*** FILED: PALM BEACH COUNTY, FL SHARON BOCK, CLERK. ***

Electronically Filed 09/12/2013 11:04:05 AM ET

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)
(Previously proceeding in Division IZ, but transferred to Division IX by way of an Order of this Court dated January 31, 2013)

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.
_____/

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rule of Judicial Administration 2.420(d)(2), Petitioner/Counter-Respondent, THOMAS H. MAYES's counsel hereby gives notice that confidential information is included within the document(s) being filed, has identified the confidentiality provision that applies to the identified information, and has identified the precise location of the confidential information within the document as follows:

Title/Type of Document(s):	Thomas H. Mayes' Petition for Removal of Curator and for Surcharge
Identified Information:	Bank Account Numbers and Bank Account Statements which Include Detailed Account Information

X Social Security, bank account, charge, debit, and credit card numbers in court records. §119.0714(l)(i)-(j), (2)(a)-(e), Fla. Stat. (Unless redaction is requested pursuant to §119.0714(2), this information is exempt only as of January 1, 2011.)

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of the foregoing was furnished via email to: **Sheri Hazeltine, Esq.** (counsel for Curator, Elizabeth Savitt) 800 Palm Trail Plaza, Suite 3, Delray Beach, Florida 33483 [sheri@hazeltinelaw.com; info@hazeltinelaw.com]; via e-mail to: **Stephanie J. Chambers**, 1008 Arbor Meadows, Derby, Kansas 67037 [schambers61@cox.net]; via e-mail to: **Kathleen M. Osterbuhr**, 1300 Cresthill, Derby, Kansas 67037 [kosterbuhr1@cox.net]; and via e-mail to Daniel Mayes, 3742 NW 5th Ave., Boca Raton, FL 33431 [whodawatda@hotmail.com] on this 11th day of September, 2013. I furthermore certify that Formal Notice of the filing of this Petition has been served on all parties named above, with proof of formal notice to timely be filed with this Court.

By: */s/ Andrew M. Schwartz, Esquire*

Attorney for Petitioner / Counter-Respondent / Personal Representative
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IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.
_____/

Probate Division
Case No. 502012CP002908XXXXSB (IX)
(Previously proceeding in Division IZ, but transferred to Division IX by way of an Order of this Court dated January 31, 2013)

THOMAS H. MAYES' PETITION FOR REMOVAL OF CURATOR AND FOR SURCHARGE

The Petitioner/Counter-Respondent, THOMAS H. MAYES, by and through the undersigned counsel, hereby Petitions this Court for the entry of an Order removing Elizabeth Savitt as Curator of the Estate of Helen M. O'Grady and for the entry of an Order surcharging the Curator for all unnecessary costs and fees incurred by the estate due to her actions, upon proffer of the following:

1. As all parties to this action well know, this case began after the passing of the decedent on May 29, 2012, and the filing of a Petition for Administration of her May 19, 2010 last will and testament. This Petition was filed by THOMAS H. MAYES, who now stands as the appointed personal representative of the estate of Helen M. O'Grady.

2. As a result of a Counter-Petition filed by RONALD O. MAYES, final disposition of the Petition for Administration did not occur until July 11, 2013, when the Court entered the Order attached hereto as Exhibit "1". By way of said Order, the subject May 19, 2010 will was admitted to probate, and THOMAS H. MAYES was appointed personal representative of the estate of Helen M. O'Grady. Attached hereto as Exhibit "2" is a copy of the Letter(s) of Administration issued in favor of THOMAS H. MAYES as personal representative of the estate of Helen M. O'Grady.

3. While the subject will contest remained pending, on or about March 19, 2013, this court held a hearing on DANIEL MAYES' Petition for Appointment of Curator, and after a lengthy hearing, this Court made the determination to appoint ELIZABETH SAVITT, existing Guardian of the deceased ward, as the Curator of the estate of Helen M. O'Grady. By way of the Order attached hereto as Exhibit "3", ELIZABETH SAVITT was formally appointed as Curator and ordered to file (within five [5]) days her designation of resident agent and oath.

4. For some unknown reason, it became necessary for the Curator to obtain a duplicate Order Appointing Curator and directing the issuance of Letters of Curatorship. Same is attached hereto as Exhibit "4".

5. Thereafter, ELIZABETH SAVITT occupied the position of Curator of the estate of Helen M. O'Grady, and therewith she was authorized to exercise any powers expressly vested in her by Order of the Court, and she remained subject to all restrictions, obligations, and duties of a duly appointed Curator. Under Florida law, this also encompasses any restrictions, obligations, and duties of a duly appointed Personal Representative.

6. Specifically, Rule 5.122 of the Florida Probate Rules expressly states: "**(d) Powers.** By order, the court may authorize the curator to perform any duty or function of a personal representative, including publication and service of notice to creditors, or if a will has been admitted, service of notice of administration ... **(g) Subject to Other Provisions.** Curators shall be subject to the provisions of these rules and other applicable law concerning personal representatives."

7. Pursuant to Florida Statutes § 733.602, " (1) A personal representative is ***a fiduciary who shall observe the standards of care applicable to trustees***. A personal representative is under a duty to settle and distribute the estate of the decedent in accordance with the terms of the decedent's will and this code ***as expeditiously and efficiently as is consistent with the best interests of the estate. A personal representative shall use the authority conferred by this code, the authority in the will, if any, and the authority of any order of the court, for the best interests of interested persons, including creditors***." Fla. Stat. §733.602 (2009).

8. As noted above, pursuant to Rule 5.122 of the Florida Probate Rules, all duties and obligations set forth within Florida Statutes §733.602 are directly applicable to any Curator appointed by Order of the Court.

9. Furthermore, Pursuant to Florida Statutes § 733.501, any Curator appointed shall be subject to removal and surcharge.

10. The statutory basis for removal of an appointed Curator or Personal Representative are set forth within Florida Statutes § 733.504, which states as follows:

> A personal representative may be removed and the letters revoked for any of the following causes, and the removal shall be in addition to any penalties prescribed by law:
>
> (1) Adjudication that the personal representative is incapacitated.
> (2) Physical or mental incapacity rendering the personal representative incapable of the discharge of his or her duties.

(3) ***Failure to comply with any order of the court,*** unless the order has been superseded on appeal.
(4) ***Failure to account for the sale of property or to produce and exhibit the assets of the estate when so required.***
(5) ***Wasting or maladministration of the estate.***
(6) Failure to give bond or security for any purpose.
(7) Conviction of a felony.
(8) Insolvency of, or the appointment of a receiver or liquidator for, any corporate personal representative.
(9) ***Holding or acquiring conflicting or adverse interests against the estate that will or may interfere with the administration of the estate as a whole.*** This cause of removal shall not apply to the surviving spouse because of the exercise of the right to the elective share, family allowance, or exemptions, as provided elsewhere in this code.
(10) Revocation of the probate of the decedent's will that authorized or designated the appointment of the personal representative.
(11) Removal of domicile from Florida, if domicile was a requirement of initial appointment.
(12) The personal representative would not now be entitled to appointment.

Fla. Stat. 733.504 (2009) (emphasis added).

11. As denoted below, it is the belief of THOMAS H. MAYES, appointed Personal Representative of the estate of Helen M. O'Grady, that the present Curator, ELIZABETH SAVITT, is 1) presently taking action which is causing detriment and harm to the estate, 2) is placing the appointed Personal Representative, THOMAS H. MAYES, in a precarious position of liability due to a directed misinformation being fed to him combined with the Curator's intentional withholding of information pertaining to actions she is performing with estate assets, and 3) as a result of what appears to be a newly derived and clear conflict of interest.

12. To address each of these issues in turn, pursuant to the Order attached hereto as Exhibit "1", the Curator was to file her Petition for Discharge and Final Accounting on or before July 31, 2013. Rather than comply with this Order, the Curator and her Counsel, SHERI HAZELTINE, ESQ., filed on July 16, 2013 two (2) Petitions for Payment of Fees in this action, and two (2) Petitions for Payment of Fees in Case No.: 502012GA000016XXXXSB (IX). Same are attached hereto as Composite Exhibit "5".

13. During this period, the Personal Representative requested that the Curator provide an informal accounting of the estate, denoting the present status of the estate's assets as of July 11, 2013, so that the Personal Representative had a clear picture of those assets which would be subject to administration. See attached Exhibit "6".

14. Despite repeated requests for this information, **nothing** was provided in response to this request until August 13, 2013, more than a month later. Again, the Personal Representative was denied an up-to-date picture of the assets of the estate of Helen M. O'Grady for more than a month, despite his requests for this information from the Curator, ELIZABETH SAVITT.

15. During the intervening period, the Curator left the County on a two (2) week vacation, and then on August 6, 2013, nearly a week after the time-frame had expired for the filing of the Curator's Petition for Discharge and Final Accounting, the Curator filed the attached Motion for Extension of Time. See Exhibit "7".

16. Despite objections raised by the undersigned at an inappropriately quick-set uniform motion calendar hearing held on August 8, 2013 to address the merits of the Curator's Motion, this Court entered the Order attached hereto as Exhibit "8", granting the Curator up through August 30, 2013 to file her Petition for Discharge and Final Accounting. This unfortunately stood as the tipping point for numerous unauthorized, unexplained, and wholly improper actions of the Curator which followed in the subsequent three (3) week period.

17. On August 8, 2013, when this Court entered the Order attached as Exhibit "8", the Court expressly refused to rule on any pending Petitions for Attorney's fees. However, thereafter somehow an Agreed Order was submitted to the Court, and Entered, which granted two (2) Petitions for Payment of Fees pending in Case No.: 502012GA000016XXXXSB (IX). Again, on August 8, 2013, Christopher Salivar, Esq., counsel for the Personal Representative, THOMAS H. MAYES, appeared before this Court, along with ELIZABETH SAVITT and her Counsel, SHERI HAZELTINE, ESQ., and at that time the Court specifically stated that it was not hearing **any** petition for payment of fees. In light of this, the undersigned, and THOMAS H. MAYES, are at a loss as to how this "Agreed Order" was entered. The undersigned has specifically asked the Curator (by and through her counsel, SHERI HAZELTINE, ESQ.) to explain the entry of this Order, but to date the undersigned has received no response whatsoever.

18. Of note, the undersigned did not agree to the entry of any such Order. Furthermore, the Personal Representative was not in the State of Florida on August 8, 2013, and had in no way indicated to the Curator or her counsel that he was in agreement with the Petitions for Fees filed by the Curator and her Counsel in Case No.: 502012GA000016XXXXSB (IX).

19. Thereafter, on August 12, 2013, the Curator issued herself a draft from Estate Account XXXXXXX2739 in the sum of $1,725.00. See Composite Exhibit "9" attached hereto, which is a copy of pages three (3) and four (4) of the Final Accounting filed by the Curator. Curiously, this payment was supposedly made pursuant to a Court Order dated August 18, 2013. The Personal Representative and the undersigned are unaware of **any** Order of this Court entered on August 18, 2013 authorizing any such payment, and presume that this is a scrivener's error, and is meant to reference the improperly obtained Agreed Order entered on August 8, 2013.

20. On August 13, 2013, the Curator issued her counsel a draft from Estate Account XXXXXXX2739 in the sum of $1,745.36. See Composite Exhibit "9". Again, this payment too is referenced as made pursuant to a Court Order dated August 18, 2013. The Personal Representative and the undersigned are unaware of **any** Order of this Court entered on August 18, 2013 authorizing any such payment, and presume that this is a scrivener's error, and is meant to reference the improperly obtained Agreed Order entered on August 8, 2013.

21. Next, on August 14, 2013, the Curator, ELIZABETH SAVITT, issued herself a draft in the amount of $7,000.00 (denoted on Exhibit "9" as "Held in Trust") from Estate Account XXXXXXX2739, and as of this date no reason whatsoever has been given for the issuance of this draft. The undersigned has requested, multiple times, an explanation for this action, and no response whatsoever has been given. See attached Exhibit "10".

22. On August 14, 2013, the Curator, ELIZABETH SAVITT, also issued herself a draft in the amount of $13,000.00 (denoted on Exhibit "9" as "Held in Trust") from Estate Account XXXXXX2734. Again, as of this date no reason whatsoever has been given for the issuance of this draft, and despite the undersigned's requests, no response has been given to the undersigned's inquiries regarding this action. See attached Exhibit "10".

23. Then, on August 22, 2013, the Curator, ELIZABETH SAVITT, issued a draft to her counsel, SHERI HAZELTINE, ESQ., in the amount of $10,000.00 (denoted on Exhibit "9" as "Held in Trust") from Estate Account XXX-XXXXX3-267. As with the other two (2) August 14, 2013 drafts referenced above, despite repeated requests by the undersigned for an explanation for this action, no response or explanation has been given to date for this payment.

Court order for joint authority

24. Of note, each and every action set forth above was taken **after the appointment of THOMAS H. MAYES as Personal Representative of the estate of Helen M. O'Grady**, and each and every action set forth above **was unilaterally performed by ELIZABETH SAVITT without prior consultation or discussion with the Personal Representative.**

25. Prior to such action being taken, the undersigned conversed via e-mail with counsel for ELIZABETH SAVITT about concerns regarding unilateral action being taken without consultation with the Personal Representative. See Exhibit "11". Thereby, the undersigned was assured that no unilateral action was being taken, ***or would be taken***. Again, see Exhibit "11".

26. This ultimately was not the case, as none of the foregoing actions were discussed with the Personal Representative before same were taken.

27. At this point, and without Court Order authorizing such action, ELIZABETH SAVITT has taken $30,000.00 of estate assets and removed them from the estate's accounts. She has also precluded any access to these assets by the Court Appointed

Personal Representative, and to date the Curator has proffered no explanation whatsoever for such action. This action, without Order of the Court authorizing same, is a direct deprivation of the estate's property without the Curator possessing any authority to do so, and without the Curator possessing any recognized property interests in the assets taken. ***This is, by definition, an act of conversion.***

28. Finally, after taking the foregoing improper and unauthorized action, the Curator filed (on September 2, 2013, three (3) days after the time-frame set forth within Exhibit "8"), her Petition for Discharge and Final Accounting. As part thereof, the Curator and her Counsel have filed two (2) Petitions for Payment of fees seeking a sum total between them in excess of $110,000.00. See Exhibit "12".

29. As the undersigned and the Personal Representative have separately filed objections to these Petitions denoting the baseless nature of the SHERI HAZELTINE petition, and the apparent unreasonableness of the ELIZABETH SAVITT petition, the undersigned and the Personal Representative will not unnecessarily restate all argument set forth within those Objections here. However, the Personal Representative herein incorporates by direct reference all argument set forth within said Objections.

30. What the Personal Representative will reassert is the complete impropriety of the requests made by the two aforementioned Petitions for Fees. On or about July 16, 2013, the Curator and her Counsel filed the Petitions for fees attached hereto as Exhibit "5". Therein, ELIZABETH SAVITT requested payment of the time she asserts was reasonably expended in furtherance of the good of the estate at a rate of $150.00 / hour (which inexplicably is twice the rate she previously billed as Guardian of the now-deceased ward). Therein, SHERI HAZELTINE, ESQ. billed at an hourly rate of $325.00 / hr, and requested payment for all time she asserted she reasonably expended in furtherance of the good of the estate.

31. Now, by way of Exhibit "12", the Curator and her Counsel have withdrawn their July 16, 2013 Petitions, and assert that they are somehow entitled to a blanket "fee" each of **$55,222.60**. Of note, the period of time to be covered by these new blanket "fees" expressly incorporates the period from March 19, 2013 through July 16, 2013 which was previously covered by the Petitions attached hereto as part of Exhibit "5".

32. The undersigned and the Personal Representative **cannot fathom** how the Curator, as a fiduciary of the estate, can honestly claim that she believes that she was previously entitled (as of July 16, 2013) to payment of $6,624.10 as compensation for all services rendered from March 20, 2013 through July 10, 2013, and then at the same time subsequently allege that she is now entitled **to an additional $48,598.50** for any services rendered from July 11, 2013 through September 2, 2013.

33. Equally confusing is how SHERI HAZELTINE, ESQ., as counsel for the Curator, can previously allege that she believes she is entitled (as of July 16, 2013) to payment of $11,274.16 for all services rendered from March 19, 2013 through July 9, 2013, and then at the same time subsequently allege that she is now entitled **to an additional $43,948.44** for any services rendered from July 10, 2013 through September 2, 2013.

34. Furthermore, where the Curator was previously communicating *ex-parte* with the beneficiaries of the estate of Helen M. O'Grady regarding the need for a Curator in the first place, and where the Curator requested that the beneficiaries instruct their respective counsel(s) and representatives to allow the Curator to handle interim administration of the estate until such time as the prior will contest matter was concluded in the guise of providing a cost reduction benefit to the estate (see attached Exhibit "13"), the Personal Representative and the undersigned cannot fathom how the Curator honestly believes the recently filed Petitions are in any way reasonable or appropriate.

35. At this point, it is the Personal Representative's belief that the foregoing actions are being perpetrated by the Curator and her Counsel solely for the purpose of seeking to maximize their financial gain in connection with ELIZABETH SAVITT'S appointment as Curator for this estate. This is the underlying basis of the Personal Representative's belief that a present conflict of interest exists: the Curator's (and her counsel's) interest in maximizing the fees generated from the handling of this estate, playing against the fiduciary duty owed by the Curator and her retained agents to the estate and its beneficiaries.

36. It is the Personal Representative's firm belief that the foregoing also establishes clear misadministration of estate assets, an act of conversion perpetrated by ELIZABETH SAVITT and SHERI HAZELTINE, ESQ., a violation of the fiduciary duty which ELIZABETH SAVITT owes to the estate and all beneficiaries thereof, and a clear over-stepping of any authority vested in ELIZABETH SAVITT as Curator of this estate.

37. Furthermore, the foregoing actions have required the Personal Representative to expend his time and effort meeting with the undersigned counsel, and directing the undersigned counsel to take action to prevent and/or remedy the actions of the Curator and her counsel set forth above. This is ultimately time and expense of the estate which is wasted, and which never should have been incurred, and which would not have been incurred but/for the foregoing actions of the Curator and her Counsel.

38. In light of the foregoing, the Personal Representative seeks the entry of an Order of this Court 1) immediately removing ELIZABETH SAVITT as Curator of the estate of Helen M. O'Grady; 2) entering an Order specially setting a hearing to determine the amount of damage(s) sustained by the estate for purposes of the entry of a final judgment of Surcharge against ELIZABETH SAVITT; 3) Directing ELIZABETH SAVITT and SHERI HAZELTINE, ESQ. to immediately return to the Personal Representative of the estate the $30,000.00 sum presently being held by ELIZABETH SAVITT and SHERI HAZELTINE, ESQ., and 4) Reserving jurisdiction over ELIZABETH SAVITT and her retained counsel, SHERI HAZELTINE, ESQ., to enter such other and further Orders as this Court may find just and proper.

WHEREFORE THOMAS H. MAYES, as Personal Representative of the estate of Helen M. O'Grady and as a beneficiary of the estate of Helen M. O'Grady, hereby requests that

this honorable Court enter an Order granting THOMAS H. MAYES and the estate of Helen M. O'Grady such relief as this Court may deem just and proper, including but not limited to:

1) Immediately removing ELIZABETH SAVITT as Curator of the estate of Helen M. O'Grady;

Was there any action on this Oct 31?

2) Specially setting a hearing to determine the amount of damage(s) sustained by the estate for purposes of the entry of a final judgment of Surcharge against ELIZABETH SAVITT (which shall include all costs and fees incurred by counsel for the Personal Representative to address the foregoing conduct of the Curator and her retained counsel);

3) Directing ELIZABETH SAVITT and SHERI HAZELTINE, ESQ. to immediately return to the Personal Representative of the estate the $30,000.00 sum presently being held by ELIZABETH SAVITT and SHERI HAZELTINE, ESQ.; and

4) Reserving jurisdiction over ELIZABETH SAVITT and her retained counsel, SHERI HAZELTINE, ESQ., to enter such other and further Orders as this Court may find just and proper.

VERIFICATION OF PETITIONER

Under penalties of perjury I declare that I have read the foregoing and the facts alleged are true to the best of my knowledge and belief.

Executed this 9th day of September, 2013.

THOMAS H. MAYES, as:
Petitioner, Personal Representative, and Beneficiary

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of the foregoing was furnished via email to: **Sheri Hazeltine, Esq.** (counsel for Curator, Elizabeth Savitt) 800 Palm Trail Plaza, Suite 3, Delray Beach, Florida 33483 [sheri@hazeltinelaw.com; info@hazeltinelaw.com]; via e-mail to: **Stephanie J. Chambers**, 1008 Arbor Meadows, Derby, Kansas 67037 [schambers61@cox.net]; via e-mail to: **Kathleen M. Osterbuhr**, 1300 Cresthill, Derby, Kansas 67037 [kosterbuhr1@cox.net]; and via e-mail to Daniel Mayes, 3742 NW 5th Ave., Boca Raton, FL 33431 [whodawatda@hotmail.com] on this 12th day of September, 2013. I furthermore certify that Formal Notice of the filing of this Petition has been served on all parties named above, with proof of formal notice to timely be filed with this Court.

By: /S/ *Andrew M. Schwartz, Esq.*
Attorney for Petitioner / Counter-Respondent / Personal Representative
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EXHIBIT "1"

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

_____/

Probate Division
Case No. 502012CP002908XXXXSB (IX)
(Previously proceeding in Division IZ, but transferred to Division IX by way of an Order of this Court dated January 31, 2013)

2013 JUL 11 AM 10:37
PALM BEACH COUNTY, FL
SOUTH CTY BRANCH-FILED

ORDER APPROVING MEDIATION SETTLEMENT AGREEMENT

THIS CAUSE, having come to be considered before this Court on the Parties submission for in camera inspection of a confidential Mediation Settlement Agreement, and the Court having reviewed same and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1. The Parties' Mediation Settlement Agreement dated June 11, 2013 is hereby approved by this Court.

2. All parties obligated to take action pursuant to the Mediation Settlement Agreement are hereby authorized to take such action.

3. Within five (5) days of the entry of this Order, RONALD O. MAYES shall file a Notice of Voluntary Dismissal with Prejudice of all claims which he has and which are pending in this action.

4. Within five (5) days of the entry of this Order, all parties to this action shall execute the General Releases which shall immediately hereafter be circulated by Andrew M. Schwartz, P.A.

5. Elizabeth Savitt, as Curator of the Estate and Guardian for the property of the decedent, is hereby authorized to immediately take such action as is necessary to comply with all payment obligations imposed upon her by the Mediation Settlement Agreement dated June 11, 2013

6. By way of this Order, the May 19, 2010 will submitted by THOMAS H. MAYES and referenced within the Petition for Administration filed on June 26, 2012 is hereby admitted to probate.

7. By way of this Order, THOMAS H. MAYES is hereby appointed Personal Representative of the Estate of Helen M. O'Grady, to serve in such capacity and

exercise such powers as are authorized by Florida law. Letters of Administration shall hereafter immediately be issued to THOMAS H. MAYES as Personal Representative of the Estate of Helen M. O'Grady.

8. Within five (5) days of the entry of this Order, THOMAS H. MAYES shall file his Oath of Personal Representative and Designation and Acceptance of Resident Agent.

9. Within 20 days of the entry of this Order, Elizabeth Savitt, as Curator of the Estate and Guardian for the property of the decedent, shall file her Petition for Discharge and Final Accounting.

Until the Curator is discharged by order of the Court, the Personal Representative and the Curator shall have concurrent authority over the assets of the estate. The Personal Representative and the Curator are hereby authorized to make an in kind $300,000.00 preliminary distribution to each of the beneficiaries.* The Personal Representative and the Curator

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 11 day of July, 2013.

STATE OF FLORIDA PALM BEACH COUNTY
I hereby certify that the foregoing is a true copy of the record in my office.
THIS 11 DAY OF July, 2013
SHARON R. BOCK
CLERK & COMPTROLLER
By Susan LaBelle
Deputy Clerk

The Honorable Edward Garrison

Copies to:

- Andrew M. Schwartz, Esq., Andrew M. Schwartz, P.A., 101 Plaza Real South, Suite 218, Boca Raton, Florida 33432 (Counsel for Plaintiff)
- Jami Huber, Esq. Jami L. Huber, P.A., (Counsel for Ronald O. Mayes), 2101 NW Corporate Boulevard, Suite 400, Boca Raton, Florida 33431
- Jordan R. Hammer, Esq., (counsel for Daniel Mayes), Clark & Skatoff, P.A. 2925 PGA Boulevard, Suite 103, Palm Beach Gardens, Florida 33410
- Sheri Hazeltine, Esq. (counsel for Guardian, Elizabeth Savitt) 800 Palm Trail Plaza, Suite 3, Delray Beach, Florida 33483
- Stephanie J. Chambers, 1008 Arbor Meadows, Derby, Kansas 67037
- Kathleen M. Osterbuhr, 1300 Cresthill, Derby, Kansas 67037

are also hereby authorized to pay from the estate the sum of $55,000.00 to Andrew M Schwartz, P.A. (to Andrew M. Schwartz Trust Account) and to Clark Skatoff P.A. (to Clark Skatoff P.A. IOTA) the sum of $30,000.00, within Ten (10) days, for attorney fees incurred in this action.

* The $300,000.00 in kind distribution to Daniel Mayes shall be sent to ~~Clark Skatoff P.A.~~ [redacted]

EXHIBIT "2"

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

_____/

Probate Division
Case No. 502012CP002908XXXXSB (IX)
(Previously proceeding in Division IZ, but transferred to Division IX by way of an Order of this Court dated January 31, 2013)

2013 JUL 11 AM 10:40
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

LETTERS OF ADMINISTRATION

TO ALL WHOM IT MAY CONCERN

WHEREAS, Helen M. O'Grady, a resident of Boca Raton, Palm Beach County, Florida, died on May 29, 2013, owning assets in the State of Florida, and

WHEREAS, THOMAS H. MAYES, has been appointed personal representative of the estate of the decedent and has performed all acts prerequisite to issuance of Letters of Administration in the estate,

NOW, THEREFORE, I, the undersigned Circuit Judge, declare **THOMAS H. MAYES**, to be duly qualified under the laws of the State of Florida to act as personal representative of the estate of **Helen M. O'Grady**, deceased, with full power to administer the estate according to law; to ask, demand, sue for, recover, and receive the property of the decedent; to pay the debts of the decedent as far as the assets of the estate will permit and the law directs; and to make distribution of the estate according to the law.

ORDERED on this 11 day of July, 2013.

I hereby certify that the foregoing is a true copy as recorded in my office and the same is in full force and effect.
THIS 11 DAY OF July, 2013
SHARON R. BOCK
CLERK & COMPTROLLER
By _____ DEPUTY CLERK

_____
CIRCUIT COURT JUDGE
EDWARD A. GARRISON

Copies to:
- Andrew M. Schwartz, Esq., Andrew M. Schwartz, P.A., 101 Plaza Real South, Suite 218, Boca Raton, Florida 33432 (Counsel for Plaintiff)

- **Jordan R. Hammer, Esq.,** (counsel for Daniel Mayes), Clark & Skatoff, P.A. 2925 PGA Boulevard, Suite 103, Palm Beach Gardens, Florida 33410

- **Sheri Hazeltine, Esq.** (counsel for Guardian, Elizabeth Savitt) 800 Palm Trail Plaza, Suite 3, Delray Beach, Florida 33483

- **Stephanie J. Chambers,** 1008 Arbor Meadows, Derby, Kansas 67037

- **Kathleen M. Osterbuhr,** 1300 Cresthill, Derby, Kansas 67037

EXHIBIT "3"

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA

PROBATE DIVISION: IV
File No: 502012CP002908XXXXSB

IN RE: THE ESTATE OF

HELEN M. O'GRADY,

Deceased

ORDER ON PETITION FOR APPOINTMENT OF CURATOR

THIS MATTER having come before the Court on March 19, 2013 on Daniel W. Maye's Petition for Appointment of Curator and the Court having heard argument of counsel and being otherwise fully advised in the premises, it is hereby:

ORDERED and ADJUDGED that the Petition for Appointment of Curator is GRANTED. That ELIZABETH SMITT is appointed as Curator of the estate, and shall serve without bond. The curator is authorized to ask, demand, sue for, recover and receive the property of the decedent; to pay the debts of the decedent as far as the assets of the estate will permit and the law directs; and to make distribution of the estate. The curator shall file a designation of resident agent and oath. Upon such filing, letters of curatorship shall issue.

DONE and ORDERED in Chambers in Delray Beach, Palm Beach County, Florida this WITHIN 5 DAYS 19 day of MARCH, 2013.

Edward Garrison
Circuit Court Judge

Copies furnished to:
Jordan R. Hammer, Esq.
Andrew Schwartz, Esq.
Jami Huber, Esq.
Sheri Hazeltine, Esq.
Stephanie Chambers
Kathleen Osterbuhr

EXHIBIT "4"

COPY

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF HELEN M. O'GRADY. /

DIVISION: IX

CASE NO. 502012CP002908XXXXSB

DUPLICATE ORDER APPOINTING CURATOR

After a hearing held on March 19, 2013 on the issue of appointment of a curator of the estate of HELEN M. O'GRADY, deceased, the court finding that the decedent died on May 29, 2012 and that ELIZABETH SAVITT is entitled to appointment as curator; it is

ADJUDGED that ELIZABETH SAVITT is appointed curator of the estate of the decedent, and that upon taking the prescribed oath, filing designation and acceptance of resident agent, and entering into bond in the sum of – 0- , letters of curatorship shall be issued.

