



AAA Mediation.org™

## **FN-6050008 MN-6050008 LN-6050008**

**Laguna Hills, California**

### **Professional Summary**

I help people resolve their disputes over family wealth transfers and caring for aging loved ones. With extensive trial and mediation experience, I am able to observe from the balcony, from where I can serve as a calm voice of reason to help people find a fair, honest, and swift resolution.

### **Current Employer and Title**

Partner  
Carico Glowacki Macdonald Kil & Benz LLP  
<http://www.caricofirm.com>

### **Work History**

Partner - Carico Glowacki Macdonald Kil & Benz LLP (2023 to present)

Founding and Managing Partner - Roehl & Glowacki, P.C. (2016 to present)

Partner - Deily Roehl & Glowacki, P.C. (2015 to 2016)

Associate - Deily Law Firm, A.P.C. (2011 to 2015)

Associate - Kidman, Behrens & Tague LLP (f.k.a. McCormick, Kidman & Behrens, LLP) (2007 to 2011)

Associate - Reback, McAndrews & Kjar, LLP (2004 to 2007)

### **ADR Experience**

Counsel for parties in hundreds of mediations (2004 to present)

### **Experience as Mediator**

Mandatory Settlement Conference Settlement Officer, Orange County Superior Court Probate Mental Health Panel (2016 to present)

Volunteer Mediator, Los Angeles County Superior Court Probate Division (2023 to present)

Private Mediations

### **Issues Handled as a Mediator**

Trusts (interpretation, trust contests, accountings, asset management, appointment/removal of trustees, fee disputes)

Probate estates (heirship determinations, will contests, appointment/removal of personal representatives, accountings and distribution)

Conservatorships of the Person and/or Estate (establishing conservatorships, appointment/removal of conservators, accounting, breach of fiduciary duty, asset management, terminating conservatorships, change of residence of conservatee, consent to medical treatment, end-of-life care)

Financial Elder Abuse (breach of fiduciary duty, fraud, undue influence, conversion, trustee de son tort, disinheritance)

Financial powers of attorney (breach of fiduciary duty, suspension/removal of attorney-in-fact, accounting)

Advanced Health Care Directives (breach of fiduciary duty, care management, consent to medical treatment, end-of-life care, suspension/removal of attorney-in-fact)

## **Mediator Style and Process Preferences**

I take a facilitative approach at first, encouraging transparency and open communication about interests.

If appropriate, I will offer evaluative input, particularly around the procedural and financial aspects of ongoing litigation.

Whenever possible, I offer a transformative approach to try to repair family relationships.

## **Technology Proficiency**

I am trained in Zoom and Teams and I am comfortable conducting remote and hybrid mediations with the parties' consent.

## **Education Background**

Straus Institute, Pepperdine University, Caruso School of Law  
LLM, Alternative Dispute Resolution (Mediation Concentration)  
In progress

University of California Law, San Francisco (f.k.a. UC Hastings College of Law)  
J.D.  
2004

University of California, Berkeley  
B.A., Political Science (English minor)  
2001

## **Acquired Professional Licenses**

Law license, California (2001 to present)

## **Professional Connections**

Orange County Bar Association (Director at Large, 2023 to present; member, 2004 to present; Chair, Trusts & Estates Section, 2016)

Los Angeles County Bar Association

American Bar Association

Southern California Mediation Association

Orange County Trial Lawyers Association

## **Recent Publications and Speaking Engagements**

Speaker, Observations on Capacity Issues (First American Trust Company, 2024)

Speaker, Mediation and Arbitration in Trust and Estate Disputes (First American Trust Company, 2023)

Speaker, Difficult Administrations: How to Avoid Litigation While Preparing For It (Orange County Bar Association, Elder Law Section, August 2017)

Speaker, Difficult Administrations: How to Avoid Litigation While Preparing For It (First American Trust Company, eight times in 2018)

Speaker, Trying a Will or Trust Contest Based on Undue Influence or Incapacity; and, Intentional Interference with Expected Inheritance (AKA, "For Every Wrong There is a Remedy" (Orange County Bar Association, Elder Law Section, May 2012)

Speaker, I've Got a Trial Date in Probate Court. Now What? (Orange County Bar Association, Trusts & Estates Section Annual Seminar, October 2011)

Speaker, Know When (and How) to Hold 'Em – From a Legal Perspective (Professional Fiduciaries Association of California Annual Conference, November 2010)

<b>Mediation Rate</b>	\$550 Per Hour
<b>Languages</b>	English
<b>Locale</b>	Laguna Hills, CA

The AAA's Rules provide the AAA with the authority to administer a mediation including, mediator appointment, general oversight and billing. Accordingly, mediations that proceed without AAA administration are not considered AAA mediations, even when the parties select an mediator who is on the AAA's Roster.

The information contained in this resume has been supplied solely by the individual mediator and may, or may not, be a complete recitation of their experience. The AAA assumes no responsibility for the content, completeness, accuracy, or reliability of the information contained in a mediator's resume. If you have any questions about a mediator's experience or background, you are encouraged to contact your case manager.

Mediators on the AAA Roster are not employees or agents of the AAA.