.3d 138 (Tex. 2019)

³⁰ Texas Property Code - PROP § 112.035 (a), (g)(1)(A), (B)(i)





("We believe that our laws and judicial system are adequate to ferret out and prevent collusion. . . ."); cf. Whitworth v. Bynum, 699 S.W.2d 194, 197 (Tex. 1985)

102. It seems rather apparent that these state court actions were improperly filed for the purpose of interfering with the jurisdiction of the federal court and depriving the real party of the traditional right to choice of forum.

Want or Excess of Jurisdiction

103. Disobedience of an Order issued without or in excess of jurisdiction constitutes no punishable wrong. *See Alfonso v. Skadden*, 251 S.W.3d 52, 55 (Tex. 2008) (recognizing that lack of subject matter jurisdiction may be raised at any time, including in action to enforce underlying judgment, if void for lack of jurisdiction); *Browning v. Prostok*, 165 S.W.3d 336, 346 (Tex. 2005) (stating that only void judgment, which includes judgment rendered by court lacking subject matter jurisdiction, may be collaterally attacked); *Stewart v. USA Custom Paint Body Shop, Inc.*, 870 S.W.2d 18, 20 (Tex. 1994). *Glassman v. Goodfriend*, 347 S.W.3d 772, 778-79 (Tex. App. 2011)

"The jurisdiction of all Texas courts ... derives from the Texas Constitution and state statutes. Absent an express constitutional or statutory grant, we lack jurisdiction to decide any case." In re Allcat Claims Serv., L.P., 356 S.W.3d 455, 460 (Tex.2011) (citing *Chenault v. Phillips*, 914 S.W.2d 140, 141 (Tex.1996) (per curiam)).

104. This Court terminated its plenary powers by its own hand when it approved the inventory and administratively closed the estate on April 4, 2013.

Judicial action taken after the trial court's plenary power has expired is void. Sw. Bell Tel. Co., 35 S.W.3d at 605; *State ex. rel Latty v. Owens*, 907 S.W.2d 484, 486 (Tex.1995); see also *Scott & White*





Mem'l Hosp. v. Schexnider, 940 S.W.2d 594, 596 n. 2 (Tex.1996) (declaring that court cannot issue sanctions order after its plenary power has expired); *Mapco, Inc. v. Forrest*, 795 S.W.2d 700, 703 (Tex.1990) (defining a void judgment as one rendered when a court has no jurisdiction over the parties or subject matter, no jurisdiction to render judgment, or no capacity to act as a court).

105. A trial court has inherent power to sanction bad faith conduct *during the course of litigation that interferes with administration of justice or the preservation of the court's dignity and integrity*. *Onwuteaka v. Gill*, 908 S.W.2d 276, 280 (Tex.App.-Houston [1st Dist.] 1995, no writ); *Metzger v. Sebek*, 892 S.W.2d 20, 51 (Tex.App.-Houston [1st Dist.] 1994, writ denied); see *Eichelberger v. Eichelberger*, 582 S.W.2d 395, 399 (Tex.1979). The power may be exercised to the extent necessary to deter, alleviate, and counteract bad faith abuse of the judicial process, such as any significant interference with the traditional core functions of the court. See *Lawrence v. Kohl*, 853 S.W.2d 697, 700 (Tex.App.-Houston [1st Dist.] 1993, no writ). These core functions include hearing evidence, deciding issues of fact raised by the pleadings, deciding questions of law, rendering final judgments, and enforcing judgments. See *Dallas Cnty. Constable Pct. 5 v. KingVision Pay-Per-View, Ltd.*, 219 S.W.3d 602, 610 (Tex.App.-Dallas 2007, no pet.).

106. The inherent power to sanction, however, has limits. *Gill*, 908 S.W.2d at 280. Because inherent power is “ ‘shielded from direct democratic controls, [it] must be exercised with restraint and discretion.’ ” *Shepherd v. Am. Broad. Cos.*, 62 F.3d 1469, 1475 (D.C.Cir.1995) , *quoted in Crowe v. Smith*, 151 F.3d 217, 226 (5th Cir.1998) (internal quotation omitted). Inherent power exists only to the extent necessary to deter, alleviate, and counteract bad faith abuse of the judicial process,



such as significant interference with the core judicial functions of Texas courts. *See Lawrence*, 853 S.W.2d at 699–700.

107. Inherent power is not a substitute for plenary power. *See Lane Bank Equip. Co. v. Smith So. Equip.*, 10 S.W.3d 308, 311 (Tex.2000) (citing *Hjalmarson v. Langley*, 840 S.W.2d 153, 155 (Tex.App.-Waco 1992, orig. proceeding)). Consequently, a court cannot rely on its inherent power to issue sanctions after its plenary power has expired. *Scott & White Mem'l Hosp.*, 940 S.W.2d at 596 & n. 2.

CONCLUSION

108. Probate is covered under Title 2 of the Estates Code, guardianship is governed under Title 3 and definitions are in Title 1. Trusts are covered under Subtitles A-C of Title 9 of the Texas Property Code, which is a different set of books entirely. The Brunsting Trust is not an asset of any probate estate.

109. There was no administration of any core estate “pending” in the probate court on April 9, 2013 when ancillary action 412249-401 was filed. Therefore, ancillary action number 412249-401 was filed "ancillary" or "pendent" to nothing, and this court was without jurisdiction to take cognizance of those claims.

110. There was no administration of any core estate “pending” in the probate court on June 6, 2014 when the Order Accepting Remand of Candace Louise Curtis No. 4:12-cv-592 from the federal court to Probate Court No. 4 was entered and the remand was received by this court "ancillary" or "pendent" to nothing.

111. The District Court action was not filed by a proper party plaintiff (real party in interest) and there was no administration of the estates “pending” in the probate



Harris



court on April 4, 2019 when this Court entered an Order to transfer the District Court case to the probate court.

112. This court could not exercise ancillary jurisdiction over the Brunsting trust because cause No. 412249-401 involving the Brunsting trust controversy is not incident to an estate,³¹ nor was an estate “pending” in the probate court when 412249-401 was filed.

113. This court cannot exercise its original jurisdiction over an inter vivos trust already in the custody of another court.

114. The Estates of Elmer and Nelva Brunsting are not the real party in interest to claims involving the trust administration and neither state court action was properly filed by a plaintiff with standing. If they were valid at the time filed, a competent co-trustee would have substituted for the interim Plaintiff long ago.

115. Defendants are not trustees and have performed no affirmative duties for the benefit of the other beneficiaries. Quite the contrary, Defendants have held the property of the other beneficiaries conditional on the other beneficiaries surrendering a portion of their property to pay for Defendants’ own transgressions. At the same time Defendants continued making in Terrorem threats based upon vague conclusory assertions.

116. This Court’s jurisdiction over the Brunsting Trust was not properly invoked and therefore this Court is without subject matter jurisdiction.

³¹ The remedial estate is incident to the trust as the trust is the sole devisee. The estate is not a beneficiary of the trust and neither are the attorneys.





I, Teneshia Hudspeth, County Clerk of Harris County, Texas certify that these pages are a true and correct copy of the original record filed and recorded in my office, electronically or hard copy, as it appears on this date.

Witness my official hand and seal of office
This July 5, 2022

Teneshia Hudspeth, County Clerk
Harris County, Texas

Confidential information may have been redacted from the document in compliance with the Public Information Act.



TAB 50

Teneshia Hudspeth

County Clerk Harris County, Texas



CAUSE NO. 412,249-404

IN THE ESTATE OF § IN THE PROBATE COURT
NELVA E. BRUNSTING, § NUMBER FOUR OF
DECEASED § HARRIS COUNTY, TEXAS

ORDER DENYING CANDACE LOUISE CURTIS'
PETITION FOR BILL OF REVIEW

On February 14, 2019, the Court signed an Order Denying Candace Louise Curtis' Plea to the Jurisdiction filed October 19, 2018 and Candace Louis Curtis' Verified Plea in Abatement. Nine plus months later, on November 21, 2019 Candace Louise Curtis filed her Statutory Bill of Review complaining of the February 14, 2019 Order.

Having considered the Statutory Bill of Review filed by Candace Louise Curtis, the responsive pleadings and Brief in Response to her Bill of Review, the evidence if any, and the applicable law, the Court is of the opinion that the Bill of Review should be DENIED. It is therefore,

ORDERED that the Statutory Bill of Review filed by Candace Louis Curtis is DENIED. By this Order, the Court disposes of all claims, causes of action, and parties under Cause No. 412,249-404. This is a final judgment.

SIGNED this 3/2/2022 day of March, 2022.

Kathleen S. Stone

cc Presiding Judge





I, Teneshia Hudspeth, County Clerk of Harris County, Texas certify that these pages are a true and correct copy of the original record filed and recorded in my office, electronically or hard copy, as it appears on this date.

Witness my official hand and seal of office
This July 5, 2022

Teneshia Hudspeth, County Clerk
Harris County, Texas

Confidential information may have been redacted from the document in compliance with the Public Information Act.



CAUSE NO. 412,249-404

IN THE ESTATE OF § IN THE PROBATE COURT
NELVA E. BRUNSTING, § NUMBER FOUR OF
DECEASED § HARRIS COUNTY, TEXAS

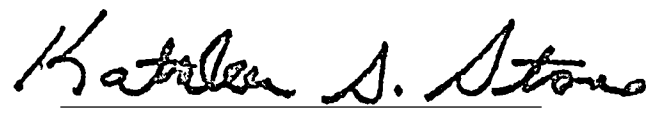
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ORDERED that the Statutory Bill of Review filed by Candace Louis Curtis is DENIED. By this Order, the Court disposes of all claims, causes of action, and parties under Cause No. 412,249-404. This is a final judgment.

SIGNED this 3/2/2022 day of March, 2022.


cc Presiding Judge

COPY

12/01/2014 Designation

OF EXPERT
WITNESSES Film code
number PBT-2014-
385649

Designation 15

11/18/2014 RECEIPT

http://www.hcclerk.net/Applications/MasterInquiry/CourtSearch_R.aspx?ID=5rboVfNJYS... 8/22/2019

Confidential information may have been redacted from the document in compliance with the Public Information Act.

A Certified Copy
Attest: 8/22/2019
Diane Trautman, County Clerk
Harris County, Texas



Deputy



CON:471457|0

Olivia Guerrero

TAB 51

The Mendel Law Firm, L.P.

Attorneys & Counselors
1155 Dairy Ashford, Suite 104
Houston, TX 77079

Anita K. Brunsting
801 Bassington Court
Pflugerville, TX 78660

In Reference To: C.A. No. 412249 & 412249-401; *Candace Curtis v. Anita Brunsting, Et Al*; In Probate Court No. 4, Harris County, Texas.

C.A. No. 412249 & 412249-402; *Candace Curtis v. Anita Brunsting, Et Al - Plea in Abatement*; In Probate Court No. 4, Harris County, Texas.

C.A. No. 412249 & 412249-403; *Carl Henry Brunsting, Executor of the Estates of Elmer H. Brunsting & Nelva E. Brunsting; v. Candace L. Kunz-Greed & Vacek & Freed, PLLC*; In Probate Court No. 4, Harris County, Texas (transfer of C.A. 2013-05455 from the 164th District Court, Harris County, Texas).

C.A. No. 412249 & 412249-404; *Candace Curtis v. Anita Brunsting, Et Al - Bill of Review*; In Probate Court No. 4, Harris County, Texas.

Professional Services

		<u>Hrs/Rate</u>		<u>Amount</u>	
9/10/2014	SAM	Conferred with prepared correspondence to	0.50 395.00/hr	Canda L120	NO CHARGE
9/17/2014	SAM	Reviewed the court's file re case status; reviewed authorities re	0.60 395.00/hr	Litiga L120	\$237.00
9/26/2014	SAM	Prepared for and met with conferred with	3.00 395.00/hr	Canda L120	\$1,185.00
	BEF	Reviewed probate court records, federal court records, district court Vacek & Freed records, and District Court Rule 202 records re status and	2.40 295.00/hr	Canda L110	\$708.00

			<u>Hrs/Rate</u>	<u>Amount</u>	
allegations in the various cases and potential issues regarding trust and related issues; prepared multiple correspondence to					
9/26/2014	BEF	Met with	3.00 295.00/hr	Canda L110	NO CHARGE
10/13/2014	SAM	Prepared for and attended telephone conference with	1.50 395.00/hr	Canda L120	\$592.50
		conferred with			
		conferred with			
	BEF	Conferred with	0.20 295.00/hr	Canda L120	NO CHARGE
10/17/2014	BEF	Reviewed documents produced by former counsel re deadlines.	0.20 295.00/hr	Canda L120	\$59.00
10/21/2014	SAM	Prepared the engagement letter; prepared correspondence to	0.30 395.00/hr	Canda L120	NO CHARGE
10/26/2014	SAM	Finalized the engagement letter for prepared correspondence to	0.20 395.00/hr	Canda Admi	NO CHARGE
10/30/2014	SAM	Reviewed correspondence from reviewed file re	0.30 395.00/hr	Canda L120	\$118.50
	BEF	Reviewed J. Ostrom's request for distribution.	0.30 295.00/hr	Canda L120	\$88.50
11/5/2014	SAM	Reviewed the court's file; prepared correspondence to	0.60 395.00/hr	Canda L120	\$237.00
	LGR	Reviewed and updated the litigation files; conferred with K. Clairmont re same.	0.30 129.50/hr	Litiga L140	NO CHARGE
11/6/2014	KRC	Reviewed notice of hearing; updated pleadings index.	0.20 129.50/hr	Litiga L140	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
11/7/2014	BRD	Reviewed the court's records and obtained a copy of the case files.	0.80 129.50/hr	Canda L190	\$103.60
11/10/2014	SAM	Reviewed correspondence from conferred with	0.20 395.00/hr	Canda L120	\$79.00
	BRD	Reviewed and organized client documents; conferred with	0.50 129.50/hr	Canda L140	\$64.75
	BRD	Reviewed and organized client documents.	0.80 129.50/hr	Canda L140	\$103.60
	BEF	Reviewed motion to modify preliminary injunction.	0.10 295.00/hr	Canda L120	\$29.50
11/11/2014	BRD	Reviewed and organized client documents.	0.80 129.50/hr	Canda L140	\$103.60
11/12/2014	BRD	Prepared notice of appearance.	1.30 129.50/hr	Canda L190	NO CHARGE
11/13/2014	SAM	Conferred with	0.30 395.00/hr	Canda L120	NO CHARGE
	SAM	Prepared file memo re status of the case.	0.20 395.00/hr	Canda L120	\$79.00
	BRD	Prepared notice of appearance.	0.80 129.50/hr	Canda L190	\$103.60
	BEF	Reviewed Mills Shirley case files re case history.	1.00 295.00/hr	Canda L110	\$295.00
11/14/2014	SAM	Conferred with finalized the notice of appearance; prepared correspondence to	1.10 395.00/hr	Canda L120	\$434.50
	BRD	Conferred with prepared notice of appearance.	0.50 129.50/hr	Canda L190	\$64.75

			<u>Hrs/Rate</u>		<u>Amount</u>
11/19/2014	BEF	Reviewed supplemental bank statements and spreadsheets prepared by prepared statements for production; reviewed file re prior production.	0.90 295.00/hr	Canda L320	\$265.50
	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L320	NO CHARGE
	BEF	Reviewed the trusts re trustee obligations and rights; met with	0.90 295.00/hr	Trust L120	\$265.50
11/20/2014	KRC	Reviewed and organized client documents; updated pleadings index.	0.30 129.50/hr	Litiga L190	NO CHARGE
	BEF	Prepared statements for production; prepared correspondence to counsel re same; reviewed correspondence from B. Bayless re Edward Jones statements; reviewed file re same.	1.30 295.00/hr	Carl L320	\$383.50
	BEF	Prepared correspondence to ; prepared correspondence to	0.30 295.00/hr	Trust L320	NO CHARGE
11/21/2014	TTT	Conferred with reviewed file re same; reviewed authorities re removal of the trustee and various causes of action against the trustee.	1.00 295.00/hr	Canda L120	\$295.00
	KRC	Conferred with reviewed and organized client documents.	0.30 129.50/hr	Litiga L190	NO CHARGE
	BEF	Prepared stock statements for production and reviewed same; reviewed various spreadsheets and pleadings re reviewed gifting analysis.	3.00 295.00/hr	Trust L320	\$885.00
12/2/2014	SAM	Conferred twice with	0.80 395.00/hr	Canda L120	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>
12/2/2014	BEF	0.30 295.00/hr	Trust L120	NO CHARGE
	BEF	2.10 295.00/hr	Canda L250	\$619.50
12/3/2014	SAM	0.60 395.00/hr	Canda L120	\$237.00
	TTT	0.30 295.00/hr	Trust L120	NO CHARGE
	BEF	5.80 295.00/hr	Canda L240	\$1,711.00
12/5/2014	SAM	0.80 395.00/hr	Canda L240	\$316.00
	BEF	3.10 295.00/hr	Carl L250	\$914.50

reviewed trust instruments re same; prepared response to Carl Brunsting's motion for distribution of trust fund to pay creditor-attorneys; prepared response to Carl Brunsting's motion to remove Anita & Amy as co-trustees; prepared exhibits re same; conferred with

		<u>Hrs/Rate</u>		<u>Amount</u>
	met with			
12/5/2014	BEF Reviewed authorities re	3.00 295.00/hr	Canda L250	\$885.00
	prepared response to C. Curtis' motion for distribution of trust fund to pay creditor-attorneys; prepared exhibits re same; conferred with met with			
	BEF Prepared correspondence to	0.10 295.00/hr	Litiga L250	NO CHARGE
12/8/2014	BEF Prepared correspondence to	0.20 295.00/hr	Litiga L120	NO CHARGE
	BEF Reviewed C. Curtis' reply and response to motion for distribution of funds; reviewed authorities cited therein re prepared correspondence to	1.10 295.00/hr	Canda L120	\$324.50
12/9/2014	SAM Conferred with	0.20 395.00/hr	Litiga L250	NO CHARGE
	BEF Prepared for, traveled to, attended, and returned from hearing on motions to disburse trust funds to C. Curtis' attorneys; motions denied by court; prepared orders denying C. Curtis' motions; authorities showing error in C. Curtis' logic with respect to implicit argument that legislature included attorneys fees as necessities; met with J. Ostrom and B. Bayless post-hearing re potential settlement and case history; met with C. Reed prior to the hearing re status of the Vacek litigation; met with	3.50 295.00/hr	Canda L230	\$1,032.50

		<u>Hrs/Rate</u>		<u>Amount</u>
12/9/2014	BEF	3.60 295.00/hr	Carl L230	\$1,062.00
	BEF	0.40 295.00/hr	Carl L120	\$118.00
12/10/2014	BEF	0.80 295.00/hr	Carl L120	\$236.00
	BEF	0.70 295.00/hr	Carl L320	\$206.50
	BEF	1.40 295.00/hr	Canda L320	\$413.00
12/11/2014	SAM	1.30 395.00/hr	Canda L120	\$513.50
	BEF	4.00 295.00/hr	Canda L120	\$1,180.00

Prepared for, traveled to, attended, and returned from hearing on motions to disburse trust funds to Carl Brunsting's attorneys; motions denied by court; prepared orders denying Carl Brunsting's motions; authorities showing error logic with respect to implicit argument that legislature included attorneys fees as necessities; met with J. Ostrom post-hearing re potential settlement and case history; met with C. Reed prior to the hearing re status of the Vacek litigation; met with

Conferred with

Conferred with

Prepared supplemental document production; conferred with B. Bayless re bond liquidation; prepared correspondence to all counsel re same; reviewed objection from B. Bayless and prepared response citing specific language in the court order.

Reviewed Mills Shirley file re apparently missing documents and files from the federal case; prepared correspondence to reviewed trust instrument re claims and defenses in the case and varying standards for Anita's decisions;

Reviewed the decedent's trust, survivor's trust, the QBD trust; conferred with

conferred with ; conferred with

Conferred with prepared outline of the case and extensively review of trust documents and


			<u>Hrs/Rate</u>		<u>Amount</u>
		potential ambiguities and arguments related to same; conferred with reviewed authorities re			
12/12/2014	TTT	Conferred with	0.30 295.00/hr	Canda L120	\$88.50
	BEF	Conferred with	0.40 295.00/hr	Canda L120	NO CHARGE
	BEF	Reviewed file re	2.50 295.00/hr	Canda L310	\$737.50
		conferred with J. Ostrom re C. Curtis' failure to provide mandatory disclosures in federal case; prepared request for disclosure; conferred with			
		prepared plea to the jurisdiction and related issues re federal injunction.			
	BEF	Reviewed file re	2.40 295.00/hr	Carl L310	\$708.00
		prepared request for disclosure; conferred with			
		prepared plea to the jurisdiction and related issues re federal injunction.			
12/16/2014	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L310	NO CHARGE
1/9/2015	BEF	Reviewed correspondence re proposed deposition dates; reviewed file re injunction and problems with the federal court remand or case that was never removed, J. Ostrom nonsuit of injunctive relief, and trust barriers to such injunction.	3.10 295.00/hr	Canda L250	\$914.50

		<u>Hrs/Rate</u>		<u>Amount</u>
1/12/2015	BEF	0.30	Canda	
		295.00/hr	L330	NO CHARGE
	BEF	0.50	Carl	
		295.00/hr	L330	\$147.50
	BEF	0.40	Canda	
		295.00/hr	L330	\$118.00
1/13/2015	SAM	0.40	Canda	
		395.00/hr	L120	\$158.00
	BEF	0.30	Trust	
		295.00/hr	L110	NO CHARGE
	BEF	3.20	Canda	
		295.00/hr	L310	\$944.00
				Reviewed document production and discovery responses exchanged in the case; conferred with prepared correspondence to all counsel re need for new docket control order in light of plaintiff's failure to provide substantive responses to request for disclosure regarding damages, attorneys' fees, and matters in dispute; prepared supplemental responses to request for production and prepared correspondence to
	BEF	2.10	Canda	
		295.00/hr	L120	\$619.50
1/14/2015	BEF	0.30	Litiga	
		295.00/hr	L120	NO CHARGE
	BEF	0.30	Canda	
		295.00/hr	L120	\$88.50
1/21/2015	BEF	0.10	Canda	
		295.00/hr	L110	\$29.50

			<u>Hrs/Rate</u>		<u>Amount</u>
1/22/2015	KRC	Reviewed request for disclosure; updated pleadings index.	0.20 129.50/hr	Canda L140	\$25.90
1/27/2015	BEF	Reviewed C. Curtis' new pleadings.	0.30 295.00/hr	Canda L210	\$88.50
	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L210	NO CHARGE
1/28/2015	BEF	Reviewed client documents re response to issues raised in C. Curtis' petition; conferred with	0.90 295.00/hr	Canda L120	\$265.50
1/29/2015	BEF	Conferred with	0.40 295.00/hr	Canda L120	NO CHARGE
1/30/2015	BL	Conferred with	0.10 129.50/hr	Canda L190	\$12.95
	BEF	Reviewed documents received from reviewed transcript of federal case TRO hearing; prepared correspondence to	1.30 295.00/hr	Canda L310	\$383.50
	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L120	NO CHARGE
2/4/2015	BEF	Conferred with prepared correspondence to reviewed the Wills re executors.	0.70 295.00/hr	Carl L330	\$206.50
2/5/2015	SAM	Conferred with	0.30 395.00/hr	Litiga L120	NO CHARGE
	BEF	Prepared no-evidence motion for summary judgment re Carl Brunsting's allegations and causes of action against A. Brunsting.	0.30 295.00/hr	Carl L240	\$88.50

			<u>Hrs/Rate</u>		<u>Amount</u>
2/5/2015	BEF	Prepared no-evidence motion for summary judgment re C. Curtis' allegations and causes of action against A. Brunsting.	0.30 295.00/hr	Canda L240	\$88.50
	BEF	Reviewed the C. Curtis' pleadings and filings re transfer of federal case and new request for distribution; conferred with	0.70 295.00/hr	Canda L210	\$206.50
	BEF	Prepared correspondence to	0.20 295.00/hr	Canda L210	NO CHARGE
2/6/2015	BEF	Reviewed personal representative issues and claims by personal representatives; conferred with	0.80 295.00/hr	Carl L120	\$236.00
2/17/2015	SAM	Conferred twice with	0.60 395.00/hr	Carl L120	\$237.00
	BEF	Reviewed deposition of Carl Brunsting; prepared correspondence to C. Reed re same and re meeting with him re facts of the case.	1.00 295.00/hr	Carl L330	\$295.00
	BEF	Prepared correspondence to conferred with	0.10 295.00/hr	Carl L120	NO CHARGE
	BEF	Prepared response to C. Curtis' request for distribution, and motion to quash injunction.	0.20 295.00/hr	Canda L120	NO CHARGE
	BEF	Prepared motion to quash injunction; reviewed authorities re	1.10 295.00/hr	Canda L250	\$324.50
	BEF	Prepared response to C. Curtis' motion for distribution; reviewed main case and subdocket re C. Curtis' several filings in wrong case and ensuring responses are filed in wrong case to ensure consideration; reviewed Carol Brunsting's objection to C. Curtis' request; conferred with	2.20 295.00/hr	Canda L250	\$649.00

		<u>Hrs/Rate</u>	<u>Amount</u>		
		; conferred with			
2/18/2015	BEF	Prepared response to C. Curtis' motion for \$40,000 distribution for attorneys' fees; prepared for, traveled to, attended, and returned from court oral hearing on motion for continuance and C. Curtis' motion for distribution; motion for continuance granted; C. Curtis' motion for distribution denied.	4.80 295.00/hr	Canda L230	\$1,416.00
	BEF	Conferred with	0.50 295.00/hr	Carl L230	\$147.50
2/19/2015	KRC	Reviewed request for disclosures; updated pleadings index.	0.20 129.50/hr	Litiga L140	NO CHARGE
	BEF	Prepared correspondence to J. Ostrom re order of consolidation.	0.20 295.00/hr	Canda L250	\$59.00
	BEF	Prepared correspondence to	0.20 295.00/hr	Canda L440	NO CHARGE
	BEF	Reviewed file re B. Bayless inquiries into document production and tax returns; conferred with	0.60 295.00/hr	Trust L320	\$177.00
	BEF	Reviewed Carl Brunsting's motion to resign; reviewed authorities re implications of same.	0.40 295.00/hr	Carl L250	\$118.00
2/20/2015	BEF	Prepared correspondence to C. Reed re court's indication it would bring in legal malpractice case; reviewed C. Curtis' emails re objections to her appointment.	0.50 295.00/hr	Canda L120	\$147.50
2/23/2015	BEF	Conferred with	1.10 295.00/hr	Canda L120	\$324.50

		<u>Hrs/Rate</u>		<u>Amount</u>
2/23/2015	BEF Reviewed tax documents from reviewed IRS forms re same.	0.20 295.00/hr	Trust L310	\$59.00
2/25/2015	BEF Reviewed the trust 2013 1041 tax returns. 	0.20 295.00/hr	Trust L320	\$59.00
2/26/2015	BEF Reviewed C. Curtis' response to request for disclosures and alleged damages; compared allegations to financial records and unable to reconcile; conferred with J. Ostrom re where allegations arose from; reviewed master's report and determined reviewed emails and correspondence in the federal case re	3.00 295.00/hr	Canda L110	\$885.00
	BEF Conferred with	0.80 295.00/hr	Canda L120	\$236.00
	BEF Conferred with reviewed file re same.	0.80 295.00/hr	Canda L120	\$236.00
	BEF Reviewed authorities re conferred with	0.60 295.00/hr	Canda L120	\$177.00
	BEF Prepared supplemental production.	1.30 295.00/hr	Canda L320	\$383.50

			<u>Hrs/Rate</u>		<u>Amount</u>
2/27/2015	BEF	Prepared correspondence to	0.20 295.00/hr	Litiga L110	NO CHARGE
	BEF	Reviewed the recordings of Carl Brunsting re split with D. Brunsting; compared to timeline re same.	0.50 295.00/hr	Carl L110	\$147.50
	BEF	Reviewed file and compiled exhibits re objection to C. Curtis' application for appointment as personal representative; prepared objection re same.	2.10 295.00/hr	Canda L210	\$619.50
3/4/2015	BEF	Prepared correspondence to	0.10 295.00/hr	Trust L120	\$29.50
	BEF	Prepared correspondence to J. Ostrom re filing consolidation order.	0.10 295.00/hr	Canda L250	\$29.50
3/5/2015	BEF	Prepared objection and response to C. Curtis' application for appointment as personal representative; reviewed client documents and discovery produced re same; prepared correspondence to	3.10 295.00/hr	Canda L250	\$914.50
3/9/2015	SAM	Conferred with	0.20 395.00/hr	Litiga L120	NO CHARGE
	BEF	Conferred with	0.30 295.00/hr	Canda L120	NO CHARGE
	BEF	Prepared objection and response to C. Curtis' application for appointment as personal representative; conferred with prepared exhibits re same; prepared correspondence to counsel of record re same.	1.20 295.00/hr	Canda L250	\$354.00
3/10/2015	SAM	Conferred with	0.20 395.00/hr	Trust L120	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>	
3/10/2015	BEF	Reviewed rejected filing re claim of original filing fee due; reviewed government code re same and cited same to rejecting clerk; prepared document for resubmission and explanation of fees permissible under government code.	1.00 295.00/hr	Litiga L210	\$295.00
	BEF	Prepared correspondence to prepared correspondence to	0.20 295.00/hr	Litiga L210	NO CHARGE
	BEF	Reviewed A. Tschirhart's proposed objections and response to C. Curtis' application to be appointed personal representatives of the estates; prepared correspondence to conferred with	1.20 295.00/hr	Canda L210	\$354.00
	BEF	Prepared motion to compel Carl Brunsting to respond to requests for disclosures; prepared exhibits re same; prepared demand to B. Bayless re accounting from Carl Brunsting.	0.80 295.00/hr	Carl L350	\$236.00
	BEF	Prepared motion to compel C. Curtis to respond to requests for disclosures.	0.40 295.00/hr	Canda L350	\$118.00
3/11/2015	SAM	Conferred with	0.20 395.00/hr	Canda L120	\$79.00
	KRC	Reviewed docket control order; updated pleadings index.	0.50 129.50/hr	Canda L140	\$64.75
	BEF	Prepared motion to compel Carl Brunsting to respond to disclosures; conferred with prepared exhibits re same; reviewed authorities re	1.30 295.00/hr	Carl L350	\$383.50