ORDERED NUNC PRO TUNC March 26, 2013 ~~on this 19th day of March, 2013~~ in Delray Beach, Palm Beach County, Florida. April 3, 2013

CIRCUIT JUDGE EDWARD GARRISON

Copy to:
Sheri L. Hazeltine, Esq., 800 Palm Trail, Ste. 3, Delray Beach, FL 33483

STATE OF FLORIDA - PALM BEACH COUNTY
I hereby certify that the foregoing is a true copy of the record in my office.
THIS 3 DAY OF April, 20 13
SHARON R. BOCK
CLERK & COMPTROLLER
By _____ DEPUTY CLERK

SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED
2013 APR -3 AM 9:54

EXHIBIT "5"

IN THE CIRCUIT COURT FOR THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF HELEN O'GRADY,

Deceased.
_____/

FILE NO.: 502012CP002908XXXXSB

DIVISION: Probate

PETITION FOR ORDER AUTHORIZING PAYMENT OF COMPENSATIONAND EXPENSES OF CURATOR ELIZABETH SAVITT

COMES NOW, ELIZABETH SAVITT, by and through her attorney, SHERI L. HAZELTINE, ESQ., and hereby submits this petition for order authorizing payment of compensation and expenses of the curator of the estate of Helen O'Grady. The grounds for this petition are as follows:

1. Petitioner, ELIZABETH SAVITT, was appointed by the court as the emergency temporary guardian of the person and property of HELEN O'GRADY (the now-deceased Ward) on January 11, 2012 and appointed as the permanent plenary guardian of the person and property on April 2, 2012.

2. Helen O'Grady passed away on May 29, 2012, was domiciled in Palm Beach County, Florida, and was survived by one or more lineal descendants. The guardian of the estate, Ms. Savitt, was appointed curator of the estate on March 26, 2013.

3. The total amounts of all prior fees paid or costs previously awarded to petitioner in this proceeding as curator are:

Fees: $0

Costs: $0

4. Petitioner, ELIZABETH SAVITT, has rendered services as curator of the estate and incurred expenses from March 20, 2013 to July 10, 2013, as more fully

described and set forth in the itemized schedule of services and expenses attached hereto as Exhibit A, for which Petitioner has not been paid.

5. Based upon the criteria established by F.S. 733.501(3) (Compensation of curators) and F.S. 733.617 (Compensation of Personal Representative), Florida Probate Law, petitioner is of the opinion that reasonable compensation for the services performed by petitioner during that time period is: **$6,674.10**

Petitioner requests that an order be entered awarding petitioner reasonable compensation for the services rendered and expenses incurred by the petitioner for the benefit of the estate, and authorizing and directing that such compensation and expenses be paid from the assets of the estate.

Under penalties of perjury, I declare that I have read the foregoing, and the facts alleged are true, to the best of my knowledge and belief.

Signed on this 12th day of July, 2013.

By: _____
ELIZABETH SAVITT, Petitioner and Curator

DATED THIS 17th day of July, 2013 at Delray Beach, Florida.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____
Sheri L. Hazeltine, Esq.
Attorney for Elizabeth Savitt, Curator
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail, Suite 3
Delray Beach, Florida 33483
(561) 243-4655 (office)
(561) 243-6933 (fax)

Savitt Guardians

4101 Satin Leaf Ct.
Delray Beach , FL 33445
Phone: 561-573-1292 | Fax: 561-496-1559

Estate of Helen O'Grady

Invoice Date: June 17, 2013
Invoice Number: 10020
Invoice Amount: $5,669.10

Matter: Curator of Estate

Curator Fees				
3/20/2013	Sign and discuss documents at Hazeltine office,.	E.S.	.50	$75.00
3/21/2013	Responce to e-mails from Hazeltine/ Schlatter and Salivar, filing documents.	E.S.	.50	$75.00
3/21/2013	Meeting with S. Hazeltine to discuss curatorship.	E.S.	.50	$75.00
3/29/2013	Travel to court house to get original documents.	E.S.	.20	$30.00
4/2/2013	Read and respond to e-mails from Jami Huber re: sale of stock and estate values. Filing and inventory work. T.C. to S. Hazeltine re: getting signed letters.	E.S.	.50	$75.00
4/5/2013	E-mail to S. Hazeltine for petition to establish homestead property and sale.	E.S.	.20	$30.00
4/5/2013	Work on inventory and tax preparation.	E.S.	2.20	$330.00
4/5/2013	E-mail to Sheri Hazeltine re: petitions for sale of home and early distributions. E-mail to Morgan Stanley for accounting and questions. Payments sent in today.	E.S.	.30	$45.00
4/7/2013	Verified Inventory work continued	E.S.	.40	$60.00
4/8/2013	Travel to PNC Bank to close out account and transfer assets to Curator account at Wells Fargo.	E.S.	1.00	$150.00
4/8/2013	T.C. Wells Fargo re: Kraft and Mondelese 1099's and Obtaining documents for Curator.	E.S.	.50	$75.00
4/10/2013	T.C. PNC Bank documents ready. Picked up at bank.	E.S.	.50	$75.00
4/10/2013	T.C. (2) to Wells Fargo. Scan Letters and Orders of Curator to bank.	E.S.	.60	$90.00
4/11/2013	E-mail to S. Hazeltine re: distribution and sale of Homestead property not in estate.	E.S.	.30	$45.00
4/12/2013	Meet realtor at O'Grady home. Discuss condition of home with Dan. Discuss pricing with realtor. Look over comparables.	E.S.	1.50	$225.00

4/15/2013	E-mail S. Hazeltine re: meeting at O'Grady home.	E.S.	.20	$30.00
4/17/2013	T.C. Realtor, e-mail previous estimates.	E.S.	.40	$60.00
4/19/2013	Verified Inventory finalization. T.C. Tom O'Grady for verification of disbursements. T.C. First Choice Credit Union. T.C. Morgan Stanley for Mondelez totals. Obtain stock prices. Copy all statements and confirm dates.	E.S.	6.50	$975.00
5/2/2013	E-mail to Sheri Hazeltine re: billing at the Boca Raton home.	E.S.	.20	$30.00
5/6/2013	Work on pleading for listing and selling home, and inspection. Reply to e-mails from S. Hazeltine re: scheduling of hearings.	E.S.	.50	$75.00
5/13/2013	E-mail and telephone to Hazeltine office re: UMC set for Tuesday on Motion to inspect home and list for sale.	E.S.	.30	$45.00
5/13/2013	Send taxpayer Id forms to Wells Fargo, billing and filing forms to Shareholder Services re: accounts.	E.S.	.50	$75.00
5/14/2013	Read e-mail answers from attorney. Compose e-mail to family members re: estate home.	E.S.	.50	$75.00
5/14/2013	Review correspondence from attorney Hazeltine re: petitions concerning the home, depositions, mediation.	E.S.	.50	$75.00
5/15/2013	T.C. Terry Rasmussen at Morgan Stanley, re: statements.	E.S.	.20	$30.00
5/16/2013	T.C. to Wells Fargo shareholder services. Fill out forms from Wells Fargo holding company for stock power. Sending: orders of curator, 4 stock power forms, and original stock certificate insured for 2% of value and traceable postage, voided check for Estate of Helen O'Grady, request for financial confirmation statements of both accounts, account authorization forms. Travel to Wells Fargo for Medallion signature stamps, and post all.	E.S.	2.80	$420.00
5/19/2013	Read and respond to E-mail from Sheri Hazeltine re: June 19th special set hearing on Boca Raton Home.	E.S.	.20	$30.00
5/21/2013	T.C. to Computershare re: stock certificate. Compose letter of instruction, download forms. Travel to Wells Fargo for verification and medallion stamp. Mail package with court orders, stamped forms, blank check, and instructions, insurance and return card to Computershare.	E.S.	1.00	$150.00
5/23/2013	T.C. S. Hazeltine re: Review request from J.Huber for HIPAA signatures sent from S. Hazeltine.	E.S.	.20	$30.00
5/28/2013	Receive letter from Computershare, travel to Wells Fargo for additional bank stamp needed. .	E.S.	.60	$90.00
5/29/2013	Receive additional forms from Wells Fargo, travel to bank for additional medallion stamp. Send all mail back.	E.S.	.60	$90.00
5/31/2013	Furnish Billing for Home to S. Hazeltine for Petition	E.S.	.40	$60.00

	for instructions.			
5/31/2013	Signed HIPAA forms for Ron O'Grady.	E.S.	.30	$45.00
5/31/2013	Received mail and filing.	E.S.	.30	$45.00
6/5/2013	Furnish information on Helen requested by Jami Huber.	E.S.	.15	$22.50
6/11/2013	Mediation	E.S.	11.00	$1,650.00
SUBTOTAL:			37.05	$5,557.50

Costs

5/18/2013	Postage for stock forms and 2% insurance for Stock Certificate.	$67.30
5/21/2013	Postage for Computershare plus insurance.	$44.30
SUBTOTAL:		$111.60

TOTAL: $5,669.10
PREVIOUS BALANCE DUE: $0.00
CURRENT BALANCE DUE AND OWING: $5,669.10

Savitt Guardians

4101 Satin Leaf Ct.
Delray Beach , FL 33445
Phone: 561-573-1292 | Fax: 561-496-1559

Account Statement

Prepared for Estate of Helen O'Grady

Re: Curator of Estate

Previous Invoice Amount	$5,669.10
Last Payment Received	$0.00
Previous Balance	$5,669.10
Current Charges	$1,005.00
Total Due	$6,674.10

Savitt Guardians

4101 Satin Leaf Ct.
Delray Beach , FL 33445
Phone: 561-573-1292 | Fax: 561-496-1559

Estate of Helen O'Grady

Invoice Date: July 10, 2013
Invoice Number: 10023
Invoice Amount: $1,005.00

Matter: Curator of Estate

6/19/2013	T.C. Sheri Hazeltine re: settlement agreement and hearing today. E-mail and receive e-mail re: same. Discuss 10 day time frame for completion. Setting for UMC on 6/27.	E.S.	.30	$45.00
6/19/2013	Review e-mails concerning settlement.	E.S.	.20	$30.00
6/19/2013	Print and send payment to Mediator less Ron Mayes share.	E.S.	.10	$15.00
6/21/2013	Receive and review agreement. E-mail to S. Hazeltine with additions.	E.S.	.50	$75.00
6/24/2013	e-Mail to S. Hazeltine re: agreement.	E.S.	.20	$30.00
6/27/2013	Read and respond to e-mails re: agreement	E.S.	.40	$60.00
7/2/2013	Read and respond to e-mails re: Having payment ready for the July 11th deadline, and hearing date. Review agreement and respond.	E.S.	.60	$90.00
7/4/2013	E-mail response to S. Hazeltine re: settlement agreement	E.S.	.20	$30.00
7/5/2013	T.C. Morgan Stanley, execute trade of Phillip Morris for payment to Ron Mayes on July 11. 1,145 shares @ 87.7577. Discuss timing of future trading, to raise funds.	E.S.	.40	$60.00
7/8/2013	Reading of letters from Kathleen and Stephanie objecting to Global Settlement.	E.S.	.30	$45.00
7/9/2013	Prepare answer to letters, review agreement for meeting with S. Hazeltine.	E.S.	.40	$60.00
7/10/2013	Receive and read through e-mails on status of the home. T.C. Morgan Stanley re: statements and payments. Prepare for hearing.	E.S.	1.00	$150.00
7/10/2013	T.C. S. Hazeltine re: hearing for settlement.	E.S.	.70	$105.00
7/10/2013	T.C. Computerserve re; account statements not	E.S.	.40	$60.00

	received.			
7/10/2013	Attend settlement hearing	E.S.	1.00	$150.00
SUBTOTAL:			6.70	$1,005.00

Costs

SUBTOTAL:	$0.00

TOTAL: $1,005.00
PREVIOUS BALANCE DUE: $5,669.10
CURRENT BALANCE DUE AND OWING: $6,674.10

CERTIFICATE OF SERVICE

I hereby certify that a true copy of this Petition for Order Authorizing Payment of Compensation and Expenses of Curator, with attached Exhibit A, copy of invoices for Curator's fees and expenses from Elizabeth Savitt, was served via E-Service on this ~~11th~~ 10th day of July, 2013 to the parties, attorneys, and/or persons of interested on the attached Service List.

By: _____
Sheri L. Hazeltine, Esq.
Florida Bar No. 0674567

SERVICE LIST
In Re: Estate of Helen O'Grady
Case No. 502012CP002908XXXXSB

Christopher Salivar, Esq.
Attorney for Thomas Mayes
101 Plaza Real, Suite 218
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ams@amslaw.biz
cs@amslaw.biz
cmp@amslaw.biz
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Jordan R. Hammer, Esq.
Attorney for Daniel Mayes
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Jami Huber, Esq.
Attorney for Ronald Mayes
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Stephanie Chambers
1008 Arbor Meadows
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Kathleen M. Osterbuhr
1300 Chesthill
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kosterbuhr1@cox.net

IN THE CIRCUIT COURT FOR THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF

HELEN O'GRADY,

Deceased.
_____/

FILE NO.: 502012CP002908XXXXSB

DIVISION: Probate

PETITION FOR ORDER AUTHORIZING PAYMENT OF ATTORNEY'S FEES AND EXPENSES

Petitioner, Sheri L. Hazeltine, Esq. alleges:

1. Petitioner is an attorney engaged in the practice of law in Palm Beach County and elsewhere in the State of Florida.

2. Petitioner is the attorney for ELIZABETH SAVITT, Curator and guardian for the now-deceased Ward, HELEN O'GRADY. Mrs. O'Grady died testate on May 29, 2012, was domiciled in Palm Beach County, Florida, and was survived by one or more lineal descendants. The guardian of the estate, ELIZABETH SAVITT, was appointed curator of the estate on March 26, 2013.

3. To-date petitioner has rendered legal services for the benefit of the estate, from March 19, 2013 to July 9, 2013, as more fully described and set forth in the itemized scheduled of services and expenses attached hereto as Exhibit A, for which petitioner has not been paid yet.

4. Petitioner's records indicate that during the period of time above mentioned 46.50 attorney hours and 7.25 paralegal hours have been devoted to the representation of ELIZABETH SAVITT, as curator in the estate of Helen O'Grady.

5. Based upon the criteria established by Section 733.6171 of the Florida Probate Law, petitioner believes that a reasonable fee for the services performed by the petitioner during that period of time is:

Hourly rate:	$	325.00
Atty. Hours worked:	$	46.80
Paralegal rate:	$	120.00
Paralegal Hrs. worked:	$	7.25
Total fees:	$	11,261.50
Total costs:	$	12.66

Total amount of Fees and Compensation: **$11,274.16**

WHEREFORE, Sheri L. Hazeltine, Esq. respectfully requests that this Court enter an Order awarding attorney fees and expenses provided on behalf of the and made payable from the probate estate.

Under penalties of perjury I declare that I have read the foregoing, and the facts alleged are true to the best of my knowledge and belief.

DATED this 10th day of July, 2013 at Delray Beach, Florida.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____

Sheri L. Hazeltine, Esq.
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail Plaza, Ste. 3
Delray Beach, Florida 33483
(561) 243-4655 (office)
(561) 243-6933 (fax)

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of this Petition for Attorneys Fees and Costs has been furnished via E-Service on this 10th 17th day of July, 2013 to the following parties or persons of interest listed on the attached Service List.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____

Sheri L. Hazeltine, Esq.
Florida Bar No. 0674567

SERVICE LIST
In Re: Estate of Helen O'Grady
Case No. 502012CP002908XXXXSB

Christopher Salivar, Esq.
Attorney for Thomas Mayes
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Jordan R. Hammer, Esq.
Attorney for Daniel Mayes
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Jami Huber, Esq.
Attorney for Ronald Mayes
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Stephanie Chambers
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kosterbuhr1@cox.net

SHERI L. HAZELTINE & ASSOCIATES, P.A.

Attorney at Law

800 Palm Trail Plaza, Suite 3
Delray Beach, Florida 33483
Phone: 561-243-4655; Fax: 561-243-6933

Member, National Academy of Elder Law Attorneys; Academy of Florida Elder Law Attorneys; Florida Guardianship Association; Palm Beach Guardianship Association; Florida Bar Association; Elder Law Section, Palm Beach County Bar Association; South Palm Beach County Bar Association; Florida's Voice on Developmental Disabilities; Admitted in Alaska and Florida.

Invoice

Elizabeth Savitt, Curator.
4101 Satin Leaf Ct.
Delray Beach, FL 33445

Invoice Date: July 10, 2013
Invoice Number: 11102
Invoice Amount: $11, 274.16

Case: *In re Estate of Helen O'Grady*
Case No.: 502012CP002908XXXXSB

Attorney Fees at 46.80 @ $325/hr.; Paralegal Fees at 7.25 hours, at $120/hr.

3/19/2013	Attendance at court hearing on Dan Mayes' petition for appointment of curator in front of the Honorable Circuit Judge Edward Garrison. Present also were Ms. Savitt, Ms. Hazeltine, Mr. Hammer, Mr. Salivar, and Ms. Huber. After oral argument, the court appointed Ms. Savitt as the new curator. Ms. Hazeltine to file signed Oath and Acceptance of resident agent within five (5) days.	S.L.H.	.80	$260.00
3/19/2013	Preparation for court hearing at 4:30 pm today on Mr. Dan Mayes' petition for appointment of curator.	S.L.H.	1.00	$325.00
3/19/2013	Telephone call to Client Ms. Savitt to discuss case. She will stop by office tomorrow morning to sign documents for filing with clerk of court tomorrow.	S.L.H.	.10	$32.50
3/19/2013	Preparation of Oath and acceptance of Resident Agent; preparation of Letters of Curator and Order appointing Curator.	S.L.H.	.75	$243.75
3/20/2013	Prepare letter to Judge Garrison enclosing proposed Order Appointing Curator and Letters of Curator.	R.P.	.20	$24.00
3/20/2013	Preparation of Notice to Creditors.	S.L.H.	.75	$243.75
3/20/2013	Filed signed Oath with clerk of court.	S.L.H.	.10	No Charge
3/21/2013	Scanned and e-mailed a copy of the Oath of curator, letter to Judge Garrison, Order and Letters of Curator, to all parties.	R.P.	.20	No Charge
3/21/2013	Review of email from Client Ms. Savitt asking about the Helen O'Grady homestead property. Preparation of response email.	S.L.H.	.10	$32.50
3/21/2013	Meeting in person with Ms. Savitt to discuss probate case and role as Curator.	S.L.H.	.75	$243.75

3/21/2013	Filed letter to Judge Garrison, along with copy of filed Oath, and Order and Letters appointing Curator, at the South County Courthouse dropbox.	S.L.H.	.10	No Charge
3/21/2013	Faxed notice to creditors to Palm Beach County Daily Review.	R.P.	.10	No Charge
3/21/2013	Prepare notice of court filing - oath of curator.	R.P.	.10	$12.00
3/25/2013	Review of email from Ms. Savitt to Dan Mayes asking for visit to the homestead. Review of reply email from Dan Mayes asking why she had to visit the home. Review of reply from Curator Ms. Savitt stating she was entitled to make regular visits to inspect the home.	S.L.H.	.10	$32.50
3/25/2013	Review of email from Ms. Savitt asking about status of signed Curator Order and Letters. Preparation of reply email stating paralegal would be checking with the JA to Judge Garrison on this, and that she should check with paralegal.	S.L.H.	.10	No Charge
3/30/2013	Review of rec'd signed Letters of Curator and Order Appointing Curator.	R.P.	.10	$12.00
4/1/2013	At clerk of court's office to obtain certified copies of Letters and Order for curator. Clerk Janice stated the file was not there plus the original order had not yet been scanned into their computer. Said to come back in three (3) days.	S.L.H.	.10	$32.50
4/1/2013	Telephone call with Ms. Savitt to relay information to her that had been unsuccessful in obtaining the certified copies. Discussion of what to do to obtain if they were not available by tomorrow from clerk's office.	S.L.H.	.10	$32.50
4/1/2013	Scanned and sent signed Letters and Orders to Ms. Savitt.	R.P.	.20	No Charge
4/2/2013	Review of email from Ms. Huber to Ms. Savitt asking how much was left after the stock was sold and what was the value of the stock on the day it was sold. Requested to know the current value of Mrs. O'Grady's estate.	S.L.H.	.10	$32.50
4/2/2013	Prepare motion to duplicate orders appointing curator and duplicate letters of curator; prepare draft orders appointing curator and letters of curator.	R.P.	.50	$60.00
4/2/2013	Scheduled UMC online for 8:45 a.m. hearing tomorrow on motion for duplicate orders and letters.	R.P.	.20	$24.00
4/2/2013	Receipt and review of letter from Sunflower Bank enclosing stipulation and dismissal. Scanned and e-mailed to Ms. Savitt.	R.P.	.20	No Charge
4/2/2013	Telephone call to Susan at PBC Daily Business Review. She stated she would fax us the first date of publication today.	R.P.	.20	$24.00
4/3/2013	Preparation for court hearing today at 8:45 am to obtain duplicate letters & order.	S.L.H.	.25	$81.25
4/3/2013	Attendance at court hearing at 8:45 am in front of the Honorable Judge Garrison to obtain duplicate order and letters appointing curator, so that Ms. Savitt could have certified copies. Waited from 8:45 am until 9:30 am in	S.L.H.	1.75	$568.75

	line at UMC and then in back of courtroom. Was told at 9:30 am by deputy to instead see the JA for court to speak to her instead first. Traveled to see and speak to court's JA, who said she would talk to the court about it, as he did not have UMC on Wednesdays. Traveled back to courtroom and waited until break in court's cases. Court signed new duplicate order and letters. Took court file downstairs to clerk's office and obtained certified copies for Ms. Savitt.			
4/3/2013	Telephone call to curator Ms. Savitt to tell her was successful and obtained new certified copies. Will meet with her this afternoon to give to her.	S.L.H.	.10	No Charge
4/5/2013	Obtained certified copies of Order and Oath for Ms. Savitt at clerk of court's office, South County Courthouse.	R.B.	.25	$30.00
4/5/2013	Review of email from Ms. Savitt requesting we prepare a petition to determine homestead property. Preparation of response email.	S.L.H.	.10	$32.50
4/5/2013	Review of email from Ms. Savitt asking for preparation of petition for early distribution to siblings, 10% to each of the 4 children, as per requests from some of them, leaving 60% of funds remaining. Preparation of response email.	S.L.H.	.10	$32.50
4/6/2013	Review of email from Ms. Savitt regarding petitioning court to provide an early distribution to the siblings. Preparation of response email.	S.L.H.	.10	$32.50
4/8/2013	Review of email from Ms. Savitt; review of email she sent to family regarding Mr. Ron Mayes' questions.	S.L.H.	.10	$32.50
4/8/2013	Telephone call with Client Ms. Savitt regarding tasks in case.	S.L.H.	.25	$81.25
4/11/2013	Review of email from Mr. Jordan Hammer, Esq. asking me to give him a call to discuss my client's intended visit to the O'Grady home.	S.L.H.	.10	No Charge
4/13/2013	Preparation of petition to determine homestead status. Research and review of relevant rules and statutes. Review of filed petitions and Wills in probate case. Further preparation of petition to determine homestead and Notice of Intent to Take Possession of Homestead Property by Curator. Preparation of Formal Notice to parties.	S.L.H.	3.50	$1,137.50
4/14/2013	Further work on petition and formal notice. Preparation of emailed letter to Client Ms. Savitt along with attached copies of draft petition documents for her review.	S.L.H.	.50	$162.50
4/15/2013	Client Ms. Savitt came in to office to review the Notice of Intent to take Possession of Protected Homestead Property and Petition to Determine Homestead Status of Real Property. Discussion of documents; she req'd a few changes; made changes.	S.L.H.	.30	$97.50
4/15/2013	Preparation of email to Ms. Savitt regarding sending filed petition via formal notice, with 20 days for parties to respond, along with attached copy of Formal Notice	S.L.H.	.10	$32.50

	document.			
4/15/2013	Review of Request for Production of Documents from Ronald Mayes to Thomas Mayes.	S.L.H.	.10	No Charge
4/15/2013	Receipt and review of petitioner/counter-respondent T. Mayes' motion to compel responses to duces tecum request served upon R. Mayes on 1/14/13. E-mailed to Ms. Savitt.	R.P.	.10	No Charge
4/15/2013	Revision of the petition document.	S.L.H.	.10	$32.50
4/15/2013	Transmitted via email the revised petition for Ms. Savitt's review.	S.L.H.	.10	No Charge
4/15/2013	Review of email from Curator Ms. Savitt approving final revisions to the petition.	S.L.H.	.10	$32.50
4/16/2013	Review of Motion for Implementation of Pretrial Deadlines filed by Daniel Mayes.	S.L.H.	.10	No Charge
4/16/2013	Filed Notice of Intent to Take Possession of Protected Homestead Property; and Petition to Determine Homestead Status of Real Property.	R.B.	.10	No Charge
4/17/2013	Receipt of UMC Notice of Hearing on Mayes' Motion for Implementation of Pretrial Deadlines.	R.P.	.10	No Charge
4/17/2013	Prepare six certified mail packages enclosing formal notice, notice of intent to take possession of protected homestead property; and petition to determine homestead status of real property to all parties on the service list.	R.P.	.40	No Charge
4/17/2013	Review of Thomas Mayes' Motion for Implementation of Pretrial Deadlines.	S.L.H.	.10	No Charge
4/17/2013	Preparation of E-Service of formal notice, notice of intent to take possession of protected homestead property; and petition to determine homestead status of real property.	R.P.	.30	$36.00
4/17/2013	Review of email from Christine Parrot asking for coordination of UMC date for the motion to compel responses from Ronald Mayes. Preparation of emailed response stating I would check with client and get back to her.	S.L.H.	.10	No Charge
4/17/2013	Review of Jordan Hammer's response stating he was available for all dates.	S.L.H.	.10	$32.50
4/17/2013	Preparation of email to Client Ms. Savitt asking her about her availability about the named UMC dates on the motion to compel.	S.L.H.	.10	$32.50
4/17/2013	Review of email from Client Ms. Savitt stating she will be out of town until May 6th.	S.L.H.	.10	$32.50
4/17/2013	Emailed copy of the filed petition to Client Ms. Savitt.	S.L.H.	.10	No Charge
4/17/2013	Review of Notice of Hearing (UMC) of April 23, 2013 at 8:45 am on Dan Mayes' Motion for Implementation of Pretrial Deadlines.	S.L.H.	.10	$32.50
4/18/2013	Prepare e-mail to Judge Garrison's JA (per her request) asking her to give us some available dates and times for a hearing on our notice of intent to take possession of protected homestead property; and petition to determine homestead status of real property.	R.P.	.20	$24.00

