

1 situation of this kind where, basically, you have a Will

2 ---

3 THE COURT - Let me stop you. I just want to  
4 make -- it seems to me that the statute has one of two  
5 stipulations. Paragraph one is where there was a Will,  
6 and that's the order you want to be reconsidered, and  
7 paragraph two is if there wasn't a Will. Isn't that the  
8 scheme that statute sets up?

9 MR. FOSTER - Reading it that way would  
10 essentially mean that a Will can never be found after the  
11 event even under the best case scenario even under good  
12 faith.

13 THE COURT - Under this statute.

14 MR. FOSTER - Yeah, if that's -- if that's our  
15 reading.

16 THE COURT - But I mean it seems to me that it's  
17 -- that their -- paragraph one is there was a Will but  
18 you're challenging it, and number two is that the probate  
19 court found there was intestacy and their provisions for  
20 what, you know, ---

21 MR. FOSTER - I would not -- I can only say I  
22 don't think that's the intent of saying, quote, another  
23 Will. In this case, of course, there was another one the  
24 sense that we had a copy in round (sic) of the original.  
25 The copy was thrown out; now we have the original, but I

1 would only say this, sir, reading the statute in that  
2 fashion means that one can never bring forth the question  
3 of a lost Will, that one -- this statute has no effect  
4 upon that whatsoever, and I don't believe that was the  
5 intent of the Uniform Probate Code.

6 If I may continue, briefly?

7 THE COURT - Yes, sir, yeah, absolutely.

8 MR. FOSTER - The other argument, as I say, that  
9 has to do with this matter is the language of the Court in  
10 its order where it essentially said, were I to rule -- I  
11 want to be sure I'm reading this correctly ---

12 THE COURT - The probate court order? Is that  
13 what you're ---

14 MR. FOSTER - Beg your pardon, sir?

15 THE COURT - The probate court order?

16 MR. FOSTER - Probate court order.

17 THE COURT - Yes, sir. Okay, I'm there.

18 MR. FOSTER - And this is going back to the first  
19 order, and I want to read exactly. In the first order,  
20 the Court in its paragraph (H) -- this is September, 2017  
21 -- even if the Court were to rule on the amended spouse  
22 issue, there was no credible evidence presented to the  
23 Court the decedent provided for his spouse outside the  
24 Will or in lieu of a testamentary disposition, which, of  
25 course, is what we're presuming now. Our argument comes

1 to this, sir. First of all, is that a ruling; is it a  
2 judgment. To go to the basic thing, we've cited among our  
3 brief language of the restatement on -- second -- on  
4 judgment, section 27, which says that when your judgment  
5 is not dependent on a particular issue, that determination  
6 is akin to dicta, and its re-litigation is not precluded.  
7 Beyond that, we've cited a great many cases to the effect  
8 of what is the effect, if any, of a Court saying, here is  
9 a ruling or a supposed ruling or a comment in the  
10 subjective sense, we maintain, simply speaking, is not  
11 binding. It is a dicta; it is the Court saying, this is  
12 what I think, but it has nothing to do with anything can  
13 bind at the Court. It has nothing to do with binding the  
14 client. It is simply words. Beyond this there's some  
15 language, as I understand it, at least in -- I'm sorry,  
16 sir. Okay. I thought I was interrupting.

17 THE COURT - No, no, sir. I'm just -- I've got  
18 the order here.

19 MR. FOSTER - There is some language in the  
20 defendant -- respondent's brief to the effect of generally  
21 refusing the matter on the basis of general, equitable  
22 principles. Here is the situation as we understand it.  
23 Ms. Lisa Mattox was left unquestionably outside the Will a  
24 piece of property worth -- by tax value -- three hundred  
25 and ninety-five thousand dollars. It may be that if this

1 Court allows us to go forward with the case, she will  
2 still be determined to be the heir, that the language of  
3 the statute in which an heir provided for before the --  
4 before the marriage will have no effect. It is possible,  
5 however, that that will not be the case. This comes down  
6 to where the equities lie. I refer back to the language  
7 in Lanier, which I quoted to the Court.

8 THE COURT - Yes, sir.

9 MR. FOSTER - We have here a situation where  
10 there's no hint of bad faith, I understand it. The most  
11 that we're able -- that defendants -- pardon --  
12 respondents are able to say is, well, she should've acted  
13 sooner. Well, sooner is interesting, because there's no  
14 indication or affidavit of when she found this. That is  
15 specific, because, if I may allow to say so, I helped  
16 write that affidavit, and we omitted any statement because  
17 she could not say when she found it, except that it was  
18 after October of 2017. Relying upon what we understand to  
19 be both 62-3-412 and Rule 60(B), we believe we've shown a  
20 reasonable, equitable case to be allowed to proceed on  
21 this case to full discovery and decision by the probate  
22 court.