		<u>Hrs/Rate</u>		<u>Amount</u>
3/11/2015	BEF	1.30 295.00/hr	Canda L350	\$383.50
	SAM	0.10 395.00/hr	Carl L350	\$39.50
3/12/2015	BEF	0.60 295.00/hr	Trust L310	\$177.00
3/13/2015	BEF	0.70 295.00/hr	Canda L120	\$206.50
	BEF	0.40 295.00/hr	Canda L310	\$118.00
	BEF	0.30 295.00/hr	Carl L310	\$88.50
3/16/2015	SAM	0.20 395.00/hr	Litiga L120	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>
3/16/2015	BEF	1.80 295.00/hr	Canda L310	\$531.00
3/17/2015	SAM	0.40 395.00/hr	Canda L120	\$158.00
	BEF	0.30 295.00/hr	Canda L120	\$88.50
	BEF	0.80 295.00/hr	Canda L120	\$236.00
	BEF	3.10 295.00/hr	Canda L310	\$914.50
	BEF	0.20 295.00/hr	Canda L120	NO CHARGE
3/18/2015	BEF	1.70 295.00/hr	Canda L110	\$501.50
	BEF	0.30 295.00/hr	Canda L110	NO CHARGE
	BEF	1.70 295.00/hr	Canda L110	\$501.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
3/20/2015	BEF	Conferred with	0.30 295.00/hr	Carl L110	NO CHARGE
3/23/2015	BEF	Reviewed correspondence from prepared correspondence to prepared response re same.	0.20 295.00/hr	Trust L120	NO CHARGE
	BEF	Conferred with prepared for, traveled to, attended, and returned from status conference, hearing on motion to compel, and hearing re estate administrators.	6.20 295.00/hr	Canda L230	\$1,829.00
3/24/2015	BEF	Conferred with	0.30 295.00/hr	Canda L120	NO CHARGE
	BEF	Reviewed trust instruments re distribution request by the court; conferred with	1.10 295.00/hr	Canda L120	\$324.50
3/25/2015	BEF	Reviewed correspondence from Judge Butts re third party administrator.	0.20 295.00/hr	Canda L120	\$59.00
3/26/2015	KRC	Updated pleadings index.	0.20 129.50/hr	Litiga L140	NO CHARGE
	BEF	Conferred with conferred with C. Reed re proposed third party administrators; conferred with colleagues re	1.70 295.00/hr	Canda L120	\$501.50
3/27/2015	SAM	Conferred with	0.30 395.00/hr	Canda L120	NO CHARGE
3/30/2015	BEF	Reviewed C. Curtis' substitution; conferred with J. Ostrom re same; conferred with prepared correspondence	0.90 295.00/hr	Canda L210	\$265.50

		<u>Hrs/Rate</u>		<u>Amount</u>
	to Judge Butts re update on third party administrator.			
3/30/2015	BEF Prepared correspondence to	0.10 295.00/hr	Canda L210	NO CHARGE
4/7/2015	BEF Reviewed correspondence from C. Reed re Vacek & Freed preference on proposed third party administrator; prepared response re C. Curtis terminated counsel; prepared correspondence to conferred with	0.40 295.00/hr	Canda L120	\$118.00
4/10/2015	BEF Prepared correspondence to	0.10 295.00/hr	Canda L120	NO CHARGE
4/17/2015	BEF Prepared supplemental production.	0.40 295.00/hr	Canda L320	\$118.00
5/1/2015	BEF Prepared Iowa tax documents for production.	0.20 295.00/hr	Litiga L320	\$59.00
5/5/2015	BEF Conferred with	0.20 295.00/hr	Trust L320	NO CHARGE
	BEF Conferred with C. Faber re request for tax returns.	0.20 295.00/hr	Trust L320	\$59.00
5/6/2015	BEF Prepared correspondence to	0.10 295.00/hr	Canda L310	NO CHARGE
5/13/2015	BEF Prepared supplemental production.	0.60 295.00/hr	Canda L320	\$177.00
	BEF Conferred with trusting re reviewed file and	0.80 295.00/hr	Canda L120	\$236.00

		<u>Hrs/Rate</u>		<u>Amount</u>
5/15/2015	BEF	0.10 295.00/hr	Litiga L310	NO CHARGE
Prepared correspondence to				
5/18/2015	SAM	0.60 395.00/hr	Canda L120	\$237.00
Conferred twice with				
	TTT	0.30 295.00/hr	Canda L120	NO CHARGE
Conferred with				
	BEF	6.10 295.00/hr	Carl L310	\$1,799.50
Reviewed Carl Brunsting's supplemental response to request for disclosure; conferred with reviewed authorities re				
conferred with prepared outline of remaining issues in the case.				
5/19/2015	SAM	0.30 395.00/hr	Canda L120	NO CHARGE
Conferred with				
	BEF	0.40 295.00/hr	Carl L120	\$118.00
Conferred with				
	BEF	0.30 295.00/hr	Canda L120	\$88.50
Reviewed C. Curtis' motion to show authority, and C. Curtis' interrogatories.				
5/20/2015	BRD	1.00 129.50/hr	Canda L190	\$129.50
Conferred with				
	BEF	0.20 295.00/hr	Canda L310	NO CHARGE
Conferred with				

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/28/2015	SAM	Conferred with reviewed	0.40 395.00/hr	Canda L120	\$158.00
	BEF	Conferred with	0.30 295.00/hr	Carl L310	NO CHARGE
	BEF	Prepared motion for Independent Medical Examination for C. Brunsting; reviewed authorities and case files re	1.70 295.00/hr	Carl L250	\$501.50
	BEF	Prepared answers and objections to C. Curtis' interrogatories; conferred with	2.20 295.00/hr	Canda L310	\$649.00
5/29/2015	BEF	Conferred with B. Bayless re IME for Carl Brunsting, status of personal representatives for estate of Nelva and Elmer, and potential resolution of the case.	0.70 295.00/hr	Carl L160	\$206.50
	KRC	Reviewed notice of hearing; updated pleadings index.	0.20 129.50/hr	Litiga L140	\$25.90
	BEF	Reviewed pleadings and document production re no-evidence motion for summary judgment on C. Curtis' contests to the trust instruments; prepared no-evidence motion for summary judgment re same; prepared correspondence to	1.10 295.00/hr	Canda L240	\$324.50
	BEF	Reviewed pleadings and document production re no-evidence motion for summary judgment on Carl Burnsting's contests to the trust instruments; prepared no-evidence motion for summary judgment re same; prepared correspondence to	1.00 295.00/hr	Carl L240	\$295.00
	BEF	Prepared response and objections to C. Curtis' interrogatories; reviewed authorities re same and discovery limitations; prepared correspondence to	4.20 295.00/hr	Canda L310	\$1,239.00

			<u>Hrs/Rate</u>		<u>Amount</u>
		prepared correspondence to			
5/29/2015	BEF	Conferred with	0.30 295.00/hr	Canda L310	NO CHARGE
6/1/2015	BEF	Reviewed correspondence from with	0.90 295.00/hr	Canda L310	\$265.50
6/4/2015	BEF	Prepared answer and objection to C. Curtis' interrogatories; prepared response to C. Curtis' request for production; prepared supplemental production.	1.20 295.00/hr	Canda L310	\$354.00
	BEF	Prepared correspondence to	0.20 295.00/hr	Canda L310	NO CHARGE
6/16/2015	BEF	Reviewed correspondence from C. Curtis.	0.20 295.00/hr	Canda L120	\$59.00
6/18/2015	BEF	Prepared correspondence to	0.20 295.00/hr	Trust L320	NO CHARGE
6/19/2015	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L120	NO CHARGE
	BEF	Reviewed C. Brunsting and C. Curtis stipulation and medical records for C. Brunsting.	0.50 295.00/hr	Canda L210	\$147.50
	BEF	Prepared motion for summary judgment and reviewed trusts re same; reviewed correspondence from	0.60 295.00/hr	Canda L240	\$177.00
6/23/2015	BEF	Prepared supplemental production.	1.80 295.00/hr	Canda L320	\$531.00

			<u>Hrs/Rate</u>		<u>Amount</u>
6/23/2015	BEF	Reviewed authorities re	1.20 295.00/hr	Canda L240	\$354.00
6/24/2015	SAM	Conferred with	0.30 395.00/hr	Canda L120	NO CHARGE
	BEF	Conferred with	0.20 295.00/hr	Carl L120	NO CHARGE
	BEF	Conferred with	0.20 295.00/hr	Canda L120	NO CHARGE
	SAM	Conferred with	0.30 395.00/hr	Canda L120	NO CHARGE
	BEF	Prepared no-evidence motion for summary judgment; conferred with reviewed trusts and testamentary power of appointment re changes for Carl Brunsting.	2.00 295.00/hr	Carl L240	\$590.00
	BEF	Prepared no-evidence motion for summary judgment; conferred with reviewed trusts and testamentary power of appointment re changes for C. Curtis.	2.00 295.00/hr	Canda L120	\$590.00
6/25/2015	TTT	Reviewed and revised the motion for partial summary judgment; conferred with	0.40 295.00/hr	Canda L120	\$118.00
	BEF	Conferred with	0.30 295.00/hr	Carl L240	\$88.50
	BEF	Conferred with	0.30 295.00/hr	Canda L120	\$88.50

			<u>Hrs/Rate</u>		<u>Amount</u>
6/25/2015	BEF	Prepared motion for summary judgment; conferred with reviewed authorities re	2.80 295.00/hr	Carl L240	\$826.00
		prepared correspondence to per correspondence.		revised	
	BEF	Prepared motion for summary judgment; conferred with reviewed authorities	2.80 295.00/hr	Canda L240	\$826.00
		prepared correspondence to per		revised	
	BEF	Prepared supplemental production; redacted and bates-labeled files re same.	1.30 295.00/hr	Canda L320	\$383.50
	BEF	Prepared supplemental production; redacted and bates-labeled files re same.	1.30 295.00/hr	Carl L320	\$383.50
6/26/2015	LGR	Prepared correspondence to C. Curtis, B. Bayless, D. Smith, and N. Spielman re A. Brunsting's supplemental production.	0.30 129.50/hr	Litiga L190	\$38.85
	BEF	Prepared no-evidence motion for summary judgment for filing; prepared e-service entries for counsel of record; reviewed file re strategy moving forward; prepared supplemental production.	1.10 295.00/hr	Canda L240	\$324.50
6/30/2015	BEF	Reviewed trust and legal authorities re prepared trial brief re same; reviewed authorities re	2.10 295.00/hr	Canda L120	\$619.50
7/1/2015	SAM	Conferred with	0.30 395.00/hr	Canda L120	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
7/1/2015	BEF	Conferred with	0.50 295.00/hr	Canda L120	\$147.50
	BEF	Conferred with D. Smith and Judge Comstock re administrator and hearing on no-evidence motion for summary judgment.	0.60 295.00/hr	Canda L120	\$177.00
	BEF	Prepared and filed expert designation.	0.40 295.00/hr	Canda L130	\$118.00
	BEF	Prepared correspondence to prepared response to prepared response to A. Covey re C. Curtis and Drina Brunsting stipulation.	0.90 295.00/hr	Canda L120	\$265.50
7/6/2015	LGR	Updated and organized client documents.	0.20 129.50/hr	Trust L140	NO CHARGE
7/7/2015	BEF	Prepared correspondence to C. Comstock re whether court will hear no-evidence motion for summary judgment in light of personal representative issue; prepared correspondence to A. Covey re same.	0.20 295.00/hr	Canda L240	\$59.00
7/9/2015	SAM	Conferred with	0.30 395.00/hr	Litiga L120	NO CHARGE
	BEF	Conferred with prepared correspondence to C. Comstock re same and re DCO.	0.50 295.00/hr	Canda L240	\$147.50
7/10/2015	SAM	Conferred with	0.40 395.00/hr	Litiga L120	\$158.00
	BEF	Reviewed Carl Brunsting's motion for summary judgment re power of appointment exercised by Nelva and specifically referenced in the trust invalid because "irrevocable" trust; conferred with	2.40 295.00/hr	Carl L240	\$708.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	; reviewed authorities re prepared correspondence to C. Reed re same; prepared correspondence to Z. Foley re same.			
7/10/2015	BEF Reviewed Carl Brunsting's second supplemental petition.	0.30 295.00/hr	Carl L210	\$88.50
7/13/2015	SAM Conferred with	0.20 395.00/hr	Canda L310	NO CHARGE
	LGR Reviewed and organized client documents.	0.20 129.50/hr	Trust L140	NO CHARGE
	BEF Prepared notice of hearing on no-evidence motion for summary judgment; conferred with	0.30 295.00/hr	Canda L240	\$88.50
7/14/2015	BEF Conferred with	0.60 295.00/hr	Litiga L120	\$177.00
	BEF Conferred with B. Bayless re alleged improperly recorded conversations and videos; conferred with reviewed authorities cited by B. Bayless.	0.90 295.00/hr	Carl L110	\$265.50
	KRC Reviewed notice of hearing; updated pleadings index.	0.20 129.50/hr	Canda L190	NO CHARGE
7/20/2015	BEF Reviewed Carl Brunsting's motion for summary judgment and motion for protective order and claims re same; conferred with reviewed case file re prior counsel's production; reviewed authorities re alleged illegal recordings.	1.20 295.00/hr	Carl L240	\$354.00
	SAM Reviewed B. Bayless motion for protection re wire tap issues.	0.30 395.00/hr	Carl L350	\$118.50
7/21/2015	BEF Reviewed the recordings of Drina Brunsting.	0.20 295.00/hr	Carl L110	\$59.00

		<u>Hrs/Rate</u>		<u>Amount</u>
7/21/2015	BEF	5.30 295.00/hr	Canda L230	\$1,563.50
7/22/2015	BEF	0.50 295.00/hr	Carl L120	\$147.50
7/23/2015	BEF	0.50 295.00/hr	Carl L250	\$147.50
	BEF	1.10 295.00/hr	Canda L350	\$324.50
7/29/2015	BEF	0.50 295.00/hr	Carl L320	\$147.50
7/30/2015	SAM	0.20 395.00/hr	Canda L120	NO CHARGE
	BEF	2.10 295.00/hr	Carl L350	\$619.50

			<u>Hrs/Rate</u>		<u>Amount</u>
7/31/2015	BEF	Reviewed joint response to motion for protective order and conferred with	0.60 295.00/hr	Canda L350	\$177.00
8/3/2015	LGR	Prepared response to request for production.	0.30 129.50/hr	Canda L190	\$38.85
	BEF	Conferred with	0.80 295.00/hr	Canda L120	\$236.00
	BEF	Prepared for, traveled to, attended, and returned from hearing on Carl Brunsting's motion for protective order.	3.20 295.00/hr	Carl L230	\$944.00
	BEF	Reviewed and revised response to Carl Brunsting's request for production; reviewed authorities re options in light of claimed protective order; conferred with	3.60 295.00/hr	Carl L320	\$1,062.00
8/4/2015	BEF	Reviewed correspondence from C. Comstock re proposed order on protective order; conferred with prepared response and objections to proposed protective order and reviewed authorities re	2.60 295.00/hr	Canda L350	\$767.00
8/11/2015	BEF	Reviewed C. Curtis' response to motion for protective order.	0.30 295.00/hr	Canda L350	\$88.50
8/13/2015	BEF	Reviewed authorities re	0.50 295.00/hr	Carl L240	\$147.50
8/21/2015	SAM	Reviewed correspondence from B. Bayless re discovery intended for use at trial; reviewed the file re same.	0.30 395.00/hr	Carl L310	\$118.50
8/24/2015	BEF	Conferred with	0.20 295.00/hr	Trust L120	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
9/8/2015	BEF	Prepared correspondence to prepared supplemental production.	0.20 295.00/hr	Trust L110	\$59.00
9/9/2015	BEF	Conferred with	0.30 295.00/hr	Litiga L250	NO CHARGE
	BEF	Prepared response and objection to G. Lester motion to retain counsel and filed same; prepared multiple correspondence to conferred with	2.80 295.00/hr	Canda L250	\$826.00
9/10/2015	BEF	Prepared for, traveled to, attended, and returned from hearing on G. Lester's motion to retain counsel; met with G. Lester and N. Spielman post-hearing re facts of the case.	3.80 295.00/hr	Canda L230	\$1,121.00
	BEF	Conferred with	0.30 295.00/hr	Litiga L230	NO CHARGE
9/15/2015	BEF	Prepared supplemental production.	0.20 295.00/hr	Litiga L320	\$59.00
9/17/2015	SAM	Conferred twice with	0.60 395.00/hr	Canda L120	\$237.00
	BEF	Prepared for meeting with G. Lester; reviewed trust instruments, federal lawsuit, master's report, master report transcript, Carole's deposition, and source documents for master's report re same; conferred with	7.20 295.00/hr	Canda L110	\$2,124.00
9/18/2015	BEF	Conferred with	0.30 295.00/hr	Litiga L120	NO CHARGE
	BEF	Prepared for and met with G. Lester re facts of the case, amount in controversy, and estate claims.	5.50 295.00/hr	Canda L160	\$1,622.50
9/24/2015	BEF	Prepared correspondence to G. Lester confirming limited role of counsel.	0.20 295.00/hr	Canda L120	\$59.00

			<u>Hrs/Rate</u>		<u>Amount</u>
11/4/2015	BEF	Prepared correspondence to G. Lester re attorneys fees issues and value of the farm; reviewed appraisal district records and file re same.	0.90 295.00/hr	Canda L120	\$265.50
11/5/2015	BEF	Prepared correspondence to	0.20 295.00/hr	Trust L120	NO CHARGE
	BEF	Reviewed file re response to G. Lester request for appraisal and attorneys' fees issue.	0.30 295.00/hr	Canda L120	\$88.50
11/9/2015	BEF	Prepared supplemental production; prepared correspondence to G. Lester re attorneys' fees and appraisal.	0.60 295.00/hr	Canda L320	\$177.00
11/10/2015	BEF	Conferred with A. Covey re case status and mediation with Judge Butts.	0.30 295.00/hr	Litiga L120	\$88.50
1/13/2016	BEF	Prepared correspondence to	0.20 295.00/hr	Canda L120	NO CHARGE
	BEF	Prepared supplemental production.	0.20 295.00/hr	Canda L320	\$59.00
1/14/2016	SAM	Conferred with	0.20 395.00/hr	Canda L120	\$79.00
	KRC	Reviewed and organized client documents.	0.20 129.50/hr	Trust L140	NO CHARGE
	BEF	Reviewed Lester report; conferred with	0.70 295.00/hr	Canda L120	\$206.50
	BEF	Prepared correspondence to	0.20 295.00/hr	Canda L120	NO CHARGE
1/15/2016	BEF	Conferred with	0.40 295.00/hr	Canda L120	\$118.00

			<u>Hrs/Rate</u>		<u>Amount</u>
1/18/2016	BEF	Prepared correspondence to B. Bayless re Lester report; conferred with B. Bayless re mediators and status of the case.	0.60 295.00/hr	Carl L160	\$177.00
	BEF	Conferred with prepared outline of strategy issues re same.	0.70 295.00/hr	Canda L160	\$206.50
1/19/2016	KRC	Reviewed and organized client documents.	0.10 129.50/hr	Litiga L190	NO CHARGE
1/20/2016	BEF	Conferred with	0.90 295.00/hr	Canda L120	\$265.50
1/26/2016	BEF	Reviewed C. Curtis' motion for summary judgment, which completely contradicts the court appointed temporary administrator's report re trust documents.	0.30 295.00/hr	Canda L240	\$88.50
	BEF	Prepared correspondence to	0.10 295.00/hr	Canda L240	NO CHARGE
1/28/2016	BEF	Conferred with	0.60 295.00/hr	Canda L120	\$177.00
	BEF	Conferred with file re same.	0.80 295.00/hr	Canda L120	\$236.00
	BEF	Prepared correspondence to A. Covey re status of the case and mediators.	0.20 295.00/hr	Canda L120	\$59.00
1/29/2016	BEF	Prepared correspondence to	0.10 295.00/hr	Litiga L120	NO CHARGE
2/8/2016	BEF	Prepared correspondence to	0.10 295.00/hr	Litiga L120	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
2/10/2016	BEF	Reviewed E. Andell's CV and correspondence re mediators.	0.10 295.00/hr	Canda L160	\$29.50
2/19/2016	BEF	Prepared correspondence to counsel re status conference.	0.10 295.00/hr	Canda L120	\$29.50
2/24/2016	SAM	Conferred with	0.30 395.00/hr	Canda L120	\$118.50
	BEF	Met with	0.30 295.00/hr	Litiga L120	NO CHARGE
2/26/2016	SAM	Conferred with A. Covey re pending issues and mediators; prepared correspondence to A. Covey re same; reviewed correspondence from Carole Brunsting re termination of the Crain Caton representation; prepared correspondence to	0.50 395.00/hr	Litiga L190	\$197.50
3/1/2016	SAM	Reviewed the file re conferred with correspondence to with	2.30 395.00/hr	Canda L120	\$908.50
		prepared conferred			
3/2/2016	SAM	Conferred with	0.30 395.00/hr	Litiga L120	NO CHARGE
3/3/2016	SAM	Prepared file memo re pending issues.	0.50 395.00/hr	Canda L120	\$197.50
	KRC	Reviewed correspondence re motion to transfer.	0.10 129.50/hr	Litiga L190	NO CHARGE
3/4/2016	SAM	Reviewed new filings with the court.	0.30 395.00/hr	Canda L120	\$118.50
3/7/2016	SAM	Reviewed the file re production and related outstanding issues; prepared outline re same.	1.00 395.00/hr	Canda L120	\$395.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
3/8/2016	SAM	Reviewed the file re status conference hearing; prepared issue outline re same.	0.60 395.00/hr	Canda L120	\$237.00
	KRC	Prepared designation of attorney in charge; prepared correspondence to the court re same.	0.50 129.50/hr	Canda L190	NO CHARGE
3/9/2016	SAM	Prepared for, traveled to, attended, and returned from extended status conference with the court.	5.00 395.00/hr	Canda L230	\$1,975.00
	KRC	Reviewed and organized client documents; updated pleadings index.	0.20 129.50/hr	Litiga L140	NO CHARGE
3/10/2016	SAM	Reviewed correspondence from and prepared correspondence to S. Griffin re strategy issues; reviewed the file re outstanding issues; prepared	1.30 395.00/hr	Canda L120	\$513.50
	KRC	Reviewed correspondence from the court re mediation.	0.10 129.50/hr	Canda L190	NO CHARGE
3/15/2016	SAM	Reviewed correspondence from the court re mediation of the case.	0.10 395.00/hr	Canda L120	NO CHARGE
3/17/2016	SAM	Reviewed correspondence from the parties re mediation with Judge Davidson.	0.20 395.00/hr	Canda L160	\$79.00
3/18/2016	SAM	Conferred with	0.40 395.00/hr	Canda L120	\$158.00
3/19/2016	SAM	Prepared for and conferred with prepared file memo re same.	1.80 395.00/hr	Canda L120	\$711.00
3/26/2016	SAM	Reviewed correspondence from the parties re mediation of the case.	0.20 395.00/hr	Canda L120	\$79.00
3/27/2016	SAM	Reviewed multiple correspondence re mediation of the case; prepared correspondence to Judge Davidson re same.	0.20 395.00/hr	Canda L160	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>
3/28/2016	SAM	Reviewed correspondence from	0.10 395.00/hr	Litiga L160 NO CHARGE
3/29/2016	SAM	Conferred with	0.30 395.00/hr	Litiga L160 NO CHARGE
	TJJ	conferred with	0.70 195.00/hr	Canda L160 \$136.50
3/31/2016	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L120 \$79.00
4/7/2016	SAM	Reviewed the court's file re case status.	0.20 395.00/hr	Litiga L120 NO CHARGE
4/11/2016	EJW	Reviewed case file re report of temporary administrator pending contest	0.30 250.00/hr	Canda L190 NO CHARGE
4/16/2016	SAM	Reviewed correspondence from C. Curtis re motion for sanctions; reviewed same.	0.50 395.00/hr	Canda L250 \$197.50
4/24/2016	SAM	Reviewed correspondence from prepared correspondence to C. Curtis re same.	0.40 395.00/hr	Canda L120 \$158.00
4/26/2016	SAM	Reviewed correspondence from B. Bayless re trust accounting; prepared correspondence to B. Bayless and other beneficiaries re same.	0.30 395.00/hr	Trust L120 \$118.50
4/29/2016	SAM	Prepared correspondence to and reviewed correspondence from prepared outline re accounting update and document production.	0.50 395.00/hr	Canda L120 \$197.50
5/3/2016	SAM	Met with file memo re same.	1.50 395.00/hr	Canda L120 \$592.50

		<u>Hrs/Rate</u>		<u>Amount</u>
5/4/2016 SAM	Conferred with conferred with reviewed the production to date; prepared correspondence to the parties re same.	1.50 395.00/hr	Canda L310	\$592.50
TJJ	Prepared spreadsheet re trust distribution analysis; conferred with	1.70 195.00/hr	Canda L440	\$331.50
5/5/2016 TJJ	Prepared spreadsheet re trust distribution analysis.	2.90 195.00/hr	Canda L440	\$565.50
5/10/2016 SAM	Reviewed bank, brokerage, and tax documents produced by prepared correspondence to prepared correspondence to the parties re same	2.70 395.00/hr	Canda L310	\$1,066.50
TJJ	Reviewed file to confirm and update documents produced and to be produced.	2.50 195.00/hr	Canda L320	\$487.50
5/11/2016 TJJ	Reviewed file to confirm and update documents produced and to be produced.	2.00 195.00/hr	Canda L320	\$390.00
5/12/2016 TJJ	Reviewed file to confirm and update documents produced and to be produced; prepared file memo re same.	1.50 195.00/hr	Canda L320	\$292.50
5/13/2016 TJJ	Reviewed file to confirm and update documents produced and to be produced; prepared file memo re same.	2.10 195.00/hr	Canda L320	\$409.50
5/16/2016 SAM	Reviewed correspondence from reviewed same; reviewed documents to be produced to the parties.	0.60 395.00/hr	Canda L310	\$237.00
TJJ	Reviewed file to confirm and update documents produced and to be produced; reviewed correspondence from	0.70 195.00/hr	Canda L320	\$136.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/16/2016	EJW	Reviewed correspondence from R. Munson re settlement agreement.	0.10 250.00/hr	Canda L190	NO CHARGE
5/17/2016	SAM	Reviewed and organized documents to be produced to the parties; prepared correspondence to the parties re same.	1.30 395.00/hr	Canda L310	\$513.50
	TJJ	Reviewed file to confirm and update documents produced and to be produced; prepared correspondence re production of Bank of America account statements; prepared account statements to be produced.	2.40 195.00/hr	Canda L320	\$468.00
5/18/2016	SAM	Reviewed, organized, and produced the Bank of America statements to the parties.	0.30 395.00/hr	Canda L310	\$118.50
	EJW	Reviewed file re outstanding issues and C. Curtis filing.	0.40 250.00/hr	Canda L190	\$100.00
	TJJ	Prepared correspondence to all parties re production of account statements.	0.40 195.00/hr	Trust L320	\$78.00
5/19/2016	SAM	Prepared correspondence to reviewed documents to produce to the other parties; prepared correspondence to	0.50 395.00/hr	Canda L310	\$197.50
	KSM	Prepared bates labels for the document production.	1.50 129.50/hr	Canda L140	\$194.25
5/20/2016	SAM	Conferred several times with	0.40 395.00/hr	Canda L310	NO CHARGE
	KSM	Prepared bates labels for the document production; conferred with	1.20 129.50/hr	Canda L140	\$155.40
5/23/2016	SAM	Reviewed and organized documents to be produced to all parties; prepared correspondence to the parties re same.	4.30 395.00/hr	Canda L310	\$1,698.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/23/2016	KSM	Prepared bate labels for the document production.	3.00 129.50/hr	Canda L140	\$388.50
5/24/2016	SAM	Reviewed correspondence from and prepared correspondence to B. Bayless re production of documents.	0.20 395.00/hr	Carl L310	NO CHARGE
6/1/2016	SAM	Reviewed correspondence from Judge Davidson re mediation of the case; reviewed correspondence from B. Bayless re same.	0.20 395.00/hr	Litiga L160	\$79.00
6/4/2016	SAM	Reviewed the file re status of production of bank and brokerage statements; prepared correspondence to	0.20 395.00/hr	Litiga L310	\$79.00
6/5/2016	SAM	Prepared correspondence to and reviewed correspondence from	0.20 395.00/hr	Canda L310	NO CHARGE
6/7/2016	SAM	Reviewed the file re documents to produce to the parties; organized same.	0.50 395.00/hr	Canda L310	\$197.50
6/11/2016	SAM	Reviewed the May 2016 bank and brokerage statements; prepared correspondence to the parties re production of same; reviewed correspondence from D. Munson re execution of the settlement agreement.	0.80 395.00/hr	Canda L310	\$316.00
6/13/2016	SAM	Reviewed the temporary administrator's report; reviewed the file re outstanding issues; reviewed the E. Brunsting administration; prepared outline re pending issues.	0.50 395.00/hr	Canda L120	\$197.50
	TJJ	Prepared settlement agreement re trust dispersals.	2.40 195.00/hr	Canda L250	\$468.00
6/14/2016	TJJ	Prepared settlement agreement re trust dispersals; reviewed pleadings and prepared a file memo re claims for motion for summary judgment.	1.90 195.00/hr	Canda L250	\$370.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
6/16/2016	SAM	Reviewed the file re mediation issues; prepared correspondence to	0.20 395.00/hr	Litiga L160	NO CHARGE
6/17/2016	SAM	Conferred with reviewed correspondence from and prepared correspondence to	0.60 395.00/hr	Canda L160	\$237.00
	EJW	Conferred with	0.20 250.00/hr	Litiga L190	NO CHARGE
6/20/2016	EJW	Reviewed the file re outstanding issues; revised the mediation memo.	2.10 250.00/hr	Canda L190	\$525.00
6/21/2016	SAM	Conferred with the court reporter re hearing transcripts requested by C. Curtis; prepared correspondence to the court reporter re same.	0.20 395.00/hr	Canda L120	\$79.00
	EJW	Revised the mediation memo.	0.70 250.00/hr	Canda L190	\$175.00
	SPA	Prepared correspondence to the court re trial transcript request.	0.40 129.50/hr	Canda L190	\$51.80
6/22/2016	SAM	Reviewed and revised the settlement agreement.	1.00 395.00/hr	Canda L120	\$395.00
	EJW	Revised the settlement agreement and mediation memo.	1.20 250.00/hr	Canda L320	\$300.00
6/25/2016	NM	Prepared the settlement agreement.	1.00 129.50/hr	Canda L120	\$129.50
6/27/2016	SAM	Reviewed correspondence from	0.20 395.00/hr	Canda L120	NO CHARGE
	EJW	Revised the mediation memo.	0.40 250.00/hr	Canda L190	\$100.00