4/18/2013	Preparation of E-Service Notice Cover Sheet, with all attached copies of filed documents.	R.P.	.10	$12.00
4/18/2013	Preparation of emailed letter to Christine Parrot and Mr. Salivar, Esq. informing them Ms. Savitt and I were not available before May 6th for a hearing on Thomas Mayes' Motion to Compel.	S.L.H.	.10	No Charge
4/18/2013	Preparation of email to Client Ms. Savitt reminding her of due date for filing curator's inventory.	S.L.H.	.10	$32.50
4/18/2013	Preparation of email to Client Ms. Savitt, with attached copy of rec'd notice of hearing for UMC on April 23, 2013.	S.L.H.	.10	$32.50
4/18/2013	Review of email from paralegal stating Mr. Hammer had called asking if the guardian had had the power turned off at Mrs. O'Grady's home. Preparation of response email to paralegal; forwarded email to Ms. Savitt marked 'urgent'.	S.L.H.	.10	$32.50
4/18/2013	Filed Notice of Intent to Take Possession of Protected Homestead property; Petition to Determine Homestead Status of Real Property; with clerk of court.	S.L.H.	.10	No Charge
4/18/2013	Emailed filed docs and cover sheet to all parties.	R.P.	.10	No Charge
4/19/2013	Receipt and review of e-mail from Jami Huber, Esq. She is available on 5/16.	R.P.	.10	$12.00
4/19/2013	Preparation of email to parties with dates and times for hearings. Asked them to please respond by 5:00 today.	R.P.	.10	$12.00
4/19/2013	Review of e-mail from Judge Garrison's JA giving us some new dates and times for our hearing.	R.P.	.10	$12.00
4/19/2013	Review of email from Ms. Savitt stating we do not need to attend the hearing on the motion to compel. Preparation of response email in agreement.	S.L.H.	.10	No Charge
4/19/2013	Review of emailed responses from attorneys regarding the hearing dates. The dates did not work for most of them.	R.P.	.10	$12.00
4/19/2013	Review of email from Ms. Savitt stating Mr. Dan Mayes had put power in his name for FPL, and today she put it back in her name as the curator, so bill can be paid. Preparation of response email advising her to make sure all of the bills were put in her name as the curator of this asset of the estate.	S.L.H.	.10	$32.50
4/19/2013	Prepare e-mail to Judge Garrison's JA requesting alternative dates and times.	R.P.	.10	$12.00
4/19/2013	Meeting with Ms. Savitt to prepare verified inventory.	R.P.	2.00	$240.00
4/19/2013	Further preparation of draft verified inventory. Made changes; finalized for filing with clerk of court.	S.L.H.	1.00	$325.00
4/19/2013	Filed inventory with clerk of court.	R.B.	.10	No Charge
4/19/2013	Preparation of Notice of Service of Court Document, the verified inventory.	S.L.H.	.10	$32.50
4/19/2013	Emailed copy of the filed inventory to Mr. Salivar, Esq.; Ms. Huber, Esq.; Mr. Hammer, Esq.; Ms. Savitt.	S.L.H.	.10	No Charge
4/19/2013	Review of emailed msg. back from Judicial asst. Ms. Bernier stating the same dates as before.	R.P.	.10	$12.00
4/22/2013	Preparation of new email to Judicial Asst. Ms. Bernier	R.P.	.10	No Charge

	asking her for new dates, as those prior dates did not work for the attorneys.			
4/23/2013	Review of emailed letter from Judge Garrison's JA giving us alternative hearing dates.	R.P.	.10	$12.00
4/23/2013	All parties are available on 6/19. Preparation or email to JA to lock in the date; and she confirmed.	R.P.	.10	$12.00
4/23/2013	Filed Notice of Hearing with Court.	R.P.	.10	No Charge
4/23/2013	Prepare e-mail to all parties giving them the new dates. Requested that they get back to us by 3:00 p.m. today.	R.P.	.20	No Charge
4/23/2013	Receipt and review of notice of hearing on T. Mayes' motion to compel responses to deces tecum request served upon R. Mayes on 1/4/13.	R.P.	.10	No Charge
4/23/2013	Prepare notice of hearing for June 19, 2013 @ 1:30 p.m.	R.P.	.20	$24.00
4/23/2013	Review of email from Mr. Jordan Hammer, Esq. asking me to give him a call to discuss Curator authorizing an interim distribution to his client.	S.L.H.	.10	No Charge
4/23/2013	Preparation of response email to Mr. Jordan Hammer, Esq. stating I am on my way out of town to WI and would call him tomorrow if that was ok.	S.L.H.	.10	No Charge
4/23/2013	Review of email from Mr. Jordan Hammer, Esq. stating that was fine, and for me to call him in his office after 9 am EST.	S.L.H.	.10	No Charge
4/23/2013	Review of Order on Motion for Implementation of Pretrial Procedures, signed April 23, 2013 by the Honorable Judge Garrison.	S.L.H.	.10	$32.50
4/23/2013	Filed Notice of Hearing with clerk of court.	S.L.H.	.10	No Charge
4/23/2013	Review of notice of hearing on May 2, 2013 re: Thomas Mayes' motion to compel responses to duces tecum request served on Ron Mayes on Jan. 4, 2013.	S.L.H.	.10	No Charge
4/24/2013	Telephone call with Jordan Hammer, Esq. regarding his client's request for an interim distribution. Said Dan Mayes is not financially well off. Said the depos were very volatile.	S.L.H.	.25	$81.25
4/24/2013	Prepare notice of filing of court document - notice of hearing, special set.	R.P.	.20	$24.00
4/24/2013	Review of email from Client Ms. Savitt regarding interim distribution. Preparation of response email.	S.L.H.	.10	$32.50
4/24/2013	Telephone call with Client Ms. Savitt regarding sale of homestead property and any early interim distributions.	S.L.H.	.25	$81.25
4/24/2013	Emailed notice of hearing to all parties.	R.P.	.10	No Charge
4/24/2013	Preparation of emailed letter with attached Notice of Hearing, Notice of Intent to Take Possession of Protected Homestead Property; and Petition to Determine Homestead Status of Real Property to Jennifer Bernier with emailed letter.	R.P.	.10	$12.00
4/24/2013	Review of email from Mr. Jordan Hammer, Esq. regarding phone call to him. Preparation of email stating I could call him now.	S.L.H.	.10	No Charge
4/24/2013	Review of email (after phone call today) from Mr. Jordan	S.L.H.	.10	$32.50

	Hammer, Esq. stating to follow up on our conversation earlier today, my client is requesting an interim distribution of $100,000. He asked that I please discuss this with Ms. Savitt. Forwarded email to Ms. Savitt.			
4/24/2013	Telephone call to Mr. Jordan Hammer, Esq. regarding his request for interim distribution for his client, Mr. Dan Mayes. He will follow up with a more specific number/amt. that his client will want as a distribution. He also said he was not sure yet whether his client would want to purchase the homestead property or not yet.	S.L.H.	.25	$81.25
4/25/2013	Receipt and review of signed certified green cards back from Jami Huber, Esq. & Christopher Salivar.	R.P.	.10	No Charge
4/25/2013	Review of email from Ms. Savitt regarding interim distribution to Mr. Dan Mayes; asked about giving interim distributions to other family members also. Preparation of response email.	S.L.H.	.10	$32.50
4/26/2013	Preparation of email to Ms. Savitt asking her position regarding petition for interim distribution to Mr. Dan Mayes and/or other siblings. Review of response email from Ms. Savitt regarding interim distribution.	S.L.H.	.10	$32.50
4/29/2013	Review of email from Mr. Jordan Hammer, Esq. asking whether I have discussed with Ms. Savitt making an interim distribution to his client; and if so, what her position was.	S.L.H.	.10	$32.50
4/29/2013	Review of email from Client Ms. Savitt stating she had tried to schedule inspection for the real estate property, but Mr. Dan Mayes, occupant of home, told her she was unable to enter property, that he was buying the home, and no one could be let in. Preparation of response email, as I was in process of flying back to FL.	S.L.H.	.10	$32.50
4/29/2013	Review of email from Ms Savitt regarding interim distribution to Mr. Dan Mayes.	S.L.H.	.10	$32.50
4/30/2013	Review of email from Mr. Jordan Hammer, Esq. stating he had no preference as to a mediator; he is out of town on June 5 and 6.	S.L.H.	.10	$32.50
4/30/2013	Review of email from Client Ms. Savitt stating family members were inquiring of her as to how much Mr. Dan Mayes owed the estate, in light of the bills being paid on his behalf out of the estate, the fact he is staying in home rent-free, and that the costs being spent on his behalf should be repaid from his share of the estate. In addition, family members were asking when the next hearing date was scheduled. Also, a realtor she contacted to estimate the home's worth believed the home's FMV was around $205,000, but this was just an estimate at this time.	S.L.H.	.10	$32.50
4/30/2013	Preparation of email to Client Ms. Savitt asking her what dates she was unavailable before June 17th. Review of response email stating she was not available May 16; 17; and June 13, 14, 17.	S.L.H.	.10	$32.50

4/30/2013	Telephone call to Mr. Hammer, Esq. at request of Client Ms. Savitt regarding Mr. Dan Mayes' refusal to allow any party to enter the homestead property. Mr. Hammer stated he believe his client would like to purchase the property himself, and also that 'no' he was not going to allow anyone to enter the homestead property, as they had no right to enter. Also, his client wanted an interim distribution and he would need this anyway if he were forced to leave and buy another property to live in.	S.L.H.	.30	$97.50
4/30/2013	Review of email from Ms. Rousso, paralegal to Ms. Huber, Esq., stating Ms. Huber was unavailable May 10, 13 and June 5, 6, 11, 12, and 13; as has depositions and a trial. She is available on May 22, 23, 28, and 30; plus June 10th.	S.L.H.	.10	No Charge
4/30/2013	Review of email from Ms. Parrott, from Mr. Salivar's office, stating needed to narrow down date for mediation; and suggestions for proposed mediator.	S.L.H.	.10	$32.50
5/1/2013	Review of email from Client Ms. Savitt requesting we set on homestead petition for 8:45 am hearing. Preparation of response email.	S.L.H.	.10	$32.50
5/1/2013	Telephone call with Client Ms. Savitt regarding setting court hearing on petition.	S.L.H.	.20	$65.00
5/1/2013	As per request from Client Ms. Savitt to set issues at hearing at 8:45 am, preparation of emailed letter to JA Ms. Bernier asking if court will allow petition to be heard on May 9th at 8:45 am. Review of response email from JA Ms. Bernier stating 'yes' it may be scheduled for UMC on May 9th.	R.P.	.10	$12.00
5/1/2013	Review of email from Client requesting set petition for hrg. on UMC on May 9th. Preparation of response email.	S.L.H.	.10	$32.50
5/1/2013	Review of Ron Mayes' Responses to Duces Tecum Request from Thomas H. Mayes.	S.L.H.	.10	$32.50
5/1/2013	Review of email from Mr. Salivar, Esq. to Ms. Huber, Esq. stating their response was incomplete. Review of response email from Ms. Huber.	S.L.H.	.10	$32.50
5/1/2013	Forwarded emails and attachments from Ms. Huber and Mr. Salivar to Client Ms. Savitt.	S.L.H.	.10	No Charge
5/2/2013	Review of signed, certified mail green cards back from Chambers, Osterbuhr and Agency for Health Care Admin.	R.P.	.10	No Charge
5/2/2013	Review of rec'd msg. from Client re: Mr. Hammer's letter.	S.L.H.	.10	No Charge
5/2/2013	Receipt and review of Ron Mayes' responses to duces tecum request from Tom Mayes.	R.P.	.10	No Charge
5/2/2013	Preparation of emailed letter to Client Ms. Savitt regarding hearing on the petition to take possession of homestead property.	S.L.H.	.20	$65.00
5/2/2013	Review of email and attached correspondence (letter) from Mr. Jordan Hammer, Esq. regarding request of his client for interim distribution of $100,000.	S.L.H.	.20	$65.00

5/2/2013	Preparation of email to Client Ms. Savitt, forwarding correspondence from Mr. Jordan Hammer, Esq.	S.L.H.	.10	No Charge
5/2/2013	Telephone call with Client Ms. Savitt re: setting hrg. on filed petition.	S.L.H.	.10	$32.50
5/2/2013	Review of filed Objection of Dan Mayes, through Mr. Jordan Hammer, Esq.	S.L.H.	.30	$97.50
5/2/2013	Forwarded copy of Objection from Mr. Hammer to Client Ms. Savitt via email.	S.L.H.	.10	No Charge
5/2/2013	Review of email from Client Ms. Savitt; preparation of response email acknowledging her email.	S.L.H.	.10	No Charge
5/3/2013	Telephone call with Client Ms. Savitt regarding setting petition issues for UMC hearing on May 14 at 9 am.	S.L.H.	.10	$32.50
5/3/2013	Prepare notice of E-Service of notice of court hearing - court filing for emailing to all parties.	R.P.	.10	$24.00
5/3/2013	Preparation of emailed letter to Ms. Savitt, along with attached copy of prior signed order from guardianship case regarding payment of monthly bills of Mrs. O'Grady's home. Order states guardian may pay the monthly bills until a PR or curator is appointed.	S.L.H.	.10	$32.50
5/3/2013	Telephone call to Judge Garrison's JA to clarify if they cancelled the 6/19 special set hearing or if our office needs to prepare a order of cancellation of hearing.	R.P.	.10	$12.00
5/3/2013	Prepare notice of hearing for 5/14/13 at 9:00 a.m. on notice of intent to take possession of homestead property; petition to determine homestead status of real property.	S.L.H.	.20	$65.00
5/3/2013	Prepare certified mail envelopes for Osterbuhr, Chambers and Agency for Health Care.	R.P.	.20	No Charge
5/3/2013	Review of emailed letter from Christine Parrot, paralegal to Mr. Salivar, Esq., requesting to coordinate a date for mediation pursuant to the order entered by Judge Garrison. The deadline for implementation of the mediation is June 17th, 2013. Ms. Parrott proposed Friday June 14th as the mediation date. Also, suggested Mary Sue Donohue as the mediator. Asked that the parties respond to her by May 6th at 5:00pm.	S.L.H.	.10	$32.50
5/3/2013	Review of email from Ms. Jami Huber, Esq. responding to Ms. Parrott's email regarding mediation date. She believed the mediation should proceed the depositions which needed to be scheduled at the same time of out of state parties. Have mediation first, and if unsuccessful, the depositions could occur in the days following. Proposed mediation date of June 10th, with depos following during that week. She had no objection to Mary Sue as mediator, but asked that we consider also Seth Marmor and Larry Blair.	S.L.H.	.10	$32.50
5/3/2013	Review of email from Mr. Jordan Hammer, Esq. responding to Ms. Parrott's email re: mediation. Said that they are avail. June 14th, and asked that a location for mediation be set. Presumed her office (Ms. Donohue's)	S.L.H.	.10	No Charge

	office was not large enough. Said we would need 4 rooms to properly mediate case.			
5/3/2013	Review of email from Mr. Salivar stating space at Ms. Donohue's office was not a problem.	S.L.H.	.10	No Charge
5/3/2013	Review of emal from Mr. Hammer, Esq. replying to Mr. Salivar's response, stating 'o.k., sounds good." regarding space at Ms. Donohue's office.	S.L.H.	.10	No Charge
5/3/2013	Review of email from Ms. Parrott thanking Ms. Huber for her prompt response. Stated their office was not available on June 10th as they have a 1/2 day special set hrg. in Broward County.	S.L.H.	.10	No Charge
5/3/2013	Review of email from Ms. Huber, Esq. stating she can be available all day on June 11th for mediation.	S.L.H.	.10	No Charge
5/3/2013	Preparation of notice of hearing on notice of intent to take possession of homestead property; determination of homestead status.	R.P.	.10	$12.00
5/3/2013	Filed notice of hearing with clerk of court setting hrg. for May 14 2013 at 9:00am.	R.P.	.10	No Charge
5/3/2013	Review of rec'd 'Ron Mayes' Responses to Duces Tecum Request from Thomas H. Mayes."	S.L.H.	.10	No Charge
5/4/2013	Review of 'Ron Mayes Responses to Duces Tecum Request' emailed by Ms. Huber, Esq. Forwarded copy of email to Client Ms. Savitt.	S.L.H.	.10	No Charge
5/5/2013	Review of email from Ms. Savitt regarding petition to be filed, along with orders to obtain, regarding real estate property.	S.L.H.	.10	$32.50
5/5/2013	Telephone call from Client Ms. Savitt regarding real estate property and questions about access and sale.	S.L.H.	.30	$97.50
5/6/2013	Review of msg. from Client stating not in agreement with suggested mediator, and instead would like to put out names of Glen Mednick and Jay Schwartz. Preparation of email to parties with new suggested names.	S.L.H.	.10	$32.50
5/6/2013	Review of email from Jordan Hammer, Esq. stating he has conflict with Jay Schwartz being the mediator.	S.L.H.	.10	$32.50
5/6/2013	Preparation of draft petition to inspect real estate property.	S.L.H.	.30	$97.50
5/6/2013	Forwarded draft petition to Ms. Savitt for review.	S.L.H.	.10	No Charge
5/6/2013	Review of email from Ms. Huber, Esq. stating she cannot agree to Jay Schwartz, but Mr. Mednick was fine.	S.L.H.	.10	No Charge
5/6/2013	Review of email from Mr. Christopher Salivar, Esq. stating if the 'potential conflict' issue with Mr. Schwartz was a belief he had a familial relationship with 'Andy', he could say there is no relation. He 'just wanted to throw that out'. However, he still believed Ms. Donohue would be perfect for this case.	S.L.H.	.10	No Charge
5/6/2013	Review of email from Mr. Hammer, Esq. stating it was not based on any perceived familial relationship.	S.L.H.	.10	No Charge
5/6/2013	Review of email from Ms. Huber Esq. stating her objection was not based on any perceived familiar	S.L.H.	.10	No Charge

	relationship either.			
5/7/2013	Review of emailed letter from Ms. Rousso at Ms. Huber's office asking if we have a confirmation date for the mediation, and asked for confirmation of the date of June 11th. Asked if we had determined the name of a mediator. Ms. Huber had no objection to Mary Sue Donohue.	S.L.H.	.10	$32.50
5/7/2013	Review of email from Ms. Rousso at Ms. Huber's office stating Ms. Hazeltine objected to Ms. Donohue, and said see attached email.	S.L.H.	.10	No Charge
5/7/2013	Preparation of email to parties stating Ms. Savitt was available for mediation on June 11th.	S.L.H.	.10	$32.50
5/7/2013	Review of email from Client stating she is available June 11 for mediation. Preparation of response email.	S.L.H.	.10	$32.50
5/7/2013	Telephone call with Client re: mediation, draft petition to inspect real estate property, and her desire to have this issue heard on UMC hearing as soon as possible.	S.L.H.	.10	$32.50
5/8/2013	Preparation of email stating as to selection of mediator, we objected to Ms. Donohue and instead suggest alternative names of Mr. Kauffman and Jack H. Cook, retired circuit judge.	S.L.H.	.10	$32.50
5/8/2013	Review of email from Client regarding selection of mediator. Preparation of response email. Preparation of email to parties suggesting new names.	S.L.H.	.10	$32.50
5/8/2013	Review of email from Mr. Hammer, Esq. stating he had no objection to Ms. Donohue as mediator or setting hrg. at 10:00am.	S.L.H.	.10	No Charge
5/9/2013	E-File notice of Cancellation of 5/14/13 UMC Hearing. Reference # for this filing is 1975785.	R.B.	.20	No Charge
5/9/2013	Prepare notice of hearing on petition for inspection and permission to list and sell real estate.	R.P.	.20	$24.00
5/9/2013	Preparation of notice of service of notice of cancellation of hearing.	R.P.	.10	No Charge
5/9/2013	Review of email from Mr. Salivar, Esq. regarding selection of mediator. Said he can confirm for the date of June 11th, 2013. He also stated that it was his understanding that Kathleen and Stephanie wished to attend the mediation via telephone. He stated that his office generally had no problem with any of the proposed mediators, he felt Ms. Donohue would be best absent any objection. And since they received no objection, upon confirmation by Mr. Hammer of his and his client's availability for the 11th, his office would contact Ms. Donohue to confirm her availability and reserve space for mediation on the 11th.	S.L.H.	.10	No Charge
5/9/2013	Forwarded copy of Mr. Salivar's email to Ms. Savitt.	S.L.H.	.10	No Charge
5/9/2013	Prepare notice of cancellation of hearing scheduled on 5/14/13.	R.P.	.20	$24.00
5/9/2013	Receipt and review of invoice from DBR in the amount of	R.P.	.10	No Charge

	$194.00. Hand-delivered to Ms. Savitt for payment.			
5/9/2013	E-mailed notice of cancellation of hearing to all parties.	R.P.	.10	No Charge
5/9/2013	E-mailed notice of hearing and petition to all parties.	R.P.	.10	No Charge
5/9/2013	Review of email from Mr. Salivar, Esq. regarding notice of hearing scheduled for May 14. Preparation of response email.	S.L.H.	.10	$32.50
5/9/2013	E-Filed Petition for Inspection of Estate Real Property and for Permission to List and Sell said Estate Real Property	R.B.	.10	$12.00
5/9/2013	Meeting with Ms. Savitt in person regarding petition to inspect property.	S.L.H.	.20	$65.00
5/10/2013	Review of rec'd Notice of Filing from Mr. Jordan Hammer, Esq. with attached letter to court stating they are unable to attend May 14th court hearing.	S.L.H.	.10	No Charge
5/10/2013	Preparation of email to Ms. Savitt. Review of response email from Ms. Savitt.	S.L.H.	.10	No Charge
5/10/2013	Review of email from Ms. Huber, Esq. to parties regarding her 3 Notice of Intent to Serve Subpoena for production of documents without deposition; she requested responses to her questions regarding whether anyone objected to the 3 subpoenas; if they will waive the 10 day notice period.	S.L.H.	.10	$32.50
5/10/2013	Review of email from Mr. Jordan Hammer, Esq. stating they were not available on May 14th or the 16th.	S.L.H.	.10	No Charge
5/10/2013	Preparation of email to Mr. Hammer, Esq. asking him to provide evidence of his unavailability on May 14 or 16th. Review of his response email stating his assistant would forward copies of proof of his unavailability.	S.L.H.	.10	$32.50
5/10/2013	Review of email from Ms. Savitt regarding information that Mr. Dan Mayes has additional persons living with him in Mrs. O'Grady's home.	S.L.H.	.10	$32.50
5/10/2013	Review of letter from Ms. Skatoff, Esq.	S.L.H.	.10	$32.50
5/13/2013	Review of email from Ms. Savitt regarding UMC hearing.	S.L.H.	.10	$32.50
5/13/2013	Prepare notice of service of court document on notice of cancellation of hearing.	R.P.	.20	$24.00
5/13/2013	Prepared notice of cancellation of court hearing for 5/14/13.	R.P.	.20	$24.00
5/13/2013	Prepare e-mail attaching notice of cancellation of court hearing to all parties.	R.P.	.10	No Charge
5/13/2013	Preparation of email to parties stating hearing scheduled for May 14, 2013 at UMC was cancelled.	R.P.	.10	$12.00
5/14/2013	Review of email from Ms. Parrot regarding mediation date of June 11th stating Mr. Hammer was correct. Said still had to select a mediator though. Said they were awaiting a 'call' from Ms. Hazeltine to discuss her client's objection to the proposal of Mary Sue Donohue.	S.L.H.	.10	$32.50
5/14/2013	Review of email from Mr. Salivar, Esq. stating he had spoken with Thomas Mayes and can confirm the 11th for mediation. As to depositions Thomas Mayes had scheduling conflicts with work for the 12th and 13th, but	S.L.H.	.10	$32.50

	the 17th and 18th would work. He stated he could re-schedule Ronald Mayes to be completed the morning of the 17th, and Thomas Mayes to begin that afternoon, or the following day (the 18th).			
5/14/2013	Review of email from Mr. Andrew Schwartz, Esq. regarding his request for Ms. Hazeltine to return his phone call regarding their selection of a mediator.	S.L.H.	.10	No Charge
5/14/2013	Receipt and review of formal notice on objection to curator's petition for inspection of estate real estate property and for permission to list and sell said real estate property.	R.P.	.20	No Charge
5/14/2013	Review of email from Mr. Hammer, Esq. asking if someone could confirm that the status of mediation was that we were currently locked into the date of June 11th but still need to select mediator?	S.L.H.	.10	No Charge
5/14/2013	Forwarded copy of email from Mr. Schwartz to Ms. Savitt; asked for her response on issue.	S.L.H.	.10	No Charge
5/14/2013	Review of Formal Notice; and Objection to Curator's Petition for Inspection fo Estate Real Estate Property and for permission to list and sell said real estate, filed by Jordan Hammer, Esq.	S.L.H.	.50	$162.50
5/14/2013	Preparation of emailed letter to Client Ms. Savitt regarding pending petition to inspect real estate property, etc.	S.L.H.	.10	$32.50
5/14/2013	Preparation of email to Ms. Savitt re: objection to petition filed.	S.L.H.	.10	$32.50
5/14/2013	Review of email from Ms. Huber to Ms. Salivar regarding her intention to let Mr. Salivar continue to depose with Ronald Mayes first and then set Thomas Mayes. She stated she also needed dates for additional depositions: Yoshi Smith, Esq., Dr. Jorge Macia, and once they had reviewed the documents from Boulevard and Bethesda Memorial Hospital, the appropriate parties from these institutions. She said she also needed to set Kathy O. She said she had not excused any party from appearing at the mediation and neither had the court.	S.L.H.	.10	$32.50
5/15/2013	Review of Objection to Notice of Mediation and Motion to Compel Coordination of Depositions and Mediation filed by Ms. Huber, Esq.	S.L.H.	.10	No Charge
5/15/2013	Receipt and review of faxed notice of mediation.	R.P.	.10	No Charge
5/15/2013	Review of faxed Notice of Mediation from Mr. Jordan Hammer, Esq. setting Mediation Conference for June 11, 2013 before Mary Sue Donohue, Esq. at 9:30 am.	S.L.H.	.10	$32.50
5/15/2013	Review of email and attached documents entitled "Petitioner/Counter-Respondent's Objection to, and MOtion for Protective Order in connection with, Respondent/Counter-Petitioner's Request for Production - composite exhibit 4 - medical records.	S.L.H.	.10	No Charge
5/15/2013	Review of email from Ms. Huber, Esq. regarding Notice	S.L.H.	.10	No Charge

	of Mediation sent out by Mr. Hammer, Esq. and filed when there had been no consensus. Asked for parties to please advise by the end of business today their availability for UMC next week where she will be setting her Motion to Compel Coordination of Discovery and Mediation.			
5/15/2013	Review of email from Mr. Schwartz, Esq. regarding mediation. Stated Ms. Huber's alleged motion regarding mediation falls into the category of 'babysitting'. Stated Ms. Huber was acting unreasonably.	S.L.H.	.10	No Charge
5/15/2013	Review of email from Jordan Hammer, Esq. to Ms. Huber, Esq. stating he had advised her and Mr. Salivar, Esq. that he would be filing a notice of mediation today. He stated she was in fact available for June 11th but was holding out in an effort to schedule her deposition of Thomas Mayes.	S.L.H.	.10	No Charge
5/15/2013	Review of email from Ms. Huber, Esq. to Mr. Schwartz, Esq. re: scheduling mediation date.	S.L.H.	.10	No Charge
5/16/2013	Telephone call to PB Daily Business Review re: proof of publication of notice to creditors. She said notice to creditors was published on April 5 and 12th, and the proof had been mailed to us. Told her we never received it. Will double-check with paralegal and call back.	S.L.H.	.10	$32.50
5/16/2013	Review of email from Mr. Jordan Hammer, Esq. asking for dates of publication of the notice to creditors. Preparation of response email stating notice to creditors was published on April 5 and 12th.	S.L.H.	.10	$32.50
5/16/2013	Preparation of email to Client Ms. Savitt reminding her of attendance at the mediation meeting on May 22, at 8:45 am. Review of response email from Ms. Savitt.	S.L.H.	.10	No Charge
5/16/2013	Review of email from Ms. Huber's office asking if parties are available for UMC hearing on May 22 re: objection to notice of mediation and motion to compel coordination of depositions and mediation.	S.L.H.	.10	No Charge
5/16/2013	Review of email from Mr. Jordan Hammer, Esq. stating that in his letter accompanying the notice of mediation, he suggested that someone offer an alternate schedule for mediation and any needed depositions that works for the participants and meets the deadlines set by the court. Otherwise he looked forward to seeing them in mediation on June 11th.	S.L.H.	.10	No Charge
5/16/2013	Review of email from Mr. Salivar, Esq. to Ms. Huber stating he was not available for a UMC hearing on May 21st as he has a 9:30 am mediation.	S.L.H.	.10	No Charge
5/16/2013	Review of email from Ms. Huber, Esq. to Mr. Salivar, Esq. asking him if he was not available on May 21st can Mr. Schwartz attend the hearing instead; or could he appear by telephone. They believed there was no UMC on the 22nd or 23rd.	S.L.H.	.10	No Charge
5/16/2013	Review of email from Ms. Rousso from Ms. Huber's office	S.L.H.	.10	$32.50

	confirming there is no UMC on May 22 or 23 with Judge Garrison; please advise if you are able to attend UMC on May 21 on their "Objection to Notice of Mediation and Motion to Compel Coordination of Depositions and Mediation."			
5/16/2013	Review of email from Mr. Salivar, Esq. with attached "Petitioner/Counter-Respondent's Objection to, and Motion for Protective Order in connection with, Respondent/Counter-Petitioner's Request for Production".	S.L.H.	.10	No Charge
5/17/2013	Review of email from Ms. Savitt regarding Mr. Dan Mayes' occupation of home of Mrs. O'Grady.	S.L.H.	.10	No Charge
5/17/2013	Review of email from Ms. Savitt. Preparation of response email.	S.L.H.	.10	No Charge
5/17/2013	Preparation of emailed letter to Ms. Savitt in response to her prior email.	S.L.H.	.20	$65.00
5/19/2013	Review of email from Client stating that we can keep the June 19th ct. hrg. date and amend existing petition to request further instructions from court.	S.L.H.	.10	$32.50
5/20/2013	Review of email from Christine Parrot from Mr. Salivar's office; review of attached Motion to Dispense with Mediation; Notice of Filing Second Affidavit of Petitioner Thomas Mayes.	S.L.H.	.10	$32.50
5/20/2013	Receipt and review of notice of special set hearing on objection to notice of mediation and motiont o compel/Mayes' motion to dispense with mediation.	R.P.	.10	No Charge
5/21/2013	Telephone call from Client asking about hearing at 8:45 am tomorrow.	S.L.H.	.10	$32.50
5/21/2013	Review of email from Ms. Huber, Esq. asking if Ms. Savitt would sign a HIPAA form in order to have medical documents released from Dr. Macia, Boulevard Rehab, and Bethesda Hospital. Also asked if we were attending the hearing tomorrow regarding mediation. Preparation of response email stating I would need to talk to client before responding back to her questions.	S.L.H.	.10	$32.50
5/21/2013	Forwarded email from Ms. Huber to Client for review.	S.L.H.	.10	No Charge
5/21/2013	Review of response email from Client; preparation of response email.	S.L.H.	.10	$32.50
5/22/2013	Review of copy of email from Mr. Salivar to all parties discussing Mr. Thomas Mayes' unavailability for deposition and Mr. Ron Mayes' availability for deposition.	S.L.H.	.10	No Charge
5/22/2013	Review of copy of email sent from Mr. Salivar Esq. with attached copy of Order court entered today re: Mediation on June 11, 2013 at the Boca office of Mary Sue Donohue, Esq. Also stated Mr. Ron Mayes submitted a settlement offer yesterday afternoon.	S.L.H.	.10	$32.50
5/22/2013	Forwarded copy of notice of hearing for today to Client Ms. Savitt, as she would like to attend today alone to observe hearing.	S.L.H.	.10	No Charge