		<u>Hrs/Rate</u>		<u>Amount</u>
6/29/2016	SAM Reviewed correspondence from and prepared correspondence to all parties re the mediation.	0.20 395.00/hr	Canda L120	\$79.00
6/30/2016	SAM Conferred with prepared correspondence reviewed accounting documents produced by	1.30 395.00/hr	Canda L160	\$513.50
7/1/2016	SAM Reviewed bank and brokerage statements from reviewed the updated accounting.	0.60 395.00/hr	Trust L310	\$237.00
7/5/2016	SAM Reviewed correspondence from Carole Brunsting re unavailability for the mediation; conferred with prepared correspondence to Carole Brunsting re same; reviewed the 2012 federal lawsuit.	1.00 395.00/hr	Litiga L160	\$395.00
7/6/2016	SAM Reviewed correspondence from reviewed the file re same.	0.80 395.00/hr	Trust L120	\$316.00
	SAM Reviewed correspondence from and prepared correspondence to Judge Davidson's office re the need to reschedule the mediation; reviewed correspondence from and prepared correspondence to B. Bayless re same; reviewed correspondence from and prepared correspondence to reviewed correspondence from	0.80 395.00/hr	Canda L160	\$316.00
7/7/2016	SAM Reviewed correspondence from reviewed correspondence from C. Curtis re Rule 60(b) motion in the 2012 federal court case; prepared correspondence to all parties re same; reviewed correspondence from and prepared correspondence to	0.80 395.00/hr	Canda L120	\$316.00
7/9/2016	SAM Reviewed and organized documents produced in the case; determined additional documents to be produced.	0.60 395.00/hr	Canda L310	\$237.00

		<u>Hrs/Rate</u>		<u>Amount</u>
7/12/2016	SAM Reviewed documents to produce.	0.30 395.00/hr	Canda L120	\$118.50
7/19/2016	SAM Prepared correspondence to all parties re mediation of the case with Judge Davidson.	0.20 395.00/hr	Canda L160	\$79.00
7/26/2016	SAM Reviewed correspondence from and prepared correspondence to all parties re an August mediation; prepared correspondence to	0.50 395.00/hr	Canda L120	\$197.50
7/27/2016	SAM Reviewed the file re mediation issue; prepared correspondence to all parties re same.	0.30 395.00/hr	Canda L160	\$118.50
7/28/2016	SAM Prepared correspondence to prepared correspondence to	0.30 395.00/hr	Canda L160	\$118.50
7/29/2016	SAM Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L120	NO CHARGE
8/3/2016	SAM Prepared correspondence to	0.20 395.00/hr	Canda L160	\$79.00
8/4/2016	SAM Reviewed Rule 60(b) and motion for sanctions filed by C. Curtis in the federal court case.	0.30 395.00/hr	Canda L120	\$118.50
8/11/2016	SAM Conferred with reviewed correspondence from Z. Foley re same.	0.70 395.00/hr	Canda L160	\$276.50
8/25/2016	SAM Reviewed and organized documents produced and to be produced; conferred with	0.30 395.00/hr	Canda L390	\$118.50
	TJJ Conferred with reviewed and organized documents produced and to be produced.	0.40 195.00/hr	Canda L390	\$78.00
8/26/2016	SAM Reviewed and organized documents produced and to be produced; conferred with	1.00 395.00/hr	Canda L390	\$395.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
8/26/2016	TJJ	Reviewed and organized documents produced and to be produced; conferred with	1.80 195.00/hr	Canda L390	\$351.00
8/29/2016	SAM	Reviewed documents produced by	0.80 395.00/hr	Canda L310	\$316.00
	TJJ	Reviewed and organized documents produced and to be produced.	7.20 195.00/hr	Canda L390	\$1,404.00
8/30/2016	SAM	Reviewed and organized documents to be produced.	0.30 395.00/hr	Canda L120	\$118.50
	TJJ	Reviewed and organized documents produced and to be produced.	4.00 195.00/hr	Canda L390	\$780.00
8/31/2016	TJJ	Reviewed and organized documents produced and to be produced;	8.10 195.00/hr	Canda L390	\$1,579.50
9/1/2016	TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	8.70 195.00/hr	Canda L390	\$1,696.50
9/2/2016	TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	7.50 195.00/hr	Canda L390	\$1,462.50
9/6/2016	TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	6.10 195.00/hr	Canda L390	\$1,189.50
9/14/2016	SAM	Reviewed the file re documents to produce.	0.50 395.00/hr	Canda L320	\$197.50
9/20/2016	TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	4.40 195.00/hr	Canda L390	\$858.00
9/21/2016	SAM	Reviewed correspondence from and prepared correspondence to reviewed correspondence from and conferred with reviewed the	0.80 395.00/hr	Litiga L120	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	prior court orders re same; prepared correspondence to reviewed reorganization of the produced documents.			
9/21/2016 TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	4.00 195.00/hr	Canda L390	\$780.00
TJJ	Reviewed the court orders re taxes and the farm lease; prepared memo re same; conferred with	3.00 195.00/hr	Litiga L190	\$585.00
9/22/2016 SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Trust L120	NO CHARGE
TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	6.80 195.00/hr	Canda L390	\$1,326.00
9/26/2016 TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	5.50 195.00/hr	Canda L390	\$1,072.50
9/27/2016 TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	5.00 195.00/hr	Canda L390	\$975.00
9/28/2016 TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	3.90 195.00/hr	Canda L390	\$760.50
9/29/2016 TJJ	Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	3.10 195.00/hr	Canda L390	\$604.50
9/30/2016 SAM	Met with	0.30 395.00/hr	Canda L120	\$118.50

		<u>Hrs/Rate</u>		<u>Amount</u>
9/30/2016	TJJ Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	0.50 195.00/hr	Canda L390	\$97.50
10/3/2016	TJJ Reviewed and organized all document received and/or produced to date re accounting issues, the parties, all claims, and in preparation for trial.	0.60 195.00/hr	Canda L390	\$117.00
10/13/2016	SAM Conferred with	0.20 395.00/hr	Trust L310	\$79.00
10/18/2016	SAM Reviewed the file re accounting update to produce.	0.50 395.00/hr	Trust L150	\$197.50
11/8/2016	SAM Conferred with ; reviewed same.	0.50 395.00/hr	Canda L310	\$197.50
	TJJ Reviewed and organized documents to produce re accounting update; prepared correspondence to A. Brunsting, Carole Brunsting, C. Curtis, and Carl Brunsting re same.	1.80 195.00/hr	Litiga L390	\$351.00
	KSM Conferred with	3.00 129.50/hr	Canda L140	\$388.50
11/14/2016	SAM Reviewed the file re accounting updates to provide; prepared correspondence to	0.30 395.00/hr	Trust L310	\$118.50
11/17/2016	SAM Reviewed correspondence from and prepared correspondence to N. Spielman and B. Bayless re settlement conference.	0.20 395.00/hr	Carl L160	\$79.00
11/21/2016	SAM Prepared for, attended, and returned from the	1.50 395.00/hr	Carl L160	\$592.50
11/22/2016	TJJ Reviewed Carl Brunsting's motion for summary judgment; prepared file memo re same.	1.00 195.00/hr	Carl L240	\$195.00

		<u>Hrs/Rate</u>		<u>Amount</u>
11/28/2016	TJJ Prepared correspondence to Carl, Candace, Carole, and Amy Brunsting re June, July and August bank statements.	0.40 195.00/hr	Trust L190	\$78.00
12/6/2016	TJJ Reviewed Carl Brunsting's motion for summary judgment; prepared motion for summary judgment re no contest clause.	1.30 195.00/hr	Carl L240	\$253.50
12/7/2016	SAM Reviewed correspondence from B. Bayless and N. Spielman re scheduling issues; reviewed the court's electronic docket sheet re same.	0.20 395.00/hr	Carl L190	\$79.00
	TJJ Prepared motion for summary judgment re no contest clause.	1.00 195.00/hr	Canda L240	\$195.00
12/8/2016	SAM Reviewed the file re discovery produced and to be produced.	0.50 395.00/hr	Litiga L310	\$197.50
12/27/2016	SAM Conferred with reviewed same; reviewed correspondence from C. Brunsting re interim distribution; prepared correspondence to prepared correspondence to	1.20 395.00/hr	Trust L120	\$474.00
	TJJ Prepared correspondence to Carole Brunsting, Carl Brunsting, Candace Curtis, and Amy Brunsting re accounting update for June-September 2016.	0.40 195.00/hr	Trust L320	\$78.00
	TJJ Reviewed the Qualified Beneficiary Designation re distributions; reviewed the orders re same; conferred with	1.00 195.00/hr	Canda L250	\$195.00
12/28/2016	SAM Reviewed correspondence from and prepared correspondence to ; prepared correspondence to prepared correspondence to Carole Brunsting re same.	0.80 395.00/hr	Litiga L120	\$316.00

			<u>Hrs/Rate</u>		<u>Amount</u>
12/29/2016	SAM	Prepared correspondence to Carole Brunsting re her demand for distribution; reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Litiga L120	\$118.50
1/6/2017	SAM	Reviewed the file re accounting records to produce.	0.50 395.00/hr	Trust L320	\$197.50
	TJJ	Conferred with	0.20 195.00/hr	Trust L150	NO CHARGE
	KSM	Conferred with reviewed and organized documents for production.	2.00 129.50/hr	Canda L140	\$259.00
1/30/2017	SAM	Reviewed correspondence from C. Brunsting re production of accounting records; reviewed the file re same.	0.20 395.00/hr	Trust L320	\$79.00
1/31/2017	SAM	Reviewed the accounting records to produce; conferred with	2.40 395.00/hr	Trust L320	\$948.00
	TJJ	Conferred with conferred with	0.30 195.00/hr	Trust L390	NO CHARGE
	ML	Reviewed and organized documents for production; conferred with	1.00 129.50/hr	Canda L190	\$129.50
2/9/2017	SAM	Reviewed and organized documents for production for the Brunsting parties.	0.30 395.00/hr	Canda L120	\$118.50
2/10/2017	SAM	Reviewed and organized documents for production for the Brunsting parties.	0.30 395.00/hr	Canda L120	\$118.50
2/13/2017	SAM	Conferred with reviewed the file re same.	0.50 395.00/hr	Trust L310	\$197.50
	TJJ	Prepared correspondence to C. Curtis, Carol Brunsting, Carl Brunsting, and Amy Brunsting re accounting update for June to September 2016; reviewed the	1.80 195.00/hr	Trust L320	\$351.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	conferred with			
2/15/2017	TJJ Prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re accounting update for September 2016 to February 2017.	1.00 195.00/hr	Trust L320	\$195.00
2/17/2017	TJJ Revised correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re accounting update for June to September 2016.	0.40 195.00/hr	Trust L320	\$78.00
2/18/2017	SAM Reviewed the accounting to be updated; prepared file memo to	0.30 395.00/hr	Trust L150	\$118.50
2/21/2017	SAM Conferred several times with reviewed same; prepared correspondence to the parties re same; prepared correspondence to	0.80 395.00/hr	Trust L320	\$316.00
	TJJ Prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re June 2016 to February 2017 accounting updates; reviewed and organized the financial statements to be produced; conferred with	2.50 195.00/hr	Trust L320	\$487.50
2/22/2017	SAM Reviewed and revised the document production.	0.30 395.00/hr	Canda L320	\$118.50
	TJJ Prepared correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting re accounting update for September 2016 to February 2017.	0.60 195.00/hr	Trust L320	\$117.00
2/23/2017	SAM Reviewed the revised accounting to be produced to the Brunsting parties; conferred with reviewed correspondence from C. Brunsting re same.	0.60 395.00/hr	Trust L110	\$237.00

			<u>Hrs/Rate</u>		<u>Amount</u>
2/23/2017	TJJ	Review correspondence from Carole Brunsting re account updates; prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re accounting update for September 2016 to January 2017.	1.80 195.00/hr	Trust L320	\$351.00
2/24/2017	SAM	Reviewed and organized the financial records to produce; prepared master correspondence to the parties re same.	2.80 395.00/hr	Trust L120	\$1,106.00
	TJJ	Prepared correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting.	1.10 195.00/hr	Litiga L320	NO CHARGE
2/27/2017	SAM	Reviewed correspondence from and prepared correspondence to C. Brunsting re accounting documents.	0.20 395.00/hr	Trust L310	\$79.00
3/1/2017	SAM	Reviewed correspondence from C. Brunsting re accounting records.	0.20 395.00/hr	Trust L310	\$79.00
3/2/2017	SAM	Reviewed and organized the accounting records; prepared correspondence to the Brunsting parties re same; conferred several times with	2.00 395.00/hr	Trust L150	\$790.00
	TJJ	Prepared correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting re accounting update for September 2016 to November 2016; conferred with	1.00 195.00/hr	Trust L320	\$195.00
3/3/2017	SAM	Revised correspondence to the parties re the December 2016 and January 2017 accounting records.	0.30 395.00/hr	Trust L120	\$118.50
	TJJ	Prepared correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting re accounting update for December 2016 and January 2017.	0.80 195.00/hr	Trust L320	\$156.00

			<u>Hrs/Rate</u>		<u>Amount</u>
3/24/2017	SAM	Reviewed correspondence from Carole Brunsting re discovery issues; reviewed the file re same.	0.20 395.00/hr	Litiga L310	\$79.00
3/28/2017	SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re trust disbursement issues.	0.20 395.00/hr	Trust L120	\$79.00
4/11/2017	SAM	Reviewed correspondence from the CPA re tax returns; reviewed correspondence from	0.30 395.00/hr	Trust L120	\$118.50
4/17/2017	TJJ	Reviewed and organized bank, stock, and tax documents re accounting update.	1.60 195.00/hr	Trust L150	\$312.00
4/19/2017	SAM	Reviewed correspondence from and prepared correspondence to C. Brunsting re distribution issues; reviewed the file re same; prepared correspondence to	0.80 395.00/hr	Trust L120	\$316.00
	SAM	Conferred with	0.20 395.00/hr	Trust L120	NO CHARGE
5/1/2017	SAM	Conferred with	0.20 395.00/hr	Trust L150	NO CHARGE
	TJJ	Conferred with	2.90 195.00/hr	Trust L320	\$565.50
		Reviewed and revised same; prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re tax documents and accounting summary; conferred with			
5/2/2017	SAM	Reviewed the accounting update for the first quarter of 2017; prepared correspondence to all parties re same.	0.60 395.00/hr	Trust L310	\$237.00

		<u>Hrs/Rate</u>		<u>Amount</u>
5/5/2017	SAM Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Trust L120	NO CHARGE
5/12/2017	SAM Reviewed correspondence from and prepared correspondence to Carole Brunsting re distribution issues.	0.30 395.00/hr	Trust L120	\$118.50
5/16/2017	SAM Conferred with ; conferred with	1.20 395.00/hr	Litiga L120	\$474.00
5/18/2017	SAM Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Litiga L120	NO CHARGE
5/24/2017	SAM Reviewed correspondence from and prepared correspondence to A. and Carole Brunsting re settlement conference.	0.20 395.00/hr	Litiga L120	\$79.00
5/25/2017	SAM Reviewed correspondence from and prepared correspondence to A. and Carole Brunsting re meeting; prepared correspondence to	0.30 395.00/hr	Litiga L120	\$118.50
5/30/2017	SAM Reviewed the court's file re status; prepared correspondence to reviewed correspondence from B. Bayless re settlement.	0.30 395.00/hr	Carl L120	\$118.50
6/9/2017	SAM Prepared for and attended a settlement conference with Carole Brunsting and Anita Brunsting.	2.50 395.00/hr	Litiga L160	\$987.50
6/23/2017	SAM Reviewed multiple correspondence from and prepared multiple correspondence to B. Bayless re tolling agreement; conferred with reviewed and revised the tolling agreement; prepared correspondence to B. Bayless re same.	1.00 395.00/hr	Carl L190	\$395.00

			<u>Hrs/Rate</u>		<u>Amount</u>
7/13/2017	SAM	Reviewed correspondence from and prepared correspondence to B. Bayless re tolling agreement.	0.20 395.00/hr	Carl L120	\$79.00
8/1/2017	SAM	Conferred with	0.30 395.00/hr	Litiga L120	NO CHARGE
9/15/2017	SAM	Conferred with conferred with prepared correspondence to Carole Brunsting re same; conferred with Carole Brunsting re same.	1.30 395.00/hr	Litiga L120	\$513.50
9/20/2017	SAM	Conferred with	0.20 395.00/hr	Trust L120	NO CHARGE
	SAM	Reviewed the file re pending issues and the accounting.	0.20 395.00/hr	Trust L120	\$79.00
10/24/2017	SAM	Conferred with	0.20 395.00/hr	Litiga L120	NO CHARGE
12/14/2017	EJW	Conferred with reviewed the file re same and work assignments.	0.50 250.00/hr	Canda L120	NO CHARGE
	SAM	Reviewed correspondence from J. Young re the temporary administrator's fees and court approval re same; reviewed the court's file re same; conferred with	0.70 395.00/hr	Canda L120	\$276.50
12/15/2017	SAM	Prepared correspondence to all beneficiaries re proposed distributions; conferred with reviewed correspondence from and prepared correspondence to J. Young re fee disbursements for G. Lester and her firm; reviewed the file re same.	1.70 395.00/hr	Canda L120	\$671.50
12/16/2017	SAM	Reviewed correspondence from J. Young re fees to the temporary administrator.	0.20 395.00/hr	Canda L120	\$79.00

			<u>Hrs/Rate</u>		<u>Amount</u>
12/18/2017	SAM	Reviewed correspondence from and prepared correspondence to	0.50 395.00/hr	Canda L120	\$197.50
2/9/2018	SAM	Reviewed correspondence from C. Brunsting re accounting update; reviewed the file re same; prepared correspondence to conferred with	0.40 395.00/hr	Trust L120	\$158.00
	TJJ	Reviewed file re last accounting update; reviewed	0.60 195.00/hr	Trust L150	\$117.00
	TJJ	Conferred with	0.20 195.00/hr	Trust L150	NO CHARGE
2/10/2018	SAM	Reviewed correspondence from	0.20 395.00/hr	Trust L120	\$79.00
2/28/2018	EJW	Conferred with	0.20 250.00/hr	Trust L120	NO CHARGE
	SAM	Conferred with	0.20 395.00/hr	Trust L120	\$79.00
3/1/2018	TJJ	Reviewed file re trust accounting update; reviewed correspondence from reviewed and organized bank and stock statements from prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re same.	2.60 195.00/hr	Trust L150	\$507.00
	SAM	Conferred with	0.30 395.00/hr	Trust L150	\$118.50
	TJJ	Conferred with	0.30 195.00/hr	Trust L150	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>
3/2/2018	TJJ	3.40 195.00/hr	Trust L150	\$663.00
Prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re trust accounting updates; reviewed and organized trust bank and stock statements re same.				
3/7/2018	SAM	0.30 395.00/hr	Trust L150	\$118.50
Reviewed the accounting records and production of same.				
3/8/2018	NM	1.60 129.50/hr	Trust L150	\$207.20
Prepared multiple correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and A. Brunsting re accounting update from April 2017 through May 2018.				
	SAM	1.00 395.00/hr	Trust L150	\$395.00
Reviewed and revised the probate accounting for the time periods April 2017 through May 2018.				
3/9/2018	SAM	0.60 395.00/hr	Trust L150	\$237.00
Reviewed the accounting to be produced; reviewed correspondence from and prepared correspondence B. Bayless re payment of the temporary administrator fees.				
3/10/2018	SAM	0.20 395.00/hr	Trust L190	\$79.00
Reviewed correspondence from and prepared correspondence to B. Bayless re fees paid to the temporary administrator.				
3/19/2018	SAM	0.50 395.00/hr	Trust L150	\$197.50
Reviewed the accounting records; conferred with				
	TJJ	4.50 195.00/hr	Trust L150	\$877.50
Reviewed and organized all records re trust accounting.				
	TJJ	0.30 195.00/hr	Trust L150	NO CHARGE
Conferred with				
3/20/2018	SAM	1.20 395.00/hr	Trust L150	\$474.00
Conferred several times with reviewed and organized same.				

			<u>Hrs/Rate</u>		<u>Amount</u>
3/20/2018	TJJ	Reviewed and organized all trust accounting documents; reviewed Anita and Amy Brunsting's prior production re same.	6.00 195.00/hr	Trust L320	\$1,170.00
	TJJ	Conferred with	0.50 195.00/hr	Trust L320	NO CHARGE
3/27/2018	TJJ	Reviewed and organized client documents re accounting updates and prior production.	0.70 195.00/hr	Trust L320	\$136.50
3/28/2018	TJJ	Reviewed and organized client documents re accounting updates and prior production.	0.50 195.00/hr	Trust L320	\$97.50
4/2/2018	TJJ	Reviewed and organized client documents re accounting updates and prior production.	0.50 195.00/hr	Trust L320	\$97.50
5/23/2018	SAM	Met with	0.30 395.00/hr	Litiga L120	\$118.50
6/26/2018	SAM	Reviewed and executed the tolling agreement for B. Bayless; processed the execution of the tolling agreement; prepared correspondence to B. Bayless and N. Spielman re same; prepared correspondence to	1.00 395.00/hr	Carl L120	\$395.00
	SAM	Reviewed correspondence from and prepared to Carole Brunsting re meeting.	0.20 395.00/hr	Litiga L160	\$79.00
6/27/2018	SAM	Met with Carole Brunsting re settlement.	1.50 395.00/hr	Litiga L160	\$592.50
6/28/2018	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to B. Bayless and N. Spielman re the tolling agreement; reviewed and executed the tolling agreement for Carl Brunsting.	0.60 395.00/hr	Carl L190	\$237.00
7/12/2018	TJJ	Reviewed correspondence from reviewed client documents re same.	0.60 195.00/hr	Trust L150	\$117.00

			<u>Hrs/Rate</u>		<u>Amount</u>
7/12/2018	SAM	Reviewed the file re accounting issues.	0.20 395.00/hr	Trust L150	\$79.00
7/23/2018	SAM	Reviewed correspondence from	0.20 395.00/hr	Trust L320	\$79.00
7/31/2018	MT	Updated litigation index re Carl Brunsting's partial motion for summary judgment; reviewed and prepared docket matters re same.	0.30 129.50/hr	Carl L240	\$38.85
8/10/2018	TJJ	Reviewed Carl Brunsting's partial motion for summary judgment.	0.50 195.00/hr	Carl L240	\$97.50
	SAM	Conferred with	0.30 395.00/hr	Carl L240	\$118.50
	TJJ	Conferred with	0.30 195.00/hr	Carl L240	NO CHARGE
8/13/2018	TJJ	Reviewed and bates-labeled trust accounting documents from Anita Brunsting; prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re trust accounting update.	3.30 195.00/hr	Trust L320	\$643.50
8/15/2018	TJJ	Prepared Anita Brunsting's response to Carl Brunsting's partial motion for summary judgment.	0.50 195.00/hr	Carl L240	\$97.50
8/16/2018	TJJ	Prepared Anita Brunsting's response to Carl Brunsting's motion for partial summary judgment; reviewed trust documents re same; reviewed authorities re	4.20 195.00/hr	Carl L240	\$819.00
8/20/2018	TJJ	Reviewed C. Curtis' plea in abatement re Carl Brunsting's motion for partial summary judgment.	0.30 195.00/hr	Carl L240	\$58.50
	MT	Updated litigation index re plea in abatement.	0.20 129.50/hr	Litiga L210	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>
8/21/2018	TJJ	4.50 195.00/hr	Carl L240	\$877.50
	TJJ			
	SAM	1.80 395.00/hr	Canda L120	\$711.00
	TJJ	0.40 195.00/hr	Canda L120	NO CHARGE
8/22/2018	TJJ	4.90 195.00/hr	Carl L240	\$955.50
	SAM	0.60 395.00/hr	Carl L240	\$237.00
8/23/2018	TJJ	2.20 195.00/hr	Carl L240	\$429.00

Prepared Anita Brunsting's response to Carl Brunsting's motion for partial summary judgment; reviewed authorities re trust construction; prepared file memo re same; prepared motion for continuance re same.

Reviewed the file memo re the QBD (qualified beneficiary designation); conferred with T. Jadloski re same; prepared correspondence to

Conferred with

Prepared defendants' joint motion for continuance re Carl Brunsting's motion for partial summary judgment; reviewed Harris County clerk's record re same; prepared S. Mendel's affidavit in support of same; reviewed authorities re same; prepared file memo re response to Carl Brunsting's motion for partial summary judgment; prepared correspondence to

Reviewed the file re pending issues, including, but not limited to, Carl Brunsting's motion for summary judgment; conferred with
 prepared correspondence
 to prepared correspondence
 to

Prepared defendants' joint motion for continuance re Carl Brunsting's motion for partial summary judgment and supporting affidavit; prepared correspondence to and reviewed correspondence from reviewed
 correspondence

reviewed temporary administrator's report re same; reviewed master's report re same.

		<u>Hrs/Rate</u>		<u>Amount</u>
8/24/2018	TJJ	1.40 195.00/hr	Carl L240	\$273.00
	MT	0.20 129.50/hr	Carl L240	NO CHARGE
	SAM	0.20 395.00/hr	Trust L150	\$79.00
	SAM	0.40 395.00/hr	Carl L240	\$158.00
	TJJ	0.20 195.00/hr	Carl L240	NO CHARGE
8/27/2018	TJJ	0.30 195.00/hr	Trust L320	\$58.50
	TJJ	2.30 195.00/hr	Carl L240	\$448.50
	SAM	0.80 395.00/hr	Carl L240	\$316.00
	SAM	0.50 395.00/hr	Trust L320	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>
8/28/2018	TJJ	4.60 195.00/hr	Carl L240	\$897.00
	SAM	1.50 395.00/hr	Carl L240	\$592.50
	TJJ	0.40 195.00/hr	Carl L240	NO CHARGE
8/29/2018	TJJ	3.60 195.00/hr	Carl L240	\$702.00
	MT	0.10 129.50/hr	Carl L240	NO CHARGE
	SAM	1.20 395.00/hr	Carl L240	\$474.00
8/30/2018	TJJ	0.50 195.00/hr	Carl L240	\$97.50
	MT	0.10 129.50/hr	Carl L240	NO CHARGE
9/4/2018	TJJ	0.00 195.00/hr	Canda L240	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>	
9/4/2018	MT	Updated litigation index re addendum to plea in abatement; reviewed court's docket re motion for continuance and motion for summary judgment hearing.	0.20 129.50/hr	Carl L250	NO CHARGE
	SAM	Conferred with reviewed the file re same.	0.70 395.00/hr	Canda L120	\$276.50
	TJJ	Conferred with	0.50 195.00/hr	Canda L210	NO CHARGE
	TJJ	Prepared for hearing re Carl Brunsting's partial motion for summary judgment; conferred with reviewed Carl Brunsting's response to defendants' joint motion for continuance; reviewed Carl Brunsting's objection to exhibit A to defendants' joint response to Carl Brunsting's partial motion for summary judgment; prepared proposed docket control order.	2.80 195.00/hr	Carl L240	\$546.00
9/5/2018	TJJ	Prepared for, traveled to, attended, and returned from court re oral hearing on Carl Brunsting's motion for partial summary judgment and defendant's motion for continuance re same.	3.70 195.00/hr	Carl L230	\$721.50
	MT	Updated litigation index; conferred with Judge Davidson's office re mediation availability.	0.50 129.50/hr	Carl L160	\$64.75
	SAM	Prepared for, traveled to, attended, and returned from court re hearing on motions for continuance and Carl Brunsting's motion for summary judgment; conferred with B. Bayless and	3.70 395.00/hr	Carl L230	\$1,461.50
	SAM	Reviewed the file re conference with N. Spielman and B. Bayless; prepared correspondence to and reviewed correspondence from N. Spielman and B. Bayless re settlement and scheduling issues.	0.80 395.00/hr	Carl L160	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>
9/7/2018	SAM	0.50 395.00/hr	Carl L250	\$197.50
	Attended telephone conference with B. Bayless and N. Spielman re scheduling issues per the court's instructions; reviewed correspondence from Judge Comstock re same; prepared correspondence to and reviewed correspondence from			
	TJJ	0.50 195.00/hr	Litiga L120	NO CHARGE
	Conferred with reviewed the court's orders re same.			
9/11/2018	SAM	2.20 395.00/hr	Carl L250	\$869.00
	Reviewed and revised the docket control order; prepared correspondence to N. Spielman and B. Bayless re same; attended conference call with N. Spielman and B. Bayless re scheduling issues; conferred with			
	TJJ	0.70 195.00/hr	Litiga L250	NO CHARGE
	Conferred with			
9/13/2018	SAM	0.30 395.00/hr	Carl L250	\$118.50
	Reviewed and revised the proposed docket control order; prepared correspondence to N. Spielman and B. Bayless re same.			
9/14/2018	SAM	0.60 395.00/hr	Carl L250	\$237.00
	Reviewed and revised the proposed docket control order; prepared correspondence to all parties re same; revised the docket control order; prepared correspondence to all parties re amended version.			
9/15/2018	SAM	0.40 395.00/hr	Canda L250	\$158.00
	Prepared correspondence to all parties re the docket control order; reviewed correspondence from and prepared correspondence to C. Curtis re same.			
9/16/2018	SAM	0.20 395.00/hr	Canda L250	\$79.00
	Reviewed correspondence from and prepared correspondence to			
9/20/2018	TJJ	0.10 195.00/hr	Litiga L160	NO CHARGE
	Reviewed correspondence from Carole Brunsting re opposition to mediation.			

		<u>Hrs/Rate</u>		<u>Amount</u>	
9/25/2018	MT	Reviewed file memo for docket control order; conferred with Judge Davidson's assistant re mediation dates.	0.30 129.50/hr	Canda L160	\$38.85
	SAM	Reviewed correspondence from prepared correspondence to the court re the docket control order and mediation of the case.	0.40 395.00/hr	Canda L160	\$158.00
10/9/2018	SAM	Met with prepared correspondence to Judge Comstock re pending issues; prepared correspondence to	1.50 395.00/hr	Canda L120	\$592.50
10/10/2018	SAM	Prepared for and attended conference call with B. Bayless and N. Spielman re settlement issues.	0.70 395.00/hr	Carl L160	\$276.50
10/11/2018	SAM	Prepared correspondence to the Brunsting family re appraisal fees.	0.30 395.00/hr	Trust L120	\$118.50
10/13/2018	SAM	Reviewed the file re depositions to schedule; prepared correspondence to the parties re same.	0.40 395.00/hr	Canda L330	\$158.00
	SAM	Prepared correspondence to the parties re the Iowa farm appraisals.	0.20 395.00/hr	Trust L310	\$79.00
10/15/2018	SAM	Reviewed correspondence from C. Brunsting re the farm appraisals.	0.20 395.00/hr	Trust L120	\$79.00
10/16/2018	SAM	Reviewed the file re pending administration issues.	0.20 395.00/hr	Trust L120	NO CHARGE
10/19/2018	SAM	Reviewed correspondence from and prepared correspondence to R. Munson re appraisal issues; reviewed the court's file re pending pleadings.	0.30 395.00/hr	Canda L120	\$118.50
10/22/2018	TJJ	Reviewed C. Curtis' plea to the jurisdiction and motion to dismiss; prepared A. Brunsting's response to same.	0.70 195.00/hr	Canda L240	\$136.50

			<u>Hrs/Rate</u>		<u>Amount</u>
10/31/2018	TJJ	Prepared notice of intent to take deposition of C. Kunz-Freed; prepared correspondence to A. Johnson re same.	0.70 195.00/hr	Canda L330	\$136.50
	TJJ	Prepared A. Brunsting's motion to disburse trust funds; reviewed authorities re	1.60 195.00/hr	Canda L250	\$312.00
	SAM	Conferred with prepared correspondence to	0.50 395.00/hr	Canda L160	\$197.50
	TJJ	Prepared A. Brunsting's notice of deposition of C. Kunz-Freed; reviewed and filed same.	0.40 195.00/hr	Canda L330	\$78.00
	TJJ	Conferred with	0.30 195.00/hr	Trust L250	NO CHARGE
	SAM	Reviewed correspondence from and prepared correspondence to N. Spielman and B. Bayless re settlement.	0.30 395.00/hr	Carl L160	\$118.50
	SAM	Conferred with ; reviewed correspondence from and prepared correspondence to B. Bayless re the depositions; reviewed correspondence from and prepared correspondence to	0.70 395.00/hr	Canda L330	\$276.50
11/28/2018	TJJ	Reviewed authorities re prepared C. Kunz-Freed subpoena to appear for oral deposition; conferred with prepared correspondence to C. Reed re service of same.	1.30 195.00/hr	Canda L330	\$253.50
	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L330	NO CHARGE
	MT	Updated litigation index re notice of intent to deposition C. Freed.	0.10 129.50/hr	Canda L330	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
11/29/2018	TJJ	Prepared motion to compel deposition of C. Kunz-Freed.	0.80 195.00/hr	Canda L350	\$156.00
	TJJ	Reviewed subpoena to C. Kunz-Freed to appear for oral deposition; prepared correspondence to J. Hershey re service of same.	0.40 195.00/hr	Canda L330	\$78.00
11/30/2018	EJW	Revised motion to disburse trust funds.	0.30 250.00/hr	Canda L250	\$75.00
	TJJ	Prepared A. Brunsting's motion to disburse trust funds and order granting same.	1.80 195.00/hr	Canda L250	\$351.00
	SAM	Reviewed C. Kunz-Freed's motion to quash and for protection.	0.30 395.00/hr	Canda L250	\$118.50
12/3/2018	TJJ	Reviewed C. Kunz-Freed's motion to quash and motion for protection; prepared A. Brunsting's response and motion to compel deposition; reviewed authorities re	3.30 195.00/hr	Canda L350	\$643.50
12/4/2018	EJW	Reviewed and revised motion to compel deposition and response to motion for protection.	0.60 250.00/hr	Canda L350	\$150.00
	TJJ	Prepared A. Brunsting's motion to compel and response to C. Kunz-Freed's motion to quash and for protection; reviewed authorities re attorney client privilege and capacity.	2.70 195.00/hr	Canda L350	\$526.50
12/8/2018	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Litiga L120	\$118.50
	SAM	Prepared correspondence to B. Bayless re the deposition and mediation of the case.	0.30 395.00/hr	Litiga L330	\$118.50
12/10/2018	SAM	Prepared correspondence to prepared correspondence to	0.40 395.00/hr	Canda L120	\$158.00

			<u>Hrs/Rate</u>		<u>Amount</u>
12/10/2018	TJJ	Prepared A. Brunsting's motion to compel and response to C. Kunz-Freed's motions to quash and for protection.	1.00 195.00/hr	Canda L350	\$195.00
	SAM	Conferred with	0.20 395.00/hr	Litiga L120	NO CHARGE
	SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re mediation and related issues.	0.40 395.00/hr	Litiga L160	\$158.00
12/14/2018	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L120	\$118.50
12/15/2018	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L120	\$79.00
12/17/2018	TJJ	Prepared A. Brunsting's motion to compel and response to C. Kunz-Freed's motions to quash and for protection.	2.80 195.00/hr	Canda L350	\$546.00
	MT	Conferred with court clerk re motion to quash.	0.20 129.50/hr	Canda L350	\$25.90
12/18/2018	TJJ	Prepared A. Brunsting's motion to compel deposition of C. Kunz-Freed; prepared proposed order granting same; reviewed and filed same; prepared A. Brunsting's response to C. Kunz-Freed's motions to quash and for protection.	2.60 195.00/hr	Canda L350	\$507.00
	MT	Prepared correspondence to and reviewed correspondence from Judge Comstock re hearing for motion to compel; reviewed and prepared docket matters re hearing for motion to compel.	0.40 129.50/hr	Canda L250	\$51.80
12/19/2018	MT	Updated litigation index re affidavit of service on C. Kunz-Freed.	0.10 129.50/hr	Canda L140	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>	
12/28/2018	MT	Prepared and filed notice of hearing re motion to quash, motion for protection, and motion to compel; updated litigation index re same.	0.40 129.50/hr	Canda L350	\$51.80
	TJJ	Conferred with	0.20 195.00/hr	Canda L350	NO CHARGE
	SAM	Conferred with	0.20 395.00/hr	Canda L330	\$79.00
	SAM	Prepared correspondence to reviewed the file re same.	0.20 395.00/hr	Trust L120	\$79.00
1/3/2019	SAM	Reviewed correspondence from Carole Brunsting re settlement; reviewed correspondence from	0.20 395.00/hr	Litiga L160	\$79.00
1/4/2019	TJJ	Prepared A. Brunsting's response to C. Kunz-Freed's motions to quash and for protection; prepared A. Brunsting's motion to disburse trust funds.	1.00 195.00/hr	Canda L250	\$195.00
1/10/2019	MT	Reviewed status of docket.	0.20 129.50/hr	Canda L190	NO CHARGE
1/11/2019	TJJ	Reviewed and revised A. Brunsting's response to C. Kunz-Freed's motions to quash and for protection.	0.60 195.00/hr	Canda L350	\$117.00
1/15/2019	TJJ	Prepared A. Brunsting's response to C. Kunz-Freed's motion to quash and for protection; reviewed authorities re	1.30 195.00/hr	Canda L350	\$253.50
	SAM	Reviewed and revised the motion to compel against C. Kunz-Freed; conferred with	0.60 395.00/hr	Canda L350	\$237.00

			<u>Hrs/Rate</u>		<u>Amount</u>
1/15/2019	TJJ	Prepared A. Brunsting's response to C. Kunz-Freed's motion to quash and for protection; reviewed authorities re	1.30 195.00/hr	Canda L350	\$253.50
	TJJ	Conferred with	0.20 195.00/hr	Canda L350	NO CHARGE
1/16/2019	SAM	Revised the reply to the response to A. Brunsting's motion to compel the deposition of Kunz-Freed.	1.00 395.00/hr	Canda L350	\$395.00
	TJJ	Prepared A. Brunsting's response to C. Kunz-Freed's motions to quash and for protection; conferred with reviewed and filed same.	1.10 195.00/hr	Canda L350	\$214.50
1/17/2019	MT	Updated litigation index re response to motion to quash.	0.10 129.50/hr	Canda L140	NO CHARGE
1/22/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L350	\$118.50
1/23/2019	MT	Updated litigation index re A. Brunsting's reply to C. Kunz-Freed's response to motion to compel.	0.10 129.50/hr	Canda L140	NO CHARGE
1/24/2019	TJJ	Prepared for, traveled to, attended, and returned from court re oral hearing on A. Brunsting's motion to compel and C. Kunz-Freed's motions to quash and for protection.	4.40 195.00/hr	Canda L230	\$858.00
	TJJ	Prepared A. Brunsting's motion to disburse trust funds re farm appraisal; prepared order granting same.	0.40 195.00/hr	Canda L250	\$78.00
	TJJ	Reviewed court's order granting A. Brunsting's motion to compel the deposition of C. Kunz-Freed; prepared correspondence re same; prepared correspondence to Z. Foley re dates for deposition.	0.40 195.00/hr	Canda L330	\$78.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
1/25/2019	TJJ	Reviewed C. Curtis' motion to make more definite and certain the parties and claims; reviewed Amy Brunsting's draft motion for clarification and/or motion to dismiss; conferred with	1.30 195.00/hr	Canda L250	\$253.50
	SAM	Conferred with reviewed Amy Brunsting's draft motion for clarification and/or motion to dismiss.	0.30 395.00/hr	Canda L250	\$118.50
1/28/2019	SAM	Reviewed and revised Amy Brunsting's motion for clarification and dismissal; conferred with conferred with	1.30 395.00/hr	Canda L250	\$513.50
	TJJ	Conferred with	0.50 195.00/hr	Canda L250	NO CHARGE
	TJJ	Conferred with	0.70 195.00/hr	Canda L350	\$136.50
	MT	Updated litigation index re C. Kunz-Freed and Vacek's motion to dismiss with want of prosecution; reviewed court's docket for hearing re same; prepared notice of appearance; conferred with	0.90 129.50/hr	Canda L140	\$116.55
	TJJ	Reviewed and revised Amy Brunsting's motion for clarification and/or motion to dismiss; prepared Anita Brunsting's motion to obtain approval re appraisal; prepared order re same; reviewed and filed same.	3.40 195.00/hr	Canda L250	NO CHARGE
1/29/2019	SAM	Reviewed and revised Anita Brunsting's motion for clarification and dismissal; conferred with reviewed correspondence from	0.50 395.00/hr	Canda L250	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
		and prepared correspondence to			
1/29/2019	TJJ	Reviewed correspondence from C. Reed re C. Kunz-Freed deposition dates; conferred with	0.30 195.00/hr	Canda L330	NO CHARGE
	TJJ	Prepared Anita Brunsting's motion to join Amy Brunsting's motion for clarification and/or motion to dismiss; conferred with reviewed and filed same.	0.60 195.00/hr	Canda L250	\$117.00
	MT	Updated litigation index re motion to clarify, notice of hearing for same, motion for approval of appraisers, and motion to join; reviewed and prepared docket matters re same.	0.40 129.50/hr	Canda L140	\$51.80
1/30/2019	TJJ	Prepared correspondence to C. Curtis, Carole Brunsting, Carl Brunsting, and Amy Brunsting re trust accounting update; reviewed and organized client documents re same	3.50 195.00/hr	Trust L320	\$682.50
	TJJ	Conferred with	0.30 195.00/hr	Trust L150	NO CHARGE
2/1/2019	SAM	Conferred with prepared correspondence to	0.70 395.00/hr	Canda L330	\$276.50
2/4/2019	TJJ	Prepared subpoena for documents and tangible things to C. Kunz-Freed; prepared A. Brunsting's 1st requests for production to C. Curtis.	1.10 195.00/hr	Canda L310	\$214.50
	MT	Updated litigation index re C. Kunz-Freed's response to motion to clarify and C. Brunsting's response to motion to clarify; prepared correspondence to Judge Comstock re court's availability for C. Kunz-Freed's deposition.	0.50 129.50/hr	Canda L330	\$64.75

		<u>Hrs/Rate</u>		<u>Amount</u>
2/5/2019	SAM	1.00 395.00/hr	Canda L390	\$395.00
			Conferred several times with conferred with	
	TJJ	0.30 195.00/hr	Canda L330	\$58.50
			Reviewed correspondence from C. Comstock re C. Kunz-Freed deposition.	
	TJJ	1.80 195.00/hr	Canda L250	\$351.00
			Reviewed and revised draft of Amy Brunsting's reply to C. Curtis' response to Amy Brunsting's motion for clarification and to dismiss; reviewed C. Curtis' response to Amy Brunsting's motion for clarification and to dismiss; reviewed authorities re estate claims as property; conferred with S.	
	TJJ	0.90 195.00/hr	Canda L310	\$175.50
			Prepared subpoena for documents and tangible things to C. Kunz-Freed; conferred with prepared correspondence to C. Reed re same.	
	MT	0.10 129.50/hr	Canda L140	NO CHARGE
			Updated litigation index re A. Brunsting's response to C. Curtis' motions.	
	TJJ	0.50 195.00/hr	Litiga L250	NO CHARGE
			Conferred with	
	SAM	0.30 395.00/hr	Canda L250	\$118.50
			Conferred with	
2/6/2019	TJJ	0.40 195.00/hr	Canda L250	\$78.00
			Reviewed court's docket re hearing on Amy Brunsting's motion for clarification and to dismiss.	
2/7/2019	MT	0.70 129.50/hr	Canda L330	\$90.65
			Prepared correspondence to and reviewed correspondence from court re confirmation of deposition date and hearing for motion to obtain an appraisal; reviewed and prepared docket matters re	

			<u>Hrs/Rate</u>		<u>Amount</u>
		deposition date; reviewed court's response re hearing for motion to obtain an appraisal.			
2/7/2019	SAM	Reviewed the file re hearing dates and strategy issues.	0.30 395.00/hr	Canda L120	\$118.50
	TJJ	Reviewed C. Curtis response to Amy Brunsting's interrogatories and requests for production.	0.90 195.00/hr	Canda L310	\$175.50
	TJJ	Prepared for, traveled to, attended, and returned from court re oral hearing on Amy Brunsting's motion to clarify and to dismiss.	3.50 195.00/hr	Canda L230	\$682.50
2/8/2019	MT	Prepared correspondence to court re hearing for motion to obtain an appraisal; reviewed and prepared docket matters re same; prepared and filed notice of hearing; updated litigation index re same.	0.40 129.50/hr	Canda L190	\$51.80
	TJJ	Reviewed correspondence from C. Comstock re hearing date for Anita Brunsting's motion for appraisal and notice of C. Kunz-Freed deposition.	0.20 195.00/hr	Canda L250	\$39.00
2/11/2019	SAM	Reviewed correspondence from and prepared correspondence to Judge Comstock re the hearings for an appraisal, an attorney fee application, and C. Curtis' pleas for abatement and to the court's jurisdiction.	0.50 395.00/hr	Canda L120	\$197.50
	TJJ	Reviewed correspondence from and prepared correspondence to Judge Comstock re hearing date for motion to approve appraisal; reviewed authorities re pleading deadlines; conferred with	1.20 195.00/hr	Canda L250	\$234.00
	SAM	Conferred with	0.00 395.00/hr	Canda L250	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>
2/13/2019	TJJ	0.80 195.00/hr	Canda L330	\$156.00
2/14/2019	MT	0.40 129.50/hr	Canda L330	\$51.80
	MT	0.10 129.50/hr	Canda L350	\$12.95
2/20/2019	TJJ	1.30 195.00/hr	Canda L330	\$253.50
	TJJ	1.30 195.00/hr	Canda L310	\$253.50
	TJJ	1.50 195.00/hr	Canda L350	\$292.50
	SAM	1.00 395.00/hr	Canda L120	\$395.00
2/22/2019	MT	0.40 129.50/hr	Canda L140	\$51.80
2/25/2019	SAM	0.30 395.00/hr	Trust L120	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
2/25/2019	TJJ	Reviewed C. Curtis notice of intent and attorney-client privilege briefing re C. Kunz-Feed deposition; prepared Anita Brunsting's brief to court re attorney-client privilege; reviewed authorities re exceptions to same.	3.00 195.00/hr	Canda L330	\$585.00
	TJJ	Reviewed C. Curtis' objection to motion to approve appraisal.	0.30 195.00/hr	Canda L250	\$58.50
	TJJ	Met with	1.50 195.00/hr	Canda L120	\$292.50
	TJJ	Conferred with	0.20 195.00/hr	Canda L250	NO CHARGE
2/26/2019	TJJ	Reviewed correspondence from C. Reed re privilege waiver; reviewed proposed agreement re same; reviewed correspondence from and prepared correspondence to prepared briefing to court re attorney client privilege; reviewed authorities re same; reviewed draft briefing from conferred with	4.10 195.00/hr	Canda L250	\$799.50
2/27/2019	TJJ	Prepared briefing re attorney client privilege.	1.20 195.00/hr	Canda L250	\$234.00
	TJJ	Prepared Anita Brunsting's requests for production to C. Curtis; reviewed exhibits to C. Curtis motion for summary judgment response and federal court petition re same.	0.80 195.00/hr	Canda L350	\$156.00
	TJJ	Reviewed authorities re	0.80 195.00/hr	Canda L210	\$156.00
	TJJ	Prepared Anita Brunsting's motion to approve attorney's fees and expenses.	0.60 195.00/hr	Canda L250	\$117.00

			<u>Hrs/Rate</u>		<u>Amount</u>
2/28/2019	TJJ	Prepared Anita Brunsting's motion to approve attorneys' fees and expenses; reviewed and responded to correspondence from prepared notice of transfer to district court and order re same.	2.70 195.00/hr	Canda L250	\$526.50
	TJJ	Prepared correspondence to	0.10 195.00/hr	Canda L350	NO CHARGE
3/1/2019	TJJ	Reviewed correspondence from C. Reed re attorney client privilege waivers; reviewed and revised Anita and Amy Brunsting's joint brief re rule of evidence 503(d); prepared correspondence to reviewed C. Freed's brief re same.	1.50 195.00/hr	Canda L330	\$292.50
	TJJ	Prepared Anita Brunsting's motion for reimbursement of attorneys' fees.	0.50 195.00/hr	Canda L250	\$97.50
	MT	Updated litigation index re C. Kunz-Freed's brief re privilege.	0.20 129.50/hr	Canda L140	NO CHARGE
3/4/2019	TJJ	Prepared Anita Brunsting's motion for reimbursement of attorneys' fees.	0.40 195.00/hr	Canda L250	\$78.00
3/5/2019	TJJ	Reviewed correspondence from conferred with	0.50 195.00/hr	Trust L320	\$97.50
	TJJ	Conferred with reviewed county and district clerk records re same.	0.50 195.00/hr	Canda L240	\$97.50
	TJJ	Reviewed C. Kunz-Freed privilege log; reviewed authorities re	0.50 195.00/hr	Canda L390	\$97.50
	MT	Updated litigation index re notice of filing of privilege log.	0.20 129.50/hr	Canda L140	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>
3/6/2019	SAM	Conferred with	0.20 395.00/hr	Litiga L120 NO CHARGE
	TJJ	Prepared for hearing re motion to approve appraisal; conferred with prepared correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting re same; reviewed correspondence from and prepared correspondence to N. Konz re same.	1.70 195.00/hr	Trust L250 \$331.50
3/7/2019	SAM	Conferred with	0.20 395.00/hr	Trust L120 \$79.00
	TJJ	Prepared for, traveled to, attended, and returned from court re oral hearing on Anita Brunsting's motion to approve appraisal.	2.20 195.00/hr	Canda L230 \$429.00
	TJJ	Reviewed correspondence from C. Reed re C. Kunz-Freed withheld documents responsive to subpoena duces tecum.	0.20 195.00/hr	Canda L320 \$39.00
	TJJ	Conferred with	0.20 195.00/hr	Litiga L250 NO CHARGE
3/8/2019	TJJ	Reviewed correspondence from B. Bayless re legal fees in 2017 trust tax returns; reviewed returns re same.	0.20 195.00/hr	Trust L390 \$39.00
3/11/2019	SAM	Conferred several times with	0.30 395.00/hr	Canda L120 \$118.50
	TJJ	Reviewed 2017 trust tax returns re professional fees; conferred with prepared correspondence to B. Bayless re same.	0.60 195.00/hr	Trust L390 \$117.00
	TJJ	Reviewed privileged documents from C. Kunz-Freed re waiving privilege; reviewed and responded to correspondence from	1.80 195.00/hr	Canda L320 \$351.00

			<u>Hrs/Rate</u>		<u>Amount</u>
3/11/2019	TJJ	Conferred with	0.20 195.00/hr	Trust L390	NO CHARGE
3/12/2019	SAM	Conferred with	0.20 395.00/hr	Canda L120	\$79.00
	TJJ	Reviewed and responded to correspondence from	0.30 195.00/hr	Canda L320	\$58.50
3/19/2019	EJW	Conferred with several court reporter agencies re March 20 deposition; prepared exhibit binders for same.	4.00 250.00/hr	Canda L330	\$1,000.00
	TJJ	Conferred with reviewed C. Kunz-Freed's production re same; prepared deposition exhibits re same; reviewed C. Curtis' pleadings re same.	4.00 195.00/hr	Canda L330	\$780.00
	SAM	Prepared for the deposition of Candace Kunz-Freed; conferred twice with ; conferred several times with	6.40 395.00/hr	Canda L330	\$2,528.00
	JM	Prepared and organized deposition exhibits; conferred with conferred with multiple court reporting agencies re deposition availability; conferred with M. Mauger re same.	4.50 129.50/hr	Canda L330	\$582.75
	MW	Prepared and organized deposition exhibits.	2.00 129.50/hr	Canda L330	\$259.00
	MT	Conferred with multiple court reporting agencies re deposition; prepared multiple correspondences to multiple court reporting agencies re same; prepared and organized deposition exhibits; conferred with	4.50 129.50/hr	Canda L330	\$582.75

			<u>Hrs/Rate</u>		<u>Amount</u>
3/19/2019	TJJ	Conferred with M. Mauger, J. Munro, and E. Wyatt re outline and exhibits for C. Kunz-Freed deposition.	0.50 195.00/hr	Canda L330	NO CHARGE
	TJJ	Conferred with reviewed C. Kunz-Freed's production re same; prepared deposition exhibits re same; reviewed Carl Brunsting's pleadings re same.	4.00 195.00/hr	Canda L330	\$780.00
3/20/2019	TJJ	Prepared for, traveled to, and attended the deposition of C. Kunz-Freed; conferred with	9.00 195.00/hr	Canda L330	\$1,755.00
	SAM	Prepared for, traveled to, attended, and returned from the deposition of Candace Kunz-Freed.	12.00 395.00/hr	Canda L330	\$4,740.00
3/21/2019	SAM	Reviewed the file post-deposition of Candace Kunz-Freed and evaluated the litigation strategy moving forward.	3.80 395.00/hr	Canda L120	\$1,501.00
3/22/2019	TJJ	Reviewed and organized Anita Brunsting's accounting documents and correspondence re same.	0.60 195.00/hr	Trust L140	\$117.00
3/23/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L120	\$118.50
3/26/2019	TJJ	Received and organized accounting documents and correspondence.	0.70 195.00/hr	Trust L140	\$136.50
	TJJ	Conferred with	0.40 195.00/hr	Canda L210	\$78.00
	MT	Prepared correspondence to updated litigation index re same.	0.20 129.50/hr	Canda L140	\$25.90
3/28/2019	TJJ	Reviewed and organized	3.40 195.00/hr	Trust L140	\$663.00

		<u>Hrs/Rate</u>		<u>Amount</u>
4/1/2019	TJJ	Reviewed and organized	2.70 195.00/hr	Trust L140 \$526.50
4/11/2019	SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re the resumption of C. Kunz-Freed deposition; reviewed correspondence from	0.30 395.00/hr	Canda L310 \$118.50
4/26/2019	TJJ	Reviewed Anita Brunsting's prior accounting correspondence re frequency.	0.40 195.00/hr	Trust L320 \$78.00
5/2/2019	MT	Updated discovery index re C. Kunz-Freed deposition transcript with exhibits.	0.40 129.50/hr	Canda L190 \$51.80
5/8/2019	SAM	Reviewed purported notice from R. Munson re a hearing on a closed federal court case; conferred with reviewed the court's electronic records re same.	0.50 395.00/hr	Canda L120 \$197.50
5/13/2019	TJJ	Reviewed Amy Brunsting's motion for sanctions; reviewed authorities re Court's inherent sanction powers; prepared correspondence to	1.00 195.00/hr	Canda L250 \$195.00
5/14/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L330 \$79.00
5/15/2019	TJJ	Reviewed correspondence from C. Reed re date to continue C. Kunz-Freed deposition; reviewed and revised correspondence to Judge Comstock re same.	0.20 195.00/hr	Canda L330 \$39.00
	MT	Updated litigation index re Amy Brunsting's motion for sanctions and contempt.	0.10 129.50/hr	Litiga L140 NO CHARGE
5/17/2019	TJJ	Reviewed correspondence from prepared notice re same; reviewed and filed same.	0.50 195.00/hr	Canda L330 \$97.50

			<u>Hrs/Rate</u>		<u>Amount</u>
5/17/2019	TJJ	Prepared Anita Brunsting's motion for reimbursement of attorney's fees; reviewed fee invoices re same; prepared proposed order re same.	2.30 195.00/hr	Canda L250	\$448.50
	MT	Updated litigation index re notice of intent to continue deposition of C. Kunz-Freed; conferred with Carole Davis re court reporter for same; prepared correspondence to and from Carole Davis re same; prepared correspondence to and from Southwest Court Reporting re same; reviewed and prepared docket matters re deposition.	0.60 129.50/hr	Canda L140	\$77.70
5/20/2019	TJJ	Reviewed correspondence from prepared same.	0.30 195.00/hr	Litiga L310	\$58.50
	TJJ	Reviewed correspondence from prepared same.	0.30 195.00/hr	Canda L310	\$58.50
5/21/2019	MT	Updated litigation index re notice of hearing for Amy's motion for sanctions and contempt; reviewed and prepared docket matters re same.	0.20 129.50/hr	Litiga L140	NO CHARGE
	TJJ	Prepared Anita Brunsting's first requests for production to C. Curtis; reviewed order dismissing C. Curtis' claims re same.	0.30 195.00/hr	Canda L310	\$58.50
	TJJ	Prepared Anita Brunsting's first requests for production to Carole Brunsting.	0.30 195.00/hr	Litiga L310	\$58.50
5/22/2019	TJJ	Reviewed correspondence from reviewed and revised original counterclaims re same; reviewed trust documents re same; reviewed and revised correspondence to	1.00 195.00/hr	Canda L210	\$195.00
6/6/2019	TJJ	Reviewed prior correspondence re accounting updates re frequency.	0.50 195.00/hr	Trust L320	\$97.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
6/6/2019	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to	0.60 395.00/hr	Trust L120	\$237.00
6/7/2019	TJJ	Reviewed correspondence from reviewed prior correspondence re same.	0.50 195.00/hr	Trust L150	\$97.50
	SAM	Conferred several times with reviewed the files re same; prepared correspondence to C. Brunsting re same; prepared correspondence to	1.20 395.00/hr	Trust L150	\$474.00
	TJJ	Conferred with	0.30 195.00/hr	Trust L150	NO CHARGE
6/8/2019	SAM	Reviewed correspondence from B. Bayless re accounting records; reviewed the file re same; prepared correspondence to all parties re same.	0.40 395.00/hr	Trust L120	\$158.00
6/12/2019	MT	Updated litigation index re C. Curtis' response to application for contempt and petition for declaratory judgment.	0.20 129.50/hr	Canda L140	NO CHARGE
	TJJ	Reviewed C. Curtis' response to Amy Brunsting's motion for sanctions; reviewed authorities re legal title and pour-over Will issues.	1.60 195.00/hr	Canda L250	\$312.00
6/14/2019	SAM	Reviewed multiple correspondence among the parties and the court re deposition scheduling issues.	0.30 395.00/hr	Canda L330	\$118.50
6/24/2019	MT	Reviewed correspondence from and prepared correspondence to court reporter re deposition of C. Kunz-Freed.	0.30 129.50/hr	Canda L330	\$38.85

		<u>Hrs/Rate</u>		<u>Amount</u>
6/25/2019	TJJ	7.50 195.00/hr	Canda L330	\$1,462.50
6/26/2019	TJJ	4.80 195.00/hr	Canda L330	\$936.00
	SAM	1.00 395.00/hr	Canda L330	\$395.00
	TJJ	0.40 195.00/hr	Canda L330	NO CHARGE
6/27/2019	SAM	9.00 395.00/hr	Canda L330	\$3,555.00
	SAM	0.40 395.00/hr	Trust L120	\$158.00
	EJW	0.30 250.00/hr	Canda L120	NO CHARGE
	TJJ	7.70 195.00/hr	Canda L330	\$1,501.50
6/28/2019	SAM	0.50 395.00/hr	Canda L120	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
6/28/2019	TJJ	Prepared Anita and Amy Brunsting's joint application for reimbursement of attorneys' fees; prepared affidavit of _____ conferred with _____	2.80 195.00/hr	Canda L250	\$546.00
	TJJ	Prepared for, traveled to, attended, and returned from court re oral hearing on Amy Brunsting's motion for sanctions against C. Curtis.	2.60 195.00/hr	Canda L230	\$507.00
7/1/2019	TJJ	Conferred with _____	0.30 195.00/hr	Trust L120	NO CHARGE
	SAM	Conferred with _____ reviewed the accounting correspondence to the family members.	0.40 395.00/hr	Trust L120	\$158.00
	SAM	Reviewed correspondence from and prepared correspondence to B. Bayless re tolling agreement; reviewed correspondence from _____	1.40 395.00/hr	Carl L250	\$553.00
	TJJ	Reviewed and organized accounting documents; prepared correspondence to Amy Brunsting, Carl Brunsting, Carole Brunsting; and C. Curtis re accounting update.	3.30 195.00/hr	Trust L320	\$643.50
	TJJ	Prepared S. Mendel's and S. Griffin's affidavits re Amy and Anita Brunsting's joint application for reimbursement of attorneys' fees; prepared order granting same.	0.40 195.00/hr	Canda L250	\$78.00
7/2/2019	TJJ	Prepared correspondence to R. Vander Werff re farm appraisal; reviewed prior correspondence re same.	1.30 195.00/hr	Trust L190	\$253.50
7/3/2019	MT	Updated litigation index re proposed order for Amy's motion for sanctions.	0.10 129.50/hr	Canda L140	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
7/4/2019	SAM	Prepared correspondence to	0.30 395.00/hr	Canda L330	\$118.50
7/8/2019	SAM	Conferred with conferred with	0.60 395.00/hr	Canda L330	\$237.00
	MT	Updated litigation index re C. Curtis' proposed order re post hearing findings of fact and memorandum re appointing an administrator.	0.20 129.50/hr	Canda L190	NO CHARGE
	SAM	Conferred with	0.40 395.00/hr	Canda L240	\$158.00
	TJJ	Reviewed C. Curtis' proposed order and findings and conclusions of law re Amy Brunsting's motion for sanctions; reviewed C. Curtis' memo re appointment of administrator.	0.80 195.00/hr	Canda L250	\$156.00
	TJJ	Conferred with	0.40 195.00/hr	Trust L250	NO CHARGE
7/11/2019	SAM	Reviewed and approved the tolling agreement for Carl Brunsting.	0.20 395.00/hr	Carl L250	\$79.00
	MT	Updated file memo re tolling agreement; prepared correspondence to B. Bayless re same.	0.20 129.50/hr	Carl L250	\$25.90
7/12/2019	SAM	Reviewed the file re pending administration issues.	0.20 395.00/hr	Trust L120	NO CHARGE
7/13/2019	SAM	Reviewed correspondence from B. Bayless re Carl Brunsting's tolling agreement; reviewed the file re the appraisal issue; prepared correspondence to	0.40 395.00/hr	Carl L250	\$158.00