5/22/2013	Review of Order on Motion to Compel Coordination of Depositions and Mediation, ordered by Judge Garrison. Motion to dispense with mediation filed by Mr. Thomas Mayes denied; mediation ordered to occur on June 11, 2013 before Mary Sue Donohue, Esq.; all parties shall attend mediation in person.	S.L.H.	.10	$32.50
5/22/2013	Receipt and review of notice of compliance from T. Mayes. E-mailed to Ms. Savitt.	R.P.	.10	No Charge
5/22/2013	Preparation of email to Palm Beach Daily Business review asking them to send us a paper copy of the Proof of Publication of Notice to Creditors. Review of email back from DBR asking if the invoice of $194.00 had been paid yet. Preparation of email to Client asking if bill had been paid in amt. of $194.00 to DBR.	S.L.H.	.10	$32.50
5/22/2013	Review of email from Ms. Huber, Esq. stating that the judge ordered that mediation must occur on June 11th, with Mary Sue Donohue as mediator. She said she was sending us the order now and she also planned to set several depositions in the days that followed the mediation, including Thomas Mayes. Forwarded copy of email to Client and paralegal.	S.L.H.	.10	$32.50
5/23/2013	Review of email from Ms. Rousso, paralegal to Ms. Huber, Esq., regarding attached 3 HIPAA releases prepared for Ms. Savitt's signature.	S.L.H.	.10	$32.50
5/23/2013	Receipt and review of three HIPAA releases from Jami Huber, Esq. Forwarded to Ms. Savitt.	R.P.	.10	No Charge
5/28/2013	Review of email from Ms. Scheiblich from Mr. Salivar's office to Ms. Donohue with attached notice of mediation filed by Mr. Hammer, Esq. Said there was no room or suite number indicated for her.	S.L.H.	.10	No Charge
5/29/2013	Telephone call back to Ms. Jami Huber, Esq. She wanted to discuss HIPAA releases and need for Ms. Savitt to sign.	S.L.H.	.25	$81.25
5/29/2013	Review of email from Randi Scheiblich from Mr. Salivar's office to Ms. Donohue's office, asking to put suite number on notice of mediation. Forwarded email to Client Ms. Savitt.	S.L.H.	.10	No Charge
5/29/2013	Review of NOTICE OF TAKING DEPOSITION DUCES TECUM - KATHLEEN M. OSTERBUHR NOTICE OF TAKING DEPOSITION DUCES TECUM - STEPHANIE J. CHAMBERS from Mr. Huber, Esq. Forwarded copies via email to Ms. Savitt.	S.L.H.	.10	No Charge
5/29/2013	Review of email from Client Ms. Savitt stating she was available on date of mediation, but would be out of town from June 12 to June 16, 2013.	S.L.H.	.10	$32.50
5/29/2013	Review of email from Mr. Salivar, Esq. to Ms. Huber inquiring about her new address. Review of reply email from Ms. Huber stating that was her correct new address: 500 S. Australian Avenue, Suite 500, West Palm Beach, FL 33401.	S.L.H.	.10	$32.50

5/30/2013	Telephone call (return call) to Ms. Huber, Esq. regarding signing the HIPAA authorizations to obtain copies of Mrs. O'Grady's medical records.	S.L.H.	.10	$32.50
5/30/2013	Telephone call with Client Ms. Savitt regarding Ms. Huber's request for immediate signing of HIPAA authorizations.	S.L.H.	.10	$32.50
5/31/2013	Meeting with Ms. Savitt to sign HIPAA authorization forms.	R.P.	.10	$12.00
5/31/2013	Scanned and e-mailed HIPAA releases to Jami Huber, Esq. Also mailed originals to her.	R.P.	.20	No Charge
5/31/2013	Preparation of amended petition and request for instructions from court. Review of responses filed by Mr. Hammer and Mr. Schwartz. Review of probate rules and statutes governing duties of curator.	S.L.H.	1.00	$325.00
5/31/2013	Emailed copy of draft amended petition to Client Ms. Savitt for review.	S.L.H.	.10	No Charge
5/31/2013	Review of email from Ms. Huber, Esq. with attached authorizations for Ms. Savitt to sign. Forwarded via email the documents to Client Ms. Savitt.	S.L.H.	.10	$32.50
6/3/2013	Preparation of amended petition with changes indicated; finalized for E-filing with clerk of court.	S.L.H.	.10	$32.50
6/3/2013	Preparation of email to Ms. Savitt following up to ask her for the totals on bills for the O'Grady home had been expended, as per her previous email asking that this info. be included in the amended petition.	S.L.H.	.10	$32.50
6/3/2013	Review of email from Ms. Savitt with signed attached amended petition.	S.L.H.	.10	$32.50
6/3/2013	E-file Petition for instruction.	R.B.	.20	$24.00
6/4/2013	Prepare notice of unavailability.	R.P.	.20	$24.00
6/5/2013	Receipt and review of petitioner T. Mayes' pre-trial disclosure.	R.P.	.10	No Charge
6/5/2013	Receipt and review of notice of taking depositions for S. Chambers and Laura Ernst.	R.P.	.20	No Charge
6/5/2013	Receipt and review of petitioner Mayes' objection to taking the deposition of K. Osterbuhr and S. Chambers.	R.P.	.20	No Charge
6/6/2013	Receipt and review of Notice of Deposition Deces Tecums and Notice of Taking Depositions of Amy Beller, Esq. & Yoshimi O. Smith, Esq.	R.P.	.20	No Charge
6/10/2013	Telephone call from Mary Sue Donohue, Esq. at office. She said I as attorney would need to attend, along with my client Ms. Savitt, as she was a party and I was her atty. of record. She said the court had asked that all parties attend the mediation. I told her I had not planned on attending, as my client wanted to keep costs down. She stated since my client was a party and I was her attorney, the court order mandated we both come. I agreed to come to at least the beginning of the mediation, and would take direction from my client after that.	S.L.H.	.10	$32.50
6/10/2013	Telephone call to Client Ms. Savitt to discuss attendance	S.L.H.	.10	$32.50

	at mediation meeting tomorrow. She will go also and meet me there.			
6/10/2013	Review of Notice of Mediation regarding mandated mediation meeting tomorrow.	S.L.H.	.10	$32.50
6/11/2013	Msg. from Client in evening at approximately 7:30 pm that mediation had finally ended, and had achieved resolution.	S.L.H.	.10	No Charge
6/11/2013	Attendance at mediation hearing at law office of Mary Sue Donohue, Esq. from 9:30am to 12:30 pm. Client stated I did not need to stay for entirety.	S.L.H.	3.00	$975.00
6/13/2013	Review of email from Jordan Hammer, Esq. objecting to certain items in the draft final settlement agreement.	S.L.H.	.10	No Charge
6/13/2013	Review of Global Settlement Agreement emailed by Ms. Huber, Esq. Noticed one small typo. Preparation of email to Ms. Huber for correction.	S.L.H.	.20	$65.00
6/18/2013	Review of email from Mr. Salivar, Esq. with attached revised global settlement agreement and original settlement agreement.	S.L.H.	.10	No Charge
6/18/2013	Prepare draft guardian fee petition and attorney fee petition and invoice for attorney review.	R.B.	.40	No Charge
6/19/2013	Telephone call with Mary Sue Donohue, Esq. regarding terms of signed mediated agreement dated June 11th.	S.L.H.	.20	No Charge
6/19/2013	Attendance at court hearing; present also was Jordan Hammer, Esq. Deputy came out to tell us that the court rec'd word that the hearing will be cancelled today. We confirmed this (in agreement) and therefore court did not appear; no hearing.	S.L.H.	.30	No Charge
6/19/2013	Review of email from Mr. Salivar asking for hearing today to be cancelled because the new amended agreement was not finalized yet; preparation of response email.	S.L.H.	.10	No Charge
6/19/2013	Review of email from Ms. Savitt. Preparation of response email.	S.L.H.	.10	No Charge
6/19/2013	Preparation of email to Jennifer Bernier, Judicial Asst. to the Honorable Judge Garrison. Also phone msg. left for her.	S.L.H.	.10	No Charge
6/19/2013	Review of mediated settlement agreement dated June 11th, in regard to issue that the parties have 10 days or until the end of the day this Friday to come up with second amended agreement.	S.L.H.	.20	$65.00
6/20/2013	Review of email from Ms. Kosterbuhr, daughter of Mrs. O'Grady. Preparation of response email back to her.	S.L.H.	.10	No Charge
6/25/2013	Preparation of email to Kathleen Kosterbuhr asking for update on her review of the final settlement agreement.	S.L.H.	.10	No Charge
6/25/2013	Receipt and review of invoice from Mary Sue Donohue, mediator in the amount of $4,972.50. Scanned in dropbox.	R.P.	.10	No Charge
6/26/2013	Review of email from Kathleen Kosterbuhr. Review of email from Ms. Savitt. Preparation of email with attached copy of mediated signed settlement agreement to Ms.	S.L.H.	.10	$32.50

	Kosterbuhr. .			
6/27/2013	Review of invoice received from mediator Mary Sue Donohue, Esq. Preparation of email to curator Ms. Savitt with copy of invoice.	S.L.H.	.10	$32.50
6/30/2013	E-Filed copy of the Notice of Filing Proof of Publication of Notice to Creditors in the Daily Business Review	S.L.H.	.40	$130.00
6/30/2013	Preparation of E-Service document, with attached Notice of Filing Proof of Publication of Notice to Creditors, to all parties.	S.L.H.	.10	$32.50
6/30/2013	E-Filed the "Notice to Creditors" with clerk of court.	S.L.H.	.20	$65.00
6/30/2013	Preparation of E-Service document to e-mail the "Notice to Creditors" to the parties and persons.	S.L.H.	.20	$65.00
7/2/2013	Review of email from Jami Huber, Esq. stating she is preparing a motion to compel based on the lack of response from the attys.	S.L.H.	.10	$32.50
7/2/2013	Forwarded email from Ms. Huber on to Client Ms. Savitt.	S.L.H.	.10	No Charge
7/2/2013	Review of email from Mr. Salivar, Esq., asking parties to sign the attached GSA, which has already been signed by Ron and Thomas. Reviewed attachment.	S.L.H.	.10	$32.50
7/2/2013	Review of email from Mr. Jordan Hammer, Esq. asking if Ms. Savitt had signed the 13 page Global Settlement Agreement yet. Preparation of response email, with cc to Ms. Savitt.	S.L.H.	.10	$32.50
7/2/2013	Review of email from Stephanie Chambers, daughter of Mrs. O'Grady. She stated she was not going to sign the new 13 page. agreement. Preparation of response email, with cc to all the parties, asking her if that was Kathleen's position also.	S.L.H.	.10	$32.50
7/2/2013	Review of email from Mr. Hammer, Esq. regarding Ms. Savitt's signature on the GSA.	S.L.H.	.10	$32.50
7/2/2013	Forwarded Mr. Hammer's email to Ms. Savitt regarding signing off on the GSA.	S.L.H.	.10	No Charge
7/2/2013	Preparation of email to Ms. Savitt regarding her position on the GSA now.	S.L.H.	.10	$32.50
7/2/2013	Review of notice of hearing sent by Mr. Hammer on his motion to compel.	S.L.H.	.10	$32.50
7/2/2013	Forwarded notice of hearing to Client Ms. Savitt.	S.L.H.	.10	No Charge
7/3/2013	Review of email from Ms. Huber, Esq. regarding settlement agreement.	S.L.H.	.10	$32.50
7/3/2013	Forwarded Ms. Huber's email to Ms. Savitt.	S.L.H.	.10	No Charge
7/3/2013	Review of email from Mr. Hammer stating he had prepared a motion to compel enforcement of the mediation agreement, with attached motion to compel.	S.L.H.	.10	$32.50
7/3/2013	Review of email from Ms. Huber stating she was not available on either July 9 or 11th, but would join Mr. Hammer's motion and does not object to us proceeding in her absence.	S.L.H.	.10	$32.50
7/3/2013	Review of email from Mr. Salivar, Esq. stating he was available on July 9th; but he will also ask to affirm the	S.L.H.	.10	$32.50

	mediation agreement, and will send in a proposed order.			
7/3/2013	Review of email from Ms. Huber, Esq. stating it would continue to be her position to enforce the global settlement agreement, plus she would ask to assess fees against the parties that would not sign, as their only objection had been about its length.	S.L.H.	.10	$32.50
7/3/2013	Forwarded Ms. Huber's email to Client Ms. Savitt.	S.L.H.	.10	No Charge
7/3/2013	Review of email from Ms. Huber, Esq. to myself, asking what Ms. Savitt's position is on the mediation agreement.	S.L.H.	.10	$32.50
7/3/2013	Forwarded Ms. Huber's email to Ms. Savitt.	S.L.H.	.10	No Charge
7/3/2013	Preparation of response email to Ms. Huber stating I will be getting back to her soon.	S.L.H.	.10	No Charge
7/3/2013	Review of email from Mr. Hammer, Esq. to me stating Ms. Savitt should have the ability to cut an $11,000.00 check to Ron Mayes in the event his motion is granted. He also asked Ms. Huber for her trust account information.	S.L.H.	.10	$32.50
7/3/2013	Review of email from Client regarding hearing on July 11 at 9:00am. Preparation of response email.	S.L.H.	.10	$32.50
7/3/2013	Review of email from Client Ms. Savitt regarding settlement agreement. Preparation of response email.	S.L.H.	.10	$32.50
7/3/2013	Review of another email from Client Ms. Savitt regarding settlement and mediation agreement. Preparation of response email.	S.L.H.	.10	No Charge
7/7/2013	Review of email from Ms. Savitt regarding change to be made regarding the listing of Mr. Ron Mayes' companies in the first paragraph of the global settlement agreement, so they are included as "hereto referred as Ron", etc.	S.L.H.	.10	$32.50
7/7/2013	Preparation of emailed letter to attorneys and parties regarding preparation for court hearing on July 11th, and final settlement.	S.L.H.	.10	$32.50
7/8/2013	Review of email from Kathleen Osterbuhr and copy of attached letter she sent to the court on July 5th, 2013. She asked if I would answer questions. Preparation of response email stating I would need to check with my client Ms. Savitt first. Forwarded email and response to Ms. Savitt for review.	S.L.H.	.30	$97.50
7/9/2013	Review of email from Ms. Savitt to Kathleen Osterbuhr and Stephanie Chambers regarding letter sent by them to court.	S.L.H.	.10	No Charge
7/9/2013	Review of email from Ms. Savitt regarding hearing on July 11th and finalization of case. Preparation of response email.	S.L.H.	.10	No Charge
SUBTOTAL:			54.05	$11,261.50

Costs

4/3/2013	Paid for certified copies (2) of the letters and order to appoint curator.	$6.00
4/5/2013	Cost for certified copies.	$6.00
5/31/2013	Postage.	$0.66

SUBTOTAL: $12.66

TOTAL: $11,274.16
PREVIOUS BALANCE DUE: $0.00
CURRENT BALANCE DUE AND OWING: $11,274.16

EXHIBIT "6"

Christopher Salivar

From: Christopher Salivar
Sent: Friday, July 12, 2013 1:55 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: IN re Helen M. O'Grady

Great. Thank you!

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Friday, July 12, 2013 1:44 PM
To: Christopher Salivar
Cc: info@hazeltinelaw.com; Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: Re: IN re Helen M. O'Grady

Thank you for your message Chris. Ms. Savitt and I are currently at the Florida Guardianship Conference at PGA but I will ask her to send you this information as soon as possible.

Sincerely,

Sheri L. Hazeltine, Esq.
800 Palm Trail Plaza, Ste. 3
Delray Beach, FL 33483
Sent from my iPhone

On Jul 12, 2013, at 1:00 PM, Christopher Salivar <cs@amslaw.biz> wrote:

Dear Sheri,

When you and your client are able, can you please send to my attention an up-to-date (i.e., 7-11-13) accounting/valuation of the assets of the estate? I will need this to establish the value of the estate as of 7-11-13 (the date of appointment of my client as personal representative), so that we can appropriately ensure that any distributions worked out with Betsy and Tom are correct, and that the values which we all discussed yesterday will still remain in control of the estate to ensure that all necessary taxes and estate administration fees (including costs and fees to counsel for the parties) can appropriately be satisfied.

Thank you.

Christopher S. Salivar, Esq.

Andrew M. Schwartz, P.A.

101 Plaza Real South

Suite 218

Boca Raton, FL 33432

(561) 347-6767 Palm Beach

(954) 574-0770 Broward

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cs@amslaw.biz <mailto:cs@amslaw.biz>

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Christopher Salivar

From: Sheri L. Hazeltine [sheri@hazeltinelaw.com]
Sent: Wednesday, August 21, 2013 11:31 AM
To: Christopher Salivar
Cc: Christine Parrott; 'Randee Parrish'
Subject: RE: O'Grady probate

Dear Chris,
Thank you for your message.
We were hoping to spare the additional expense of the preparation of a formal accounting but if you and your client are not willing to waive it at this point then there is no problem in having an accountant prepare it.
Yes, I agree a meeting via teleconference is a good idea. I will check with my client regarding her availability and get back to you soon.
Sincerely,
Sheri L. Hazeltine, Esq.
Sheri L. Hazeltine & Associates, P.A.
800 Palm Trail Plaza, Suite 3
Delray Beach, Florida 33483
(561) 243-4655 office; (561) 243-6933 fax
sheri@hazeltinelaw.com
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-----Original Message-----
From: Christopher Salivar [mailto:cs@amslaw.biz]
Sent: Wednesday, August 21, 2013 11:22 AM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: FW: O'Grady distributions

Dear Ms. Hazeltine,

I received the e-mail below a few days ago from your client. At this point my client is compiling all necessary financial information to ensure a smooth final transition from Ms. Savitt to Mr. Mayes as the party authorized to handle the assets of the estate of Helen M. O'Grady, however we will still need a full formal accounting prepared in connection with Ms. Savitt's handling of the estate as Guardian/Curator.

To date the accounting has been prepared up through March 31, 2013. I had previously requested that at least an informal accounting be given to my client so he was aware of the status of the estate assets as of July 11, 2013. At this point, as Ms. Savitt is required to file her final accounting along with per petition for discharge (all by August 30, 2013), I see no need for a second accounting running through July 11, 2013. The information I previously requested will ultimately be contained within Ms. Savitt's full final accounting.

Also, you previously inquired as to whether or not it would be a good idea for you, I, Ms. Savitt, and Mr. Mayes to meet in person to discuss the status of the estate's assets and the

preliminary distributions that have been made to date. I do think holding a meeting to address these issues would be a good idea, but it may be more beneficial to simply hold it via teleconference rather than in person (to reduce time expended on travel, etc.). Please let me know your and Ms. Savitt's availability (or unavailability) for next Monday and Tuesday, as that might be the best time to hold such a teleconference.

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Betsy Savitt [mailto:savittguardians@gmail.com]
Sent: Monday, August 19, 2013 11:02 AM
To: thomas mayes; Christopher Salivar
Subject: O'Grady distributions

--

Dear Tom,

I have enclosed the distribution sheet to date. Ms Hazeltine and I are wanting to know if you are requiring that we fill a complete and formal accounting to the July 11th date, or if this will not be necessary.

Sincerely,

Elizabeth "Betsy" Savitt
Savitt Guardians

4101 Satin Leaf Ct.
Delray Beach, Fl 33445
561-573-1292
Fax 561-496-1559

No virus found in this incoming message.
Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3211.1.1/6082 - Release Date: 08/19/13
02:15:00

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Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3211.1.1/6094 - Release Date: 08/21/13 02:04:00

Christopher Salivar

From: Christopher Salivar
Sent: Wednesday, August 21, 2013 11:22 AM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: FW: O'Grady distributions
Attachments: O'Grady distribution report.docx; prior e-mail chain.txt

Dear Ms. Hazeltine,

I received the e-mail below a few days ago from your client. At this point my client is compiling all necessary financial information to ensure a smooth final transition from Ms. Savitt to Mr. Mayes as the party authorized to handle the assets of the estate of Helen M. O'Grady, however we will still need a full formal accounting prepared in connection with Ms. Savitt's handling of the estate as Guardian/Curator.

To date the accounting has been prepared up through March 31, 2013. I had previously requested that at least an informal accounting be given to my client so he was aware of the status of the estate assets as of July 11, 2013. At this point, as Ms. Savitt is required to file her final accounting along with per petition for discharge (all by August 30, 2013), I see no need for a second accounting running through July 11, 2013. The information I previously requested will ultimately be contained within Ms. Savitt's full final accounting.

Also, you previously inquired as to whether or not it would be a good idea for you, I, Ms. Savitt, and Mr. Mayes to meet in person to discuss the status of the estate's assets and the preliminary distributions that have been made to date. I do think holding a meeting to address these issues would be a good idea, but it may be more beneficial to simply hold it via teleconference rather than in person (to reduce time expended on travel, etc.). Please let me know your and Ms. Savitt's availability (or unavailability) for next Monday and Tuesday, as that might be the best time to hold such a teleconference.

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Betsy Savitt [mailto:savittguardians@gmail.com]
Sent: Monday, August 19, 2013 11:02 AM
To: thomas mayes; Christopher Salivar
Subject: O'Grady distributions

--

Dear Tom,

I have enclosed the distribution sheet to date. Ms Hazeltine and I are wanting to know if you are requiring that we fill a complete and formal accounting to the July 11th date, or if this will not be necessary.

Sincerely,

Elizabeth "Betsy" Savitt
Savitt Guardians
4101 Satin Leaf Ct.
Delray Beach, Fl 33445
561-573-1292
Fax 561-496-1559

No virus found in this incoming message.
Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3211.1.1/6082 - Release Date: 08/19/13 02:15:00

Christopher Salivar

From: Christopher Salivar
Sent: Friday, July 26, 2013 10:15 AM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: re: In re HElen M. O'Grady

Dear Sheri,

I'm meeting with my client, Tom, in my office now, and have been made privy to some odd and somewhat puzzling information. As Tom has now been appointed P.R. for the estate, and as by Order of the Court he and Betsy have JOINT authority over the assets of the estate, I expect that Tom will be notified of any proposed action on Betsy's part prior to same being taken, NOT AFTER.

Tom has informed me that Ms. Savitt has decided to transfer all of the Kraft, Mondaliz, and Altria stock to an account with Morgan Stanley, yet this was not told to Tom until AFTER Ms. Savitt had this set in motion. Additionally, Ms. Savitt has told Tom of her plans to make an imminent equal distribution to all of the beneficiaries without the beneficiaries first agreeing upon the issue of whether or not Daniel intends to take the O'Grady residence as an in-kind distribution valued at $190k.

This kind of unilateral action cannot work, and cannot be tolerated, when two parties have been vested with authority over the assets of the estate.

Though it might mean that actions take one or two more phone calls before being performed, I expect that Ms. Savitt or you will either a) call Tom, or b) call my office, in regards to future planned actions pertaining to the assets of the Estate.

Since we are nearing the end of the administration of this estate, I would like for things to run smoothly, rather than having new waves come in and "rock the boat" so to speak.

Please call me when you can to discuss this issue.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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Christopher Salivar

From: Christopher Salivar
Sent: Monday, July 22, 2013 5:26 PM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott; 'Jordan Hammer'; service@clarkskatoff.com
Subject: Re: O'grady

Dear Ms. Hazeltine,

In addition to my e-mail below, do you have any idea of the status of the attorney's fee payment(s) pursuant to the Court's 7-11-13 Order? I know that Tom has now been in contact with, and working with, Ms. Savitt to address the status of the estate and how best distributions can be made, but we do not have any information regarding this, and checks were to have been issued to Clark Skatoff, P.A. and my firm as of today.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

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-----Original Message-----
From: Christopher Salivar
Sent: Monday, July 22, 2013 5:19 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: NOTICE OF SERVICE OF COURT DOCUMENT - FINAL ACCOUNTING

Dear Ms. Hazeltine,

We have received Ms. Savitt's accounting up through March 31, 2013. Any updates as to the status of the more current and up-to-date final accounting?

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Tuesday, July 16, 2013 8:15 AM
To: Christopher Salivar; jhammer@clarkskatoff.com; 'Stephen M. Chambers'; kosterbuhr1@cox.net
Cc: 'Randee Parrish'; 'Betsy Savitt'
Subject: NOTICE OF SERVICE OF COURT DOCUMENT - FINAL ACCOUNTING

Court

Palm Beach County Circuit Court

Case Number

502012GA000016XXXXSB

Case Style

In re Guardianship of Helen O'Grady

Document(s) Served

Final Accounting

Sender's Name

Sheri L. Hazeltine, Esquire

Sender's Telephone

561-243-4655

Sheri L. Hazeltine, Esq.

Sheri L. Hazeltine & Associates, P.A.

800 Palm Trail Plaza, Suite 3

Delray Beach, Florida 33483

(561) 243-4655 office; (561) 243-6933 fax

sheri@hazeltinelaw.com

Connect with us on FACEBOOK

An elder law attorney and mom of a 'differently-abled' child. Providing caring legal services and support to families with members with special needs. Guardianship for the elderly, developmentally disabled, the mentally incapacitated, guardianship litigation, special needs trusts, and estate planning needs.

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Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3204.1.1/5991 - Release Date: 07/15/13 09:33:00

No virus found in this incoming message.
Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3204.1.1/6010 - Release Date: 07/22/13 02:05:00

Christopher Salivar

From: Christopher Salivar
Sent: Monday, July 22, 2013 5:19 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: NOTICE OF SERVICE OF COURT DOCUMENT - FINAL ACCOUNTING

Dear Ms. Hazeltine,

We have received Ms. Savitt's accounting up through March 31, 2013. Any updates as to the status of the more current and up-to-date final accounting?

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Tuesday, July 16, 2013 8:15 AM
To: Christopher Salivar; jhammer@clarkskatoff.com; 'Stephen M. Chambers'; kosterbuhr1@cox.net
Cc: 'Randee Parrish'; 'Betsy Savitt'
Subject: NOTICE OF SERVICE OF COURT DOCUMENT - FINAL ACCOUNTING

Court

Palm Beach County Circuit Court

Case Number

Christopher Salivar

From: Christopher Salivar
Sent: Monday, July 15, 2013 5:19 PM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com; 'Paralegal1'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: FW: SERVICE OF COURT DOCUMENTS - CASE NO.:502012CP002908XXXXSB
Attachments: Notice of Voluntary Dismissal with Prejudice - his Petition for Administration.pdf; Notice of Voluntary Dismissal with Prejudice -Objection to the Petition for Administration .pdf

Dear Sheri,

I believe Ms. Savitt and your office were awaiting the filing of the attached prior to tendering payment to Jami Huber and Ron Mayes pursuant to the Court approved Mediation Settlement Agreement. Now that the necessary filings have been done, please let me know when payment has been tendered to Jami/Ron.

I'm trying to keep a full registry of all payments made over the past week (and up through conclusion of the Curatorship/Guardianship) to ensure that my client's accounting matches that of your client.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Admin [mailto:admin@jamihuberlaw.com]
Sent: Monday, July 15, 2013 5:06 PM

To: Andrew M. Schwartz; Christopher Salivar; Christine Parrott; Randi Scheiblich; 'Jeffrey Skatoff'; 'Jordan Hammer'; service@clarkskatoff.com; 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Jami Huber
Subject: SERVICE OF COURT DOCUMENTS - CASE NO.:502012CP002908XXXXSB

Court Identity:

FIFTEENTH JUDICIAL CIRCUIT, PALM BEACH COUNTY

Case Number

502012CP002908XXXXSB

Case Style

ESTATE OF HELEN O'GRADY

Title of document(s) served:

NOTICE OF VOLUNTARY DISMISSAL WITH PREJUDICE - PETITION FOR ADMINISTRATION

NOTICE OF VOLUNTARY DISMISSAL WITH PREJUDICE - OBJECTION TO THE PETITION FOR ADMINISTRATION

Sending Attorney's Name:

JAMI L. HUBER, P.A.

Telephone No. (561) 283.4770

Primary e-mail address: jami@jamihuberlaw.com <mailto:honeill@mandolaw.com>

Secondary e-mail address: admin@jamihuberlaw.com <mailto:service@mandolaw.com>

Regards,

Lynne Rousso

Paralegal for Jami L. Huber, Esq.

JAMI L. HUBER, P.A.

500 South Australian Avenue

Suite 500

West Palm Beach, FL 33401

Telephone: 561.283.4770

Facsimile: 561.283.4775

Primary Email: jami@jamihuberlaw.com

Secondary Email: admin@jamihuberlaw.com

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Checked by AVG - www.avg.com
Version: 9.0.932 / Virus Database: 3204.1.1/5991 - Release Date: 07/15/13 02:42:00

Christopher Salivar

From: Christopher Salivar
Sent: Monday, July 15, 2013 4:11 PM
To: 'Paralegal1'; 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: re: In re Helen M. O'Grady

Dear Ms. Hazeltine,

Yes, I do still need the accounting as of July 11, 2013, as that will effectively be Tom's "jumping on point" due to the Court Order being entered appointing him as P.R. for the estate.

Please let me know when Ms. Savitt completes same, so I can review it with my client.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

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-----Original Message-----
From: Paralegal1 [mailto:paralegal1@hazeltinelaw.com]
Sent: Saturday, July 13, 2013 10:52 AM
To: Christopher Salivar
Cc: 'Betsy Savitt'
Subject: RE: re: In re Helen M. O'Grady

Hi Chris,

Just so you know, I am "Ms. Hazeltine" (not Mrs.) and Betsy is "Ms. Savitt"

(not Mrs.). We both still have our maiden names as our legal names. :]

Do you still need the most current account info. you requested from us Friday? Let me know.

Sincerely,

Sheri Hazeltine, Esq.