		<u>Hrs/Rate</u>		<u>Amount</u>
7/15/2019 MT	Reviewed correspondence from B. Bayless re tolling agreement; reviewed correspondence from	0.10 129.50/hr	Carl L250	NO CHARGE
7/19/2019 MT	Reviewed correspondence from court reporter re reporter's record from hearing.	0.10 129.50/hr	Litiga L190	NO CHARGE
	SAM Reviewed correspondence from the court reporter re transcript for the sanctions hearing.	0.20 395.00/hr	Canda L230	\$79.00
7/23/2019 MT	Updated litigation index re order for sanctions re C. Curtis; reviewed correspondence from the court re same.	0.20 129.50/hr	Canda L140	\$25.90
7/30/2019 MT	Updated discovery index re C. Kunz-Freed's deposition transcript and deposition exhibits; reviewed correspondence from court reporter re same.	0.40 129.50/hr	Canda L110	\$51.80
8/1/2019 MT	Updated file memo re correspondence from Southwest Reporting re C. Kunz-Freed's deposition.	0.10 129.50/hr	Canda L330	NO CHARGE
8/12/2019 MT	Updated litigation index re order granting appraisal; prepared correspondence to	0.20 129.50/hr	Trust L140	\$25.90
	SAM Reviewed correspondence from and prepared correspondence to reviewed multiple correspondence from and prepared multiple correspondence to B. Bayless and N. Spielman re settlement issues.	0.50 395.00/hr	Carl L160	\$197.50
8/13/2019 MT	Reviewed multiple correspondences to and from opposing counsel re mediation; prepared correspondence to	0.30 129.50/hr	Canda L160	\$38.85

		<u>Hrs/Rate</u>		<u>Amount</u>	
8/14/2019	MT	Reviewed multiple correspondences from opposing counsel re mediation.	0.10 129.50/hr	Canda L160	NO CHARGE
	SAM	Reviewed credentials of Judge Charles Seymore to be mediator; reviewed multiple correspondence from and prepared multiple correspondence to B. Bayless and N. Spielman re mediation issues.	0.70 395.00/hr	Canda L160	\$276.50
8/15/2019	MT	Reviewed multiple correspondences re mediation.	0.10 129.50/hr	Canda L160	\$12.95
	TJJ	Reviewed correspondence from Carole Brunsting, B. Bayless, and N. Spielman re potential mediator; reviewed potential mediator's curriculum vitae.	0.30 195.00/hr	Canda L160	\$58.50
	SAM	Conferred with	0.40 395.00/hr	Canda L160	\$158.00
	TJJ	Conferred with	0.40 195.00/hr	Litiga L160	NO CHARGE
8/16/2019	SAM	Reviewed the file re pending administration issues.	0.30 395.00/hr	Trust L120	\$118.50
8/20/2019	SAM	Conferred with	0.30 395.00/hr	Canda L160	\$118.50
	TJJ	Conferred with ; prepared correspondence to Judge Seymore re conference call to discuss case.	0.40 195.00/hr	Canda L160	\$78.00
	TJJ	Conferred with	0.30 195.00/hr	Litiga L160	NO CHARGE
8/26/2019	TJJ	Conferred with conferred with	0.40 195.00/hr	Canda L160	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
8/26/2019	SAM	Reviewed the file re appraisal issues; conferred with	0.30 395.00/hr	Canda L120	\$118.50
	TJJ	Reviewed correspondence from and prepared correspondence to	0.20 195.00/hr	Canda L160	\$39.00
9/3/2019	MT	Reviewed file re outstanding issues; conferred with	0.20 129.50/hr	Trust L190	NO CHARGE
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Trust L120	\$118.50
9/5/2019	MT	Reviewed correspondence from outstanding issues.	0.10 129.50/hr	Canda L160	NO CHARGE
		reviewed file re			
9/13/2019	MT	Conferred with	0.10 129.50/hr	Canda L190	NO CHARGE
9/17/2019	SAM	Conferred with Charles Seymore re mediation of the case; prepared correspondence to	0.40 395.00/hr	Canda L160	\$158.00
10/9/2019	SAM	Conferred with Judge Seymore re mediation issues; prepared multiple correspondence to Judge Seymore re trust issues.	1.20 395.00/hr	Canda L160	\$474.00
10/10/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.40 395.00/hr	Canda L120	\$158.00
	SAM	Reviewed correspondence from and prepared correspondence to C. Seymore re settlement issues; prepared correspondence to	0.50 395.00/hr	Canda L160	\$197.50
10/12/2019	SAM	Prepared file memo re	0.30 395.00/hr	Canda L330	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
10/16/2019	EJW	Reviewed C. Kunz-Freed's motion for appointment of successor representative of the estate.	0.30 250.00/hr	Canda L120	\$75.00
	SAM	Prepared file memo re pending issues; conferred with	0.50 395.00/hr	Canda L120	\$197.50
10/17/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L160	\$118.50
	ROC	Reviewed the file re case status and outstanding issues; prepared file memo re mediation and strategy issues.	2.50 175.00/hr	Canda L160	\$437.50
10/18/2019	EJW	Reviewed and prepared docket matters; reviewed motion to appoint personal representative.	0.30 250.00/hr	Canda L190	\$75.00
	ROC	Reviewed authorities re reviewed and revised counterclaim.	2.20 175.00/hr	Canda L120	\$385.00
10/21/2019	SAM	Reviewed the file re counterclaims to be asserted.	0.30 395.00/hr	Canda L120	\$118.50
10/22/2019	MT	Updated litigation index re reporter's certificate re C. Kunz-Freed's deposition.	0.10 129.50/hr	Canda L140	NO CHARGE
	SAM	Reviewed and revised the joint petition for declaratory judgment; prepared correspondence to	1.00 395.00/hr	Canda L210	\$395.00
10/23/2019	SAM	Conferred with prepared file memo re same; prepared correspondence to	1.60 395.00/hr	Canda L210	\$632.00
	ROC	Prepared amended answer re affirmative defenses; reviewed the federal and state litigation reports re production for source of financial and stock transfers from survivor trust or decedent trust.	3.40 175.00/hr	Canda L250	\$595.00

			<u>Hrs/Rate</u>		<u>Amount</u>
10/24/2019	SAM	Conferred with _____ reviewed and revised the second amended answer; reviewed the counterclaims re same.	2.30 395.00/hr	Canda L210	\$908.50
	ROC	Reviewed the federal and state litigation reports re	0.70 175.00/hr	Canda L320	\$122.50
10/25/2019	SAM	Prepared for and attended the status conference call with _____; reviewed correspondence from _____ and prepared correspondence to _____	3.00 395.00/hr	Canda L120	\$1,185.00
10/26/2019	SAM	Prepared correspondence to _____	0.20 395.00/hr	Canda L120	\$79.00
10/28/2019	SAM	Reviewed correspondence from C. Seymore re mediation issues; reviewed the C. Curtis distribution chart; prepared correspondence to C. Seymore re same; prepared correspondence to _____ reviewed the Iowa farm appraisal; prepared correspondence to _____	0.80 395.00/hr	Canda L160	\$316.00
11/2/2019	SAM	Reviewed correspondence from _____ prepared correspondence to C. Seymore re same.	0.50 395.00/hr	Canda L160	\$197.50
11/4/2019	MT	Updated litigation index re Amy and Anita Brunsting's response to motion to appoint personal representative with proposed order; filed second amended answer.	0.40 129.50/hr	Canda L140	\$51.80
	SAM	Reviewed and revised the settlement proposal for the mediator; prepared correspondence to _____ conferred with _____ reviewed correspondence from _____ and prepared correspondence to C. Seymore re mediation issues.	3.30 395.00/hr	Canda L160	\$1,303.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
11/4/2019	SAM	Reviewed and revised the second amended answer; conferred with prepared correspondence to	1.00 395.00/hr	Canda L210	\$395.00
	SAM	Reviewed and revised the response to Vacek & Freed's motion to appoint a personal representative; prepared correspondence to	1.00 395.00/hr	Canda L250	\$395.00
11/5/2019	MT	Updated litigation index re second amended answer and Amy's motion for second contempt and additional sanctions with proposed order; reviewed multiple correspondences to and from Judge Seymore re mediation and settlement alternatives.	0.40 129.50/hr	Canda L140	\$51.80
	SAM	Reviewed and revised the settlement proposal; prepared correspondence to reviewed authorities re prepared correspondence to prepared correspondence to	1.80 395.00/hr	Canda L160	\$711.00
11/6/2019	SAM	Prepared for, traveled to, attended, and returned from the oral hearing on Vacek & Freed's motion for the appointment of a single personal representative.	2.00 395.00/hr	Canda L230	\$790.00
11/7/2019	SAM	Reviewed correspondence from and prepared correspondence to reviewed multiple correspondence from N. Spielman and C. Seymore re settlement issues.	0.80 395.00/hr	Canda L160	\$316.00
	MT	Updated litigation index re amended notice of hearing re appointment of personal representative; reviewed and prepared docket matters re same.	0.20 129.50/hr	Canda L140	NO CHARGE
	EJW	Reviewed and redacted invoices.	0.30 250.00/hr	Trust L190	\$75.00
	EJW	Prepared documents for production.	0.30 250.00/hr	Canda L320	\$75.00

		<u>Hrs/Rate</u>		<u>Amount</u>
11/7/2019	SAM Prepared multiple correspondence to and reviewed multiple correspondence from N. Spielman and B. Bayless re the deposition of C. Curtis.	0.50 395.00/hr	Canda L330	\$197.50
11/8/2019	MT Prepared documents for production.	1.00 129.50/hr	Canda L320	\$129.50
	EJW Reviewed and redacted invoices.	0.40 250.00/hr	Trust L190	\$100.00
	EJW Prepared documents for production.	0.40 250.00/hr	Canda L320	\$100.00
11/11/2019	SAM Reviewed correspondence from C. Seymore re mediation meeting; conferred with reviewed the file re same.	0.30 395.00/hr	Canda L160	\$118.50
11/13/2019	SAM Prepared the attorneys' fees exhibit for C. Seymore; reviewed and revised the co-trustees settlement offer; conferred with attended conference call with C. Seymore (mediator) and	2.00 395.00/hr	Canda L160	\$790.00
11/14/2019	SAM Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L160	\$79.00
11/17/2019	SAM Reviewed correspondence from C. Schwager re new counsel re C. Curtis; prepared correspondence to the mediator re same; prepared correspondence to	0.60 395.00/hr	Canda L160	\$237.00
11/18/2019	MT Updated litigation index re notice of hearing for second motion for contempt and sanctions; reviewed and prepared docket matters re same; prepared notice of intent to take the deposition of C. Curtis.	0.50 129.50/hr	Canda L140	\$64.75

		<u>Hrs/Rate</u>		<u>Amount</u>	
11/18/2019	SAM	Reviewed correspondence from and prepared correspondence to	2.00 395.00/hr	Canda L120	\$790.00
	SAM	Prepared for and attended the conference call with C. Seymore and N. Spielman re settlement issues.	0.50 395.00/hr	Canda L160	\$197.50
11/19/2019	MT	Updated litigation index re C. Curtis' bill of review and notice of appearance.	0.20 129.50/hr	Canda L210	\$25.90
	SAM	Reviewed correspondence from C. Seymore re settlement of the case; prepared correspondence to C. Seymore re same; prepared correspondence to	1.50 395.00/hr	Canda L160	\$592.50
	SAM	Reviewed bill of review filed by C. Curtis; prepared correspondence to C. Seymore re same; prepared correspondence to	0.50 395.00/hr	Canda L210	\$197.50
11/20/2019	SAM	Reviewed correspondence from and prepared correspondence to reviewed correspondence from N. Spielman and C. Seymore re same.	0.90 395.00/hr	Canda L160	\$355.50
11/21/2019	SAM	Reviewed correspondence from N. Spielman and C. Seymore re settlement issues; prepared correspondence to reviewed correspondence from reviewed the revised asset summary.	0.80 395.00/hr	Canda L160	\$316.00
11/22/2019	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to C. Seymore the co-trustees settlement proposal; prepared for and attended the reviewed correspondence from the mediator re same; prepared correspondence to	1.00 395.00/hr	Canda L160	\$395.00

			<u>Hrs/Rate</u>		<u>Amount</u>
12/5/2019	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Litiga L160	NO CHARGE
12/11/2019	EJW	Conferred with	0.20 250.00/hr	Canda L190	NO CHARGE
	MT	Updated litigation index re first amended notice of hearing re motion to appoint a personal representative; reviewed court's docket re pending motions.	0.30 129.50/hr	Canda L140	\$38.85
	SAM	Conferred with reviewed the file memo re same.	0.30 395.00/hr	Canda L210	\$118.50
	EJW	Reviewed file re outstanding issues for hearing; prepared correspondence to	0.80 250.00/hr	Canda L190	NO CHARGE
12/12/2019	SAM	Conferred with	0.50 395.00/hr	Canda L250	\$197.50
	EJW	Conferred with	0.20 250.00/hr	Canda L250	NO CHARGE
12/13/2019	SAM	Reviewed correspondence from and prepared correspondence to ; conferred with	0.30 395.00/hr	Canda L160	\$118.50
1/9/2020	SAM	Conferred with prepared the first supplemental petition; prepared correspondence to	0.80 395.00/hr	Canda L210	\$316.00
	EJW	Conferred with	0.20 250.00/hr	Canda L190	NO CHARGE
	SAM	Revised the settlement proposal; prepared correspondence to	1.50 395.00/hr	Canda L160	\$592.50
1/10/2020	MT	Filed first supplemental petition.	0.20 129.50/hr	Canda L210	\$25.90

		<u>Hrs/Rate</u>		<u>Amount</u>
1/10/2020	SAM	1.50 395.00/hr	Canda L210	\$592.50
	EJW	0.20 250.00/hr	Canda L120	NO CHARGE
	SAM	2.50 395.00/hr	Canda L230	\$987.50
1/12/2020	SAM	0.80 395.00/hr	Canda L130	\$316.00
	SAM	0.80 395.00/hr	Canda L120	\$316.00
1/13/2020	MT	0.10 129.50/hr	Canda L140	NO CHARGE
	SAM	3.50 395.00/hr	Canda L160	\$1,382.50
	SAM	0.60 395.00/hr	Canda L130	\$237.00
1/14/2020	SAM	0.50 395.00/hr	Trust L120	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>
1/15/2020	SAM Reviewed multiple correspondence from the parties re mediation issues; prepared correspondence to the parties re same; reviewed correspondence from and prepared correspondence to C. Schwager travel expense issues.	0.60 395.00/hr	Canda L160	\$237.00
1/16/2020	MT Updated litigation index re C. Curtis' objection to first supplemental petition.	0.10 129.50/hr	Canda L140	NO CHARGE
	SAM Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L160	\$79.00
1/18/2020	SAM Reviewed correspondence from C. Schwager re mediation; prepared correspondence to and reviewed correspondence from B. Bayless re same; prepared correspondence to	0.80 395.00/hr	Canda L160	\$316.00
1/23/2020	SAM Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Trust L120	\$118.50
1/25/2020	SAM Reviewed multiple correspondence from and prepared correspondence to reviewed the financial records to prepare the semi-annual 2019 accounting.	1.30 395.00/hr	Trust L120	\$513.50
1/27/2020	SAM Reviewed multiple correspondence from and prepared multiple correspondence to B. Bayless and N. Spielman re mediation issues; conferred with prepared correspondence to C. Schwager re mediation and forensic examination issues.	1.30 395.00/hr	Canda L160	\$513.50
1/28/2020	MT Conferred with L. Diaz re document production.	0.20 129.50/hr	Litiga L320	NO CHARGE
	SAM Reviewed multiple correspondence from prepared an outline of the semi-annual accounting report; conferred	0.40 395.00/hr	Canda L120	\$158.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	with L. Diaz re same; reviewed the file re same; reviewed correspondence from and prepared correspondence to			
1/29/2020 SAM	Reviewed and revised the 2019 semi-annual accounting; prepared correspondence to all parties re same; conferred with and prepared correspondence to	1.30 395.00/hr	Trust L120	\$513.50
L-Ast	Prepared multiple correspondence to C. Curtis, Carl Brunsting, Carole Brunsting, and Amy Brunsting re accounting update.	1.10 95.00/hr	Trust L150	\$104.50
1/30/2020 SAM	Conferred with the CPA re tax returns to produce; prepared correspondence to the CPA re same; prepared the draft order of the results of the January 10, 2020 hearing; prepared correspondence to the parties re same; conferred with Judge Davidson's office re mediation; reviewed correspondence from Judge Davidson's office re same; reviewed correspondence from Rich Rikkers re local Iowa counsel; prepared correspondence to and reviewed correspondence from the firm of Crary Huff (Iowa) and J. Johnson re same; conferred with reviewed correspondence from and prepared correspondence to mediation issues.	2.20 395.00/hr	Canda L190	\$869.00
2/1/2020 SAM	Finalized the draft order re the January 2020 hearing; prepared multiple correspondence to the parties re same.	0.50 395.00/hr	Trust L230	\$197.50
2/2/2020 SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Canda L160	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>
2/2/2020	SAM	0.50 395.00/hr	Trust L150	\$197.50
Conferred with L. Diaz re trust accounting issues; prepared correspondence to the parties re same; conferred with R. Ridders (Iowa CPA) re the 2018 tax returns.				
2/3/2020	SAM	0.40 395.00/hr	Canda L250	\$158.00
Reviewed correspondence from and prepared correspondence to B. Bayless re the draft order for the January 10, 2020 hearing based on B. Bayless's suggestions; revised same; prepared correspondence to				
	SAM	0.40 395.00/hr	Trust L120	\$158.00
Reviewed correspondence from and prepared correspondence to B. Bayless re the appraisal; reviewed the appraisal.				
2/5/2020	SAM	1.60 395.00/hr	Canda L160	\$632.00
Conferred with prepared for and attended a conference call with N. Spielman and B. Bayless re settlement; prepared file memo re same; revised the draft order re same.				
2/8/2020	SAM	1.00 395.00/hr	Canda L250	\$395.00
Prepared draft order re the January 10, 2020 hearing; prepared correspondence to B. Bayless and N. Spielman re same.				
2/12/2020	SAM	0.70 395.00/hr	Canda L160	\$276.50
Reviewed and revised the proposed mediation order; reviewed correspondence from and prepared correspondence to N. Spielman and B. Bayless re same; reviewed correspondence from and prepared correspondence to				
2/13/2020	SAM	0.40 395.00/hr	Canda L120	\$158.00
Reviewed correspondence from reviewed correspondence from B. Bayless re same; prepared correspondence to and reviewed correspondence from				
2/15/2020	SAM	0.50 395.00/hr	Canda L160	\$197.50
Prepared the agreed mediation order; prepared correspondence to the parties re same.				

		<u>Hrs/Rate</u>		<u>Amount</u>
2/17/2020	SAM	0.20 395.00/hr	Canda L160	\$79.00
Prepared correspondence to and reviewed correspondence from C. Schwager and C. Reed re status of the agreed mediation order.				
2/18/2020	SAM	0.50 395.00/hr	Canda L240	\$197.50
Reviewed correspondence from and prepared correspondence to				
2/19/2020	SAM	0.50 395.00/hr	Canda L250	\$197.50
Reviewed multiple correspondence from and prepared correspondence to B. Bayless, A. Brunsting, N. Spielman, and Carole Brunsting re the proposed January 2020 order.				
2/20/2020	EJW	1.00 250.00/hr	Canda L250	\$250.00
Prepared motion for order to mediate; revised proposed order re same.				
	SAM	1.80 395.00/hr	Canda L250	\$711.00
Prepared the joint motion for the mediation order; filed and served same; prepared correspondence to Judge Comstock re same; conferred several times with				
2/21/2020	MT	0.10 129.50/hr	Canda L140	NO CHARGE
Updated litigation index re motion for mediation order and proposed order.				
2/24/2020	MT	0.20 129.50/hr	Canda L190	NO CHARGE
Updated litigation index re C. Curtis' requests for citation on all parties re bill of review.				
	SAM	1.00 395.00/hr	Canda L160	\$395.00
Reviewed multiple correspondence from and prepared multiple correspondence to C. Schwager re the court ordered mediation.				
2/25/2020	SAM	1.00 395.00/hr	Canda L160	\$395.00
Reviewed multiple correspondence from and prepared multiple correspondence to C. Schwager re the court ordered mediation; reviewed correspondence from				
2/26/2020	SAM	1.30 395.00/hr	Canda L160	\$513.50
Reviewed correspondence from the court re the modified mediation order; revised same; prepared correspondence to N. Spielman and B. Bayless re same.				

		<u>Hrs/Rate</u>		<u>Amount</u>
2/26/2020	SAM	0.70 395.00/hr	Canda L160	\$276.50
	SAM	0.60 395.00/hr	Canda L160	\$237.00
2/27/2020	SAM	1.30 395.00/hr	Canda L160	\$513.50
2/28/2020	SAM	0.40 395.00/hr	Canda L160	\$158.00
3/13/2020	SAM	1.00 395.00/hr	Canda L160	\$395.00
3/14/2020	SAM	0.40 395.00/hr	Canda L160	\$158.00
	SAM	0.40 395.00/hr	Canda L210	\$158.00
3/15/2020	SAM	0.30 395.00/hr	Canda L160	\$118.50
3/21/2020	SAM	0.30 395.00/hr	Canda L160	\$118.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
3/21/2020	SAM	Reviewed correspondence from C. Schwager re accounting issues and the 2018 tax return; reviewed the file re same.	0.30 395.00/hr	Canda L120	\$118.50
3/24/2020	MT	Reviewed and prepared docket matters re response to citation re bill of review.	0.20 129.50/hr	Canda L190	NO CHARGE
3/25/2020	SAM	Reviewed correspondence from C. Schwager re production issues; reviewed correspondence from	0.20 395.00/hr	Canda L320	\$79.00
4/16/2020	SAM	Reviewed the bill of review; prepared correspondence to	0.60 395.00/hr	Canda L210	\$237.00
4/17/2020	SAM	Reviewed correspondence from C. Schwager re the forensic examination; reviewed the credentials of C. Baggett.	0.40 395.00/hr	Canda L130	\$158.00
4/22/2020	SAM	Reviewed correspondence from conferred with ; prepared correspondence to	0.80 395.00/hr	Canda L120	\$316.00
	SAM	Reviewed correspondence from and prepared correspondence to J. Johnson re Iowa farm issues; reviewed correspondence from	0.80 395.00/hr	Canda L120	\$316.00
	SAM	Reviewed correspondence from prepared the settlement analysis; prepared correspondence to	1.50 395.00/hr	Canda L160	\$592.50
4/24/2020	SAM	Prepared for and attended conference call with Anita Brunsting, Amy Brunsting, and Neal Spielman.	2.50 395.00/hr	Canda L160	\$987.50
	SAM	Reviewed the file re Iowa farm issues; prepared correspondence to J. Jefferson re same.	0.30 395.00/hr	Canda L190	\$118.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
4/27/2020	SAM	Reviewed correspondence from and prepared correspondence to	0.40 395.00/hr	Canda L160	\$158.00
4/29/2020	SAM	Reviewed correspondence from and prepared correspondence to S. Saylor re Iowa partition issues; reviewed correspondence from C. Curtis re trust disbursements.	0.60 395.00/hr	Canda L190	\$237.00
	SAM	Reviewed correspondence from	0.20 395.00/hr	Canda L130	\$79.00
5/3/2020	SAM	Prepared the global settlement offer.	3.50 395.00/hr	Canda L160	\$1,382.50
5/4/2020	SAM	Conferred with conferred with reviewed and revised the settlement proposal; prepared correspondence to conferred with	2.30 395.00/hr	Canda L160	\$908.50
	EJW	Conferred with	0.20 250.00/hr	Litiga L120	\$50.00
5/5/2020	SAM	Prepared correspondence to Judge Davidson re mediation of the case; conferred with revised the settlement agreement re same; prepared additional correspondence to	1.30 395.00/hr	Canda L160	\$513.50
	SAM	Reviewed the attorneys' fees and expense billing records; conferred with	0.40 395.00/hr	Litiga L190	\$158.00
	SAM	Conferred with C. Schwager re forensic examination and mediation; prepared correspondence to prepared correspondence to and reviewed correspondence from	2.20 395.00/hr	Canda L130	\$869.00

			<u>Hrs/Rate</u>		<u>Amount</u>
		prepared correspondence to C. Baggett re forensic issues that may lead to settlement of the case.			
5/6/2020	SAM	Prepared the 2017 - 2019 federal tax returns for production.	0.20 395.00/hr	Trust L320	\$79.00
	EJW	Conferred with	0.20 250.00/hr	Litiga L120	\$50.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	1.10 150.00/hr	Litiga L190	\$165.00
	SAM	Conferred several times with	0.80 395.00/hr	Litiga L190	\$316.00
	SAM	Reviewed the historical invoices for production purpose; conferred with prepared correspondence to	0.40 395.00/hr	Litiga L190	\$158.00
5/7/2020	SAM	Reviewed correspondence from the CPA re the 2017 - 2019 federal tax returns; prepared the 2017 - 2019 tax returns for production; prepared correspondence to the parties re same.	2.00 395.00/hr	Trust L320	\$790.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	2.40 150.00/hr	Litiga L190	\$360.00
	SAM	Reviewed correspondence from reviewed prior correspondence from C. Schwager re same.	0.20 395.00/hr	Canda L320	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/8/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	1.80 150.00/hr	Canda L190	\$270.00
	SAM	Reviewed multiple correspondence by and between N. Spielman and C. Schwager re forensic examination and mediation issues.	0.50 395.00/hr	Canda L130	\$197.50
	SAM	Reviewed correspondence from C. Schwager re the 2017 - 2019 tax returns; reviewed the file re same; resent the same prior correspondence to C. Schwager; conferred with	1.20 395.00/hr	Canda L150	\$474.00
5/10/2020	SAM	Reviewed correspondence from and prepared correspondence to C. Schwager re C. Kunz-Freed deposition.	0.30 395.00/hr	Canda L330	\$118.50
5/11/2020	SAM	Reviewed the file re pending administration issues; prepared correspondence to	0.30 395.00/hr	Trust L190	\$118.50
	SAM	Conferred several times with	0.50 395.00/hr	Litiga L190	\$197.50
	EJW	Conferred with	0.30 250.00/hr	Litiga L190	\$75.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.10 150.00/hr	Litiga L190	\$1,215.00
	SAM	Conferred several times with reviewed the file re same.	0.40 395.00/hr	Litiga L390	\$158.00
5/12/2020	SAM	Prepared for and attended the conference call with	0.80 395.00/hr	Canda L120	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>
5/12/2020 MT	Conferred with Judge Davidson's office re mediation memo and mediation fees; prepared correspondence to Judge Davidson re same.	0.30 129.50/hr	Canda L190	\$38.85
SAM	Prepared correspondence to B. Bayless re settlement issues; prepared for and attended the settlement conference call with B. Bayless.	0.70 395.00/hr	Carl L160	\$276.50
SAM	Conferred several times with	0.80 395.00/hr	Litiga L190	\$316.00
SAM	Prepared for and attended the settlement conference call with prepared file memo re same; prepared for and attended the settlement conference call with prepared correspondence to Judge Davidson re parties to the mediation and confirmation of the date re same; prepared correspondence to and reviewed correspondence from Carole Brunsting re mediation of the case.	1.60 395.00/hr	Canda L160	\$632.00
ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.20 150.00/hr	Litiga L190	\$1,230.00
5/13/2020 EJW	Reviewed file re outstanding issues for attorneys' fees; conferred with conferred with	0.40 250.00/hr	Litiga L120	\$100.00
ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	7.90 150.00/hr	Litiga L190	\$1,185.00
SAM	Reviewed the planning instruments for issues re the mediation memorandum; reviewed correspondence from and prepared correspondence to	0.50 395.00/hr	Canda L160	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
5/13/2020	SAM	Reviewed C. Curtis' pleadings; reviewed issues related to same for the mediation of the case.	0.80 395.00/hr	Canda L210	\$316.00
	SAM	Reviewed correspondence from C. Schwager re forensic examination issues; reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L130	\$118.50
5/14/2020	EJW	Conferred with reviewed and redacted same; conferred with	1.50 250.00/hr	Litiga L120	\$375.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.40 150.00/hr	Litiga L190	\$1,260.00
5/15/2020	EJW	Conferred with	0.90 250.00/hr	Litiga L120	\$225.00
	MT	Reviewed correspondence from Judge Davidson; prepared mediation letter information form.	0.30 129.50/hr	Canda L190	\$38.85
	SAM	Reviewed the correspondence from Judge Davidson; reviewed and edited mediation letter information form.	0.50 395.00/hr	Canda L190	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	3.60 150.00/hr	Litiga L190	\$540.00
5/16/2020	SAM	Conferred several times with	0.50 395.00/hr	Litiga L190	\$197.50
5/18/2020	SAM	Prepared the attorneys' fees billing and expense records; conferred with	0.60 395.00/hr	Litiga L190	\$237.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/18/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.00 150.00/hr	Litiga L190	\$1,200.00
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L130	\$118.50
5/19/2020	MT	Prepared attorney fee affidavit.	0.40 129.50/hr	Litiga L210	\$51.80
	SAM	Reviewed and organized the attorneys' fee billing and expense records; prepared application for same; conferred with reviewed authorities re	0.60 395.00/hr	Litiga L190	\$237.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.30 150.00/hr	Litiga L190	\$1,245.00
5/20/2020	SAM	Conferred several times with	0.50 395.00/hr	Litiga L120	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	3.90 150.00/hr	Litiga L190	\$585.00
5/21/2020	SAM	Conferred several times with reviewed and organized the billing and expense records.	0.50 395.00/hr	Litiga L190	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	8.10 150.00/hr	Litiga L190	\$1,215.00