SHERI L. HAZELTINE & ASSOCIATES, P.A.
800 Palm Trail, Suite 3
Delray Beach, FL 33483
office (561) 243-4655
fax (561) 243-6933
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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Thursday, July 11, 2013 12:40 PM
To: paralegal1@hazeltinelaw.com
Subject: FW: re: In re Helen M. O'Grady - Service of Court Document(s) - Case No.: 502012CP002908XXXXSB (IX)

-----Original Message-----
From: Christopher Salivar [mailto:cs@amslaw.biz]
Sent: Thursday, July 11, 2013 12:12 PM
To: 'Jordan Hammer'; info@hazeltinelaw.com; Jami Huber; Admin; Sheri L. Hazeltine; info@hazeltinelaw.com; kosterbuhr1@cox.net; 'Stephen M. Chambers'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: FW: re: In re Helen M. O'Grady - Service of Court Document(s) - Case No.: 502012CP002908XXXXSB (IX)

Dear all,

A moment ago, I served via e-mail 1) the 7-11-13 Order of the Court approving the MSA, 2) Thomas H. Mayes' Oath of P.R., and 3) Letters of Administration in favor of Thomas H. Mayes as P.R. of the estate.

Attached hereto are the Mutual General Releases referenced within the 7-11-13 Order I forwarded a moment ago. Please have same executed and then transmitted directly to Mrs. Huber, so her client may execute same.

Jami,

In discussions today with Sheri Hazeltine and Elizabeth Savitt, I was informed that stock has been liquidated sufficient to allow the estate to tender payment of the subject $100,000.00 to your client. Mrs. Savitt is holding this sum pending your client's voluntary dismissal of

his claims, now that the MSA has been approved by the Court. Please file the voluntary dismissal with prejudice as soon as you can, and please contact Mrs. Hazeltine directly to inform Mrs. Savitt how the subject $100,000.00 is to be paid to Ronald.

And lastly, once Ronald has counter-signed the attached General Releases, please ensure that copies are sent appropriately to each party for his/her retention.

Lastly, and to all, though it has been a long road to this point it has been a pleasure working with everyone to reach a final resolution to the will contest.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Christopher Salivar
Sent: Thursday, July 11, 2013 12:06 PM
To: 'Jordan Hammer'; service@clarkskatoff.com; Jami Huber; Admin; Sheri L. Hazeltine; info@hazeltinelaw.com; kosterbuhr1@cox.net; 'Stephen M. Chambers'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: re: In re Helen M. O'Grady - Service of Court Document(s) - Case No.: 502012CP002908XXXXSB (IX)

NOTICE OF SERVICE OF COURT DOCUMENT(S)

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA

In re: Estate of Helen M. O'Grady

CASE NO.: 502012CP002908XXXXSB (IX)

DOCUMENT(S) ATTACHED:

1) 7/11/13 Order of the Court Approving Mediation Settlement Agreement;

2) Letters of Administration: Thomas H. Mayes as Personal Representative of the Estate

3) Oath of Personal Representative and Designation of Resident Agent.

Sincerely,

Christopher S. Salivar, Esq.

Andrew M. Schwartz, P.A.

101 Plaza Real South

Suite 218

Boca Raton, FL 33432

(561) 347-6767 Palm Beach

(954) 574-0770 Broward

(561) 347-6768 Fax

cs@amslaw.biz <mailto:cs@amslaw.biz>

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EXHIBIT "7"

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF PROBATE DIVISION

HELEN M. O'GRADY. CASE NO. 502012CP002908XXXXSB

_____/

AMENDED MOTION FOR EXTENSION OF TIME TO FILE FINAL ACCOUNTING BY THE CURATOR ELIZABETH SAVITT

COMES NOW SHERI L. HAZELTINE, ESQ., attorney on behalf of the Curator, ELIZABETH SAVITT, and hereby files this Amended Motion for Extension of Time to file the final accounting. The curator was appointed on March 26, 2013. On July 11, 2013 Thomas Mayes was appointed as the curator by the Honorable Circuit Judge Garrison, with 20 days given as the time allowed to file the final accounting. This was an unrealistic time-frame, especially as Ms. Savitt has been on vacation and was out of the country for the past two weeks.

Therefore, this attorney respectfully requests until September 15th, 2013 to file the final accounting.

DATED this 6th day of August, 2013 at Delray Beach, Florida.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____

Sheri L. Hazeltine, Esq.
Attorney for Elizabeth Savitt, Curator
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail, Suite 3
Delray Beach, Florida 33483
(561) 243-4655 (office)
(561) 243-6933 (fax)

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of this Motion for Extension of Time was sent via E-Service on August 6, 2013 to the parties and/or attorneys of record listed on the Service List below.

By: _____
Sheri L. Hazeltine, Esq.
Florida Bar No. 0674567

SERVICE LIST

Christopher Salivar, Esq.
Attorney for Thomas Mayes
101 Plaza Real, Suite 218
Boca Raton, Florida 33432
ams@amslaw.biz
cs@amslaw.biz
cmp@amslaw.biz
receptionist@amslaw.biz

Jordan R. Hammer, Esq.
Jeffrey H. Skatoff, Esq.
Attorney for Daniel Mayes
Clark Skatoff PA
3300 PGA Blvd., Suite 450
Palm Beach Gardens, Florida 33410
jhammer@clarkskatoff.com
jskatoff@clarkskatoff.com
service@clarkskatoff.com
sperini@clarkskatoff.com

Jami Huber, Esq.
Attorney for Ronald Mayes
500 South Australian Ave., Suite 500
West Palm Beach, FL 33401
jami@jamihuberlaw.com
admin@jamihuberlaw.com

Stephanie Chambers
1008 Arbor Meadows
Derby, Kansas 67037
schambers61@cox.net

Kathleen M. Osterbuhr
1300 Chesthill
Derby, Kansas 67037
kosterbuhr1@cox.net

EXHIBIT "8"

COPY

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF

HELEN M. O'GRADY.

/

PROBATE DIVISION

CASE NO. 502012CP002908XXXXSB

ORDER ON AMENDED MOTION FOR EXTENSION OF TIME

THIS MATTER having come before the Court upon Sheri L. Hazeltine, Esq.'s Motion for Extension of Time to File the Final Accounting, and the Court being fully advised in the premises, it is

ORDERED AND ADJUDGED that the final accounting in this matter be filed by ~~September 15~~ AUG 30, 2013.

DONE and ORDERED on this 8th day of August, 2013 at Delray Beach, Palm Beach County, Florida.

SIGNED & DATED
AUG 08 2013
JUDGE EDWARD A. GARRISON

By: _____
CIRCUIT JUDGE EDWARD GARRISON

Copy furnished to:
Sheri L. Hazeltine, Esq.
800 Palm Trail, Suite 3
Delray Beach, Florida 33483

Christopher Salivar

From: Randee Parrish [randee@hazeltinelaw.com]
Sent: Thursday, August 08, 2013 11:37 AM
To: Andrew M. Schwartz; Christopher Salivar; Christine Parrott; Randi Scheiblich; 'Jordan Hammer'; jskatoff@clarkskatoff.com; service@clarkskatoff.com; Susan Perini; 'Jami Huber'; 'Admin'; 'Stephen M. Chambers'; kosterbuhr1@cox.net
Cc: 'Sheri L. Hazeltine'
Subject: Estate of Helen O'Grady
Attachments: O'Grady.Helen.Order on Motion for Extension of Time.pdf

Dear Counsel,

Attached please find Order on Amended Motion for Extension of Time to File the Final Accounting.

Thank You,

<http://www.bing.com/images/search?q=butterfly+smile&FORM=HDRSC2#view=detail&id=41A585A4490B6FB2957027F547903689524A1D76&selectedIndex=640>

Sincerely,

Randee Parrish

Paralegal to Sheri L. Hazeltine, Esq.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

800 Palm Trail, Suite 3

Delray Beach, FL 33483

office (561) 243-4655

fax (561) 243-6933

Email: randee@hazeltinelaw.com <mailto:randee@hazeltinelaw.com>

Sheri L. Hazeltine, Esq. is a member of the following organizations: National Academy of Elder Law Attorneys; Academy of Florida Elder Law Attorneys; Florida State Guardianship Association; Elder Law Section, Florida Bar; Palm Beach County Bar Association, Guardian Education Committee, co-chair; South Palm Beach County Bar Association; Florida's Voice on

EXHIBIT "9"

FINAL ACCOUNTING

Estate OF Helen M. O'Grady

FOR THE PERIOD COMMENCING: 04/01/13

THROUGH: 08/22/13

SCHEDULE - B Disbursements and Distributions

Does not include purchases of principal assets.
Such transactions are shown on Schedule C.

Date	Brief Descriptions of Items	Income	Principal
	Morgan Stanley Smith Barney a/c [redacted]67		
04/05/13	Hark Burkhalter Yon, PL - Atty fees		9,021.09
04/09/13	Sheri Hazeltine - Atty fees		8,755.19
04/05/13	Thomas Mayes		3,381.25
04/08/13	Thomas Mayes		500.00
07/19/13	Wire Tfr to Jami L Huber a/c # x[redacted] c/o 7/11/13		100,000.00
07/29/13	Withdrawal - Andrew M. Schwartz, P.A c/o dtd 7/11/13		85,000.00
07/29/13	Withdrawal - Clark Skatoff, P.A. c/o dtd 7/11/13		30,000.00
08/22/13	Sheri Hazeltine - Atty fees (held in trust)		10,000.00
08/22/13	Guardianship Financial Reporting Services		1,040.00
08/22/13	Ira Goldfarb		200.00
	Wells Fargo Checking a/c [redacted]		
04/04/13	Ck # 1050 - Elizabeth Savitt (fees)		2,821.50
04/10/13	Ck # 1077 - Florida Space (storage)		151.58
04/11/13	Ck # 1076 - City of Boca Raton		73.44
04/17/13	Debit - ATT		151.34
05/31/13	Ck # 1078 - CVR distributon		396.80
08/14/13	Ck # 1053 - E. Savitt (held in trust)		13,000.00
	Wells Fargo Checking a/c [redacted]		
05/13/13	Ck # 95 - Daily Business Review		194.00
05/14/13	Debit - FPL		219.24
06/03/13	Ck # 104 - Fla Space Coast (storage)		75.79
06/03/13	Ck # 103 - City of Boca Raton		73.73
06/18/13	Debit - FPL		58.50
06/25/13	Ck # 106 - Mary Sue Donohue		4,552.50
		$ 0.00	$ 269,665.95

FINAL ACCOUNTING

Estate OF Helen M. O'Grady

FOR THE PERIOD COMMENCING: 04/01/13

THROUGH: 08/22/13

SCHEDULE - B Disbursements and Distributions

Does not include purchases of principal assets.
Such transactions are shown on Schedule C.

Date	Brief Descriptions of Items	Income	Principal
	Wells Fargo Checking a/c [redacted]		
07/23/13	Ck # 110 - Guardianship Financial Reporting Svcs, Inc.		1,275.00
07/23/13	Ck # 112 - Fla Space Coast (storage)		75.79
07/23/13	Ck # 108 - Fla Space Coast (storage)		75.79
07/23/13	Ck # 107 - Fla Space Coast (storage)		75.79
08/12/13	Ck # 114 - Elizabeth Savitt- Guardian fees c/o dtd 8/18/13		1,725.00
08/13/13	Ck # 113 - Sheri Hazeltine c/o date c/o dtd 8/18/13		1,745.36
08/14/13	Ck # 115 - Elizabeth Savitt (Held in Trust)		7,000.00
	PNC Bank a/c [redacted] **(acct closed)**		
04/16/13	Tfr to Wells Fargo Bank a/c # [redacted]		2,511.18
		$ 0.00	$ 14,483.91

EXHIBIT "10"

Christopher Salivar

From: Christopher Salivar
Sent: Friday, September 06, 2013 12:11 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott; 'thomas mayes'; kosterbuhr1@cox.net; 'Stephen M. Chambers'; whodawatda@hotmail.com; 'Randee Parrish'
Subject: RE: In re Helen M. O'Grady
Attachments: o'grady helen order on motion for extension of time.pdf

Sheri,

The only Order I received at the conclusion of the 8/8/13 hearing is attached. You, Betsy, and I were all present when Judge Garrison said "I'm not hearing any Petition for Fees." After that, he executed this Order. I left. No hearing was held on the Guardianship Petitions for Fees. And I never received a copy of any "Agreed Order" entered by the Court on same.

Again, to date I HAVE NEVER SEEN ANY ORDER FROM AUGUST 8, 2013 GRANTING ANY PETITION FOR FEES. And as I stated below, I CERTAINLY NEVER AGREED TO ONE.

Please provide me with a copy of it now. I don't want to have to waste my time traipsing down to the Courthouse to obtain the Order.

I also note that, again, there is no response to my inquiries regarding the $30,000.00 now being "held in trust."

Lastly, I haven't charged for any of my multiple e-mails to you trying to find out what is going on presently with the cash that, up until two (2) weeks ago, was in the estate's accounts. I will have to charge for my client's objections to your Petitions for Fees, the Petition for Removal, and the Objection to the Petition for Discharge.

I would appreciate a phone call about this, since I've asked multiple times for a call, and I called your office this morning and left a voicemail, and I haven't received one.

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Friday, September 06, 2013 11:12 AM
To: Christopher Salivar
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott; thomas mayes; kosterbuhr1@cox.net; Stephen M. Chambers; whodawatda@hotmail.com; Randee Parrish
Subject: Re: In re Helen M. O'Grady

Dear Mr. Salivar,

Please tell the truth, you were at the hearing on the guardianship fees, you received a copy of this signed Order at the hearing, and and yes it has been on the docket.

Why don't we focus on closing this case for Mrs. O'Grady's children and not incurring even more attorneys fees. Heaven knows how much you just charged for your lengthy email below.

Sincerely,

Sheri L. Hazeltine, Esq.
800 Palm Trail Plaza, Ste. 3
Delray Beach, FL 33483
Sent from my iPhone

On Sep 6, 2013, at 9:43 AM, Christopher Salivar <cs@amslaw.biz> wrote:

Sheri,

On a feeling, I perused the docket sheet for Case No.: 502012GA000016XXXXSB this morning. I'm quite shocked as some things I've now seen.

On August 8, 2013, you, Ms. Hazeltine, and I appeared before the Court on your Motion for Extension of Time to file the Petition for Discharge. After Judge Garrison granted an extension up through August 30, 2013 over my objection, you attempted to have your pending Petitions for Payment of Fees heard by Judge Garrison. When I told him that I was not properly noticed for any such hearing and was not ready to address them at that time, he expressly indicated that he was NOT HEARING ANY FEE PETITION that morning. After this, I left the Courthouse.

How is it then that an Agreed Order was submitted to Judge Garrison's attention on your and your client's petitions for fees filed in 502012GA000016XXXXSB?

I didn't agree to this?

Who actually agreed with you and Betsy regarding the submission of a proposed Order simply approving your fee petition?

I said in open Court that I was not prepared to address the fee petitions at that time since I was not properly noticed of any hearing on the issues. I also told you that I wanted to have my client back in the country to look over the petitions with me prior to rendering any decision. Judge Garrison then said that he was not ruling on the fee petitions.

SO HOW DID THIS ORDER GET SUBMITTED? I'VE NEVER EVEN SEEN A COPY OF IT. YET DESPITE THIS YOU AND MS. SAVITT WROTE YOURSELVES CHECKS ON 8/12/13 and 8/13/13 pursuant to this "Agreed Order"?

I'm at a loss to even try to comprehend how this happened...

I sent an e-mail to you two days ago, and another yesterday, inquiring about the payments you and Betsy took on 8/12/13 and 8/13/13, and you have never responded to me. Now I see why.

CALL ME NOW TO DISCUSS THIS. This action is so beyond the realm of reasonable conduct that I can hardly express myself right now.

Please note, this action is going to also be included in my Petition to have Ms. Savitt removed as Curator, because I simply cannot comprehend how you would submit an AGREED ORDER to the Court if you had not actually obtained the agreement of the parties as to the Order itself. I cannot speak for what action my client, as well as the remaining beneficiaries, may seek to take against Ms. Savitt and you for this conduct.

Christopher S. Salivar, Esq.

Andrew M. Schwartz, P.A.

101 Plaza Real South

Suite 218

Boca Raton, FL 33432

(561) 347-6767 Palm Beach

Christopher Salivar

From: Christopher Salivar
Sent: Wednesday, September 04, 2013 2:15 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott; 'thomas mayes'
Subject: RE: In re estate of Helen O'Grady - closing estate
Attachments: DOC090413.pdf

Dear Sheri,

Of course. The e-mails are scanned and attached. By chance, do you have a contact telephone number for Daniel? One wasn't provided in the Order discharging Clark Skatoff as counsel for Daniel, and I've been informed that the land-line maintained at the property has been disconnected.

Also, has your office been in contact with Daniel as of late? If so, I would appreciate being forwarded all communications with him, as well as all communications with the other beneficiaries of the estate. I've been informed that Stephanie and Kathleen have been communicating with Betsy and your office directly. I was led to believe that Stephanie voiced an interest in purchasing the real estate if Daniel did not, and while I may ultimately need to disposes Daniel if he doesn't get back to me soon, I'd certainly like to look into selling the home to another of the beneficiaries if they are interested.

Also, any response to my inquiry regarding the $30,000.00 pulled out to be held in "trust" and the $110k+ petitions for "fees"?

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Wednesday, September 04, 2013 2:02 PM
To: Christopher Salivar
Cc: Randee Parrish
Subject: Re: In re estate of Helen O'Grady - closing estate

Dear Chris,

Again, please forward me immediately a copy of all correspondence from your office to Mr. Dan Mayes.

Sheri L. Hazeltine, Esq.
800 Palm Trail Plaza, Ste. 3
Delray Beach, FL 33483
Sent from my iPhone

On Sep 4, 2013, at 1:07 PM, Christopher Salivar <cs@amslaw.biz> wrote:

> Dear Sheri,
>
> In response to your e-mail below, my office corresponded with Daniel through Clark Skatoff prior to its discharge, asking Daniel to voluntarily turn over the property by September 15, 2013, indicating that if he did not, I would move forward seeking an Order from the Court directing him to turn over the parcel (as it is estate property and he has no legally cognizable interest in it other than his interest in the proceeds which its sale will bring to the estate). I then forwarded this to him directly via e-mail after Clark Skatoff's discharge, and also asked him to notify me if he still wants to buy the property for $190k.
>
> Per my e-mails, if he contacts me by Friday of this week, I'll prepare a Petition for Entry of Order approving sale to Daniel Mayes for $190k, and if he does not I'll begin formal action to obtain entry of an Order directing him to immediately relinquish possession of the property to Tom as P.R. of the Estate.
>
> Also, we are in the process of obtaining a CPA to review the accountings prepared to date, and to prepare a final accounting for the estate which will be filed along with Tom's Petition for Discharge after the home has been sold, all necessary taxes have been paid, and all final distributions have been made.
>
> As to what your office can do to assist this, I would request that the funds taken from the estate's accounts to be held in "trust" be returned until such time as a Court Order is entered authorizing any further payment to any party for fees, costs, etc. I'm not sure why this was done, but it is unreasonable to take $30,000.00 from the estate's accounts and leave it with no liquid assets to address any incidental expenses of administration, particularly where Tom had prior discussions with Ms. Savitt regarding the preliminary distributions that have been made and at no time was any discussion ever held which addressed Ms. Savitt's and your office's intent to remove this sum.
>
> Christopher S. Salivar, Esq.
> Andrew M. Schwartz, P.A.
> 101 Plaza Real South
> Suite 218
> Boca Raton, FL 33432
> (561) 347-6767 Palm Beach
> (954) 574-0770 Broward
> (561) 347-6768 Fax

>
> cs@amslaw.biz
>
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>
>
> -----Original Message-----
> From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
> Sent: Saturday, August 31, 2013 8:15 AM
> To: Christopher Salivar
> Subject: In re estate of Helen O'Grady - closing estate
>
> Dear Chris,
>
> Please inform me of what you and your client have been doing to close Mrs. O'Grady's estate since Mr. Mayes was appointed as the personal representative.
>
> For example, I was recently informed your client or your office may have issued correspondence to Mr. Dan Mayes concerning leaving the homestead property. Please provide a copy of these and any other documents sent out since July 11th regarding the estate to me immediately.
>
> Finally, while the curator's accounting has now been filed and we are working towards her discharge, until she is discharged by order of the court the Curator has concurrent authority with Thomas Mayes and must be kept informed of everything he and your office are doing to close the estate. See July 11th order issued by Judge Garrison: "Until the Curator is discharged by order of the court, the Personal Representative and the Curator shall have concurrent authority over the assets of the estate."
>
> Mrs. O'Grady's estate should be closed very quickly now and we will help however we can.
>
> Thank you in advance for your courtesy,
>
> Sheri L. Hazeltine, Esq.
>
> Sheri L. Hazeltine & Associates, P.A.
>
> 800 Palm Trail Plaza, Suite 3
>
> Delray Beach, Florida 33483
>
> (561) 243-4655 office; (561) 243-6933 fax
>

Christopher Salivar

From: Christopher Salivar
Sent: Wednesday, September 04, 2013 1:09 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott; 'thomas mayes'; kosterbuhr1@cox.net; Stephen M. Chambers; whodawatda@hotmail.com
Subject: RE: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge
Attachments: O'Grady.Helen.Notice of Final Accounting of Curator and Petition for Dis....pdf; o'grady.helen.probate.hazeltine attys. fees.pdf; mayes-petition for order authorizing payment of compensation and expenses of guardian.pdf

Sheri,

I've finished my initial review of the Annual Accounting and the Final Accounting served with the Petition for Discharge. I've noticed some things that have not been adequately explained within the Petition/Final Accounting, as well as references to Court Orders which I have never received.

Specifically, the Final Accounting indicates that your firm is presently holding $10,000.00 "in trust", and that Ms. Savitt is presently holding $20,000.00 "in trust", with no explanation. Why is this? What are these funds being held for? I've never received any Order which would authorize your firm and Ms. Savitt to take such action, specifically after Tom was appointed as P.R. This action was never even mentioned to Tom, let alone approved by him. And based upon the Accounting itself, it looks like these funds were withdrawn from the Estate's accounts within the past week and a half.

Also, there are two (2) checks which were issued (one to Ms. Savitt, one to your firm) on August 12 and 13th, respectively. The check to you was in the amount of $1,745.36, and the one to Ms. Savitt was in the amount of $1,725.00. Both reference that they were issued as payment for "Fees", and in the actual accounting it issues that these were done pursuant to a "c/o" (which I presume means Court Order) dated 8/18/13. Was this Order ever entered authorizing the payment of these fees? My recollection is that when we appeared before Judge Garrison on August 8, 2013 he DID NOT hold a hearing on the Petitions for Fees which you and Ms. Savitt filed in July. Again, neither Tom or my firm were provided notice of this action until we received the Final Accounting, and I have never received any Order authorizing these payments.

Please call my office today so we can address these issues, as they are creating serious problems in what should be the wind-down of Ms. Savitt's and your involvement in this case and the close-out of the estate. Again, I've received direction to file an Objection to the Final Accounting and the Petition for Discharge/Petitions for Fees based on the foregoing, and in the interest of professionalism and candor I'd like the opportunity to discuss the foregoing with you prior to filing those Objections.

Finally, as to the Petitions for Fees that were filed seeking in excess of $55,000.00 each for Ms. Savitt and for your firm, I still do not see how these could be filed in good faith where in July you and Ms. Savitt filed Petitions for Fees for all work done as "Curator" from March of 2013 through July of 2013, billing at an hourly rate (which inexplicably increased over the prior submitted billing invoices), and where the total sum(s) sought amounted to roughly $17,000.00. Again, I reassert what I said previously about the impropriety of these filings based on prior representations to the Court and prior filings on your and Ms. Savitt's behalf, and furthermore there is no basis whatsoever for counsel retained by a Curator to seek payment of a flat percentage based fee under Florida Statutes 733.6171. I spent an hour yesterday scouring Westlaw to see if even a shred of support, case law based or statutory based, existed for such a claim and I found absolutely nothing. Again, I would

Sheri L. Hazeltine, Esq.
800 Palm Trail Plaza, Ste. 3
Delray Beach, FL 33483
Sent from my iPhone

On Sep 3, 2013, at 1:25 PM, Christopher Salivar <cs@amslaw.biz> wrote:

> Sheri,
>
> Please ensure that any documents served are properly served on all parties at my office. I just got back into the office from an out-of-country vacation, and saw your service e-mail below. It was only addressed to me, and not to all primary and secondary e-mail addresses of record for my office in this action.
>
> Also, I will be reviewing the filed Petition for Discharge, final accounting, and Petition for Payment of Fees with Thomas, and I expect I will shortly be filing an objection to the final Petition for Fees filed on behalf of your office and on behalf of Ms. Savitt.
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> Sincerely,
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> Christopher S. Salivar, Esq.
> Andrew M. Schwartz, P.A.
> 101 Plaza Real South
> Suite 218
> Boca Raton, FL 33432
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>
>
> -----Original Message-----
> From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]

Christopher Salivar

From: Sheri L. Hazeltine [sheri@hazeltinelaw.com]
Sent: Wednesday, September 04, 2013 2:14 PM
To: Christopher Salivar
Subject: Re: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge

Thank you for your message. I am in Miami now and will respond soon.

Sheri L. Hazeltine, Esq.
800 Palm Trail Plaza, Ste. 3
Delray Beach, FL 33483
Sent from my iPhone

On Sep 4, 2013, at 1:08 PM, Christopher Salivar <cs@amslaw.biz> wrote:

> Sheri,
>
> I've finished my initial review of the Annual Accounting and the Final Accounting served with the Petition for Discharge. I've noticed some things that have not been adequately explained within the Petition/Final Accounting, as well as references to Court Orders which I have never received.
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Savitt's behalf, and furthermore there is no basis whatsoever for counsel retained by a Curator to seek payment of a flat percentage based fee under Florida Statutes 733.6171. I spent an hour yesterday scouring Westlaw to see if even a shred of support, case law based or statutory based, existed for such a claim and I found absolutely nothing. Again, I would request that you withdraw the final Petitions for Fees filed by your firm and Ms. Savitt, to avoid an unnecessary waste of expenses on a hearing set to address said Petitions.
>
> Sincerely,
>
> Christopher S. Salivar, Esq.
> Andrew M. Schwartz, P.A.
> 101 Plaza Real South
> Suite 218
> Boca Raton, FL 33432
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>
>
> -----Original Message-----
> From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
> Sent: Tuesday, September 03, 2013 2:31 PM
> To: Christopher Salivar
> Cc: Randee Parrish
> Subject: Re: In re estate of O'Grady - Notice of Final Accounting of
> Curator and Petition for Discharge
>
> Dear Chris,
>
> Thank you for your message. I apologize if not all staff in your office were copied with the documents we recently filed. I see you had even listed your receptionist as needing a copy! We will make sure we send copies to your staff in the future.
>
> As for our requested fees, we have never represented to the court or any party that we entered into an agreement with you or Mr. Thomas Mayes or any other party to charge an hourly fee for our services in the probate case. I think you must be confusing this with the guardianship case.
>

> I believe you are wrong about the fees, and instead Ms. Savitt has saved the estate considerable fees. I think all parties should work quickly to close the probate estate now so that more fees are not incurred by anyone.
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> 800 Palm Trail Plaza, Ste. 3
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decline(nt) toute responsabilite au titre de ce message, dans l'hypothese ou il aurait ete modifie.
>>
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>> -----Original Message-----
>> From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
>> Sent: Tuesday, September 03, 2013 12:19 AM
>> To: Christopher Salivar; whodawatda@hotmail.com; schambers61@cox.net;
>> kosterbuhr1@cox.net
>> Cc: 'Betsy Savitt'; 'Randee Parrish'
>> Subject: In re estate of O'Grady - Notice of Final Accounting of
>> Curator and Petition for Discharge
>>
>> Court
>>
>> Palm Beach County Circuit Court
>>
>>
>> Case Number
>>
>> 502012CP002908XXXXSB
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>>
>> Case Style
>>
>> Estate of Helen O'Grady
>>
>>
>> Document(s) Served
>>
>> Notice of Final Accounting of Curator and Petition for Discharge.
>>
>>
>> Sender's Name
>>
>> Sheri L. Hazeltine, Esquire
>>
>>
>> Sender's Telephone
>>
>> 561-243-4655
>>
>>
>>
>> Sincerely,
>>
>> Sheri L. Hazeltine, Esq.
>>
>> Sheri L. Hazeltine & Associates, P.A.
>>
>> 800 Palm Trail Plaza, Suite 3
>>
>> Delray Beach, Florida 33483
>>
>> (561) 243-4655 office; (561) 243-6933 fax
>>
>> sheri@hazeltinelaw.com

Christopher Salivar

From: Sheri L. Hazeltine [sheri@hazeltinelaw.com]
Sent: Tuesday, September 03, 2013 2:31 PM
To: Christopher Salivar
Cc: Randee Parrish
Subject: Re: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge

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> Boca Raton, FL 33432

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> Subject: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge
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> Sheri L. Hazeltine, Esquire
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>
> Sender's Telephone

Christopher Salivar

From: Christopher Salivar
Sent: Wednesday, September 04, 2013 1:08 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: In re estate of Helen O'Grady - closing estate

Dear Sheri,

In response to your e-mail below, my office corresponded with Daniel through Clark Skatoff prior to its discharge, asking Daniel to voluntarily turn over the property by September 15, 2013, indicating that if he did not, I would move forward seeking an Order from the Court directing him to turn over the parcel (as it is estate property and he has no legally cognizable interest in it other than his interest in the proceeds which its sale will bring to the estate). I then forwarded this to him directly via e-mail after Clark Skatoff's discharge, and also asked him to notify me if he still wants to buy the property for $190k.

Per my e-mails, if he contacts me by Friday of this week, I'll prepare a Petition for Entry of Order approving sale to Daniel Mayes for $190k, and if he does not I'll begin formal action to obtain entry of an Order directing him to immediately relinquish possession of the property to Tom as P.R. of the Estate.

Also, we are in the process of obtaining a CPA to review the accountings prepared to date, and to prepare a final accounting for the estate which will be filed along with Tom's Petition for Discharge after the home has been sold, all necessary taxes have been paid, and all final distributions have been made.

As to what your office can do to assist this, I would request that the funds taken from the estate's accounts to be held in "trust" be returned until such time as a Court Order is entered authorizing any further payment to any party for fees, costs, etc. I'm not sure why this was done, but it is unreasonable to take $30,000.00 from the estate's accounts and leave it with no liquid assets to address any incidental expenses of administration, particularly where Tom had prior discussions with Ms. Savitt regarding the preliminary distributions that have been made and at no time was any discussion ever held which addressed Ms. Savitt's and your office's intent to remove this sum.

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
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-----Original Message-----
From: Sheri L. Hazeltine [mailto:sheri@hazeltinelaw.com]
Sent: Saturday, August 31, 2013 8:15 AM
To: Christopher Salivar
Subject: In re estate of Helen O'Grady - closing estate

Dear Chris,

Please inform me of what you and your client have been doing to close Mrs. O'Grady's estate since Mr. Mayes was appointed as the personal representative.

For example, I was recently informed your client or your office may have issued correspondence to Mr. Dan Mayes concerning leaving the homestead property. Please provide a copy of these and any other documents sent out since July 11th regarding the estate to me immediately.

Finally, while the curator's accounting has now been filed and we are working towards her discharge, until she is discharged by order of the court the Curator has concurrent authority with Thomas Mayes and must be kept informed of everything he and your office are doing to close the estate. See July 11th order issued by Judge Garrison: "Until the Curator is discharged by order of the court, the Personal Representative and the Curator shall have concurrent authority over the assets of the estate."

Mrs. O'Grady's estate should be closed very quickly now and we will help however we can.

Thank you in advance for your courtesy,

Sheri L. Hazeltine, Esq.

Sheri L. Hazeltine & Associates, P.A.

800 Palm Trail Plaza, Suite 3

Delray Beach, Florida 33483

(561) 243-4655 office; (561) 243-6933 fax

sheri@hazeltinelaw.com

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Christopher Salivar

From: Christopher Salivar
Sent: Tuesday, September 03, 2013 1:26 PM
To: 'Sheri L. Hazeltine'
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge

Sheri,

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Also, I will be reviewing the filed Petition for Discharge, final accounting, and Petition for Payment of Fees with Thomas, and I expect I will shortly be filing an objection to the final Petition for Fees filed on behalf of your office and on behalf of Ms. Savitt.

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Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
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Cc: 'Betsy Savitt'; 'Randee Parrish'
Subject: In re estate of O'Grady - Notice of Final Accounting of Curator and Petition for Discharge

Court

Palm Beach County Circuit Court

Case Number

502012CP002908XXXXSB

Case Style

Estate of Helen O'Grady

Document(s) Served

Notice of Final Accounting of Curator and Petition for Discharge.

Sender's Name

Sheri L. Hazeltine, Esquire

Sender's Telephone

561-243-4655

Sincerely,

Sheri L. Hazeltine, Esq.

Sheri L. Hazeltine & Associates, P.A.

800 Palm Trail Plaza, Suite 3

Delray Beach, Florida 33483

(561) 243-4655 office; (561) 243-6933 fax

sheri@hazeltinelaw.com

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EXHIBIT "11"

Christopher Salivar

From: Sheri L. Hazeltine [sheri@hazeltinelaw.com]
Sent: Tuesday, August 06, 2013 2:20 PM
To: Christopher Salivar
Cc: randee@hazeltinelaw.com
Subject: RE: NOTICE OF SERVICE OF COURT DOCUMENT - ESTATE OF HELEN O'GRADY

Importance: High

Dear Chris,
Thank you for your email.
As you know, Betsy has been out of the country and has been unable to work on the final accounting (ordered on July 11th) during her vacation. She just returned on Monday and asked me to help in obtaining an extension of time as it is not ready yet. We are also dealing with an accountant who is very busy and frankly he does not have it ready yet.
We are asking your courtesy on this, as when this was set for 20 days (on July 11th) I don't think anyone took into account the fact she was going to be gone and out of the country in Costa Rica. It was certainly not a realistic time-frame.
As for her taking any actions without your client's knowledge, I do not believe she is doing anything without talking to Tom first and making sure he is in agreement. Perhaps we should set a time for a teleconference between our respective clients so we can straighten out any miscommunications. I am happy to participate in a conference with you and your client in the interests of ironing out any miscommunications and coming to agreement with an action plan, etc. Let me know your availability for this.
Thank you in advance for your courtesy,
Sheri L. Hazeltine, Esq.
Sheri L. Hazeltine & Associates, P.A.
800 Palm Trail Plaza, Suite 3
Delray Beach, Florida 33483
(561) 243-4655 office; (561) 243-6933 fax
sheri@hazeltinelaw.com
Connect with us on FACEBOOK
An elder law attorney and mom of a 'differently-abled' child. Providing caring legal services and support to families with members with special needs. Guardianship for the elderly, developmentally disabled, the mentally incapacitated, guardianship litigation, special needs trusts, and estate planning needs.

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-----Original Message-----
From: Christopher Salivar [mailto:cs@amslaw.biz]
Sent: Tuesday, August 06, 2013 2:13 PM
To: 'Randee Parrish'; 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: RE: NOTICE OF SERVICE OF COURT DOCUMENT - ESTATE OF HELEN O'GRADY

Dear Ms. Hazeltine,

I have an issue with a hearing being set less than 48 hours away on a Motion that was just served upon me, and which addresses the filing of your client's Petition for Discharge (which should have been filed almost a week ago). Back on the 11th, I specifically asked you and Betsy what additional time was needed for the filing of Betsy's petition for discharge, and it was only with your agreement that I put 20 days as the time frame in the Order which Judge Garrison approved. I would have gladly entertained another ten days if that was necessary (since no one ever mentioned that Betsy was going to leave the country for 2 week without any advanced notice). However, I certainly cannot entertain an extension up through September 15!!!
Particularly where Ms. Savitt is presently taking action in connection with estate/guardianship assets without a) letting my client know, and b) informing my client.

Tom is the P.R. for the estate. By the Court's 7/11/13 Order he and Betsy have JOINT authority over the estate assets until the time Betsy's petition for discharge is approved by the Court. It appears that even though Tom is presently trying to talk to Betsy about what to do with the estate assets as of late, Betsy is telling Tom one thing and then doing another. THIS HAS TO STOP. Both Tom and Betsy have joint authority over, and responsibility for, the estate assets. As such, Betsy cannot take unilateral action without first discussing it with Tom and obtaining Tom's agreement. Her actions become even more troubling when I've been asking for an updated accounting for nearly a month now, and I still don't have one. What is the hold up with the updated accounting? Tom has been P.R. for almost a month now, and I can't get a simple update from Betsy as to what the state of the estate assets were when he was appointed on July 11, 2013. And why did Betsy have a meeting with Michael Shapiro recently without a) letting Tom know that the meeting was taking place, and b) wherein she told Michael Shapiro that Tom was "unavailable" for the meeting? Tom was recently informed of this by Michael Shapiro's office, and I can't for the life of me figure out why she would feed misinformation to anyone about Tom's ability to actually attend meetings which address the handling of estate assets.

The way things are presently being handled is starting to give me serious concern about how this estate will ultimately be wound up, and what additional liabilities Betsy's unilateral actions may ultimately trigger.

Lastly, I'm clearly objecting to any request for an extension of time up through 9/15/13 for the filing of Betsy's petition for discharge.

Sincerely,

Christopher S. Salivar, Esq.
Andrew M. Schwartz, P.A.
101 Plaza Real South
Suite 218
Boca Raton, FL 33432
(561) 347-6767 Palm Beach
(954) 574-0770 Broward
(561) 347-6768 Fax

cs@amslaw.biz

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-----Original Message-----
From: Randee Parrish [mailto:randee@hazeltinelaw.com]
Sent: Tuesday, August 06, 2013 1:27 PM
To: Andrew M. Schwartz; Christopher Salivar; Christine Parrott; Randi Scheiblich; 'Jordan Hammer'; jskatoff@clarkskatoff.com; service@clarkskatoff.com; Susan Perini; 'Jami Huber'; 'Admin'; 'Stephen M.
Chambers'; kosterbuhr1@cox.net
Cc: 'Sheri L. Hazeltine'
Subject: NOTICE OF SERVICE OF COURT DOCUMENT - ESTATE OF HELEN O'GRADY

Court

Palm Beach County Circuit Court, Judge Garrison

Case Number

502012CP002908XXXXSB

Case Style

Estate of Helen O'Grady

Document(s) Served

NOTICE OF HEARING AND AMENDED MOTION FOR EXTENSION OF TIME TO FILE FINAL ACCOUNTING BY THE CURATOR ELIZABETH SAVITT

Sender's Name

Sheri L. Hazeltine, Esquire

Sender's Telephone

561-243-4655

Christopher Salivar

From: Sheri L. Hazeltine [sheri@hazeltinelaw.com]
Sent: Friday, July 26, 2013 10:56 AM
To: Christopher Salivar
Cc: Christine Parrott; 'Randee Parrish'
Subject: RE: In re Helen M. O'Grady

Dear Chris,

Thank you for your email. As you know, Ms. Savitt is out of the country now on her trip and I am unable to contact her just yet. I will let you know just as soon as I speak with her.

Please be assured any confusion regarding the new roles between the joint PRs can be worked out. As you know this is a relatively new situation, and I am not sure Ms. Savitt was even aware Thomas disagreed with any action she may have discussed with him or taken. I am glad you brought this to my attention and I am sure in the future we will take extra precaution to ensure both your client and mine, plus their attorneys, are all on the same page before any action is taken to liquidate or make disbursements, etc.

Finally, please convey to me Thomas Mayes' proposal regarding a final distribution of the assets to the beneficiaries.

Sincerely,

Sheri L. Hazeltine, Esq.

Sheri L. Hazeltine & Associates, P.A.

800 Palm Trail Plaza, Suite 3

Delray Beach, Florida 33483

(561) 243-4655 office; (561) 243-6933 fax

sheri@hazeltinelaw.com

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An elder law attorney and mom of a 'differently-abled' child. Providing caring legal services and support to families with members with special needs. Guardianship for the elderly, developmentally disabled, the mentally incapacitated, guardianship litigation, special needs trusts, and estate planning needs.

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From: Christopher Salivar [mailto:cs@amslaw.biz]
Sent: Friday, July 26, 2013 10:15 AM
To: 'Sheri L. Hazeltine'; info@hazeltinelaw.com
Cc: Andrew M. Schwartz; Christopher Salivar; Randi Scheiblich; Christine Parrott
Subject: re: In re HElen M. O'Grady

Dear Sheri,

I'm meeting with my client, Tom, in my office now, and have been made privy to some odd and somewhat puzzling information. As Tom has now been appointed P.R. for the estate, and as by Order of the Court he and Betsy have JOINT authority over the assets of the estate, I expect that Tom will be notified of any proposed action on Betsy's part prior to same being taken, NOT AFTER.

Tom has informed me that Ms. Savitt has decided to transfer all of the Kraft, Mondaliz, and Altria stock to an account with Morgan Stanley, yet this was not told to Tom until AFTER Ms. Savitt had this set in motion. Additionally, Ms. Savitt has told Tom of her plans to make an imminent equal distribution to all of the beneficiaries without the beneficiaries first agreeing upon the issue of whether or not Daniel intends to take the O'Grady residence as an in-kind distribution valued at $190k.

This kind of unilateral action cannot work, and cannot be tolerated, when two parties have been vested with authority over the assets of the estate.

Though it might mean that actions take one or two more phone calls before being performed, I expect that Ms. Savitt or you will either a) call Tom, or b) call my office, in regards to future planned actions pertaining to the assets of the Estate.

Since we are nearing the end of the administration of this estate, I would like for things to run smoothly, rather than having new waves come in and "rock the boat" so to speak.

Please call me when you can to discuss this issue.

Sincerely,

Christopher S. Salivar, Esq.

Andrew M. Schwartz, P.A.

101 Plaza Real South

Suite 218

Boca Raton, FL 33432

(561) 347-6767 Palm Beach

(954) 574-0770 Broward

(561) 347-6768 Fax

cs@amslaw.biz

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Version: 9.0.932 / Virus Database: 3204.1.1/6016 - Release Date: 07/26/13 02:34:00

EXHIBIT "12"

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF

HELEN O'GRADY,
Deceased.
_____/

FILE NO.: 502012CP002908XXXXSB

DIVISION: IX

NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

TO:

Thomas Mayes, c/o Christopher Salivar, Esq., attorney for Thomas Mayes; 101 Plaza Real, Suite 218, Boca Raton, Florida 33432; cs@amslaw.biz

Daniel Mayes, 3742 N.W. 5th Avenue, Boca Raton, Florida 33431; whodawatda@hotmail.com

Stephanie Chambers, 1008 Arbor Meadows, Derby, Kansas 67037; schambers61@cox.net

Kathleen M. Osterbuhr, 1300 Chesthill, Derby, Kansas 67037; kosterbuhr1@cox.net

YOU ARE NOTIFIED that a Final Accounting of the Curator and a Petition for Discharge have been filed in this court by ELIZABETH SAVITT, Curator of the estate of Helen O'Grady, deceased, true copies of which accompany this notice. You are required to file with the clerk of the above court not later than 30 days after the date of service of this notice upon you any objections to the Petition for Discharge, to the Final Accounting and the proposed compensation to be paid, and to serve a copy thereof on petitioner's attorney, whose name and address are set forth below, and on all interested persons, which are:

Thomas Mayes, c/o Christopher Salivar, Esq., attorney for Thomas Mayes, Personal Representative; 101 Plaza Real, Suite 218, Boca Raton, Florida 33432; cs@amslaw.biz
Daniel Mayes, 3742 N.W. 5th Avenue, Boca Raton, Florida 33431; whodawatda@hotmail.com
Stephanie Chambers, 1008 Arbor Meadows, Derby, Kansas 67037; schambers61@cox.net
Kathleen M. Osterbuhr, 1300 Chesthill, Derby, Kansas 67037; kosterbuhr1@cox.net

Any objections must be in writing and must state with particularity the item or items to which the objections are directed and must state the grounds on which the objections are based. If a notice of hearing on the objections is not served within 90 days of filing the objections, the objections shall be deemed abandoned and judgment may be entered in due course upon the petition.

CERTIFICATE OF SERVICE

I CERTIFY that true and correct copies of this NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE; FINAL ACCOUNTING; PETITION FOR DISCHARGE OF CURATOR ELIZABETH SAVITT, and EXHIBITS A , B, C, & D have been E-served via E-Mail on this 2nd day of Sept., 2013; and sent also via UPS mail, on the above addresses by Sheri L. Hazeltine, Esq. on this 2nd date of Sept, 2013.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____

Sheri L. Hazeltine, Esq., attorney for
the Curator, Elizabeth Savitt.
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail, Suite 3
Delray Beach, Florida 33483
Office (561) 243-4655
Fax (561) 243-6933

E-Filed
08/30/13

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF FILE NO.: 502012CP002908XXXXSB

HELEN O'GRADY, DIVISION: IX

/

FINAL ACCOUNTING OF CURATOR ELIZABETH SAVITT

FOR THE PERIOD COMMENCING April 1, 2013
THROUGH August 22, 2013.

The purpose of this accounting is to acquaint all interested persons with the transactions that have occurred during the period covered by the accounting and the assets that remain on hand. It consists of a SUMMARY sheet and Schedule A showing all Receipts, Schedule B showing all Disbursements, Schedule C showing all Distributions, Schedule D showing all Capital Transactions and Adjustments (the effect of which are also reflected in other schedules, if appropriate), and Schedule E showing assets on hand at the end of the accounting period.

It is important that this accounting be carefully examined. Requested for additional information and any questions should be addressed to the curator or the attorney for the curator, the names and addresses of whom are set forth below.

Under penalties of perjury, the undersigned curator declares that I have read and examined this accounting and that the facts and figures set forth in the Summary and the attached Schedules are true, to the best of my knowledge and belief, and that it is a complete report of all cash and property transactions and of all receipts and disbursements by me as curator of the estate of Helen O'Grady, deceased, from April 1, 2013 through August 22, 2013.

Signed on August 30, 2013.

Attorney for Curator:

Sheri L. Hazeltine, Esq., Attorney
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail, Suite 3
Delray Beach, Florida 33483
Telephone: (561) 243-4655
Fax: (561) 243-6933

Signed on August 30, 2013

Curator:

Name: Elizabeth Savitt.

Estate of Helen M. O'Grady Final Accounting of Curator Elizabeth Savitt

For the period commencing 04/01/13 through 08/22/13.

Attached are copies of the statements of the decedent's accounts from each of the institutions where the funds were deposited.

This final accounting was prepared by Guardian Financial Reporting Services, Denzil Parkes, 1040 Bayview Drive, Ste. 405, Ft. Lauderdale, Florida, 33304.

Under penalties of perjury, the undersigned Curator declares that I have read and examined this accounting and that the facts and figures set forth in the Summary and Schedules are true, to the best of my knowledge and belief, and that it is a complete report of all cash and property transactions and of all receipts and disbursements by me as curator of the estate of Helen O'Grady, deceased, from April 1, 2013 through August 22, 2013.

Signed on this 30th day of August, 2013.

ELIZABETH SAVITT, Curator.

DATED this 30th day of August, 2013 at Delray Beach, Florida.

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: _____

SHERI L. HAZELTINE, ESQ.
Attorney for the Curator, Elizabeth Savitt
Florida Bar No. 0674567
sheri@hazeltinelaw.com
800 Palm Trail Plaza, Suite 3
Delray Beach, Florida 33483
Telephone: (561) 243-4655
Facsimile: (561) 243-6933

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF

HELEN M. O'GRADY

_____/

PROBATE DIVISION
CASE NO. 502012CP002908XXXXSB

THOMAS H. MAYES,
Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

_____/

SUPPLEMENT TO FINAL ACCOUNTING OF CURATOR

From: AUGUST 22, 2013, Through: OCTOBER 28, 2013

The purpose of the attached supplement to the final accounting is to acquaint all interested persons with the transactions that have occurred since the filing of the final accounting, and the assets that remain on hand. It is important that this supplement be carefully examined. Requests for additional information and any questions should be addressed to the curator or the attorneys for the curator, the names and addresses of whom are set forth below.

Under penalties of perjury, the undersigned curator declares that I have read and examined this accounting and that the facts and figures set forth in the attached are true, to the best of my knowledge and belief, and that it is a complete report of all cash and property transactions and of all receipts and disbursements by me as curator of the estate of Helen O'Grady, deceased, from August 22, 2013 through October 28, 2013.

Dated this 29th day of October, 2013.

Attorney for the Curator:

Ellen S. Morris, Esq.
Attorney for Elizabeth B. Savitt
Florida Bar No. 850306
ELDER LAW ASSOCIATES PA
7284 W. Palmetto Park Road, Suite 101
Boca Raton, Florida 33433
Telephone: (561) 750-3850
Fax: (561) 750-4069
E-mail: emorris@elderlawassociates.com
Secondary E-mail: lrubin@elderlawassociates.com

Curator:

Elizabeth B. Savitt
4101 Satin Leaf Court
Delray Beach, FL 33445

lelp
Page: 1 of 2

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)

The Honorable Judge Edward Garrison

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

FILED
2013 NOV 14 AM 9:50
SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

ORDER ON CURATOR, ELIZABETH SAVITT'S PETITION FOR DISCHARGE OF CURATOR AND ON PERSONAL REPRESENTATIVE, THOMAS H. MAYES' OBJECTION TO ELIZABETH SAVITT'S NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

THIS CAUSE, having come to be considered before this Court on October 31, 2013 upon the aforementioned Petition for Discharge of Curator and the Personal Representative's Objection to same, and the Court having heard the argument of the parties and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1) Elizabeth Savitt is hereby discharged as Curator for the estate of Helen M. O'Grady, and is relieved of all authority to act on behalf of the estate of Helen M. O'Grady.

2) The Court hereby retains jurisdiction over the Curator to a) address the issue of approval of the Curator's Final Accounting, b) address the Personal Representative's pending Petition for Removal and Surcharge, and c) address the Petition for Hourly Fees and Costs which the Curator shall be filing pursuant to the Order of this Court also entered this day.

3) The Curator is hereby Ordered to turnover all of the assets of the estate (including the $20,000.00 sum presently held by the Curator in trust and the $7,330.00 sum presently held by Sheri Hazeltine, Esq. in trust) to the Personal Representative, THOMAS H. MAYES, within ten (10) days of ~~October 31, 2013~~ THIS ORDER.

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 13 day of November, 2013.

The Honorable Edward Garrison

OCR Language: English

Copies to:

- **Andrew M. Schwartz, Esq.**, Andrew M. Schwartz, P.A., 101 Plaza Real South, Sui 218, Boca Raton, Florida 33432 (Counsel for Plaintiff)

- **David Beckerman, Esq.,** (counsel for Daniel Mayes), 7000 W. Palmetto Park Rd., Suit 500, Boca Raton, FL 33433 [dbecker86@aol.com]

- **Sheri Hazeltine, Esq.** (former counsel for Curator, Elizabeth Savitt) 800 Palm Trai Plaza, Suite 3, Delray Beach, Florida 33483 [sheri@hazeltinelaw.com info@hazeltinelaw.com]

- **Robert W. Tribuiani, Esq**., (counsel for Stephanie J. Chambers), 3300 PGA Blvd., Suite 520, Palm Beach Gardens, FL 33410 [Robert@Tribuianilaw.com] and c/o Stephanie J. Chambers, 1008 Arbor Meadows, Derby, Kansas 67037 [schambers61@cox.net].

- **Kathleen M. Osterbuhr**, 1300 Cresthill, Derby, Kansas 67037 [kosterbuhr1@cox.net]

- **Ellen Morris, Esq**., (counsel for Curator, Elizabeth Savitt) 7284 W. Palmetto Park Rd., Suite 101, Boca Raton, FL 33433 [EMorris@ElderLawAssociates.com]

CERTIFICATE OF SERVICE

I hereby certify that a copy of the foregoing was served by e-mail on this 29th day of October, 2013, to Andrew M. Schwartz, Esq. and Christopher S. Salivar, Esq., Andrew M. Schwartz, P.A., 101 Plaza Real South, Suite 218, Boca Raton, FL 33432; David M. Beckerman, Esq., David M. Beckerman, P.A., 7000 W. Palmetto Park Road, Suite 500, Boca Raton, FL 33433-3424; Robert W. Tribuiani, Esq., Tribuiani Law Firm, 3300 PGA Blvd., Suite 520, Palm Beach Gardens, FL 33410; and Ms. Kathleen M. Osterbuhr, 1300 Cresthill, Derby, KS 67037.

Ellen S. Morris, Esq.
Florida Bar No. 850306

Guardianship account at Wells Fargo

10/17/13	MONTHLY SERVICE FEE REVERSAL $5.00		**$159.70**
10/17/13	MONTHLY SERVICE FEE REVERSAL $5.00		
10/16/13	CHECK # 1055 Florida Storage	$75.79	$149.70
10/11/13	MONTHLY SERVICE FE	$5.00	$225.49
10/02/13	CHECK # 1054 Tax accountant	$320.00	$230.49
09/13/13	MONTHLY SERVICE FEE	$5.00	$550.49

Estate account at Wells Fargo

10/28/13	MONDELEZ INTERNA DIV 0.1400 130930 KFT14003580111 SAVITT,ELIZABETH	$275.10		**$3,076.75**
10/25/13	KRF14003580111 SAVITT,ELIZABETH	$5.25		$2,801.65
10/25/13	KRAFT FOODS COMM DIV 0.5250 131011 KRF14003582710 SAVITT,ELIZABETH	$273.53		$2,796.40
10/17/13	MONTHLY SERVICE FEE REVERSAL	$7.00		$2,522.87
10/15/13	MONDELEZ INTERNA DIV 0.1400 130930 KFT14003580111 SAVITT,ELIZABETH	$4.58		$2,515.87
10/10/13	ALTRIA GROUP INC DC01DD1310 131010 C0038642821MOA ELIZABETH SAVITT CURAT	$1,152.00		$2,511.29
09/27/13	MONTHLY SERVICE FEE		$7.00	$1,359.29

In addition the taxes were paid from the trust account held at Sheri Hazeltine

$10,000.0 less $2,670.00 Total $7,330.00

Held in Curator trust		$20,000.00
Morgan Stanley		
+ Dividend from Phillip Morris	501.58	$48,263.72
Kraft		$29,512.98
Mondelez		$96,455.24
Altria		$88,032.00

TOTAL $292,830.39

Gary R. Nikolits, CFA
Property Appraiser
Palm Beach County

Property Appraiser's Public Access PAPA

Location Address 3742 NW 5TH AVE
Municipality BOCA RATON
Parcel Control Number 06-43-47-07-02-026-0090
Subdivision BOCA RATON HILLS SEC 3
Official Records Book 06326 Page 1437
Sale Date JUL-1989
Legal Description BOCA RATON HILLS SEC 3 LT 9 BLK 26

Owners	Mailing address
OGRADY HELEN EST	SAVIT ELIZABETH C/O 4101 SATIN LEAF CT DELRAY BEACH FL 33445 1259

Sales Date	Price	OR Book/Page	Sale Type	Owner
JUL-1989	$100	06326 / 1437	REP DEED	OGRADY HELEN EST

No Exemption Information Available.

Number of Units 1 *Total Square Feet 1878 Acres 0.35
Use Code 0100 - SINGLE FAMILY Zoning RTD - Single Family (06-BOCA RATON)

Tax Year	2013 P	2012	2011
Improvement Value	$95,031	$88,400	$95,741
Land Value	$98,650	$87,301	$91,896
Total Market Value	$193,681	$175,701	$187,637

P = Preliminary

All values are as of January 1st each year

Tax Year	2013 P	2012	2011
Assessed Value	$193,681	$105,895	$102,811
Exemption Amount	$0	$50,000	$50,000
Taxable Value	$193,681	$55,895	$52,811

Tax Year	2013 P	2012	2011
Ad Valorem	$3,775	$1,301	$1,263
Non Ad Valorem	$260	$259	$254
Total tax	$4,035	$1,560	$1,517

CLIENT STATEMENT | For the Period July 1-31, 2013

Morgan Stanley

#BWNJGWM

BETSY SAVITT GUA
FOR HELEN M O'GRADY
4101 SATIN LEAF CT
DELRAY BEACH FL 33445-1259

TOTAL VALUE LAST PERIOD (as of 6/30/13)	$951,124.13
NET CREDITS/DEBITS/TRANSFERS	(213,704.55)
CHANGE IN VALUE	34,793.84
TOTAL VALUE OF YOUR ACCOUNTS (as of 7/31/13) (Total Values include accrued interest)	**$772,213.42**

Your Branch

595 SO FEDERAL HWY STE 400
BOCA RATON, FL 33432
Telephone: 561-393-2000
Alt. Phone: 800-327-0144
Fax: 561-393-6250

Your Financial Advisor

Michael J Shapiro
Senior Vice President
Michael.J.Shapiro@morganstanley.com
561 393-2042

Access your accounts online

www.morganstanley.com/online

Morgan Stanley Smith Barney LLC. Member SIPC.

Consolidated Summary

OVERVIEW OF YOUR ACCOUNTS (Includes accrued interest)

Although only whole dollar amounts are displayed below, both dollars and cents are used to calculate all totals. Manually summing the individual line items may not equal the actual total displayed. Refer to Account Statements for details.

	Account Number	Beginning Value (7/1/13)	Funds Credited/(Debited)	Security Transfers Rcvd/(Dlvd)	Change in Value	Ending Value (7/31/13)	Income/ This Period/YTD	YTD Realized Gain/(Loss) (Total ST/LT)	Unrealized Gain/(Loss) (Total ST/LT)	Page
TOTAL ACCOUNTS		$951,124	$(213,704)	—	$34,793	$772,213	$9,180	—	—	
							$30,606	—	—	
Personal Accounts										
BETSY SAVITT GUA	[redacted]	951,124	(213,704)	—	34,793	772,213	9,180	—	—	5
FOR HELEN M O'GRADY							30,606	—	—	
BETSY SAVITT CURATOR		—	—	—	—	—	—	—	—	*
EST OF HELEN O GRADY							—	—	—	
Total Personal Accounts		$951,124	$(213,704)	—	$34,793	$772,213	$9,180	—	—	
							$30,606	—	—	

*This summary may include assets held in brokerage and/or advisory accounts, and may include assets not held here. Visit http://www.morganstanley.com/ourcommitment to understand the differences between brokerage and advisory accounts. Refer to individual Account Gain/(Loss) Summary and expanded Disclosures for additional information. *This account had no activity and held no assets this period, so a statement has not been included.*

Security Mark at Right

Consolidated Summary

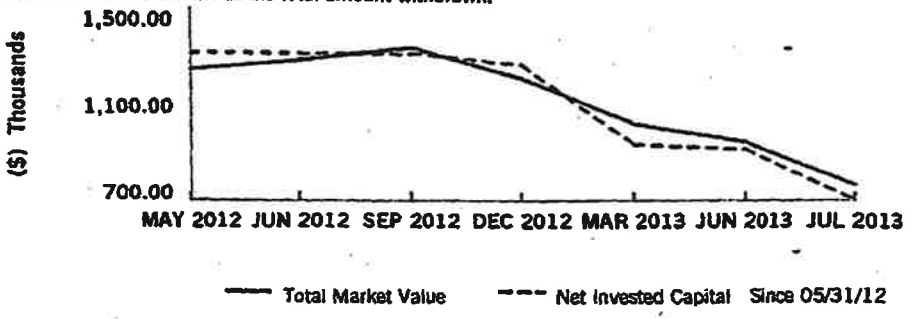
CHANGE IN VALUE OF YOUR ACCOUNTS (includes accrued interest)

	This Period (7/1/13-7/31/13)	This Year (1/1/13-7/31/13)
TOTAL BEGINNING VALUE	**$951,124.13**	**$1,217,663.78**
Credits	1,295.45	3,886.35
Debits	(215,000.00)	(570,436.68)
Security Transfers	—	—
Net Credits/Debits/Transfers	**$(213,704.55)**	**$(566,550.33)**
Change in Value	**34,793.84**	**121,099.97**
TOTAL ENDING VALUE	**$772,213.42**	**$772,213.42**

Net Credits / Debits include investment advisory fees as applicable. See Activity section for details.