		<u>Hrs/Rate</u>		<u>Amount</u>
5/22/2020	ROC Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	3.60 150.00/hr	Litiga L190	\$540.00
	SAM Reviewed the file re correspondence to and correspondence from Judge Davidson's office re mediation of the case; reviewed and revised the case party summary requested by Judge Davidson; prepared correspondence to Judge Davidson re same.	0.60 395.00/hr	Litiga L160	\$237.00
	SAM Reviewed the attorneys' fees billing and expense records; conferred with	0.70 395.00/hr	Litiga L190	\$276.50
	SAM Reviewed multiple correspondence from and prepared multiple correspondence to reviewed correspondence from and prepared correspondence to	0.50 395.00/hr	Canda L130	\$197.50
5/25/2020	SAM Reviewed correspondence from and prepared correspondence to Judge Davidson the mediation of the case and party information re same; reviewed correspondence from and prepared correspondence to B. Bayless re settlement issues.	0.60 395.00/hr	Canda L160	\$237.00
5/26/2020	ROC Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; conferred several times with	7.60 150.00/hr	Litiga L190	\$1,140.00
	SAM Reviewed correspondence from reviewed authorities re prepared correspondence to	0.50 395.00/hr	Canda L130	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
5/27/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared affidavit re same; conferred several times with	4.60 150.00/hr	Litiga L190	\$690.00
	SAM	Reviewed correspondence from	0.30 395.00/hr	Canda L160	\$118.50
	SAM	Reviewed and revised the joint settlement demand re Vacek & Freed; prepared correspondence to	0.50 395.00/hr	Canda L160	\$197.50
5/28/2020	SAM	Reviewed the file re mediation issues; prepared correspondence to and reviewed correspondence from prepared correspondence to and reviewed correspondence from prepared the master settlement agreement; conferred with	1.50 395.00/hr	Litiga L160	\$592.50
	SAM	Reviewed the attorneys' fees billing and expense records; conferred with	0.50 395.00/hr	Litiga L190	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared Settlement Agreement and Mutual Release; conferred several times with	8.90 150.00/hr	Litiga L190	\$1,335.00
	SAM	Reviewed multiple correspondence from	0.30 395.00/hr	Canda L190	\$118.50
5/29/2020	SAM	Reviewed the attorneys' fees billing and expense records; conferred with reviewed and revised the master settlement agreement; reviewed correspondence from	1.00 395.00/hr	Litiga L160	\$395.00

	<u>Hrs/Rate</u>		<u>Amount</u>
5/29/2020 SAM Reviewed file re proposed forensic examiners.	0.30 395.00/hr	Canda L130	\$118.50
ROC Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared Settlement Agreement and Mutual Release; conferred several times with	9.00 150.00/hr	Litiga L440	\$1,350.00
For professional services rendered	<u>1075.80</u>		<u>\$274,119.35</u>
Additional Charges :			
6/21/2016 Trial transcripts.			\$70.00
12/19/2017 Courier. FedEx.			\$17.31
8/28/2018 Filing fees re defendants' joint motion for continuance regarding Carl Brunsting's motion for partial summary judgment.			\$2.06
Filing fees re order granting defendants' motion for continuance regarding Carl Brunsting's motion for partial summary judgment.			\$2.06
Filing fees re notice of hearing on defendants' joint motion for continuance regarding Carl Brunsting's motion for partial summary judgment			\$2.06
8/29/2018 Filing fees re defendants' joint response to plaintiff's motion for partial summary judgment.			\$2.06
8/30/2018 Filing fees re order denying plaintiff's motion for partial summary judgment.			\$2.06
9/4/2018 Copy			\$16.80
Fax			\$8.40
10/31/2018 Filing fees re defendant A. Brunsting's notice of the oral and/or video deposition of C. Kunz-Freed			\$2.06

	<u>Amount</u>
12/19/2018 Service of subpoena on C. Kunz-Freed re deposition.	\$95.00
1/16/2019 Filing fees re A. Brunsting's response to C. Kunz-Freed's motions to quash and for protection.	\$2.06
1/24/2019 Parking and local travel.	\$10.00
1/28/2019 Filing fees re A. Brunsting's motion to obtain appraisal.	\$2.06
Filing fees re proposed order granting appraisal.	\$2.06
1/29/2019 Filing fees re Anita Brunsting's motion to join Amy Brunsting's motion for clarification and/or motion to dismiss.	\$2.06
2/8/2019 Filing fees re notice of hearing for motion to obtain appraisal.	\$2.06
3/6/2019 Copy	\$6.40
3/19/2019 Copies within the Firm.	\$187.20
Copy	\$2.00
Copy	\$32.40
Copy	\$9.00
Fax	\$9.20
Fax	\$7.20
Fax	\$17.40
Fax	\$12.20
3/20/2019 Parking re deposition of C. Kunz-Freed.	\$6.00
5/17/2019 Filing fees re notice of intention to continue deposition of C. Kunz-Freed.	\$2.06
6/7/2019 Deposition transcript of Candace Kunz-Freed.	\$2,263.42

	<u>Amount</u>
6/25/2019 Fax	\$13.20
6/26/2019 Fax	\$17.60
6/27/2019 Parking and local travel.	\$15.00
7/1/2019 Parking and local travel.	\$10.00
8/2/2019 Deposition transcript of C. Kunz-Freed.	\$1,551.33
5/19/2020 Copies from court re affidavit.	\$1.00
Total additional charges	<u>\$4,406.90</u>

The Mendel Law Firm, L.P.

**Attorneys & Counselors
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Anita K. Brunsting
801 Bassington Court
Pflugerville, TX 78660

In Reference To: C.A. No. 412249 & 412249-401; *Candace Curtis v. Anita Brunsting, Et Al*; In Probate Court No. 4, Harris County, Texas.

C.A. No. 412249 & 412249-402; *Candace Curtis v. Anita Brunsting, Et Al - Plea in Abatement*; In Probate Court No. 4, Harris County, Texas.

C.A. No. 412249 & 412249-403; *Carl Henry Brunsting, Executor of the Estates of Elmer H. Brunsting & Nelva E. Brunsting; v. Candace L. Kunz-Greed & Vacek & Freed, PLLC*; In Probate Court No. 4, Harris County, Texas (transfer of C.A. 2013-05455 from the 164th District Court, Harris County, Texas).

C.A. No. 412249 & 412249-404; *Candace Curtis v. Anita Brunsting, Et Al - Bill of Review*; In Probate Court No. 4, Harris County, Texas.

Professional Services

		<u>Hrs/Rate</u>		<u>Amount</u>
6/1/2020 ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	7.70 60.00/hr	Litiga L160	\$462.00
SAM	Prepared correspondence to M. Wakshull re forensic issues; conferred several times with M. Wakshull re same; prepared correspondence to [REDACTED] re [REDACTED] prepared correspondence to [REDACTED] re [REDACTED] reviewed authorities re [REDACTED]	2.80 395.00/hr	Canda L130	\$1,106.00

			<u>Hrs/Rate</u>		<u>Amount</u>
6/1/2020	SAM	Reviewed and organized the attorneys' fees billing and expense records.	0.50 395.00/hr	Litiga L190	\$197.50
6/2/2020	SAM	Reviewed multiple correspondence from [REDACTED] re [REDACTED] prepared correspondence to B. Bayless re same; conferred with B. Bayless re same.	0.60 395.00/hr	Canda L130	\$237.00
	SAM	Reviewed correspondence from B. Bayless re insurance issues; reviewed the Vacek Defendants response to requests for disclosure.	0.30 395.00/hr	Canda L110	\$118.50
	SAM	Reviewed correspondence from B. Bayless re settlement issues; prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Carl L160	\$79.00
6/4/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	4.20 60.00/hr	Litiga L440	\$252.00
6/5/2020	SAM	Reviewed and organized the attorneys' fees billing and expense records; conferred with G. Saunders re same.	0.50 395.00/hr	Litiga L120	\$197.50
	SAM	Reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] [REDACTED]	0.50 395.00/hr	Canda L120	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	3.50 60.00/hr	Litiga L190	\$210.00
6/7/2020	SAM	Prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Litiga L160	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
6/8/2020	SAM	Conferred with [REDACTED] re [REDACTED]	0.20 395.00/hr	Canda L120	\$79.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	7.90 60.00/hr	Litiga L160	\$474.00
6/9/2020	SAM	Reviewed the file re the motions for summary judgment to be filed against C. Curtis.	0.40 395.00/hr	Canda L240	\$158.00
6/10/2020	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to Carole Brunsting re the QBD issues; conferred with [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED]	1.00 395.00/hr	Canda L130	\$395.00
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	4.20 60.00/hr	Litiga L160	\$252.00
6/11/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] [REDACTED] conferred several times with [REDACTED] re [REDACTED]	3.00 60.00/hr	Litiga L190	\$180.00
	SAM	Met with Carole Brunsting re the authenticity of the planning instruments; prepared correspondence to Anita Brunsting, Amy Brunsting, and Neal Spielman re same; prepared correspondence to the C. Schwager re original QBD Trust and forensic testing.	2.50 395.00/hr	Canda L390	\$987.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
6/11/2020	SAM	Reviewed multiple correspondence from and prepared correspondence to ██████████ re ██████████ reviewed correspondence from ██████████ re ██████████	0.50 395.00/hr	Trust L190	\$197.50
	SAM	Reviewed multiple correspondence from B. Bayless and N. Spielman re settlement issues.	0.30 395.00/hr	Litiga L160	\$118.50
6/12/2020	MT	Updated discovery index re C. Kunz-Freed's second supplemental response to request for disclosure.	0.20 129.50/hr	Litiga L310	\$25.90
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared ██████████ ██████████ conferred several times with ██████████ re ██████████	5.20 60.00/hr	Litiga L190	\$312.00
	SAM	Conferred with ██████████ re ██████████ ██████████ reviewed and organized the accounting files re same.	2.40 395.00/hr	Trust L150	\$948.00
	KSM	Conferred with ██████████ re ██████████ ██████████ reviewed and organized the files re same; prepared the trust accounting.	3.00 129.50/hr	Trust L150	\$388.50
	SAM	Reviewed and revised ██████████ ██████████	1.10 395.00/hr	Litiga L160	\$434.50
6/13/2020	SAM	Reviewed and revised the January 2020 to April 2020 trust accounting; prepared correspondence to the parties re same; prepared correspondence to the parties re the 2019 tax return and 2019 appraisal; reviewed the farm agreement.	2.50 395.00/hr	Trust L150	\$987.50
	KSM	Prepared the trust accounting reports.	1.00 129.50/hr	Trust L150	\$129.50

		<u>Hrs/Rate</u>		<u>Amount</u>
6/15/2020	ROC	4.20 60.00/hr	Litiga L190	\$252.00
	SAM	5.20 395.00/hr	Litiga L160	\$2,054.00
6/16/2020	ROC	4.90 60.00/hr	Litiga L190	\$294.00
	SAM	1.50 395.00/hr	Litiga L160	\$592.50
	SAM	0.50 395.00/hr	Litiga L150	\$197.50
6/17/2020	SAM	1.00 395.00/hr	Litiga L160	\$395.00
	ROC	7.70 60.00/hr	Litiga L440	\$462.00

			<u>Hrs/Rate</u>		<u>Amount</u>
6/17/2020	SAM	Reviewed the court's file re the petition to enforce a foreign (federal) judgment; reviewed the federal court file; reviewed authorities re [REDACTED]	1.00 395.00/hr	Canda L210	\$395.00
	SAM	Reviewed correspondence from C. Curtis re settlement; prepared correspondence to C. Schwager re same; prepared correspondence to [REDACTED] re [REDACTED]	1.00 395.00/hr	Canda L160	\$395.00
6/18/2020	ACD	Reviewed mediation memo for Judge Davidson.	0.20 129.50/hr	Litiga L160	\$25.90
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] conferred several times with [REDACTED] re [REDACTED]	6.50 60.00/hr	Litiga L440	\$390.00
	SAM	Reviewed and revised the mediation memorandum; prepared correspondence to [REDACTED] re [REDACTED] prepared correspondence to [REDACTED] re [REDACTED]	1.50 395.00/hr	Litiga L160	\$592.50
6/19/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] conferred several times with [REDACTED] re [REDACTED]	5.20 60.00/hr	Litiga L320	\$312.00
	SAM	Reviewed correspondence from and prepared correspondence to C. Reed re production of the insurance policy.	0.20 395.00/hr	Litiga L310	\$79.00
6/22/2020	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] conferred several times with [REDACTED] re [REDACTED]	6.60 60.00/hr	Litiga L190	\$396.00
	SAM	Conferred with [REDACTED] re [REDACTED]	0.30 395.00/hr	Litiga L160	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
6/22/2020	SAM	Conferred with [REDACTED] re [REDACTED] [REDACTED]	0.30 395.00/hr	Litiga L440	\$118.50
	SAM	Reviewed the accounting records for additional trust accountings to the parties.	0.50 395.00/hr	Trust L150	\$197.50
6/23/2020	SAM	Reviewed and revised the billing and accounting records for the mediation.	0.80 395.00/hr	Trust L150	\$316.00
	SAM	Prepared for the mediation of the case; prepared correspondence to [REDACTED] re [REDACTED]	0.50 395.00/hr	Litiga L160	\$197.50
	ROC	Reviewed and organized attorneys' fees and expense billing records; prepared application for payment of same; prepared [REDACTED] conferred several times with [REDACTED] re [REDACTED]	5.90 60.00/hr	Litiga L190	\$354.00
	SAM	Reviewed correspondence from and prepared correspondence to C. Reed re disclosure of the Vacek insurance policy.	0.20 395.00/hr	Trust L320	\$79.00
6/24/2020	SAM	Reviewed the file re [REDACTED] prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Litiga L440	\$79.00
	SAM	Prepared for the mediation of the case; conferred with Judge Davidson re same; conferred several times with [REDACTED] re [REDACTED] met with [REDACTED] re [REDACTED] reviewed correspondence from [REDACTED] and prepared correspondence to C. Schwager re settlement; prepared correspondence to B. Bayless re same; prepared correspondence to [REDACTED] re [REDACTED]	6.50 395.00/hr	Litiga L160	\$2,567.50
	ROC	Prepared Mediation exhibit re [REDACTED] [REDACTED] Conferred with [REDACTED] several times re [REDACTED]	6.30 60.00/hr	Trust L440	\$378.00
	SAM	Reviewed and updated the file re [REDACTED] [REDACTED]	0.50 395.00/hr	Trust L150	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>
6/25/2020	SAM Prepared for and attended the mediation of the case; conferred several times with [REDACTED] [REDACTED] re [REDACTED] from and prepared correspondence to Carole Brunsting re the mediation; conferred with Carole Brunsting re same; prepared correspondence to [REDACTED] re [REDACTED]	11.00 395.00/hr	Litiga L160	\$4,345.00
6/29/2020	SAM Prepared for and conferred with [REDACTED] re [REDACTED] prepared correspondence to Judge Davidson re notice to the court re mediation held and not successful.	1.20 395.00/hr	Litiga L160	\$474.00
6/30/2020	SAM Reviewed correspondence from [REDACTED] re [REDACTED] reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] prepared file memo re [REDACTED]	0.90 395.00/hr	Litiga L160	\$355.50
	SAM Updated the accounting records.	0.40 395.00/hr	Trust L150	\$158.00
7/1/2020	SAM Reviewed correspondence from the mediator re the mediator's proposal was not accepted; prepared correspondence to the court re same; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] reviewed correspondence from [REDACTED] re [REDACTED]	0.50 395.00/hr	Litiga L160	\$197.50
7/2/2020	MT Updated litigation index re C. Kunz-Freed's second amended notice of hearing re appointment of personal representative; reviewed and prepared docket matters re same.	0.30 129.50/hr	Litiga L190	\$38.85
	SAM Reviewed and organized the trust accountin records.	1.00 395.00/hr	Trust L150	\$395.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
7/3/2020	SAM	Reviewed correspondence from and prepared correspondence to B. Bayless settlements issues and the tolling agreement.	0.30 395.00/hr	Litiga L160	\$118.50
7/6/2020	MT	Updated litigation index re original answer and motion to transfer and for sanctions.	0.20 129.50/hr	Litiga L250	NO CHARGE
7/7/2020	SAM	Prepared for and attended the conference call with [REDACTED] re [REDACTED]	0.80 395.00/hr	Litiga L120	\$316.00
	SAM	Reviewed the accounting records; processed the return of trust funds to the Bank of America accounts re the mediator's fee, if the parties had agreed to the use of trust funds.	0.60 395.00/hr	Trust L150	\$237.00
7/8/2020	MT	Updated litigation index re amended notice of hearing re appointment for personal representative.	0.10 129.50/hr	Litiga L190	NO CHARGE
	SAM	Prepared correspondence to C. Schwager re the depositon of C. Curtis; prepared correspondence to [REDACTED] re [REDACTED]	0.40 395.00/hr	Canda L330	\$158.00
	SAM	Prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Canda L330	\$79.00
7/9/2020	SAM	Reviewed correspondence from and prepared correspondence to Judge Comstock re hearing dates for pending issues; prepared correspondence to C. Reed re same; conferred with [REDACTED] re [REDACTED]	0.60 395.00/hr	Litiga L230	\$237.00
7/10/2020	SAM	Reviewed multiple correspondence by and among the parties re a hearing on various motions; conferred with [REDACTED] re [REDACTED]	0.40 395.00/hr	Litiga L230	\$158.00
	SAM	Reviewed the tolling agreement from B. Bayless; prepared correspondence to B. Bayless re same; prepared correspondence to and reviewed correspondence from [REDACTED] re [REDACTED]	0.50 395.00/hr	Carl L190	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>
7/13/2020	MT	0.20 129.50/hr	Litiga L250	\$25.90
	SAM	0.40 395.00/hr	Litiga L250	\$158.00
7/14/2020	MT	0.10 129.50/hr	Litiga L190	NO CHARGE
	ACD	0.20 129.50/hr	Litiga L320	NO CHARGE
7/20/2020	MT	0.50 129.50/hr	Canda L330	\$64.75
	SAM	0.60 395.00/hr	Canda L330	\$237.00
	SAM	0.70 395.00/hr	Canda L120	\$276.50
	SAM	0.50 395.00/hr	Canda L210	\$197.50
7/22/2020	SAM	0.20 395.00/hr	Canda L210	\$79.00
7/23/2020	SAM	0.80 395.00/hr	Canda L310	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
7/23/2020	MT	Updated litigation index re C. Curtis' objection to deposition and motion for protective order; prepared correspondence to Carol Davis re same.	0.40 129.50/hr	Canda L210	\$51.80
7/27/2020	SAM	Reviewed C. Curtis' motion to quash her deposition.	0.20 395.00/hr	Canda L350	\$79.00
7/29/2020	SAM	Prepared correspondence to [REDACTED] re [REDACTED] [REDACTED]	0.20 395.00/hr	Carl L240	\$79.00
7/30/2020	EJW	Revised response to Carl's motion for summary judgment.	2.00 250.00/hr	Carl L240	\$500.00
	SAM	Prepared response to Carl Brunsting's partial motion for summary judgment; prepared the exhibits re same; prepared multiple correspondence to and reviewed multiple correspondence from [REDACTED] re [REDACTED] filed and served the response on all parties.	7.70 395.00/hr	Carl L240	\$3,041.50
	EJW	Conferred with [REDACTED] several times re [REDACTED]	0.50 250.00/hr	Carl L240	NO CHARGE
7/31/2020	MT	Updated litigation index re response to C. Brunsting's motion for summary judgment with exhibits.	0.20 129.50/hr	Carl L240	NO CHARGE
8/2/2020	SAM	Prepared the motion to compel C. Curtis' deposition; filed and served same.	0.80 395.00/hr	Canda L350	\$316.00
	SAM	Reviewed the status of C. Curtis' various litigation matters.	0.60 395.00/hr	Canda L210	\$237.00
8/3/2020	MT	Updated litigation index re motion to compel the deposition of C. Curtis and Carl Brunsting's response to motion to appoint personal representative.	0.20 129.50/hr	Carl L250	\$25.90

			<u>Hrs/Rate</u>		<u>Amount</u>
8/3/2020	SAM	Reviewed the file re C. Curtis' litigation; prepared correspondence to the court re hearing on the motion to compel C. Curtis' deposition.	0.20 395.00/hr	Canda L230	\$79.00
	SAM	Prepared correspondence to and reviewed correspondence from B. Bayless re the pending hearing.	0.20 395.00/hr	Carl L230	\$79.00
8/4/2020	MT	Prepared and filed notice of hearing re motion to compel the deposition of C. Curtis; updated litigation index re same and Amy's motion to transfer and/or vacate.	0.60 129.50/hr	Canda L190	\$77.70
8/5/2020	MT	Updated litigation index re Carl Brunsting's reply to response to motion for summary judgment.	0.10 129.50/hr	Carl L190	NO CHARGE
8/6/2020	MT	Updated litigation index re C. Curtis' response to motion to transfer with multiple exhibits and Amy Brunsting's status report and request for additional relief; reviewed same.	0.40 129.50/hr	Canda L210	\$51.80
	SAM	Conferred with San Francisco court reporters re deposition for C. Curtis; prepared for and attended the Zoom hearing re motion to compel C. Curtis' deposition and denial of the motion for protection; reviewed multiple correspondence from C. Schwager re filings made to and pending in the federal district court.	1.30 395.00/hr	Canda L230	\$513.50
	SAM	Prepared for and attended the Zoom hearing re Carl Brunsting's motion for partial summary judgment.	3.00 395.00/hr	Carl L230	\$1,185.00
	SAM	Attended the Zoom hearing re motion to appoint a third party representative; conferred with [REDACTED] conferred with [REDACTED]	1.30 395.00/hr	Litiga L250	\$513.50
8/7/2020	SAM	Conferred with [REDACTED] re [REDACTED]	0.20 395.00/hr	Carl L240	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>
8/8/2020	SAM	0.80 395.00/hr	Canda L350	\$316.00
	SAM	0.70 395.00/hr	Carl L240	\$276.50
	SAM	0.50 395.00/hr	Litiga L250	\$197.50
8/9/2020	SAM	0.30 395.00/hr	Carl L240	\$118.50
8/10/2020	MT	0.30 129.50/hr	Litiga L210	\$38.85
	SAM	0.30 395.00/hr	Canda L330	\$118.50
	SAM	0.30 395.00/hr	Carl L240	\$118.50
	SAM	0.20 395.00/hr	Litiga L250	\$79.00
	SAM	0.20 395.00/hr	Canda L250	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
8/10/2020	SAM	Reviewed the draft answer to C. Curtis' bill of review; prepared correspondence to ██████████ re ██████████	0.20 395.00/hr	Canda L210	\$79.00
8/11/2020	MT	Filed proposed order re deposition of C. Curtis, proposed order re Carl's partial motion for summary judgment, and proposed order re personal representative.	0.20 129.50/hr	Litiga L210	\$25.90
	SAM	Prepared the proposed order re the appointment of a personal representative to the Estate; prepared correspondence to the parties re same.	0.40 395.00/hr	Litiga L250	\$158.00
	SAM	Prepared the proposed order regarding the briefing schedule for Carl Brunsting's motion for partial summary judgment.	0.60 395.00/hr	Carl L240	\$237.00
	SAM	Prepared the proposed order re the deposition of C. Curtis; prepared correspondence to the parties re same.	0.60 395.00/hr	Canda L330	\$237.00
8/12/2020	MT	Updated litigation index re proposed orders re Carl Brunsting's motion for summary judgment.	0.20 129.50/hr	Carl L240	NO CHARGE
	SAM	Revised the proposed order re the briefing schedule; prepared correspondence to the parties re same.	0.20 395.00/hr	Carl L240	\$79.00
	SAM	Revised the proposed order re C. Curtis' deposition; prepared correspondence to the parties re same.	0.20 395.00/hr	Carl L330	\$79.00
	SAM	Revised the proposed order re C. Kunz-Freed motion to appoint a personal representative; reviewed correspondence from C. Reed re same; prepared correspondence to the parties re same.	0.20 395.00/hr	Litiga L250	\$79.00
8/13/2020	ACD	Prepared response to ex parte motion.	1.00 129.50/hr	Litiga L320	\$129.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
8/13/2020	SAM	Reviewed and revised the co-trustees response to C. Curtis' federal Rule 60 motion for relief; reviewed and revised the proposed order re same; efiled and eserved same.	2.80 395.00/hr	Canda L240	\$1,106.00
8/14/2020	MT	Updated litigation index re co-trustee's response to ex parte motion for relief.	0.20 129.50/hr	Canda L210	NO CHARGE
	SAM	Reviewed correspondence from [REDACTED] re [REDACTED] reviewed the file re [REDACTED] prepared correspondence to [REDACTED] re [REDACTED]	0.40 395.00/hr	Trust L190	\$158.00
	SAM	Revised the proposed federal order to dismiss the rule 60 request for relief; prepared correspondence to [REDACTED] re [REDACTED]	0.80 395.00/hr	Canda L240	\$316.00
8/18/2020	SAM	Reviewed correspondence from [REDACTED] re [REDACTED] prepared multiple correspondence to [REDACTED] re [REDACTED]	0.50 395.00/hr	Canda L120	\$197.50
	SAM	Prepared multiple correspondence to and reviewed multiple correspondence from the court reporter re additional transcripts to obtain.	0.30 395.00/hr	Litiga L250	\$118.50
8/19/2020	SAM	Reviewed correspondence from and prepared correspondence to C. Schwager re deposition issues.	0.20 395.00/hr	Canda L330	\$79.00
	SAM	Reviewed authorities re [REDACTED] prepared correspondence to and reviewed correspondence from [REDACTED] re [REDACTED]	0.80 395.00/hr	Canda L240	\$316.00
8/20/2020	MT	Updated litigation index re notice of submission for motion to transfer and/or motion to vacate; reviewed and prepared docket matters re same.	0.30 129.50/hr	Canda L210	\$38.85

		<u>Hrs/Rate</u>		<u>Amount</u>	
8/21/2020	SAM	Reviewed correspondence from the court reporter re additional court transcripts; prepared correspondence to [REDACTED] re [REDACTED]	0.30 395.00/hr	Litiga L230	\$118.50
8/22/2020	SAM	Reviewed the file and updated the accounting records.	0.30 395.00/hr	Trust L150	\$118.50
8/24/2020	MT	Updated litigation index re order regarding Carl Brunsting's motion for summary judgment; reviewed same; reviewed and prepared docket matters re deadline to file response and/or brief for same.	0.30 129.50/hr	Carl L210	\$38.85
8/28/2020	MT	Reviewed court's docket re Southern District case; prepared correspondence to S. Mendel and N. Spielman re same; updated litigation index re co-trustee's reply to C. Curtis' response to motion to transfer and/or vacate.	0.50 129.50/hr	Canda L210	\$64.75
	SAM	Reviewed correspondence from C. Schwager re the federal case and reopening of same; met with [REDACTED] re [REDACTED]	1.00 395.00/hr	Canda L250	\$395.00
	SAM	Met with [REDACTED] re [REDACTED]	0.50 395.00/hr	Carl L120	\$197.50
	SAM	Reviewed the file re deposition issues; prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Canda L330	\$79.00
8/29/2020	SAM	Conferred with [REDACTED] re [REDACTED] [REDACTED] reviewed correspondence from and prepared correspondence to the court reporter re other hearing transcripts; reviewed correspondence from and prepared correspondence to [REDACTED]	1.00 395.00/hr	Canda L190	\$395.00
	SAM	Reviewed the file [REDACTED] prepared correspondence to [REDACTED] re [REDACTED]	0.50 395.00/hr	Canda L330	\$197.50

		<u>Hrs/Rate</u>		<u>Amount</u>
8/29/2020	SAM	1.00 395.00/hr	Canda L130	\$395.00
8/30/2020	SAM	0.60 395.00/hr	Canda L190	\$237.00
8/31/2020	MT	1.50 129.50/hr	Canda L190	\$194.25
	ACD	2.00 129.50/hr	Litiga L190	\$259.00
	SAM	0.50 395.00/hr	Canda L330	\$197.50
	SAM	0.50 395.00/hr	Litiga L190	\$197.50
	SAM	0.50 395.00/hr	Litiga L190	\$197.50
9/1/2020	MT	0.30 129.50/hr	Canda L210	\$38.85

		<u>Hrs/Rate</u>		<u>Amount</u>
9/3/2020 MT	Updated litigation index re notice of setting for exparte motion for relief; reviewed and prepared docket matters re same.	0.30 129.50/hr	Canda L190	\$38.85
SAM	Prepared correspondence to [REDACTED] re [REDACTED] [REDACTED]	0.20 395.00/hr	Canda L330	\$79.00
SAM	Reviewed correspondence from the federal court re the Rule 60 hearing; prepared correspondence to N. Spielman re same; prepared correspondence to the parties re same.	0.50 395.00/hr	Canda L230	\$197.50
9/4/2020 SAM	Conferred with [REDACTED] re [REDACTED] [REDACTED] prepared file memo re [REDACTED]	0.50 395.00/hr	Carl L240	\$197.50
9/5/2020 SAM	Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment.	7.00 395.00/hr	Carl L240	\$2,765.00
9/6/2020 SAM	Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment.	8.00 395.00/hr	Carl L240	\$3,160.00
9/7/2020 EJW	Reviewed and revised response to motion for summary judgment.	0.70 250.00/hr	Carl L240	\$175.00
SAM	Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment; prepared multiple correspondence to and reviewed multiple correspondence from [REDACTED] re [REDACTED] [REDACTED] prepared correspondence to [REDACTED] re [REDACTED]	8.00 395.00/hr	Carl L240	\$3,160.00
9/8/2020 EJW	Conferred with [REDACTED] re [REDACTED] [REDACTED]	0.20 250.00/hr	Carl L120	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>	
9/8/2020	SAM	Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] conferred with Greg Lester re business records affidavit; reviewed the C. Kunz-Freed deposition; reviewed the accounting records.	9.50 395.00/hr	Carl L240	\$3,752.50
9/9/2020	EJW	Conferred with [REDACTED] re [REDACTED] [REDACTED] reviewed file re temporary administrator's report and supplement to temporary administrator's report.	1.00 250.00/hr	Carl L120	\$250.00
	EJW	Reviewed and revised response to Carl's motion for summary judgment; prepared correspondence to and reviewed correspondence from [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] prepared affidavit of A. Brunsting.	0.70 250.00/hr	Carl L240	\$175.00
	ACD	Reviewed, downloaded, and organized the probate court instruments.	1.50 129.50/hr	Litiga L190	\$194.25
	SAM	Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] prepared multiple correspondence to [REDACTED] re [REDACTED] reviewed correspondence from and prepared correspondence to [REDACTED] re same; prepared Anita Brunsting's unsworn declaration.	11.30 395.00/hr	Carl L240	\$4,463.50
9/10/2020	EJW	Finalized business records affidavit and business records declaration for G. Lester; prepared correspondence to G. Lester re same; conferred with G. Lester re same; reviewed correspondence	3.40 250.00/hr	Carl L240	\$850.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	from G. Lester re same; reviewed and revised declaration re Anita Brunsting; revised footnotes and organized exhibits to response to Carl's motion for summary judgment.			
9/10/2020	MT Prepared and filed request for transcript; prepared correspondence to court reporter re same; reviewed court's docket re hearings.	0.70 129.50/hr	Canda L210	\$90.65
	ACD Reviewed, downloaded, and organized the probate court instruments.	1.50 129.50/hr	Litiga L190	\$194.25
	MT Reviewed, revised, and finalized response to Carl Brunsting's motion for summary judgment; prepared exhibits re same; conferred with [REDACTED] and [REDACTED] re [REDACTED]	2.00 129.50/hr	Carl L240	\$259.00
	SAM Reviewed authorities re [REDACTED] prepared the response to Carl Brunsting's motion for summary judgment; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] conferred with [REDACTED] re [REDACTED] conferred several times with [REDACTED] re [REDACTED] reviewed multiple correspondence from and prepared multiple correspondence to [REDACTED] re [REDACTED] reviewed, organized, and prepared exhibits to response; conferred several times with [REDACTED] re [REDACTED] prepared the business records affidavit for Greg Lester; prepared the summary judgment exhibits affidavit for S. Mendel; reviewed and organized the exhibits to the response to the motion for summary judgment.	13.00 395.00/hr	Carl L240	\$5,135.00
9/11/2020	MT Updated litigation index re response to Carl Brunsting's motion for summary judgment with exhibits.	0.20 129.50/hr	Carl L210	NO CHARGE
	SAM Reviewed the authorities and response to Carl Brunsting's partial motion for summary judgment; organized the file and exhibits re same; conferred with the court reporter re prior transcripts;	1.80 395.00/hr	Carl L240	\$711.00