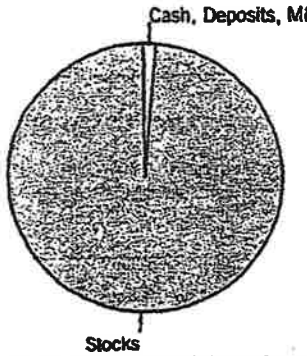
CHANGE IN VALUE OVER TIME

This graph compares the total value of your account to the net amount invested. Net investment is the total amount invested minus the total amount withdrawn.



This exhibit may not include transactions for investments in Annuities or where Morgan Stanley Smith Barney LLC is not the custodian. This may affect the reported Net Invested Capital. If we are not the custodian there may also be a delay in the reporting of your Market Value.

ALLOCATION OF HOLDINGS



	Market Value	Percentage %
Cash, Deposits, MMFs*	$11,240.48	1.5
Stocks	760,972.94	98.5
TOTAL VALUE	**$772,213.42**	**100.0%**

*This allocation represents holdings on a trade date basis and the projected settled balances for Cash/Deposits/MMF. These classifications are not for suitability purposes and may differ from Asset Allocation reports you may receive. * FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures.*

Consolidated Summary

BALANCE SHEET (^ Includes accrued interest)

	Last Period (as of 6/30/13)	This Period (as of 7/31/13)
Cash, Deposits, Money Market Funds	$15,628.13	$11,240.48
Stocks	935,496.00	760,972.94
Total Assets	**$951,124.13**	**$772,213.42**
There are no liabilities for these accounts.		
Total Liabilities (outstanding balance)		
TOTAL VALUE	**$951,124.13**	**$772,213.42**

CASH FLOW

	This Period (7/1/13-7/31/13)	This Year (1/1/13-7/31/13)
OPENING CASH, DEPOSITS, MMFs	**$15,628.13**	**$13,247.78**
Sales and Redemptions	200,136.31	533,936.61
Income	9,180.59	30,606.42
Total Investment Related Activity	**$209,316.90**	**$564,543.03**
Checks Deposited	1,295.45	3,886.35
Electronic Transfers-Debits	(215,000.00)	(570,436.68)
Total Cash Related Activity	**$(213,704.55)**	**$(566,550.33)**
Debit Card	—	—
ATM/Cash Advances	—	—
Checks Written	—	—
Automated Payments	—	—
Total Card/Check Activity	—	—
CLOSING CASH, DEPOSITS, MMFs	**$11,240.48**	**$11,240.48**

Account Summary

Basic Securities Account [redacted]

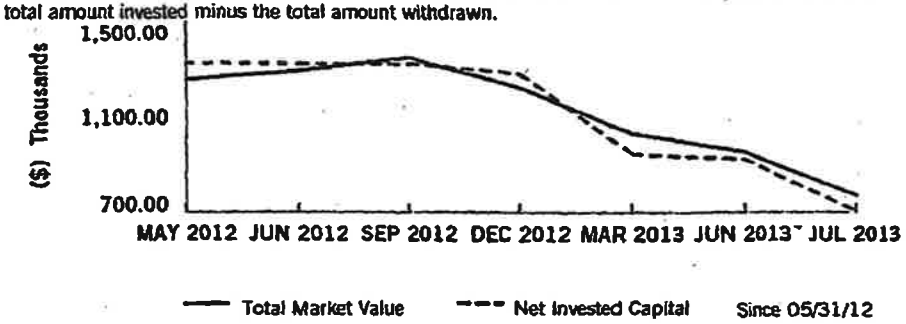
BETSY SAVITT GUA
FOR HELEN M O'GRADY

CHANGE IN VALUE OF YOUR ACCOUNTS (includes accrued interest)

	This Period (7/1/13-7/31/13)	This Year (1/1/13-7/31/13)
TOTAL BEGINNING VALUE	**$951,124.13**	**$1,217,663.78**
Credits	1,295.45	3,886.35
Debits	(215,000.00)	(570,436.68)
Security Transfers	—	—
Net Credits/Debits/Transfers	**$(213,704.55)**	**$(566,550.33)**
Change in Value	**34,793.84**	**121,099.97**
TOTAL ENDING VALUE	**$772,213.42**	**$772,213.42**

CHANGE IN VALUE OVER TIME

This graph compares the total value of your account to the net amount invested. Net investment is the total amount invested minus the total amount withdrawn.



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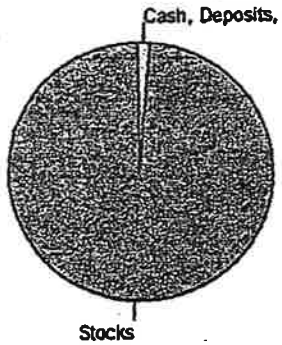
ALLOCATION OF HOLDINGS



	Market Value	Percentage %
Cash, Deposits, MMFs*	$11,240.48	1.5
Stocks	760,972.94	98.5
TOTAL VALUE	**$772,213.42**	**100.0%**

*This allocation represents holdings on a trade date basis and the projected settled balances for Cash/Deposits/MMF. These classifications are not for suitability purposes and may differ from Asset Allocation reports you may receive. * FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures.*

Account Summary

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

BALANCE SHEET (^ includes accrued interest)

	Last Period (as of 6/30/13)	This Period (as of 7/31/13)
Cash, Deposits, Money Market Funds	$15,628.13	$11,240.48
Stocks	935,496.00	760,972.94
Total Assets	**$951,124.13**	**$772,213.42**
There are no liabilities for this account.		
Total Liabilities (outstanding balance)		
TOTAL VALUE	**$951,124.13**	**$772,213.42**

CASH FLOW

	This Period (7/1/13-7/31/13)	This Yea (1/1/13-7/31/13
OPENING CASH, DEPOSITS, MMFs	**$15,628.13**	**$13,247.78**
Sales and Redemptions	200,136.31	533,936.61
Income	9,180.59	30,606.42
Total Investment Related Activity	**$209,316.90**	**$564,543.03**
Checks Deposited	1,295.45	3,886.35
Electronic Transfers-Debits	(215,000.00)	(570,436.68
Total Cash Related Activity	**$(213,704.55)**	**$(566,550.33**
CLOSING CASH, DEPOSITS, MMFs	**$11,240.48**	**$11,240.48**

INCOME SUMMARY

	This Period (7/1/13-7/31/13)	This Year (1/1/13-7/31/13)
Qualified Dividends	$9,180.00	$30,600.00
Other Dividends	—	—
Long Term Capital Gains Distributions	—	—
Interest	0.59	6.42
Other Income	—	—
Total Taxable Income	**$9,180.59**	**$30,606.42**
Dividends	—	—
Interest	—	—
Other Income	—	—
Total Tax-Exempt Income	**—**	**—**
TOTAL INCOME	**$9,180.59**	**$30,606.42**

Taxable and tax exempt income classifications are based on the characteristics of the underlying securities and not the taxable status of the account.

GAIN/(LOSS) SUMMARY

	Realized This Period (7/1/13-7/31/13)	Realized This Year (1/1/13-7/31/13)	Unrealize Inception to Dat (as of 7/31/13
TOTAL GAIN/(LOSS)	—	—	—

Gain/(Loss) Summary information is provided for informational purposes only and should not be used for tax preparation. This information may change due to basis adjustments.
Refer to the Gain/(Loss) Information in the Expanded Disclosures for additional information.

Security Mark at Right

Account Detail

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

Investment Objectives†: Capital Appreciation, Income, Aggressive Income, Speculation

Brokerage Account

† See the Expanded Disclosures for more information about investment objectives. Please review for accuracy and inform us if your investment objectives change.

HOLDINGS

This section reflects the impact of positions purchased/sold on a trade date basis, and will include positions purchased and omit positions sold in the current month. Please see the "Unsettled Purchases/Sales Activity" section for more information.
The "Market Value" and "Unrealized Gain/(Loss)" figures shown are representative values as of the last business day of the statement period indicated, which may not reflect the value that could actually be obtained in the market. See "Pricing of Securities" in the Expanded Disclosures. Fixed Income securities are sorted by maturity or pre-refunding date, and alphabetically within date.
Estimated annual income and estimated yield for certain securities can include return of principal or capital gains which could overstate such estimates. Estimated yield and estimated annual income are estimates and the actual income or yield may be lower or higher than the estimates. Estimated yield reflects only the income generated by an investment. It does not reflect changes in its price, which may fluctuate.
Structured products appear in various statement product categories and are identified as "Structured Products" in the Security Description column. Estimated accrued interest, estimated annual income and estimated yield for structured products with a contingent income feature (such as Range Accrual Notes or Contingent Income Notes) assume specified accrual conditions are met during the relevant observation period and payment in full of all contingent interest. If you hold structured products, please see "Special Considerations Regarding Structured Products" in the Disclosures.
New Treasury regulations require that we report on Form 1099-B after the close of the tax year your adjusted cost basis and classify the gain or loss as either long-term or short-term on the sale of covered securities acquired on or after January 1, 2011. These regulations also require that we make basis adjustments due to wash sales, certain corporate actions and transfers by gift or inheritance, which will be reflected on your Form 1099-B. Cost basis is reflected on monthly statements for informational purposes only and should not be used in the preparation of your income tax returns. Please refer to the Expanded Disclosures for additional information.

CASH, DEPOSITS AND MONEY MARKET FUNDS

Cash, Deposits and Money Market Funds are generally displayed on a settlement date basis. However, Global Currency Deposits may include both settled and unsettled positions. Estimated Annual Income, Accrued Interest and APY% will only be displayed for fully settled positions. In the event, all or a portion of a Global Currency Deposit position is unsettled as of month end, this data will not be available.

Description	Value	Estimated Annual Income	7-Day Current Yield %	Annual Percentage Yield %
MORGAN STANLEY BANK N.A. #	$11,240.48	$1.00	—	0.010

	Percentage of Assets %	Market Value	Estimated Annual Income Accrued Interest
CASH, DEPOSITS AND MONEY MARKET FUNDS	1.5%	$11,240.48	$1.00 $0.00

 # Bank Deposits are held at either: (1) Morgan Stanley Bank, N.A., and/or Morgan Stanley Private Bank, National Association, affiliates of Morgan Stanley Smith Barney LLC, or (2) Citibank, N.A., each a national bank and FDIC member.

Account Detail

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

STOCKS

COMMON STOCKS

Morgan Stanley & Co. LLC (Morgan Stanley), Citi Research, and Standard & Poor's equity research ratings may be shown for certain securities. All research ratings represent the "opinions" of the research provider and are not representations or guarantees of performance. Because the applicable research report contains more complete information regarding the analyst's opinions, analysis, and rating, you should read the entire research report and not infer its contents from the rating. Where a particular company is covered by both Morgan Stanley and Citi Research, you can and should view both research reports. Citi Research's equity research ratings are (1) Buy, (2) Neutral and (3) Sell. For ease of comparison, Morgan Stanley and Standard & Poor's equity research ratings have been normalized to a 1 (Buy), 2 (Hold), and 3 (Sell). Please refer to the quarter month-end statement (or your first statement, if you have not yet received a statement at the quarter-end) for a summary guide describing Morgan Stanley, Citi Research and Standard & Poor's ratings. Morgan Stanley Smith Barney LLC does not take responsibility for, and does not guarantee the accuracy, completeness, or timeliness of research prepared for Standard & Poor's.

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
PHILIP MORRIS INTL INC (PM)	—	8,533.000	—	Please Provide	$760,972.94	N/A	$29,012.20	3.81

Share Price: $89.180; Rating: Morgan Stanley: 1, Citigroup: 2, S&P: 1; Next Dividend Payable 10/2013

	Percentage of Assets %	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income / Accrued Interest	Yield %
STOCKS	98.5%	$0.00	$760,972.94	$0.00 LT	$29,012.20 $0.00	3.81%

	Percentage of Assets %	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income / Accrued Interest	Yield %
TOTAL MARKET VALUE	100.0%	$0.00	$772,213.42	$0.00 LT	$29,013.20 $0.00	3.76%

TOTAL VALUE (includes accrued interest) $772,213.42

Unrealized Gain/(Loss) totals only reflect positions that have cost basis and/or market value information available. Cash, MMF, Deposits and positions stating 'Please Provide' are not included.

ACTIVITY

INVESTMENT RELATED ACTIVITY

PURCHASES, DIVIDEND REINVESTMENTS, SALES AND REDEMPTIONS

Trade Date	Settlement Date	Activity Type	Description	Comments	Quantity	Price	Credits/(Debits)
7/5	7/10	Sold	PHILIP MORRIS INTL INC	PREFERENTIAL RATE ACTED AS AGENT	1,145.000	$87.7577	$100,046.36
7/22	7/25	Sold	PHILIP MORRIS INTL INC	PREFERENTIAL RATE ACTED AS AGENT	1,122.000	89.5956	100,089.95

TOTAL PURCHASES, DIVIDEND REINVESTMENTS, SALES AND REDEMPTIONS $200,136.31

TOTAL SALES AND REDEMPTIONS $200,136.31

Purchase and Sale transactions above may have received an average price execution. Details regarding the actual prices are available upon request.

Security Mark at Right

Account Detail

Basic Securities Account [redacted] BETSY SAVITT GUA
FOR HELEN M O'GRADY

INVESTMENT RELATED ACTIVITY

TAXABLE INCOME

Date	Activity Type	Description	Comments	Credits/(Debits)
7/12	Qualified Dividend	PHILIP MORRIS INTL INC		$9,180.00
7/30	Interest Income	MORGAN STANLEY BANK N.A. (Period 07/18-07/30)		0.31
7/30	Interest Income	CITIBANK,N.A. (Period 06/28-07/30)		0.28

TOTAL TAXABLE INCOME **$9,180.59**

TOTAL QUALIFIED DIVIDENDS $9,180.00
TOTAL INTEREST $0.59

CASH RELATED ACTIVITY

CHECKS DEPOSITED

Date	Activity Type	Description	Comments	Credits/(Debits)
7/15	Check Deposit	FUNDS RECEIVED		$1,295.45

TOTAL CHECKS DEPOSITED **$1,295.45**

ELECTRONIC TRANSFERS

Check disbursements from branch offices are displayed as Electronic Transfers.

Date	Activity Type	Description	Comments	Credits/(Debits)
7/19	Funds Transferred	WIRED FUNDS SENT	BENE: JAMI L HUBER PA TR ACCT ACCT: XXXXXX[redacted]	$(100,000.00)
7/29	Withdrawal	BRANCH CHECK	PAID TO ANDREW M SCHWARTZ TRUS	(85,000.00)
7/29	Withdrawal	BRANCH CHECK	PAID TO CLARK SKATOFF P.A. IOT	(30,000.00)

TOTAL ELECTRONIC TRANSFERS **$(215,000.00)**

TOTAL ELECTRONIC TRANSFERS-DEBITS $(215,000.00)

MONEY MARKET FUND (MMF) AND BANK DEPOSITS ACTIVITY

Date	Activity Type	Description	Credits/(Debits)
7/11	Automatic Investment	BANK DEPOSIT PROGRAM	$100,046.36
7/15	Automatic Investment	BANK DEPOSIT PROGRAM	9,180.00
7/16	Automatic Investment	BANK DEPOSIT PROGRAM	1,295.45
7/22	Automatic Redemption	BANK DEPOSIT PROGRAM	(100,000.00)
7/26	Automatic Investment	BANK DEPOSIT PROGRAM	100,089.95
7/30	Automatic Investment	BANK DEPOSIT PROGRAM	0.31

Account Detail

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

MONEY MARKET FUND (MMF) AND BANK DEPOSITS ACTIVITY (CONTINUED)

Date	Activity Type	Description	Credits/(Debits)
7/30	Automatic Investment	BANK DEPOSIT PROGRAM	0.28
7/30	Automatic Redemption	BANK DEPOSIT PROGRAM	(115,000.00)
NET ACTIVITY FOR PERIOD			**$(4,387.65)**

REALIZED GAIN/(LOSS) DETAIL

MISSING COST

Security Description	Date Acquired	Date Sold	Quantity	Sales Proceeds	Orig / Adj Total Cost	Realized Gain/(Loss)	Comments
PHILIP MORRIS INTL INC		07/05/13	1,145.000	$100,046.36	Please Provide	N/A	
		07/22/13	1,122.000	100,089.95	Please Provide	N/A	
Missing Cost This Period				**$200,136.31**	**N/A**	**N/A**	
Missing Cost Year to Date				**$533,936.61**	**N/A**	**N/A**	
Net Realized Gain/(Loss) This Period				**$200,136.31**	**$0.00**	**$0.00**	
Net Realized Gain/(Loss) Year to Date				**$533,936.61**	**$0.00**	**$0.00**	

New Treasury regulations require that we report your adjusted cost basis and classify the gain or loss as either long-term or short-term on the sale of covered securities acquired on or after January 1, 2011. These regulations also require that we make basis adjustments due to wash sales, certain corporate actions and transfers by gift or inheritance, which will be reflected on your Form 1099-B. This section may not reflect all of the basis adjustments we are required to make for tax reporting purposes. The information in this section is provided for informational purposes only and should not be used in the preparation of your income tax returns. Please refer to the Expanded Disclosures for additional information.

COPIES OF THIS STATEMENT HAVE ALSO BEEN SENT TO:

CLIIFORD B HARK

Security Mark

Standard Disclosures

The following Disclosures are applicable to the enclosed statement(s). For expanded Disclosures, refer to the Disclosures section in your last quarter-end statement (or your first statement if you have not yet received a statement at quarter end). You can also access a copy of the expanded Disclosures by logging into www.morganstanley.com/online and selecting Account Documents or by calling 800-869-3326.

Questions?

Questions regarding your account may be directed to your Financial Advisor or the Branch Manager for the branch office where you maintain your account. If you require further assistance, call Client Service at (800) 869-3326 or for account-related concerns call our Client Advocate at (866) 227-2256.

Errors and Inquiries

It is your responsibility to review your statement promptly and to seek immediate clarification about entries that you do not understand or believe were made in error by contacting the Branch Manager of the office where you maintain your account. Oral communications regarding any inaccuracy or discrepancy in this statement should be re-confirmed in writing to further protect your rights, including rights under the Securities Investor Protection Act (SIPA). Except as provided in your account documentation, your statement will be deemed correct unless we receive your written inquiry of a suspected error within 10 calendar days from the day you received your statement. See your account documentation for special rules regarding your rights and responsibilities with respect to erroneous electronic fund transfers, including a description of the transfers covered.

Availability of Free Credit Balances and Financial Statements

Under the customer protection rules of the SEC (17 CFR §240.15c3-2 & -3), we may use funds arising out of free credit balances carried for customer accounts, provided that these funds are payable to customers on demand. A financial statement of this organization is available for your personal inspection at its offices, or a copy will be mailed to you upon your written request.

Listed Options

Information with respect to commissions and other charges related to the execution of options transactions has been included in confirmations of such transactions previously furnished to you and such information will be made available to you promptly at your request.

Promptly advise us of any material change in your investment objectives or financial situation.

Margin Privileges (not available for certain accounts such as IRAs or retirement accounts)

If you have margin privileges, you may borrow money from us in exchange for pledging assets in your accounts as collateral for any outstanding margin loan. The amount you may borrow is based on the value of the eligible securities in your margin accounts. If a security has eligible shares, the number of shares pledged as collateral will be indicated below the position.

Margin Interest Charges

We calculate interest charges on margin loans as follows: (1) Multiply the applicable margin interest rate by the daily close of business net settled debit balance, and (2) Divide by 360 (days). Margin interest accrues daily throughout the month and is added to your debit balance at month-end. The month-end interest charge is the sum of the daily accrued interest calculations for the month. We add the accrued interest to your debit balance and start a new calculation each time the applicable interest rate changes and at the close of every statement month. For current margin loan interest rates, go to *https://www.morganstanleyclientserv.com/Secure/AccountServicing/MIRates.aspx*

Information regarding Special Memorandum Account

If you have a Margin Account, this is a combined statement of your Margin Account and Special Memorandum Account maintained for you under Section 220.6 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the Special Memorandum Account as required by Regulation T is available for your inspection at your request.

Structured Products

Structured Products are complex products and may be subject to special risks. Investors should consider the concentration risk of owning the related security and their total exposure to any underlying asset. Structured Products may not perform in a manner consistent with the statement product category where they appear and therefore may not satisfy portfolio asset allocation needs for that category.

Important Information About Auction Rate Securities

Due to market conditions, certain Auction Rate Securities are experiencing no or limited liquidity. Therefore, the price(s) for any Auction Rate Securities shown on this statement may not reflect the price(s) you would receive upon a sale at auction or in a secondary market transaction, and are not an indication of any offer to purchase at such price.

Security Measures

This statement features several embedded security elements to safeguard its authenticity. One is a unique security mark--a blue rectangle printed in heat-sensitive ink on the back side of every page. When exposed to warmth, the blue rectangle will disappear, and then reappear.

SIPC Protection

Morgan Stanley Smith Barney LLC is a member of SIPC, which protects securities of its customers up to $500,000 (including $250,000 for claims for cash). An explanatory brochure is available upon request or at www.sipc.org. Losses due to market fluctuation are not protected by SIPC and assets not held at Morgan Stanley Smith Barney LLC may not be covered by SIPC protection. To obtain information about SIPC, including the SIPC Brochure, contact SIPC at 1-202-371-8300 or visit www.sipc.org.

Transaction Dates and Transaction Conditions

Upon written request, we will furnish the date and time of a transaction and the name of the other party to a transaction. We and/or our affiliates may accept benefits that constitute payment for order flow. Details regarding these benefits and the source and amount of any other remuneration received or to be received by us in connection with any transaction will be furnished upon written request.

Equity Research Ratings Definitions and Consulting Group Investment Advisory Statuses

Some equity securities may have research ratings from Morgan Stanley & Co. LLC, Citi Research, or Standard & Poor's. Research ratings are the research providers' opinions and not representations or guarantees of performance. For more information about each research providers' rating systems, see the expanded disclosures on your quarter-end statement, go to www.morganstanleyclientserv.com or refer to the research provider's research report. Research reports contain more complete information concerning the analyst's views and you should read the entire research report and not infer its contents from the rating alone. If your account contains an advisory component or is an advisory account, CG IAR statuses apply.

Credit Ratings from Moody's Investors Service and Standard & Poor's

The credit rating from Moody's Investors Service and Standard & Poor's may be shown for certain securities. All credit ratings represent the opinions of the provider and are not representations or guarantees of performance. Your Financial Advisor will be pleased to provide you with further information or assistance in interpreting these credit ratings.

Revised 3/2013

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Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

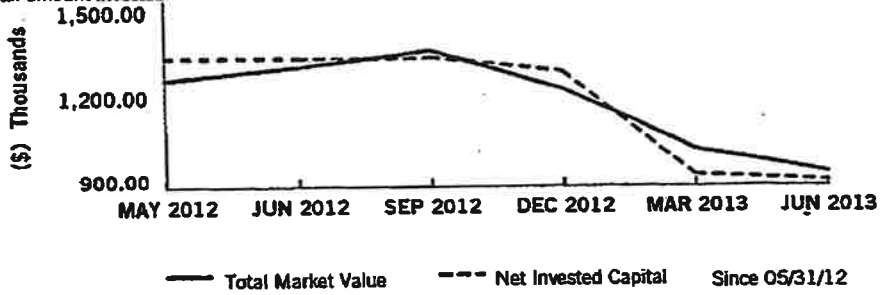
Account Summary

CHANGE IN VALUE OF YOUR ACCOUNTS (includes accrued interest)

	This Period (5/1/13-6/30/13)	This Year (1/1/13-6/30/13)
TOTAL BEGINNING VALUE	**$1,047,999.64**	**$1,217,663.78**
Credits	—	2,590.90
Debits	—	(355,436.68)
Security Transfers	—	—
Net Credits/Debits/Transfers	—	**$(352,845.78)**
Change in Value	**(96,875.51)**	**86,306.13**
TOTAL ENDING VALUE	**$951,124.13**	**$951,124.13**

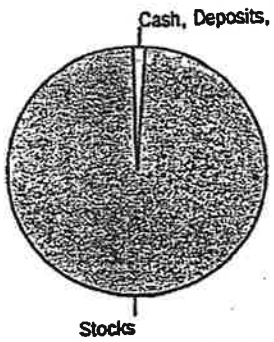
CHANGE IN VALUE OVER TIME

This graph compares the total value of your account to the net amount invested. Net investment is the total amount invested minus the total amount withdrawn.



This exhibit may not include transactions for investments in Annuities or where Morgan Stanley Smith Barney LLC is not the custodian. This may affect the reported Net Invested Capital. If we are not the custodian there may also be a delay in the reporting of your Market Value.

ALLOCATION OF HOLDINGS



	Market Value	Percentage %
Cash, Deposits, MMFs*	$15,628.13	1.6
Stocks	935,496.00	98.4
TOTAL VALUE	**$951,124.13**	**100.0%**

This allocation represents holdings on a trade date basis and the projected settled balances for Cash/Deposits/MMF. These classifications are not for suitability purposes and may differ from Asset Allocation reports you may receive. * *FDIC rules apply and Bank Deposits are eligible for FDIC insurance but are not covered by SIPC. Cash and securities (including MMFs) are eligible for SIPC coverage. See Expanded Disclosures.*

Security Mark

Account Summary

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

BALANCE SHEET (^ includes accrued interest)

	Last Period (as of 4/30/13)	This Period (as of 6/30/13)
Cash, Deposits, Money Market Funds	$15,627.64	$15,628.13
Stocks	1,032,372.00	935,496.00
Total Assets	**$1,047,999.64**	**$951,124.13**
There are no liabilities for this account.		
Total Liabilities (outstanding balance)		
TOTAL VALUE	**$1,047,999.64**	**$951,124.13**

CASH FLOW

	This Period (5/1/13-6/30/13)	This Year (1/1/13-6/30/13)
OPENING CASH, DEPOSITS, MMFs	**$15,627.64**	**$13,247.78**
Sales and Redemptions	—	333,800.30
Income	0.49	21,425.83
Total Investment Related Activity	**$0.49**	**$355,226.13**
Checks Deposited	—	2,590.90
Electronic Transfers-Debits	—	(355,436.68)
Total Cash Related Activity	**—**	**$(352,845.78)**
CLOSING CASH, DEPOSITS, MMFs	**$15,628.13**	**$15,628.13**

INCOME SUMMARY

	This Period (5/1/13-6/30/13)	This Year (1/1/13-6/30/13)
Qualified Dividends	—	$21,420.00
Other Dividends	—	—
Long Term Capital Gains Distributions	—	—
Interest	0.49	5.83
Other Income	—	—
Total Taxable Income	**$0.49**	**$21,425.83**
Dividends	—	—
Interest	—	—
Other Income	—	—
Total Tax-Exempt Income	**—**	**—**
TOTAL INCOME	**$0.49**	**$21,425.83**

Taxable and tax exempt income classifications are based on the characteristics of the underlying securities and not the taxable status of the account.

GAIN/(LOSS) SUMMARY

	Realized This Period (5/1/13-6/30/13)	Realized This Year (1/1/13-6/30/13)	Unrealized Inception to Date (as of 6/30/13)
TOTAL GAIN/(LOSS)	**—**	**—**	**—**

Gain/(Loss) Summary information is provided for informational purposes only and should not be used for tax preparation. This information may change due to basis adjustments.
Refer to the Gain/(Loss) Information in the Expanded Disclosures for additional information.

011761 WSDD252

TRUST BUSINESS ACCOUNTS

Account Detail

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

Investment Objectives†: Capital Appreciation, Income, Aggressive Income, Speculation

Brokerage Account

† See the Expanded Disclosures for more information about investment objectives. Please review for accuracy and inform us if your investment objectives change.

HOLDINGS

This section reflects the impact of positions purchased/sold on a trade date basis, and will include positions purchased and omit positions sold in the current month. Please see the "Unsettled Purchases/Sales Activity" section for more information.
The "Market Value" and "Unrealized Gain/(Loss)" figures shown are representative values as of the last business day of the statement period indicated, which may not reflect the value that could actually be obtained in the market. See "Pricing of Securities" in the Expanded Disclosures. Fixed income securities are sorted by maturity or pre-refunding date, and alphabetically within date.
Estimated annual income and estimated yield for certain securities can include return of principal or capital gains which could overstate such estimates. Estimated yield and estimated annual income are estimates and the actual income or yield may be lower or higher than the estimates. Estimated yield reflects only the income generated by an investment. It does not reflect changes in its price, which may fluctuate.
Structured products appear in various statement product categories and are identified as "Structured Products" in the Security Description column. Estimated accrued interest, estimated annual income and estimated yield for structured products with a contingent income feature (such as Range Accrual Notes or Contingent Income Notes) assume specified accrual conditions are met during the relevant observation period and payment in full of all contingent interest. If you hold structured products, please see "Special Considerations Regarding Structured Products" in the Disclosures.
New Treasury regulations require that we report on Form 1099-B after the close of the tax year your adjusted cost basis and classify the gain or loss as either long-term or short-term on the sale of covered securities acquired on or after January 1, 2011. These regulations also require that we make basis adjustments due to wash sales, certain corporate actions and transfers by gift or inheritance, which will be reflected on your Form 1099-B. Cost basis is reflected on monthly statements for informational purposes only and should not be used in the preparation of your income tax returns. Please refer to the Expanded Disclosures for additional information.