		<u>Hrs/Rate</u>		<u>Amount</u>
	prepared the draft order to deny Carl Brunsting's motion for summary judgment; prepared correspondence to and reviewed correspondence from [REDACTED] re [REDACTED]			
9/11/2020	ACD Reviewed, downloaded, and organized the probate court instruments.	1.50 129.50/hr	Litiga L190	\$194.25
9/14/2020	MT Prepared correspondence to K. Metzger re transcript fee.	0.30 129.50/hr	Litiga L330	NO CHARGE
9/15/2020	SAM Reviewed and updated the accounting; conferred with [REDACTED] re [REDACTED] prepared correspondence to the parties re same.	2.50 395.00/hr	Trust L150	\$987.50
	MT Prepared correspondence to parties re accounting for May 2020; conferred with [REDACTED] re [REDACTED] prepared bank statements for production.	0.40 129.50/hr	Trust L150	\$51.80
	ACD Prepared May 2020 accounting; conferred with [REDACTED] re [REDACTED]	0.80 129.50/hr	Trust L150	\$103.60
	SAM Conferred with Carole Brunsting re Carl Brunsting's motion for summary judgment; prepared correspondence to [REDACTED] re [REDACTED]	1.00 395.00/hr	Carl L240	\$395.00
9/16/2020	MT Reviewed correspondence from [REDACTED] re [REDACTED] updated file memo re same; conferred with [REDACTED] re [REDACTED] and [REDACTED]	0.40 129.50/hr	Trust L150	\$51.80
	ACD Reviewed and organized the financial statements; prepared correspondence to the parties re the June 2020 accounting.	0.70 129.50/hr	Canda L150	\$90.65
	SAM Reviewed the file re further trust accounting work; revised the correspondence to the parties re the June 2020 accounting.	0.50 395.00/hr	Trust L150	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
9/17/2020	ACD	Prepared correspondence to the parties re the July and August 2020 accounting.	1.00 129.50/hr	Canda L150	\$129.50
	MT	Prepared bank statements for production; conferred with [REDACTED] re [REDACTED] reviewed and finalized correspondence re accounting.	0.50 129.50/hr	Trust L150	\$64.75
	EJW	Conferred with [REDACTED] re [REDACTED]	0.30 250.00/hr	Carl L250	NO CHARGE
	SAM	Reviewed authorities re [REDACTED] [REDACTED] prepared the co-trustees first supplemental answer.	2.00 395.00/hr	Carl L210	\$790.00
	EJW	Reviewed and revised supplemental answer.	0.50 250.00/hr	Carl L250	\$125.00
9/18/2020	MT	Updated litigation index re co-trustee's first supplemental answer,	0.10 129.50/hr	Carl L210	NO CHARGE
	SAM	Reviewed and revised the June, July, and August 2020 accountings.	0.50 395.00/hr	Trust L150	\$197.50
	SAM	Conferred with [REDACTED] re [REDACTED]	0.30 395.00/hr	Carl L240	\$118.50
9/19/2020	SAM	Reviewed correspondence from C. Curtis and B. Bayless re funds allocated for the mediation of the case; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED] reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED]	0.50 395.00/hr	Trust L150	\$197.50
9/23/2020	SAM	Reviewed correspondence from and prepared correspondence to C. Reed re C. Curtis' deposition; reviewed correspondence from and prepared correspondence to [REDACTED] re [REDACTED]	0.20 395.00/hr	Canda L330	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
9/23/2020	SAM	Reviewed correspondence from the parties re accounting issues on the mediation; prepared a draft response re same; prepared correspondence to [REDACTED] re [REDACTED]	0.40 395.00/hr	Trust L150	\$158.00
9/24/2020	SAM	Prepared for C. Curtis' deposition; reviewed correspondence from [REDACTED] re [REDACTED]; reviewed correspondence from C. Curtis re same; conferred with [REDACTED] re [REDACTED] prepared file memo re [REDACTED] conferred with [REDACTED] re [REDACTED] prepared correspondence to C. Schwager re same; reviewed correspondence from Judge Comstock re same; prepared correspondence to Carole Brunsting re same; reviewed correspondence from the probate court reporter re hearing transcripts.	3.70 395.00/hr	Canda L330	\$1,461.50
	ACD	Prepared file memo re [REDACTED]	0.70 129.50/hr	Canda L320	\$90.65
	SAM	Prepared correspondence to the parties accounting issues and confirming that no trust funds were used for the mediation.	1.20 395.00/hr	Trust L150	\$474.00
9/25/2020	SAM	Reviewed correspondence from Anita Brunsting and Amy Brunsting re deposition issues; conferred with N. Spielman re deposition and objection issues; prepared correspondence to C. Schwager re same.	0.90 395.00/hr	Canda L330	\$355.50
	MT	Updated litigation index re Carl's reply to C. Kunz-Freed's response to motion for summary judgment.	0.10 129.50/hr	Carl L210	NO CHARGE
9/28/2020	SAM	Reviewed C. Curtis brief re the QBD trust; prepared response to same; prepared correspondence to N. Spielman re same; filed and served the co-trustees response to C. Curtis' QBD brief.	1.80 395.00/hr	Canda L240	\$711.00

		<u>Hrs/Rate</u>		<u>Amount</u>
9/28/2020 MT	Updated litigation index re C. Curtis' motion to quash, memo re QBD, and reply to first supplemental answer; prepared objection to memo re QBD; conferred with [REDACTED] re [REDACTED]	0.70 129.50/hr	Canda L250	\$90.65
ML	Prepared correspondence to H. Lopez re transcript payment.	0.20 129.50/hr	Litiga L190	NO CHARGE
SAM	Prepared for and attended Zoom hearing re C. Curtis' motion to quash the deposition; prepared proposed orders re same; conferred with and prepared correspondence to [REDACTED] prepared file memo re [REDACTED] prepared correspondence to the court reporter re transcription of the record.	2.70 395.00/hr	Canda L230	\$1,066.50
SAM	Conferred several times with Naegli court reporters re the deposition and/or certificate of nonappearance of C. Curtis; prepared multiple correspondence to and reviewed multiple correspondence from Naegli court reporters re same.	0.50 395.00/hr	Canda L330	\$197.50
9/29/2020 SAM	Prepared the objections to Carole Brunsting's summary judgment affidavit; prepared multiple correspondence to and reviewed multiple correspondence from [REDACTED] re [REDACTED] filed and served same.	3.70 395.00/hr	Carl L240	\$1,461.50
SAM	Reviewed correspondence from and prepared correspondence to probate court reporter re the hearing transcript; prepared correspondence to [REDACTED] re [REDACTED]	0.40 395.00/hr	Canda L330	\$158.00
9/30/2020 MT	Updated litigation index re order following telephonic conference and order re ex parte motion for relief.	0.20 129.50/hr	Canda L250	\$25.90

		<u>Hrs/Rate</u>		<u>Amount</u>
9/30/2020 MT	Updated litigation index re objections to affidavit of Carole Brunsting re motion for summary judgment and co-trustee's first supplemental motion to transfer and/or vacate.	0.30 129.50/hr	Trust L250	\$38.85
SAM	Reviewed the federal court orders that denied the Rule 60 motion for ex parte relief; reviewed the supplemental motion to transfer the district court foreign judgment lawsuit to the probate court; reviewed correspondence from and prepared correspondence to ██████████ reviewed the file re reviewed authorities re prepared correspondence to re	2.50 395.00/hr	Canda L240	\$987.50
SAM	Conferred several times with Naegeli USA re the C. Curtis certificate of nonappearance; prepared multiple correspondence to and reviewed multiple correspondence from re prepared the exhibits for same; prepared correspondence to all the parties re same.	1.00 395.00/hr	Canda L330	\$395.00
10/1/2020 SAM	Conferred with Carole Brunsting re settlement.	0.50 395.00/hr	Litiga L160	\$197.50
10/2/2020 MT	Updated litigation index re proposed order sustaining objection to C. Kunz-Freed's motion for summary judgment evidence and proposed order sustaining plaintiff's objections to defendant's motion for summary judgment evidence.	0.20 129.50/hr	Carl L210	NO CHARGE
SAM	Prepared correspondence to re settlement conversation with	0.30 395.00/hr	Litiga L160	\$118.50
10/3/2020 SAM	Reviewed correspondence from Carole Brunsting re settlement; prepared correspondence to re	0.30 395.00/hr	Litiga L160	\$118.50

		<u>Hrs/Rate</u>		<u>Amount</u>	
10/3/2020	SAM	Reviewed correspondence from and prepared correspondence to M. Wakshall re forensic expert issues.	0.30 395.00/hr	Canda L130	\$118.50
10/4/2020	SAM	Reviewed correspondence from and prepared correspondence to M. Wakshall re forensic issues.	0.20 395.00/hr	Canda L130	\$79.00
10/5/2020	SAM	Reviewed correspondence from C. Curtis re settlement and litigation issues; reviewed correspondence from prepared correspondence to re reviewed correspondence from the parties re same; conferred with re prepared correspondence to Carole Brunsting re same; reviewed the pleadings re whether to amend or supplement.	1.30 395.00/hr	Canda L190	\$513.50
10/6/2020	SAM	Reviewed correspondence from Carole Brunsting re settlement; prepared correspondence to and reviewed correspondence from re prepared correspondence to re	0.30 395.00/hr	Litiga L160	\$118.50
10/20/2020	ML	Prepared correspondence to Naegeli re payment for deposition of C. Curtis.	0.20 129.50/hr	Canda L190	NO CHARGE
	SAM	Prepared correspondence to re reviewed correspondence from re	0.50 395.00/hr	Litiga L160	\$197.50
10/22/2020	SAM	Reviewed multiple correspondence from Carole Brunsting re settlement issues.	0.30 395.00/hr	Litiga L160	\$118.50
10/23/2020	SAM	Reviewed notice of appeal by C. Curtis re the federal case; prepared correspondence to the parties re same; conferred with re	0.80 395.00/hr	Canda L510	\$316.00

		<u>Hrs/Rate</u>		<u>Amount</u>
10/23/2020 MT	Updated litigation index re notice of appeal.	0.10 129.50/hr	Canda L210	NO CHARGE
10/24/2020 SAM	Prepared correspondence to [REDACTED] [REDACTED]	0.50 395.00/hr	Litiga L160	\$197.50
10/26/2020 SAM	Conferred with [REDACTED] [REDACTED] prepared correspondence to [REDACTED] [REDACTED]	0.50 395.00/hr	Litiga L160	\$197.50
11/1/2020 SAM	Reviewed the settlement offer from Candace Curtis; reviewed correspondence from B. Bayless re same.	0.50 395.00/hr	Canda L160	\$197.50
11/2/2020 SAM	Reviewed correspondence from Carole Brunsting re the settlement offer from Candace Curtis; conferred with [REDACTED] prepared correspondence to [REDACTED] prepared a draft settlement agreement for Carole Brunsting.	0.80 395.00/hr	Litiga L160	\$316.00
11/3/2020 SAM	Prepared correspondence to Carole Brunsting re settlement of the case.	0.30 395.00/hr	Litiga L160	\$118.50
11/5/2020 SAM	Conferred with [REDACTED]	0.60 395.00/hr	Canda L120	\$237.00
11/6/2020 SAM	Reviewed correspondence from and prepared correspondence to B. Bayless re settlement offers.	0.10 395.00/hr	Litiga L160	NO CHARGE
11/9/2020 SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re settlement.	0.20 395.00/hr	Litiga L160	\$79.00
11/11/2020 SAM	Reviewed correspondence from B. Bayless re settlement; prepared draft correspondence to [REDACTED] [REDACTED] conferred with [REDACTED] [REDACTED] conferred with B. Bayless re same; prepared correspondence to B. Bayless re deferral of the ruling on the motion for summary judgment.	1.30 395.00/hr	Litiga L160	\$513.50

		<u>Hrs/Rate</u>		<u>Amount</u>
11/11/2020	SAM Reviewed C. Curtis' pro se request for the appellate record; prepared correspondence to C. Schwager re same.	0.30 395.00/hr	Canda L510	\$118.50
11/15/2020	SAM Reviewed correspondence from and prepared correspondence to Carole Brunsting re settlement; prepared correspondence to re	0.60 395.00/hr	Litiga L160	\$237.00
11/24/2020	SAM Prepared multiple correspondence to and reviewed multiple correspondence from R. Ridders re Iowa tax issues; prepared the draft of a settlement agreement for the parties; prepared correspondence to N. Spielman re same; conferred with N. Spielman re same.	1.20 395.00/hr	Litiga L160	\$474.00
	SAM Reviewed the file re Iowa Farm tax issues; prepared multiple correspondence to and reviewed multiple correspondence from R. Ridders re tax issues.	0.50 395.00/hr	Trust L150	\$197.50
11/25/2020	SAM Reviewed and revised the settlement agreement; conferred with prepared correspondence to prepared correspondence to B. Bayless re same; prepared correspondence to B. Bayless and Carole Brunsting re same; conferred twice with reviewed correspondence from	2.50 395.00/hr	Litiga L160	\$987.50
11/30/2020	SAM Reviewed correspondence from and prepared correspondence to B. Bayless re settlement; reviewed correspondence from and prepared correspondence to Carole Brunsting re same.	0.50 395.00/hr	Litiga L160	\$197.50
12/1/2020	SAM Prepared correspondence to B. Bayless re settlement; prepared correspondence to Carole Brunsting re same; prepared correspondence to	0.40 395.00/hr	Litiga L160	\$158.00

		<u>Hrs/Rate</u>		<u>Amount</u>	
12/2/2020	SAM	Reviewed correspondence from Carl Brunsting re settlement of the case; prepared correspondence to	0.30 395.00/hr	Carl L160	\$118.50
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Litiga L120	\$118.50
12/3/2020	SAM	Reviewed correspondence from reviewed authorities re same; prepared correspondence to	1.30 395.00/hr	Litiga L120	\$513.50
12/4/2020	SAM	Reviewed correspondence from the 5th Circuit re the appellate record and briefing issues; reviewed the court's file re same; reviewed correspondence from and prepared correspondence to	0.80 395.00/hr	Canda L510	\$316.00
	SAM	Prepared correspondence to and reviewed correspondence from reviewed correspondence from and prepared correspondence to B. Bayless re settlement issues.	0.50 395.00/hr	Carl L160	\$197.50
12/5/2020	SAM	Reviewed the 5th Circuit file re appellate issues.	0.30 395.00/hr	Canda L510	\$118.50
12/6/2020	SAM	Reviewed correspondence from and prepared correspondence to N. Spielman re summary judgment issues as to C. Curtis.	0.30 395.00/hr	Canda L240	\$118.50
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Carl L240	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
12/7/2020	SAM	Conferred several times with M. Tubbs re appellate file and eFile requirements.	0.30 395.00/hr	Canda L510	\$118.50
	SAM	Reviewed correspondence from and prepared correspondence to the court re settlement status; reviewed correspondence from B. Bayless re same; reviewed correspondence from	0.20 395.00/hr	Carl L160	\$79.00
	MT	Conferred with S. Mendel re work assignments.	0.30 129.50/hr	Canda L210	NO CHARGE
12/9/2020	SAM	Reviewed the 5th Circuit's electronic docket report and evaluated next steps.	0.30 395.00/hr	Canda L510	\$118.50
12/10/2020	MT	Prepared and filed notice of appearance for 5th Circuit.	0.50 129.50/hr	Canda L210	\$64.75
	SAM	Reviewed multiple correspondence from C. Schwager and N. Brunsting re Judge Hoyt's orders and appellate issues; reviewed the file re same; prepared correspondence to reviewed the 5th Circuit's briefing rules and schedule.	1.50 395.00/hr	Canda L510	\$592.50
	SAM	Prepared the outline of the response brief.	1.00 395.00/hr	Canda L520	\$395.00
12/18/2020	SAM	Reviewed correspondence from the 5th Circuit re Candace Curtis' appeal.	0.20 395.00/hr	Canda L510	\$79.00
12/20/2020	SAM	Prepared correspondence to the Fifth Circuit re counsel of record for Anita Brunsting and Amy Brunsting.	0.30 395.00/hr	Canda L510	\$118.50
12/28/2020	SAM	Revised the motion for partial summary judgment re tortious interference; reviewed authorities re same; prepared correspondence to	0.80 395.00/hr	Carl L240	\$316.00

			<u>Hrs/Rate</u>		<u>Amount</u>
12/31/2020	SAM	Reviewed correspondence from the 5th Circuit re C. Schwager's probated suspension, Pro Se status of C. Curtis, and revised briefing schedule; reviewed the state court records for the underlying facts; prepared correspondence to	1.20 395.00/hr	Canda L510	\$474.00
	SAM	Reviewed correspondence from N. Spielman re partial summary judgment on the tortious interference issue; reviewed the file re same.	0.50 395.00/hr	Canda L240	\$197.50
1/4/2021	SAM	Conferred with reviewed correspondence from reviewed the file	0.60 395.00/hr	Litiga L120	\$237.00
1/5/2021	SAM	Reviewed the file re accounting to prepare and produce.	0.40 395.00/hr	Trust L150	\$158.00
1/6/2021	SAM	Reviewed correspondence from prepared correspondence to and reviewed correspondence from	0.50 395.00/hr	Litiga L160	\$197.50
1/7/2021	SAM	Reviewed the file re accounting and tax issues; reviewed correspondence from and prepared correspondence to	0.80 395.00/hr	Trust L150	\$316.00
1/11/2021	MT	Conferred with A. Daniels re production of account statements.	0.20 129.50/hr	Trust L150	NO CHARGE
	ACD	Prepared the September and October 2020 accounting; prepared correspondences to the parties re same.	1.40 129.50/hr	Trust L150	\$181.30
1/12/2021	MT	Updated litigation index re record of appeal; reviewed same.	0.30 129.50/hr	Canda L190	\$38.85

			<u>Hrs/Rate</u>		<u>Amount</u>
1/12/2021	SAM	Prepared for and met with prepared correspondence to and reviewed correspondence from	1.50 395.00/hr	Litiga L160	\$592.50
1/13/2021	MT	Reviewed and organized electronic record of appeal.	0.50 129.50/hr	Canda L210	\$64.75
	SAM	Prepared for and attended conference call with prepared file memo re same; conferred with	1.50 395.00/hr	Litiga L160	\$592.50
	SAM	Reviewed the accounting records; reviewed and organized same; reviewed the deed history re tax issues; reviewed the file and authorities re step-up in basis issues.	2.30 395.00/hr	Trust L150	\$908.50
	ACD	Prepared correspondence to the parties re November 2020 accounting.	0.80 129.50/hr	Trust L150	\$103.60
1/14/2021	ACD	Prepared correspondence to the parties re December 2020 accounting.	0.80 129.50/hr	Trust L150	\$103.60
	SAM	Reviewed correspondence from and prepared correspondence to prepared spreadsheet prepared correspondence to Rich Ridders	1.30 395.00/hr	Trust L150	\$513.50
1/15/2021	ACD	Reviewed and revised multiple correspondence to the parties re September, October, November, and December 2020 accountings.	0.80 129.50/hr	Trust L150	\$103.60
1/18/2021	ACD	Conferred with S. Mendel re accounting work assignment.	0.10 129.50/hr	Trust L190	NO CHARGE
	SAM	Reviewed correspondence from Rich Ridders re tax issues for the farm; reviewed the file re same.	0.30 395.00/hr	Trust L150	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
1/20/2021	SAM	Reviewed the accountings to be produced for the months of September, October, November, and December 2020; prepared correspondence to and reviewed correspondence from prepared correspondence to	0.80 395.00/hr	Trust L150	\$316.00
	ACD	Reviewed and revised the accounting correspondence to the parties re September, October, November, and December 2020 accountings; conferred with S. Mendel re same.	1.00 129.50/hr	Trust L150	\$129.50
1/21/2021	ACD	Revised the accounting correspondence to the parties re September, October, November, and December 2020 accountings.	0.80 129.50/hr	Trust L150	\$103.60
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Litiga L150	\$118.50
	SAM	Reviewed correspondence from R. Ridders re tax issues; reviewed the file and authorities re same.	0.30 395.00/hr	Trust L150	\$118.50
1/25/2021	ACD	Conferred with S. Mendel re accounting work assignments; finalized correspondence to the parties re September, October, November, and December 2020 accountings.	0.40 129.50/hr	Trust L150	\$51.80
	SAM	Reviewed the trust accountings for the time period September 2020 through December 2020; prepared correspondence to the parties re same.	0.40 395.00/hr	Trust L150	\$158.00
1/30/2021	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Trust L150	\$118.50
2/2/2021	ACD	Conferred with S. Mendel re farm tax proposal.	0.10 129.50/hr	Trust L190	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
2/3/2021	SAM	Reviewed correspondence from and prepared correspondence to	0.20 395.00/hr	Trust L150	NO CHARGE
2/7/2021	SAM	Reviewed the file re sale of the farm and tax issues re same; prepared correspondence to	0.80 395.00/hr	Trust L150	\$316.00
2/9/2021	ACD	Reviewed C. Curtis federal filings; conferred with S. Mendel re same.	0.20 129.50/hr	Canda L190	\$25.90
	SAM	Reviewed and revised the settlement proposal; conferred with prepared correspondence to	0.30 395.00/hr	Litiga L160	\$118.50
	SAM	Reviewed correspondence from the 5th Circuit re C. Curtis' federal court brief; prepared correspondence to the 5th Circuit re same.	0.30 395.00/hr	Litiga L510	\$118.50
2/10/2021	MT	Updated litigation index re appellant's brief and correspondence from court re same; reviewed and prepared docket matters re deadline for appellee's brief.	0.30 129.50/hr	Canda L210	\$38.85
	ACD	Reviewed C. Curtis federal filing.	0.20 129.50/hr	Canda L190	NO CHARGE
2/11/2021	SAM	Reviewed correspondence from Anita Brunsting and N. Spielman re settlement; updated the file memo re details for the settlement offer.	0.30 395.00/hr	Litiga L160	\$118.50
2/26/2021	SAM	Reviewed multiple correspondence from conferred with	0.50 395.00/hr	Litiga L160	\$197.50
2/27/2021	SAM	Prepared correspondence to and reviewed correspondence	0.30 395.00/hr	Litiga L340	\$118.50

			<u>Hrs/Rate</u>		<u>Amount</u>
3/1/2021	SAM	Reviewed correspondence from N. Spielman re settlement issues; prepared correspondence to	0.30 395.00/hr	Litiga L160	\$118.50
	SAM	Reviewed correspondence from re settlement and 5th Circuit briefing issues; prepared correspondence to conferred with M. Ly re the allocation of fees and expenses for settlement purposes.	0.30 395.00/hr	Litiga L160	\$118.50
	ACD	Conferred with S. Mendel re scheduling.	0.10 129.50/hr	Litiga L190	NO CHARGE
3/2/2021	SAM	Reviewed and revised the prepared summary prepared correspondence to the	1.00 395.00/hr	Litiga L160	\$395.00
3/3/2021	ML	Prepared	0.60 129.50/hr	Litiga L150	\$77.70
3/4/2021	ML	Prepared conferred with S. Mendel re same.	1.20 129.50/hr	Litiga L150	\$155.40
3/5/2021	SAM	Reviewed and revised the settlement proposal; prepared multiple correspondence to and reviewed multiple correspondence from conferred with reviewed correspondence from reviewed correspondence from Candace Curtis	2.00 395.00/hr	Litiga L160	\$790.00
	ACD	Conferred with S. Mendel re proposed settlement agreement correspondence; conferred with M. Tubbs and S. Mendel re extension of filing date.	0.20 129.50/hr	Litiga L190	NO CHARGE

			<u>Hrs/Rate</u>		<u>Amount</u>
3/7/2021	SAM	Reviewed the file and authorities re appellate issues to brief.	1.00 395.00/hr	Canda L520	\$395.00
3/8/2021	MT	Prepared motion for extension of time to file brief; reviewed file memo re same.	0.60 129.50/hr	Canda L210	\$77.70
	ACD	Conferred with S. Mendel re case status.	0.10 129.50/hr	Litiga L190	NO CHARGE
3/9/2021	SAM	Prepared the motion for extension of time; reviewed authorities re same; reviewed the plaintiff's brief and record documents re same; conferred with	1.50 395.00/hr	Canda L510	\$592.50
	EJW	Reviewed and revised motion for extension of time to file appellees' brief; conferred with	0.40 295.00/hr	Trust L520	\$118.00
3/10/2021	MT	Finalized and filed motion for extension of time to file appellee's brief; conferred with S. Mendel re same; updated litigation index re same and order granting extension; reviewed and prepared docket matters re extension deadline.	0.50 129.50/hr	Canda L210	\$64.75
3/11/2021	SAM	Reviewed correspondence from and prepared correspondence to N. Spielman re appellate issues.	0.20 395.00/hr	Canda L520	\$79.00
3/15/2021	ACD	Conferred with S. Mendel re work assignments.	0.20 129.50/hr	Litiga L190	NO CHARGE
3/19/2021	ACD	Conferred with S. Mendel re case status update.	0.10 129.50/hr	Litiga L190	NO CHARGE
3/20/2021	SAM	Prepared briefing materials for prepared multiple correspondence to conferred with	1.00 395.00/hr	Canda L520	\$395.00
	SAM	Conferred with prepared multiple correspondence to	0.80 395.00/hr	Canda L520	\$316.00

			<u>Hrs/Rate</u>		<u>Amount</u>
3/23/2021	SAM	Reviewed correspondence from prepared correspondence to	0.20 395.00/hr	Canda L160	\$79.00
3/24/2021	SAM	Reviewed the multiple settlement proposals; attended the settlement conference call	1.30 395.00/hr	Litiga L160	\$513.50
	SAM	Reviewed correspondence from and prepared correspondence to	0.30 395.00/hr	Canda L520	\$118.50
3/25/2021	ACD	Reviewed Brunsting family settlement agreement.	0.20 129.50/hr	Litiga L190	\$25.90
3/26/2021	ACD	Reviewed correspondence from conferred with	0.20 129.50/hr	Litiga L190	NO CHARGE
	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to reviewed and revised the settlement proposal; prepared correspondence to	1.00 395.00/hr	Litiga L160	\$395.00
3/28/2021	SAM	Reviewed authorities re appellate issues.	0.50 395.00/hr	Litiga L520	\$197.50
3/29/2021	SAM	Reviewed correspondence from	0.20 395.00/hr	Litiga L160	\$79.00
	SAM	Reviewed the file re briefing issues.	0.50 395.00/hr	Canda L520	\$197.50
3/30/2021	SAM	Reviewed correspondence from C. Curtis re settlement; prepared correspondence to the client team re same; reviewed multiple correspondence from and prepared correspondence to N. Spielman re same; reviewed multiple correspondence from	0.80 395.00/hr	Canda L160	\$316.00

			<u>Hrs/Rate</u>		<u>Amount</u>
		the parties re settlement; conferred with			
3/31/2021	SAM	Conferred with	0.30 395.00/hr	Litiga L160	\$118.50
4/3/2021	SAM	Reviewed correspondence from C. Curtis, B. Bayless, and Carole Brunsting re rejection of the settlement proposal.	0.50 395.00/hr	Litiga L160	\$197.50
4/5/2021	ACD	Conferred with S. Mendel re scheduling.	0.20 129.50/hr	Litiga L190	NO CHARGE
4/6/2021	ACD	Conferred with S. Mendel re briefing schedule.	0.20 129.50/hr	Litiga L190	NO CHARGE
	SAM	Conferred several times with reviewed and revised the brief.	0.50 395.00/hr	Canda L520	\$197.50
4/8/2021	EJW	Reviewed and revised appellate brief; conferred with A. Daniels re work assignments; reviewed, finalized, and filed motion to extend time to file brief; conferred with	0.80 295.00/hr	Canda L520	\$236.00
	ACD	Reviewed brief; prepared same; conferred with	0.50 129.50/hr	Canda L320	\$64.75
	SAM	Conferred with reviewed and revised the motion for extension of time; prepared correspondence to and reviewed correspondence from C. Curtis re same.	1.50 395.00/hr	Canda L510	\$592.50
	SAM	Reviewed the appellate brief; conferred with conferred with	1.00 395.00/hr	Canda L520	\$395.00
4/9/2021	ACD	Conferred multiple times with the Federal Appellants Court re motion to extend status; conferred with	0.30 129.50/hr	Canda L190	\$38.85

			<u>Hrs/Rate</u>		<u>Amount</u>
4/12/2021	SAM	Reviewed correspondence from Carole Brunsting re conflicts issues raised by Judge Hoyt; reviewed the file re same; prepared correspondence to Carole Brunsting re same.	0.30 395.00/hr	Litiga L190	\$118.50
4/17/2021	SAM	Reviewed and revised the statement of acts for the appellate brief; reviewed the appellate records re details for same.	1.00 395.00/hr	Canda L520	\$395.00
4/18/2021	SAM	Reviewed and revised the entire appellate brief; reviewed record citations for the court appendix; reviewed authorities; conferred with conferred with correspondence to correspondence to correspondence to	6.00 395.00/hr	Canda L520	\$2,370.00
4/19/2021	SAM	Reviewed and revised the entire appellate brief; reviewed record citations for the court appendix; reviewed authorities; conferred with conferred with correspondence to correspondence to correspondence from	10.00 395.00/hr	Canda L520	\$3,950.00
	ACD	Prepared table of authorities re appellate brief; reviewed same; conferred with S. Mendel re same.	2.60 129.50/hr	Litiga L320	\$336.70
4/20/2021	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to the reviewed correspondence from the Fifth Circuit re the supplemental record excerpts.	1.00 395.00/hr	Canda L520	\$395.00
	ACD	Reviewed correspondence from the Federal court re brief instructions; conferred with S. Mendel re same.	0.20 129.50/hr	Litiga L190	\$25.90
4/28/2021	RMM	Conferred with court re scheduling jury trial date.	0.20 129.50/hr	Litiga L190	\$25.90