CASH, DEPOSITS AND MONEY MARKET FUNDS

Cash, Deposits and Money Market Funds are generally displayed on a settlement date basis. However, Global Currency Deposits may include both settled and unsettled positions. Estimated Annual Income, Accrued Interest and APY% will only be displayed for fully settled positions. In the event, all or a portion of a Global Currency Deposit position is unsettled as of month end, this data will not be available.

Description	Value	Estimated Annual Income	7-Day Current Yield %	Annual Percentage Yield %
CITIBANK, N.A. #	$15,628.13	$2.00	—	0.010

	Percentage of Assets %	Market Value	Estimated Annual Income	Accrued Interest
CASH, DEPOSITS AND MONEY MARKET FUNDS	1.6%	$15,628.13	$2.00	$0.00

 # Bank Deposits are at either: (1) Morgan Stanley Bank, N.A., and Morgan Stanley Private Bank, National Association, or (2) Citibank, N.A., each a national bank, FDIC member and an affiliate of Morgan Stanley Smith Barney LLC.

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

Account Detail

STOCKS

COMMON STOCKS

Morgan Stanley & Co. LLC (Morgan Stanley), Citi Research, and Standard & Poor's equity research ratings may be shown for certain securities. All research ratings represent the "opinions" of the research provider and are not representations or guarantees of performance. Because the applicable research report contains more complete information regarding the analyst's opinions, analysis, and rating, you should read the entire research report and not infer its contents from the rating. Where a particular company is covered by both Morgan Stanley and Citi Research, you can and should view both research reports. Citi Research's equity research ratings are (1) Buy, (2) Neutral and (3) Sell. For ease of comparison, Morgan Stanley and Standard & Poor's equity research ratings have been normalized to a 1 (Buy), 2 (Hold), and 3 (Sell). Please refer to the quarter month-end statement (or your first statement, if you have not yet received a statement at the quarter-end) for a summary guide describing Morgan Stanley, Citi Research and Standard & Poor's ratings. Morgan Stanley Smith Barney LLC does not take responsibility for, and does not guarantee the accuracy, completeness, or timeliness of research prepared for Standard & Poor's.

Security Description	Trade Date	Quantity	Unit Cost	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income	Dividend Yield %
PHILIP MORRIS INTL INC (PM)	—	10,800.000	—	Please Provide	$935,496.00	N/A	$36,720.00	3.92
Share Price: $86.620; Rating: Morgan Stanley: 1, Citigroup: 2, S&P: 1; Next Dividend Payable 07/12/13								

	Percentage of Assets %	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income / Accrued Interest	Yield %
STOCKS	98.4%	$0.00	$935,496.00	$0.00 LT	$36,720.00 $0.00	3.92%

	Percentage of Assets %	Total Cost	Market Value	Unrealized Gain/(Loss)	Estimated Annual Income / Accrued Interest	Yield %
TOTAL MARKET VALUE	100.0%	$0.00	$951,124.13	$0.00 LT	$36,722.00 $0.00	3.86%

TOTAL VALUE (includes accrued interest) $951,124.13

Unrealized Gain/(Loss) totals only reflect positions that have cost basis and/or market value information available. Cash, MMF, Deposits and positions stating 'Please Provide' are not included.

ACTIVITY

INVESTMENT RELATED ACTIVITY

TAXABLE INCOME

Date	Activity Type	Description	Comments	Credits/(Debits)
5/30	Interest Income	CITIBANK,N.A. (Period 04/30-05/30)		$0.26
6/27	Interest Income	CITIBANK,N.A. (Period 05/31-06/27)		0.23
TOTAL TAXABLE INCOME				**$0.49**
TOTAL INTEREST				$0.49

Basic Securities Account [redacted]

BETSY SAVITT GUA
FOR HELEN M O'GRADY

Account Detail

MONEY MARKET FUND (MMF) AND BANK DEPOSITS ACTIVITY

Date	Activity Type	Description	Credits/(Debits)
5/30	Automatic Investment	BANK DEPOSIT PROGRAM	$0.26
6/27	Automatic Investment	BANK DEPOSIT PROGRAM	0.23
NET ACTIVITY FOR PERIOD			**$0.49**

COPIES OF THIS STATEMENT HAVE ALSO BEEN SENT TO:

CLIIFORD B HARK

Security Mark
at Right

lelp
Page: 1 of 2

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)

The Honorable Judge Edward Garrison

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

FILED
2013 NOV 14 AM 9:50
SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

ORDER ON CURATOR, ELIZABETH SAVITT'S PETITION FOR DISCHARGE OF CURATOR AND ON PERSONAL REPRESENTATIVE, THOMAS H. MAYES' OBJECTION TO ELIZABETH SAVITT'S NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

THIS CAUSE, having come to be considered before this Court on October 31, 2013 upon the aforementioned Petition for Discharge of Curator and the Personal Representative's Objection to same, and the Court having heard the argument of the parties and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1) Elizabeth Savitt is hereby discharged as Curator for the estate of Helen M. O'Grady, and is relieved of all authority to act on behalf of the estate of Helen M. O'Grady.

2) The Court hereby retains jurisdiction over the Curator to a) address the issue of approval of the Curator's Final Accounting, b) address the Personal Representative's pending Petition for Removal and Surcharge, and c) address the Petition for Hourly Fees and Costs which the Curator shall be filing pursuant to the Order of this Court also entered this day.

3) The Curator is hereby Ordered to turnover all of the assets of the estate (including the $20,000.00 sum presently held by the Curator in trust and the $7,330.00 sum presently held by Sheri Hazeltine, Esq. in trust) to the Personal Representative, THOMAS H. MAYES, within ten (10) days of ~~October 31, 2013~~ THIS ORDER.

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 13 day of November, 2013.

The Honorable Edward Garrison

OCR Language: English

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Probate Division
Case No. 502012CP002908XXXXSB (IX)

Deceased,

The Honorable Judge Edward Garrison

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

_____/

2013 NOV 14 AM 9:50
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

ORDER ON CURATOR, ELIZABETH SAVITT'S PETITION FOR DISCHARGE OF CURATOR AND ON PERSONAL REPRESENTATIVE, THOMAS H. MAYES' OBJECTION TO ELIZABETH SAVITT'S NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

THIS CAUSE, having come to be considered before this Court on October 31, 2013 upon the aforementioned Petition for Discharge of Curator and the Personal Representative's Objection to same, and the Court having heard the argument of the parties and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1) Elizabeth Savitt is hereby discharged as Curator for the estate of Helen M. O'Grady, and is relieved of all authority to act on behalf of the estate of Helen M. O'Grady.

2) The Court hereby retains jurisdiction over the Curator to a) address the issue of approval of the Curator's Final Accounting, b) address the Personal Representative's pending Petition for Removal and Surcharge, and c) address the Petition for Hourly Fees and Costs which the Curator shall be filing pursuant to the Order of this Court also entered this day.

3) The Curator is hereby Ordered to turnover all of the assets of the estate (including the $20,000.00 sum presently held by the Curator in trust and the $7,330.00 sum presently held by Sheri Hazeltine, Esq. in trust) to the Personal Representative, THOMAS H. MAYES, within ten (10) days of ~~October 31, 2013~~ THIS ORDER.

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 13 day of November, 2013.

The Honorable Edward Garrison

Copies to:

- **Andrew M. Schwartz, Esq.**, Andrew M. Schwartz, P.A., 101 Plaza Real South, Sui 218, Boca Raton, Florida 33432 (Counsel for Plaintiff)

- **David Beckerman, Esq.,** (counsel for Daniel Mayes), 7000 W. Palmetto Park Rd., Suit 500, Boca Raton, FL 33433 [dbecker86@aol.com]

- **Sheri Hazeltine, Esq.** (former counsel for Curator, Elizabeth Savitt) 800 Palm Trai Plaza, Suite 3, Delray Beach, Florida 33483 [sheri@hazeltinelaw.com info@hazeltinelaw.com]

- **Robert W. Tribuiani, Esq**., (counsel for Stephanie J. Chambers), 3300 PGA Blvd., Suite 520, Palm Beach Gardens, FL 33410 [Robert@Tribuianilaw.com] and c/o Stephanie J. Chambers, 1008 Arbor Meadows, Derby, Kansas 67037 [schambers61@cox.net].

- **Kathleen M. Osterbuhr**, 1300 Cresthill, Derby, Kansas 67037 [kosterbuhr1@cox.net]

- **Ellen Morris, Esq**., (counsel for Curator, Elizabeth Savitt) 7284 W. Palmetto Park Rd., Suite 101, Boca Raton, FL 33433 [EMorris@ElderLawAssociates.com]

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA

PROBATE DIVISION: IV
File No: 502012CP002908XXXXSB

IN RE: THE ESTATE OF

HELEN M. O'GRADY,

Deceased

SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FLORIDA
SOUTHERN BRANCH FILED
13 MAR 20 AM 11:46

ORDER ON PETITION FOR APPOINTMENT OF CURATOR

THIS MATTER having come before the Court on March 19, 2013 on Daniel W. Maye's Petition for Appointment of Curator and the Court having heard argument of counsel and being otherwise fully advised in the premises, it is hereby:

ORDERED and ADJUDGED that the Petition for Appointment of Curator is GRANTED. That ELIZABETH SMITH is appointed as Curator of the estate, and shall serve without bond. The curator is authorized to ask, demand, sue for, recover and receive the property of the decedent; to pay the debts of the decedent as far as the assets of the estate will permit and the law directs; and to make distribution of the estate. The curator shall file a designation of resident agent and oath. Upon such filing, letters of curatorship shall issue. WITHIN 5 DAYS

DONE and ORDERED in Chambers in Delray Beach, Palm Beach County, Florida this 19 day of March, 2013.

Edward Garrison
Circuit Court Judge

Copies furnished to:
Jordan R. Hammer, Esq.
Andrew Schwartz, Esq.
Jami Huber, Esq.
Sheri Hazeltine, Esq.
Stephanie Chambers
Kathleen Osterbuhr

OCR Language: English NUM
4/5/2013 2:28
4/5/2013 2:20

IN THE CIRCUIT COURT OF THE 15TH JUDICIAL CIRUIT,
IN AND FOR PALM BEACH COUNTY, FLORIDA

PROBATE DIVISION

IN RE: GUARDIANSHIP OF
HELEN M. O'GRADY
File No. 502012GA000016XXXXSB
Division IX- SCHER, MARTZ, GARRISON

FILED
2013 FEB 13 PM 4:21
SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
CIRCUIT CIVIL

OBJECTION TO PETITION FOR PAYMENT OF EMERGENCY TEMPORARY GUARDIAN'S ATTORNEYS' FEES AND EXPENSES (MAY 14, 2012 through January 11, 2013)

Thomas H. Mayes, The Emergency Temporary Guardian of my late mother Helen O'Grady and applicant

For appointment as limit Guardian for my late mother Helen O'Grady, files this Objection to the Petition

For payment of Emergency Temporary Guardian's Attorneys' Fees and Expenses filed by Hark, Burkhalter Yon, PL, as attorneys for Thomas Mayes, as Emergency Temporary Guardian, and states as follows:

1. Mr. Hark has made mistakes and prolonged this case for his benefit.
2. Mr. Hark stated to me and my wife Sandra Smith that I will be the "First one to be reimbursed for my out of pocket expenses for taking care of my late mother" I have not.
3. Mr. Hark stated to me he has to "change his game plan" when we found out in the first day of court that the other limited guardian Elizabeth Betsy Savitt, that Mr. Hark brought into the case was married to Judge Colin of Probate Division of Palm Beach. In which (Conflict of Interest) has caused more problems than it has solved.
4. Mr. Hark accepting this case has not precluded any other employment. He has been late for meetings and not taking phone calls because Mr. Hark was with other clients or in court.
5. Mr. Hark stated in his petition to be paid for his services. That he has saved time in this case? He has not; this case should have been over in June of 2012. My brother Ronald Mayes counsel Mr. Miller has objected to my fees and Mr. Harks fees too. In which brings us to another hearing, the last hearing 11/09/2012 Mr. Hark does not recall the agreement with Mr. Miller in front of Judge Martz, that if I turn over my personal journal (Log) it would justify my billing so that I can be reimbursed. Two months later I had to do my bill over because Mr. Hark should have clearly stated and directed what Florida Statue 744.108 meant. To itemize my billing properly in the form of the Statue for reimbursement back in June of 2012. Now

Guardianship of Helen M. O'Grady
In the Circuit Court of the 15th
Judicial Circuit, In and For
Palm Beach County
Probate Division
Case No.: 502012GA000016XXXXSB-IX
Case No.: 502012MH000060XXXXSB-IX
Judge: Rosemarie Scher
Judge: Martz
Judge: Martin Colin
Judge: Edward A Garrison

FILED
MAIN BRANCH OFFICE
FEB 15 2013
SHARON R. BOCK
CLERK & COMPTROLLER
PALM BEACH COUNTY

February 1, 2013

To Your Honorable Judge Garrison,

I am **OBJECTING** to the final petition for payment of Emergency temporary Guardian's Attorney Fees and Costs from May 14, 2012 through January 11, 2013 in the Helen O'Grady Guardianship matter for the additional amount of $10,345.23 as per Mr. Clifford B. Harks bill. Mr. Hark had submitted a bill for **$28,011.13** and it was **paid.** These additional fees are unreasonable for a variety of reasons:

- The Affidavit of Reasonable Attorney's Fees and Cost filed by Clifford B. Hark, states that he is serving as the attorney for the Emergency Temporary Guardian of Property, Thomas Mayes, in the Guardianship of Helen M. O'Grady proceedings. While this was true that Mr. Hark was hired to represent Thomas Mayes as an expert. Mr. Hark was to have my brother Thomas Mayes who was caring for my mother for two and a half years continue in the capacity as Guardian of Self and Property to my late mother, Helen O'Grady. Mr. Hark however lost that case in March 2012. We were given a court appointed Guardian.
- Mr. Hark did bill an extra $4,200 of unused time on his original bill to complete the guardianship matters. As I recall, the Honorable Judge Sher mentioned for Mr. Hark not to drag this out and incur unnecessary costs upon the estate. I believe most of these fees are unnecessary on the second bill. My brother Thomas Mayes also put Mr. Hark on notice that upon my mother's death he had retained Probate attorneys to handle the estate.
- To me, Mr. Hark has not shown the abilities to actually save time. In reviewing the bills, I noticed a great amount of time was billed for preparing the bill. It seems to me that it shouldn't cost thousands of dollars to write a bill. Why is he writing the bill why isn't his assistant? I also notice he seems to be overlapping with the Guardians duties and the Probate attorney's duties. I am not sure that we need to pay the Guardian, her attorney, the probate attorney and Mr. Hark all for the same thing. He also seems to be billing for errors made in his first bill? I thought he was an expert in his field to be able to save the estate time and money?

- The Guardian Ms. Savitt told us she would object to Mr. Harks original bill and ask him to reduce his bill since it was above and beyond reasonable. However, she did not object in court when it was presented. At $350 an hour for Mr. Hark, I took her for her word.
- Mr. Hark stated he too would ask Ms. Savitt to reduce her bill since it too was above and beyond reasonable. She duplicated her hours billed with that of my brother who actually performed the work. Mr. Hark has shared one of Ms. Savitt's bill which totaled $6,000 for one month of service, but can't seem to provide us with the rest of her monthly bills at $75 an hour and she doesn't do anything with out her attorney which bills at $325 an hour. Is it a big secret or just can't get the task done? Again, is this fair and reasonable?
- Mr. Hark still has yet to finalize this case. Thomas Mayes has not been paid for his out of pocket expenses as Guardian for my mother from over a year ago. I also understand Thomas Mayes reduced his bill at the request of Mr. Hark and Ms. Savitt. So the bill presented isn't even for what is owed to Thomas Mayes who doesn't even get near the amount of anyone else yet he did the most important work of all. Mr. Hark has yet to reimburse Stephanie Chambers who had $708.68 and myself who had $1901.07 in travel expenses to appear in court and have our say, which I might add never, occurred. The courts ran out of time. The judge apologized. Mr. Hark keeps giving excuses as to why he can't get the checks written. Is this an oversight on his expertise to get the job done? I am attaching a summary of expenses and ask the courts to rule on them. Mr. Hark or Ms. Savitt has all the original receipts. The Judge asked us to appear.
- Now Ms. Savitt has been paid and Mr. Hark has been paid. Mr. Lee my mother's court appointed attorney was paid. The court appointed doctors have all been paid. Why can't the rest of us get paid?
- My mother Helen O'Grady did not benefit from having a court appointed guardian. My mother's doctors had already established that my mother had numerous medical issues along with dementia and Alzheimer's. I simply do not understand how the courts could continue to mount astronomical amounts of additional doctors that pretty much said the same thing. Why was this allowed to happen? Was it because I have two brothers who are "Not of Right Mind?" and knew how to tie this up in court? There is simply something wrong with putting my mother and the rest of the family through all of this. There was no evidence that Thomas Mayes had done anything wrong. This was duly noted by the Honorable Judge Scher and again emphasized by Mr. Hark and I do believe he was paid above and beyond for his efforts. I do not deny Mr. Hark a reasonable amount of money but $350 an hour is above the national average as a guardian attorney. My mother was a teacher who raised five children on a salary that was less than what Mr. Hark has already been paid. Mr. Hark has also been paid more than I make in a year and I teach 520 K-5 children a week for the public schools.
- Only my two brothers who my mother supported benefited from having my brother Thomas Mayes removed as Guardian and Power of Attorney due to a personal vendetta. My alcoholic brother Daniel Mayes gets to continue to live in my mothers house while the Court appointed Guardian pays the utility bills and my brother Ronald Mayes who has already pilfered over a million dollars and isn't even named as a beneficiary in my mother's latest two Wills and has already spent his inheritance and some. He gets to drag this out without spending any of his money but racks up costs against the estate. There is something to be said about justice. We are losing what our mother wanted us to have.

Once again, Please do not allow my dearly departed mother to have to continue to pay for a vendetta my brother's had against Tom. It isn't right. There is no justice in it. This needs to end.

We've already spent over $100,000 on the Guardianship case. I know the probate costs are over $50,000 against the estate as of this writing. Is this fair? Is this reasonable?

Thank you for your time and consideration of my Objection. Also, for letting me know yesterday by mail that you have been assigned to reside over my mother's estate matters. It was very much appreciated.

Respectfully yours,

Kathleen Osterbuhr
1300 Cresthill
Derby, Ks 67037
316-516-0459

and

1008 S. Arbor Meadows St.
Derby, KS 67037
316-789-0251

Expenses	Kathleen	Kelsi
Airline Ticket	$605.20	$475.20
Rental Car	$244.17	
Gas	$ 37.76	
Meals	$143.23	$ 78.38
Tips-Baggage/Tolls	$ 14.00	
Misc	$ 63.18	
Totals	$ 1108.54	$548.18

Florida Expenses to appear in for the Court Hearing March 28, 2012

Grandma would normally cover Kelsi's airline ticket with a little spending money for her to come down to visit. Personally I, (as a parent) feel I wouldn't of had any expenses for Kelsi (a minor child) if I wasn't present in Florida for the court hearing. I did separate expenses, so whatever you decide works for me :)

Expenses	Kathleen	Stephanie
Airline Ticket	$649.20	$343.20
Rental Car		$213.27
Gas		$ 30.00
Meals	$131.05	$ 115.21
Tips-Baggage/Tolls	$ 7.00	$ 7.00
Misc	$ 5.28	
Totals	$ 792.53	$708.68

Florida Expenses to appear in for the Court Hearing March 8, 2012

Mr. Miller turned over my journal to his client Ronald Mayes and he is trying to use it against me in the O'Grady Estate case. Case No.: 502012CP002908XXXXSB

6. Mr. Hark stated to me and my wife that he was afraid of my brother Daniel Mayes who is residing in my late mother house rent free. Mr. Hark told us when he was a prosecutor for Miami and he put away murderers and drug dealers and did not fear them but he feared my brother Daniel? Because he was a loose cannon? Mr. Hark should have stepped down, if he feared for his safety? I feel it interfered with his ability to represent me responsibly in this guardianship case.

WHEREFORE, Thomas H. Mayes objects to the Final Petition for Payment of Emergency Temporary Guardian's Attorneys' Fees and Cost filed by Hark Burkhalter Yon, PL as attorneys for Thomas Mayes, as Emergency Temporary Guardian, request that they be determined to be substantially unreasonable, and for whatever and further relief the Court deems just.

Thomas H. Mayes
1602 SW Nicholas Drive
Boynton Beach Fl. 33426
Telephone: (561) 733-0160

By:

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF **DIVISION: IX**

HELEN M. O'GRADY. **CASE NO. 502012CP002908XXXXSB**

_____/

PETITION FOR CURATOR ELIZABETH SAVITT'S FEES AND COSTS

Petitioner, ELIZABETH SAVITT, the Curator, by and through her attorney, SHERI L. HAZELTINE, ESQ., files this Petition for Curator Fees and Costs, and states as follows:

1. On March 26, 2013 Elizabeth Savitt was appointed Curator of the estate by the Court.

2. The Curator has completed her final accounting and the estate is ready to be closed.

3. Even after the Court recently appointed a personal representative of the estate, the Court ordered the Curator to continue to have concurrent authority of the estate until further order.

4. FS 733.501(3) provides the Curator is entitled to reasonable compensation for her services and the Court may consider the provisions of FS 733.617 in determining the amount of said fee.

5. FS 733.617 provides that the reasonable rate of compensation for personal representatives shall be based on the inventory value of the estate, plus income earned during administration determined at 3% (three percent) of the first million dollars and 2.5% (two and one-half percent) of the amount between $1 million dollars and $5 million dollars. The inventory value of this estate is $2,008,904 and as a result, the presumed reasonable fee for this Curator is $55,222.60.

Wherefore for the foregoing reasons, it is respectfully requested that this Honorable Court enter an Order awarding Elizabeth Savitt a Curator fee in the amount $55,222.60.

*** FILED: PALM BEACH COUNTY, FL SHARON BOCK, CLERK ***

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF DIVISION: IX

HELEN M. O'GRADY. CASE NO. 502012CP002908XXXXSB
_____/

PETITION FOR ATTORNEYS FEES FOR SHERI L. HAZELTINE, ESQ.

Petitioner SHERI L. HAZELTINE, ESQ. files this Petition for Attorneys Fees and states as follows:

1. On March 26, 2013 Elizabeth Savitt was appointed Curator of the estate by the Court. This attorney has served as the attorney for the Curator.

2. The Curator completed her final accounting and the estate is ready to be closed.

3. FS 733.6271 provides the attorney who assists the Personal Representative in the administration of a probate estate is entitled to reasonable compensation for services. Under FS 733.501 Curators shall be allowed reasonable compensation for the services, and the court may consider the provisions of FS 733.617 (compensation of personal representative) in determining a Curator's fees.

5. FS 733.6171(3) provides that the reasonable rate of compensation for attorneys in formal estate administration is presumed to be reasonable if based on the compensable value of the estate, which is the inventory value of the probate estate assets plus the income earned by the estate during administration. This compensation is determined at 3% (three percent) of the first million dollars and 2.5% (two and one-half percent) of the amount between $1 million dollars and $5 million dollars. The inventory value of this estate is $2,008,904 and as a result, the presumed reasonable fee for this attorney is $55,222.60.

Wherefore for the foregoing reasons, it is respectfully requested that this Honorable Court enter an Order awarding Sheri L. Hazeltine & Associates, P.A. a fee in the amount of $55,222.60.

OCR Language: English

lelp
Page: 1 of 2

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)

The Honorable Judge Edward Garrison

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

FILED
2013 NOV 14 AM 9:50
SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

ORDER ON CURATOR, ELIZABETH SAVITT'S PETITION FOR DISCHARGE OF CURATOR AND ON PERSONAL REPRESENTATIVE, THOMAS H. MAYES' OBJECTION TO ELIZABETH SAVITT'S NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

THIS CAUSE, having come to be considered before this Court on October 31, 2013 upon the aforementioned Petition for Discharge of Curator and the Personal Representative's Objection to same, and the Court having heard the argument of the parties and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1) Elizabeth Savitt is hereby discharged as Curator for the estate of Helen M. O'Grady, and is relieved of all authority to act on behalf of the estate of Helen M. O'Grady.

2) The Court hereby retains jurisdiction over the Curator to a) address the issue of approval of the Curator's Final Accounting, b) address the Personal Representative's pending Petition for Removal and Surcharge, and c) address the Petition for Hourly Fees and Costs which the Curator shall be filing pursuant to the Order of this Court also entered this day.

3) The Curator is hereby Ordered to turnover all of the assets of the estate (including the $20,000.00 sum presently held by the Curator in trust and the $7,330.00 sum presently held by Sheri Hazeltine, Esq. in trust) to the Personal Representative, THOMAS H. MAYES, within ten (10) days of ~~October 31, 2013~~ THIS ORDER.

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 13 day of November, 2013.

The Honorable Edward Garrison

OCR Language: English

*** FILED: PALM BEACH COUNTY, FL SHARON R BOCK, CLERK. ***

Electronically Filed 10/15/2013 10:12:33 AM ET

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)
(Previously proceeding in Division IZ, but transferred to Division IX by way of an Order of this Court dated January 31, 2013)

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner, and DANIEL MAYES, Respondent.

_____/

THOMAS H. MAYES' OBJECTION TO STIPULATION FOR SUBSTITUTION OF COUNSEL

COMES NOW THOMAS H. MAYES, as personal representative of the estate of Helen M. O'Grady, by and through the undersigned counsel, and hereby files this, his Objection to Elizabeth Savitt's Stipulation for Substitution of Counsel, as follows:

1. At present, Elizabeth Savitt, appointed Curator of the estate of Helen M. O'Grady, has filed a Stipulation for Substitution of Counsel. Same is scheduled to be heard by this Court on October 17, 2013.

2. At present, Sheri Hazeltine, Esq., current retained counsel for Elizabeth Savitt, possesses $10,000.00 which belongs to the estate. This sum was withdrawn from the accounts of the estate on or about August 22, 2013 by Elizabeth Savitt and Sheri Hazeltine, Esq. without the knowledge or consent of THOMAS H. MAYES. This sum has been retained by Sheri Hazeltine, Esq. despite multiple demands for the return of same made by THOMAS H. MAYES on behalf of the estate.

3. At present, no explanation whatsoever has been given for the segregation of these funds. See THOMAS H. MAYES' Petition for Removal and Surcharge, previously filed in this action.

4. To date, no Order of this Court has granted Elizabeth Savitt the authority to place the subject funds in the possession of Sheri Hazeltine, Esq., and no Order of the Court has granted Elizabeth Savitt the authority to divest the estate of the right of immediate possession of, and use of, these funds.

5. It would be wholly improper to allow new counsel for Elizabeth Savitt to substitute in place of Sheri Hazeltine, Esq. where Sheri Hazeltine, Esq. still possesses $10,000.00 which is lawful property of the estate of Helen M. O'Grady. If the Court grants relief

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Page: 1 of 2

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: THE ESTATE OF
HELEN M. O'GRADY

Deceased,

Probate Division
Case No. 502012CP002908XXXXSB (IX)

The Honorable Judge Edward Garrison

THOMAS H. MAYES

Petitioner/Counter-Respondent,

v.

RONALD O. MAYES, Respondent/Counter-Petitioner,
and DANIEL MAYES, Respondent.

FILED
2013 NOV 14 AM 9:50
SHARON R. BOCK, CLERK
PALM BEACH COUNTY, FL
SOUTH CITY BRANCH-FILED

ORDER ON CURATOR, ELIZABETH SAVITT'S PETITION FOR DISCHARGE OF CURATOR AND ON PERSONAL REPRESENTATIVE, THOMAS H. MAYES' OBJECTION TO ELIZABETH SAVITT'S NOTICE OF FINAL ACCOUNTING OF CURATOR AND PETITION FOR DISCHARGE

THIS CAUSE, having come to be considered before this Court on October 31, 2013 upon the aforementioned Petition for Discharge of Curator and the Personal Representative's Objection to same, and the Court having heard the argument of the parties and being otherwise duly advised in the premises,

IT IS HEREUPON ORDERED AND ADJUDGED as follows:

1) Elizabeth Savitt is hereby discharged as Curator for the estate of Helen M. O'Grady, and is relieved of all authority to act on behalf of the estate of Helen M. O'Grady.

2) The Court hereby retains jurisdiction over the Curator to a) address the issue of approval of the Curator's Final Accounting, b) address the Personal Representative's pending Petition for Removal and Surcharge, and c) address the Petition for Hourly Fees and Costs which the Curator shall be filing pursuant to the Order of this Court also entered this day.

3) The Curator is hereby Ordered to turnover all of the assets of the estate (including the $20,000.00 sum presently held by the Curator in trust and the $7,330.00 sum presently held by Sheri Hazeltine, Esq. in trust) to the Personal Representative, THOMAS H. MAYES, within ten (10) days of ~~October 31, 2013~~ THIS ORDER.

IT IS SO DONE AND ORDERED, in Chambers at Palm Beach County, Florida, this 13 day of November, 2013.

The Honorable Edward Garrison

OCR Language: English