			<u>Hrs/Rate</u>		<u>Amount</u>
4/28/2021	ACD	Conferred with S. Mendel re potential jury trial dates.	0.10 129.50/hr	Litiga L190	NO CHARGE
4/29/2021	ACD	Reviewed appellant's reply brief; conferred with S. Mendel re same.	0.30 129.50/hr	Litiga L190	\$38.85
4/30/2021	SAM	Prepared correspondence to the court re trial settings; prepared correspondence to the parties re same.	0.30 395.00/hr	Litiga L430	\$118.50
	ACD	Conferred with S. Mendel re Federal brief appendix issues.	0.10 129.50/hr	Litiga L190	NO CHARGE
5/1/2021	SAM	Reviewed the supplemental record excerpts to be amended.	0.70 395.00/hr	Canda L520	\$276.50
5/2/2021	SAM	Prepared the co-trustees first amended supplemental record excerpts; filed and served same.	4.00 395.00/hr	Canda L520	\$1,580.00
5/6/2021	ACD	Reviewed and organized client documents.	0.10 129.50/hr	Trust L190	NO CHARGE
5/9/2021	SAM	Reviewed correspondence from and prepared correspondence to the trial court re trial settings.	0.20 395.00/hr	Litiga L230	\$79.00
5/10/2021	SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re trial setting issues; prepared correspondence to the court re same; reviewed correspondence from B. Bayless re same.	0.60 395.00/hr	Litiga L250	\$237.00
5/17/2021	ACD	Conferred with S. Mendel re proposed scheduling.	0.10 129.50/hr	Litiga L190	NO CHARGE
5/19/2021	SAM	Reviewed correspondence from and prepared correspondence to Carole Brunsting re settlement.	0.20 395.00/hr	Litiga L160	\$79.00
5/24/2021	ACD	Attended May 24 hearing re trial setting; conferred with S. Mendel re same.	0.30 129.50/hr	Litiga L190	\$38.85

			<u>Hrs/Rate</u>		<u>Amount</u>
5/25/2021	SAM	Prepared for and attended the settlement conference call with reviewed the file re issues related to same.	1.50 395.00/hr	Litiga L160	\$592.50
	ACD	Conferred extensively with S. Mendel re trial setting status conference.	0.30 129.50/hr	Litiga L190	NO CHARGE
5/26/2021	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to	0.50 395.00/hr	Litiga L160	\$197.50
5/27/2021	ACD	Conferred with S. Mendel re motion for summary judgment draft.	0.20 129.50/hr	Litiga L190	NO CHARGE
5/30/2021	SAM	Reviewed and revised the joint docket control order; prepared correspondence to	0.50 395.00/hr	Litiga L230	\$197.50
5/31/2021	SAM	Reviewed and revised the co-trustees motion for summary judgment against Candace Curtis.	0.50 395.00/hr	Canda L240	\$197.50
6/1/2021	SAM	Reviewed and revised the co-trustees motion for summary judgment against Carl Brunsting.	0.30 395.00/hr	Carl L240	\$118.50
	SAM	Reviewed and revised the co-trustees motion for summary judgment against Candace Curtis.	0.30 395.00/hr	Canda L240	\$118.50
	SAM	Reviewed correspondence from B. Bayless re the docket control order.	0.40 395.00/hr	Litiga L250	\$158.00
6/3/2021	SAM	Reviewed correspondence from the parties re the proposed docket control order; prepared correspondence to C. Schwager and Carole Brunsting re same.	0.30 395.00/hr	Litiga L250	\$118.50
6/4/2021	SAM	Reviewed multiple correspondence from and prepared correspondence to Carole Brunsting re the proposed docket control order; reviewed correspondence from N. Spielman re same; finalized the proposed docket control order; eFiled	1.50 395.00/hr	Litiga L250	\$592.50

			<u>Hrs/Rate</u>		<u>Amount</u>
		and eServed same; prepared correspondence to the court and the parties re same.			
6/4/2021	SAM	Conferred with prepared correspondence to B. Bayless	0.80 395.00/hr	Litiga L160	\$316.00
6/7/2021	SAM	Prepared the formal statutory accounting; conferred with	1.50 395.00/hr	Trust L150	\$592.50
	SAM	Reviewed correspondence from B. Bayless re settlement; reviewed correspondence from and prepared correspondence to prepared correspondence to	0.50 395.00/hr	Litiga L160	\$197.50
	ACD	Reviewed client file re accountings; reviewed and organized same; conferred with S. Mendel re Quickbook formatting for Trial exhibits.	0.60 129.50/hr	Litiga L190	\$77.70
6/8/2021	SAM	Prepared the file re accounting issues; conferred with	0.50 395.00/hr	Trust L150	\$197.50
	VH	Prepared final accounting; conferred with	2.50 95.00/hr	Trust L150	\$237.50
6/9/2021	VH	Prepared final accounting.	3.00 95.00/hr	Trust L150	\$285.00
6/10/2021	VH	Prepared final accounting; conferred with	5.00 95.00/hr	Trust L150	\$475.00
6/11/2021	VH	Prepared final accounting; conferred with	0.50 95.00/hr	Trust L150	\$47.50
	SAM	Reviewed the revised docket control order; prepared multiple correspondence to reviewed correspondence from and prepared correspondence to B. Bayless re same; reviewed correspondence from and prepared	0.50 395.00/hr	Litiga L250	\$197.50

			<u>Hrs/Rate</u>	<u>Amount</u>	
correspondence to Anita Brunsting re C. Curtis hate mail.					
6/11/2021	ACD	Reviewed correspondence from C. Curtis; conferred with S. Mendel re same.	0.20 129.50/hr	Canda L190	NO CHARGE
6/14/2021	VH	Prepared final accounting.	4.00 95.00/hr	Trust L150	\$380.00
6/17/2021	VH	Prepared final accounting.	2.00 95.00/hr	Trust L150	\$190.00
6/18/2021	VH	Prepared final accounting.	4.00 95.00/hr	Trust L150	\$380.00
6/21/2021	VH	Prepared final accounting.	3.00 95.00/hr	Trust L150	\$285.00
	ACD	Reviewed 5th Circuit opinion; reviewed and organized client documents re same.	0.30 129.50/hr	Litiga L190	\$38.85
6/22/2021	VH	Prepared final accounting.	3.00 95.00/hr	Trust L150	\$285.00
6/23/2021	VH	Prepared final accounting.	3.00 95.00/hr	Trust L150	\$285.00
6/24/2021	SAM	Reviewed multiple correspondence from and prepared multiple correspondence to	0.50 395.00/hr	Litiga L160	\$197.50
	VH	Prepared final accounting.	1.00 95.00/hr	Trust L150	\$95.00
	ACD	Conferred with S. Mendel re 5th circuit opinion and scheduling.	0.10 129.50/hr	Litiga L190	NO CHARGE
6/25/2021	VH	Prepared final accounting.	1.00 95.00/hr	Trust L150	\$95.00

			<u>Hrs/Rate</u>		<u>Amount</u>
6/28/2021	VH	Prepared final accounting.	2.50 95.00/hr	Trust L150	\$237.50
6/29/2021	VH	Prepared final accounting.	1.00 95.00/hr	Trust L150	\$95.00
	SAM	Prepared for and attended the settlement conference call with	1.00 395.00/hr	Litiga L160	\$395.00
6/30/2021	SAM	Reviewed multiple correspondence from prepared correspondence to	0.30 395.00/hr	Litiga L120	\$118.50
	SAM	Reviewed the file re the semi-annual accounting; prepared correspondence to	0.30 395.00/hr	Trust L150	\$118.50
	VH	Prepared final accounting.	2.00 95.00/hr	Trust L150	\$190.00
7/1/2021	SAM	Reviewed the updated accounting; conferred with reviewed correspondence from the Iowa Revenue Department re tax issues; prepared correspondence to	0.60 395.00/hr	Trust L150	\$237.00
7/5/2021	SAM	Reviewed multiple correspondence and files from reviewed the records reviewed the updated accounting being prepared.	1.00 395.00/hr	Trust L120	\$395.00
7/6/2021	VH	Prepared final accounting.	3.00 95.00/hr	Trust L150	\$285.00
	SAM	Reviewed the records for the January through June 2021 semi-annual accounting; conferred with A. Daniels re same.	0.50 395.00/hr	Trust L150	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
7/6/2021	SAM	Prepared for and attended the strategy and case status call with	1.00 395.00/hr	Litiga L120	\$395.00
	ACD	Prepared January, February, March, April, May, and June accountings; conferred with S. Mendel re same.	2.00 129.50/hr	Trust L150	\$259.00
7/8/2021	EJW	Reviewed C. Curtis bill of review in C.A. 412249-404; reviewed co-trustees' answer; conferred with S. Mendel re same.	1.50 295.00/hr	Canda L120	\$442.50
	ACD	Conferred with E. Wyatt re summary judgement status.	0.10 129.50/hr	Litiga L190	NO CHARGE
7/9/2021	SAM	Reviewed and revised the semi-annual accounting; conferred with ; reviewed same.	1.00 395.00/hr	Trust L150	\$395.00
	SAM	Reviewed the bill of review; conferred with E. Wyatt re same; reviewed authorities re same; conferred with B. Bayless re same.	1.50 395.00/hr	Canda L210	\$592.50
	ACD	Reviewed accounting correspondences; prepared multiple correspondences to Brunsting parties re trust accountings.	0.50 129.50/hr	Trust L150	\$64.75
	EJW	Conferred with S. Mendel re amended answer; reviewed authorities re same.	0.50 295.00/hr	Canda L250	\$147.50
7/13/2021	EJW	Reviewed US Court of Appeals opinion and judgment; updated litigation index re same.	0.30 295.00/hr	Canda L140	\$88.50
	ACD	Reviewed C. Brunsting's brief in response to bill of review; conferred with S. Mendel re same.	0.20 129.50/hr	Litiga L190	\$25.90
7/14/2021	EJW	Conferred with reviewed authorities re drop order.	0.60 295.00/hr	Canda L120	\$177.00

			<u>Hrs/Rate</u>		<u>Amount</u>
7/14/2021	SAM	Prepared the response to Curtis' bill of review.	2.00 395.00/hr	Canda L240	\$790.00
	ACD	Conferred with E. Wyatt and S. Mendel re response to bill of review.	0.20 129.50/hr	Litiga L190	NO CHARGE
7/15/2021	SAM	Prepared the response to Curtis' bill of review.	1.20 395.00/hr	Canda L240	\$474.00
	EJW	Reviewed Carl's response to bill of review; revised Anita's amended answer.	0.60 295.00/hr	Canda L120	\$177.00
	ACD	Conferred with S. Mendel re response to bill of review; reviewed C. Curtis response to bill of review.	0.30 129.50/hr	Litiga L190	\$38.85
7/16/2021	SAM	Prepared the co-trustees response to C. Curtis' bill of review.	2.00 395.00/hr	Canda L240	\$790.00
7/17/2021	SAM	Reviewed the bill of review, responses, and reply briefs; reviewed authorities re same; organized same; prepared the proposed final judgment.	1.20 395.00/hr	Canda L240	\$474.00
	SAM	Conferred with _____ re trust administration and accounting issues; reviewed the file re same.	0.60 395.00/hr	Trust L150	\$237.00
7/19/2021	SAM	Reviewed the file re pending dispositive motions, responses, replies, and sur-replies re the bill of review.	0.40 395.00/hr	Canda L240	\$158.00
	EJW	Conferred with K. Olah re work assignments for Brunsting bill of review filings.	0.20 295.00/hr	Canda L190	NO CHARGE
7/21/2021	VH	Prepare final accounting.	2.50 95.00/hr	Trust L150	\$237.50
	SAM	Conferred several times with _____ re accounting issues; conferred with _____ re same; reviewed correspondence from and prepared	1.50 395.00/hr	Trust L150	\$592.50

			<u>Hrs/Rate</u>		<u>Amount</u>
	correspondence	re same; prepared			
	correspondence	re same.			
7/22/2021	SAM	Reviewed the trust accounting.	0.50 395.00/hr	Trust L150	\$197.50
	VH	Prepare final accounting.	1.00 95.00/hr	Trust L150	\$95.00
7/23/2021	VH	Prepare final accounting.	2.00 95.00/hr	Trust L150	\$190.00
7/24/2021	SAM	Reviewed the accounting update.	0.30 395.00/hr	Trust L150	\$118.50
7/28/2021	VH	Prepare final accounting.	2.00 95.00/hr	Trust L150	\$190.00
	SAM	Reviewed correspondence re the updated accounting; conferred several times with re same; conferred with A. Daniels re same; reviewed and revised same; conferred with re same.	1.30 395.00/hr	Trust L150	\$513.50
	ACD	Prepared accounting re conferred with V. Heitmann and S. Mendel re same.	1.60 129.50/hr	Litiga L150	\$207.20
8/3/2021	EJW	Conferred with S. Mendel re case status and work assignments.	0.20 295.00/hr	Trust L120	NO CHARGE
8/8/2021	SAM	Reviewed the file re motion for summary judgment issues; prepared correspondence to re same.	0.50 395.00/hr	Canda L240	\$197.50
10/5/2021	EJW	Conferred with R. Rosinski re motion for summary judgment.	0.20 295.00/hr	Trust L120	NO CHARGE
10/6/2021	RR	Reviewed file re outstanding issues; updated file memo.	0.10 129.50/hr	Litiga L120	NO CHARGE

		<u>Hrs/Rate</u>		<u>Amount</u>	
10/15/2021	RR	Reviewed plaintiff's answers to Anita, Amy, and C. Brunsting; conferred with E. Wyatt re same; reviewed C. Curtis's response to Anita and Amy Brunsting's original counterclaim.	0.30 129.50/hr	Canda L210	\$38.85
10/19/2021	RR	Reviewed motion for summary judgment.	0.20 129.50/hr	Canda L240	\$25.90
	EJW	Conferred with S. Mendel re case status and C. Curtis' recent filings.	0.10 295.00/hr	Canda L120	NO CHARGE
11/3/2021	SAM	Reviewed and revised the co-trustees motion for summary judgment; reviewed authorities re same; reviewed multiple correspondence from and prepared multiple correspondence to re same.	1.00 395.00/hr	Canda L240	\$395.00
	ACD	Prepared correspondence to A. Brunsting re November 4 hearing.	0.10 129.50/hr	Litiga L190	NO CHARGE
11/4/2021	RR	Attended Zoom hearing with S. Mendel re status conference; prepared memo re same.	0.50 129.50/hr	Litiga L230	\$64.75
11/5/2021	RR	Reviewed and revised motion for summary judgment; conferred with re same.	1.60 129.50/hr	Litiga L240	\$207.20
11/9/2021	SAM	Conferred with re settlement alternatives; reviewed correspondence from re same; reviewed correspondence from B. Bayless re same.	0.50 395.00/hr	Litiga L160	\$197.50
11/11/2021	RR	Reviewed file re outstanding issues; updated file memo.	0.10 129.50/hr	Litiga L120	NO CHARGE
11/24/2021	SAM	Prepared for and conferred with B. Bayless re settlement; prepared correspondence to and reviewed correspondence from re same.	1.50 395.00/hr	Litiga L160	\$592.50

			<u>Hrs/Rate</u>		<u>Amount</u>
11/27/2021	SAM	Reviewed the file and settlement notes with B. Bayless; prepared correspondence to re settlement and severance of the case.	1.40 395.00/hr	Litiga L160	\$553.00
11/30/2021	SAM	Conferred with re severance and settlement issues; conferred with re same.	1.00 395.00/hr	Carl L120	\$395.00
12/1/2021	SAM	Reviewed correspondence from re the motion for summary judgment and severance negotiations reviewed correspondence from re same; prepared for and conferred with B. Bayless re the summary judgments and severance issues.	1.00 395.00/hr	Carl L240	\$395.00
12/3/2021	SAM	Prepared the rule 11 agreement of Cart Brunsting, Anita Brunsting, and Amy Brunsting; prepared correspondence to B. Bayless and N. Spielman re same; prepared correspondence to re same.	1.00 395.00/hr	Carl L190	\$395.00
12/8/2021	SAM	Reviewed correspondence from and prepared correspondence to N. Spielman re the reply to C. Curtis' response to the co-trustees motion for summary judgment.	0.20 395.00/hr	Canda L240	\$79.00
12/9/2021	SAM	Reviewed C. Curtis' response to the co-trustees motion for summary judgment and motion to strike; conferred with re same; reviewed and revised the co-trustees' response to same; prepared the objections to Curtis' exhibit to her response.	2.50 395.00/hr	Canda L240	\$987.50
	VMD	Created Word Doc and Table	0.40 129.50/hr	Canda L240	\$51.80
12/13/2021	RR	Reviewed co-trustee's reply to motion for summary judgment and motion to strike.	0.20 129.50/hr	Canda L240	\$25.90

			<u>Hrs/Rate</u>		<u>Amount</u>
12/21/2021	SAM	Reviewed correspondence from re the motion to sever; reviewed correspondence from B. Bayless ; prepared correspondence to re same.	0.30 395.00/hr	Carl L250	\$118.50
1/4/2022	SAM	Reviewed Carole Brunsting's motion for partial distribution; conferred with N. Spielman re same; reviewed correspondence from and prepared correspondence to B. Bayless re same; prepared correspondence to re same.	1.00 395.00/hr	Litiga L250	\$395.00
	EJW	Reviewed correspondence from the court re zoom hearing on January 6; conferred with S. Mendel re same; reviewed notice of hearing and C. Brunsting's motion for emergency relief.	0.40 295.00/hr	Litiga L120	\$118.00
1/5/2022	SAM	Prepared motion to sever.	0.60 395.00/hr	Carl L250	\$237.00
	EJW	Revised motion to sever; conferred with re same; conferred with re same; conferred with B. Bayless re same.	0.80 295.00/hr	Litiga L250	\$236.00
	SAM	Reviewed Carole Brunsting's motion for \$100k distribution; reviewed multiple correspondence from and prepared multiple correspondence to re same.	0.60 395.00/hr	Trust L250	\$237.00
1/6/2022	RR	Filed motion to sever and proposed order re C. Brunsting; conferred with re same and hearing.	1.00 129.50/hr	Litiga L250	\$129.50
	SAM	Reviewed and revised the motion to sever.	0.50 395.00/hr	Carl L250	\$197.50
	SAM	Reviewed multiple correspondence from the client team re Carole Brunsting's motion for \$100k distribution; prepared for and attended the hearing re same.	1.20 395.00/hr	Trust L250	\$474.00

			<u>Hrs/Rate</u>		<u>Amount</u>
1/7/2022	RR	Prepared multiple correspondence to and reviewed multiple correspondence from co-counsel re hearing dates.	0.30 129.50/hr	Litiga L230	\$38.85
	RR	Prepared notice of hearing; filed same.	0.30 129.50/hr	Litiga L250	\$38.85
	EJW	Reviewed correspondence from the court re hearing; prepared and filed notice re same;	0.30 295.00/hr	Canda L190	\$88.50
1/10/2022	SAM	Reviewed multiple correspondence from and prepared multiple correspondence re the court's \$100k distribution order for Carole Brunsting.	1.00 395.00/hr	Trust L120	\$395.00
1/12/2022	EJW	Conferred with S. Mendel re emergency hearing re Carole Brunsting expense request.	0.20 295.00/hr	Litiga L120	\$59.00
1/13/2022	SAM	Reviewed correspondence from B. Bayless re trial preparation deadlines.	0.20 395.00/hr	Litiga L440	\$79.00
1/14/2022	RR	Reviewed file re outstanding issues; updated file memo.	0.10 129.50/hr	Litiga L190	\$12.95
1/15/2022	SAM	Prepared correspondence to B. Bayless anmd N. Spielman re trial preparation deadlines.	0.20 395.00/hr	Litiga L440	\$79.00
1/17/2022	SAM	Reviewed correspondence from and prepared correspondence to B. Bayless re docket control order issues.	0.20 395.00/hr	Litiga L250	\$79.00
1/18/2022	SAM	Prepared correspondence to N. Spielman re B. Bayless and docket control order issues.	0.20 395.00/hr	Litiga L250	\$79.00
1/20/2022	SAM	Conferred with J.C. Michael re the Iowa easement issue.	0.20 395.00/hr	Trust L190	\$79.00
1/21/2022	SAM	Prepared correspondence to J.C. Michael re the Iowa easement issue; prepared correspondence to re same.	0.20 395.00/hr	Trust L190	\$79.00

		<u>Hrs/Rate</u>		<u>Amount</u>
1/27/2022	RR	0.20 129.50/hr	Canda L190	\$25.90
	RR	0.30 129.50/hr	Litiga L190	\$38.85
1/28/2022	RR	0.50 129.50/hr	Canda L190	\$64.75
1/31/2022	RR	0.20 129.50/hr	Trust L150	\$25.90
	SAM	0.30 395.00/hr	Litiga L250	\$118.50
2/1/2022	SAM	0.50 395.00/hr	Trust L150	\$197.50
	SAM	0.20 395.00/hr	Litiga L250	\$79.00
	KSM	6.00 129.50/hr	Trust L150	\$777.00
	SAM	1.00 395.00/hr	Trust L150	\$395.00
2/3/2022	SAM	0.50 395.00/hr	Trust L150	\$197.50

			<u>Hrs/Rate</u>		<u>Amount</u>
2/3/2022	RR	Conferred with S. Mendel and E. Wyatt re pretrial order and Iowa farm motion.	0.70 129.50/hr	Trust L250	\$90.65
	RR	Prepared motion re approval re Iowa farm.	0.80 129.50/hr	Trust L250	\$103.60
2/4/2022	SAM	Reviewed and reviewed the motion to approve the Iowa Farm water easement; prepared correspondence to N. Spielman re same.	1.00 395.00/hr	Trust L250	\$395.00
2/7/2022	RR	Reviewed C. Curtis response re motion to sever.	0.50 129.50/hr	Canda L250	\$64.75
	SAM	Reviewed C. Curtis' response to the motion for severance.	0.30 395.00/hr	Litiga L250	\$118.50
	RR	Conferred with S. Mendel re pretrial order.	0.20 129.50/hr	Litiga L440	\$25.90
2/8/2022	RR	Prepared pretrial order.	1.00 129.50/hr	Litiga L440	\$129.50
	SAM	Conferred with re settlement and the severance.	1.50 395.00/hr	Litiga L160	\$592.50
2/9/2022	RR	Reviewed and revised pretrial order; updated file memo re same.	1.50 129.50/hr	Litiga L440	\$194.25
	RR	Conferred with S. Mendel re pretrial order.	0.20 129.50/hr	Litiga L440	\$25.90
	SAM	Conferred with re severance issues and Carole Brunsting.	0.50 395.00/hr	Litiga L250	\$197.50
2/10/2022	SAM	Conferred with B. Bayless re trial related issues; prepared outlines re trial exhibits.	1.00 395.00/hr	Litiga L440	\$395.00
	RR	Conferred with S. Mendel re trial preparation, exhibits, and pleadings.	0.60 129.50/hr	Litiga L440	\$77.70

		<u>Hrs/Rate</u>		<u>Amount</u>
2/11/2022	RR	1.10 129.50/hr	Litiga L230	\$142.45
	SAM	3.00 395.00/hr	Canda L250	\$1,185.00
	SAM	1.00 395.00/hr	Trust L250	\$395.00
	EJW	0.50 295.00/hr	Canda L250	\$147.50
	RR	0.20 129.50/hr	Litiga L190	\$25.90
2/14/2022	RR	1.00 129.50/hr	Litiga L440	\$129.50
2/17/2022	RR	1.00 129.50/hr	Litiga L440	\$129.50
2/18/2022	RR	1.50 129.50/hr	Litiga L440	\$194.25
2/19/2022	RR	2.10 129.50/hr	Litiga L440	\$271.95
	SAM	4.00 395.00/hr	Canda L440	\$1,580.00

		<u>Hrs/Rate</u>		<u>Amount</u>
2/20/2022	SAM	6.80 395.00/hr	Litiga L440	\$2,686.00
Prepared the joint pretrial order; prepared correspondence to the parties re same; reviewed correspondence from and prepared correspondence to Carole Brunsting re same.				
2/21/2022	RR	3.00 129.50/hr	Litiga L440	\$388.50
Reviewed, revised, and filed pretrial order; conferred with S. Mendel re same.				
	SAM	7.00 395.00/hr	Litiga L440	\$2,765.00
Reviewed multiple correspondence from and prepared multiple correspondence to N. Spielman, B. Bayless, and Carole Brunsting re the pretrial order; conferred with N. Spielman re same; conferred with Carole Brunsting re same; reviewed and revised the joint pretrial order; prepared correspondence to Judge Comstock re same; reviewed proposed pretrial order of Candace Curtis, as prepared by Rik Munson.				
2/22/2022	VMD	0.20 129.50/hr	Litiga L120	\$25.90
Conferred with R. Rosinski re case and scheduling.				
	SAM	2.30 395.00/hr	Canda L440	\$908.50
Prepared the first amended joint pretrial order; conferred with re same; reviewed multiple correspondence among the parties and court re same.				
2/23/2022	SAM	3.00 395.00/hr	Canda L440	\$1,185.00
Prepared the first amended joint pretrial order; met with re same; reviewed correspondence from and prepared correspondence to Judge Comstock re the pretrial order.				
2/24/2022	RR	0.50 129.50/hr	Canda L440	\$64.75
Reviewed file re fee agreement and billing record requests.				
	SAM	1.00 395.00/hr	Canda L440	\$395.00
Reviewed and revised the joint pretrial order; conferred with E. Wyatt re same.				
	EJW	0.60 295.00/hr	Litiga L120	\$177.00
Conferred with S. Mendel several times re revisions to Brunsting pre-trial order				

		<u>Hrs/Rate</u>		<u>Amount</u>
2/24/2022	EJW	2.60 295.00/hr	Litiga L440	\$767.00
2/25/2022	RR	1.80 129.50/hr	Canda L230	\$233.10
	SAM	6.50 395.00/hr	Canda L440	\$2,567.50
	SAM	3.00 395.00/hr	Canda L230	\$1,185.00
2/26/2022	SAM	0.50 395.00/hr	Canda L240	\$197.50
	SAM	1.40 395.00/hr	Canda L120	\$553.00
2/27/2022	SAM	1.50 395.00/hr	Canda L440	\$592.50

		<u>Hrs/Rate</u>		<u>Amount</u>
	case; prepared multiple correspondence to re same; prepared outline re trial issues.			
2/28/2022 RR	Reviewed discovery re supplementation needed for attorneys' fees trial.	1.50 129.50/hr	Litiga L310	\$194.25
	SAM Reviewed multiple correspondence from and prepared multiple correspondence to re pending matters post pretrial conference.	0.60 395.00/hr	Canda L120	\$237.00
	For professional services rendered	<u>591.80</u>		<u>\$164,958.05</u>
	Additional Charges :			
6/23/2020	Prepared mediation exhibit copies.			\$22.60
6/24/2020	Prepared mediation exhibit copies.			\$45.20
7/30/2020	Filing fees re response to Carl Brunsting's motion for summary judgment.			\$25.72
8/18/2020	Trial transcripts - Hipolita G. Lopez (court reporter).			\$409.49
9/10/2020	Filing fees re Defendants' & Co-Trustees' Joint Amended Response to Carl Brunsting's Motion for Partial Summary Judgment.			\$25.72
9/12/2020	Filing fees and copy fees for Brunsting federal court matters.			\$47.10
9/14/2020	Trial transcripts - Hipolita G. Lopez (court reporter) (original cost - \$799.50) / refunded check no. 282 for \$149.50.			\$650.00
	Trial transcripts - Katherine Metzger.			\$268.25
	Postage.			\$7.15
9/28/2020	Trial transcripts - Hipolita G. Lopez (court reporter).			\$120.00
	LSO.			\$21.79

	<u>Amount</u>
9/28/2020 Courier - LSO.	\$21.79
10/5/2020 Deposition transcript of Candace Curtis.	\$506.00
Certificate of non-appearance of Candace Curtis.	\$225.00
10/20/2020 Postage.	\$0.50
Copies within the Firm.	\$1.00
10/5/2021 Copies re co-trustees' motion for summary judgment.	\$6.60
10/13/2021 Telephone.	\$33.76
10/15/2021 Copies within the firm re plaintiff's answers to Anita and Amy Brunsting and C. Curtis's answers to Anita and Amy Brunsting's original counterclaim.	\$39.00
10/19/2021 Copies within the firm re motion for summary judgment.	\$6.60
11/5/2021 Copies within the Firm.	\$16.40
11/24/2021 Telephone - conference call.	\$8.84
11/30/2021 Telephone - conference call.	\$25.18
12/13/2021 Copies within the Firm.	\$3.80
1/6/2022 Filing fees re proposed order re C. Brunsting.	\$2.06
2/7/2022 Copies within the Firm re C. Curtis response to motion to sever.	\$4.00
2/8/2022 Trial transcripts - Hipolita G. Lopez inv. no. 220302.	\$72.33
2/21/2022 Filing fees re pretrial order.	\$2.06
2/24/2022 Copies regarding the joint pretrial order.	\$21.20
2/25/2022 Copies regarding the joint pretrial order.	\$42.40

Anita K. Brunsting

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Amount

2/28/2022 Copies within the Firm.

\$20.00

Total additional charges

\$2,701.54

ESTATE OF	§	IN PROBATE COURT
	§	
NELVA E. BRUNSTING,	§	NUMBER FOUR (4) OF
	§	
DECEASED	§	HARRIS COUNTY, TEXAS

CARL HENRY BRUNSTING, et al	§
	§
v.	§
	§
ANITA KAY BRUNSTING, et al	§

Defendant/Co-Trustees’ Anita K Brunsting & Amy R. Brunsting’s Supplemental Discovery Responses & Production of Attorneys’ Fees Billing Records

Defendant/Co-Trustees Anita K. Brunsting and Amy R. Brunsting supplement their prior discovery responses as provided herein.

Respectfully submitted,

Respectfully submitted,

// s // Stephen A. Mendel

// s // Neal E. Spielman

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