23 That's, basically, where we're at, Your Honor.  
24 Barring any questions, that's what I had.

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1 THE COURT - Mr. Foster, one question on Lanier.  
2 I'm looking at page five, and the Court says, when  
3 evidence is misplaced, a party must make a, specifically,  
4 targeted search to find missing evidence.

5 MR. FOSTER - No question. The question is who  
6 has to do it.

7 THE COURT - Well, I mean I would assume that the  
8 party in this case -- right? -- I mean Mr. Mattox, David  
9 Mattox.

10 MR. FOSTER - That's Mr. -- David, and he could  
11 not find it. That's in the first order. The first order  
12 ---

13 THE COURT - Right, but where ---

14 MR. FOSTER - --- says he made every effort to  
15 find it.

16 (WHEREUPON, BRIEF PAUSE)

17 MR. FOSTER - If I'm not interrupting the Court,  
18 just to go on and ---

19 THE COURT - No, I'm just -- I'm looking at the  
20 order. You said -- so the order makes a factual finding  
21 that you did everything possible to find ---

22 MR. FOSTER - That's my recollection of the  
23 reading of it, sir, that, basically, said yes, they made  
24 all this attempt and, uh -- and his attorney made all this

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attempt, and they couldn't find it. That's the first order.

THE COURT - Okay, I'm looking -- I'm looking at. I'm just ---

MR. FOSTER - This is on record on appeal page 19.

THE COURT - I'm looking at 89.

MR. FOSTER - Well, this is 19, and it speaks to paragraphs 10 through 11.

(WHEREUPON, BRIEF PAUSE)

THE COURT - I don't see anything about the petitioner saying -- it says the petitioner testified he had no knowledge of where the decedent kept the Will and had not seen or discussed it.

MR. FOSTER - Yes, sir.

THE COURT - Where does it state that he searched everywhere?

MR. FOSTER - Well, I presume I need to go back to number nine where it says the petitioner's attorney has made all this effort, but, of course, that's attributable to the petitioner.

THE COURT - Okay. I -- well, I think I understand your argument. Let me hear from the other side.

1 MR. PIERCE - Thank you, Your Honor, and before I  
2 start, I mean I -- I understand this procedure to be in  
3 the nature of an appellate oral argument, and I've  
4 withheld some objections in that vein, and I'm going to  
5 raise those now, um, and I -- the understanding, or  
6 hopefully the understanding that these are not waived  
7 because we -- this is an oral argument setting.

8 THE COURT - Okay.

9 MR. PIERCE - Okay. First, Your Honor, the issue  
10 of judicial notice, the issue of 62-3-412 and the issue of  
11 proceeding on equitable grounds I do not believe were  
12 raised in the defendant's appellate brief. I believe  
13 those issues have been waived for the purpose of our  
14 argument today. Those were raised at the underlying  
15 hearing, and they were available as arguments to be  
16 brought before the Court today, but they were not pled and  
17 they were not recited in the respondent -- or the  
18 appellant's brief. I do not believe they're appropriate  
19 grounds to be considered today.

20 THE COURT - I mean -- that's not an issue I had  
21 -- I really thought about, but I -- is it the same  
22 standard as in appellate court? Am I -- is it waived if  
23 it's not briefed?

24 MR. PIERCE - I believe that's the case, Your  
25 Honor. I cannot quote you chapter and verse on the

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1 appellate court rules on that, but -- and regardless, Your  
2 Honor, I mean -- the standard of review today has not been  
3 discussed thus far, and -- and I believe the standard of  
4 review will clean some of these ---

5 THE COURT - Okay.

6 MR. PIERCE - --- will clean some of these issues  
7 up in and of itself, Your Honor.

8 THE COURT - Okay. Well, why don't we start with  
9 that, Mr. Pierce, because I ---

10 MR. PIERCE - Sure.

11 THE COURT - I mean I'm not sure what the  
12 standard of review is in a ---

13 MR. PIERCE - Yes, Your Honor, and ---

14 THE COURT - --- my first probate appeal.

15 MR. PIERCE - I do -- I do have all of our case  
16 law that we've cited in our brief. May I approach with  
17 that, Your Honor?

18 THE COURT - You may.

19 (WHEREUPON, DOCUMENT HANDED UP TO THE COURT)

20 THE COURT - Thank you, sir.

21 MR. PIERCE - Your Honor, the standard of appeal  
22 -- an appeal from the probate court is governed by the  
23 probate code. That is cited in Golini v. Bolton, cited at  
24 326 SC 333.

25 THE COURT - Yes, sir.

1 MR. PIERCE - It says the probate code provides  
2 that you can appeal a final order of the probate court to  
3 the circuit court. The circuit court must hear and  
4 determine the appeal according to the rules of law, and in  
5 the Golini case, the South Carolina Supreme Court  
6 interpreted the phrase according to the rules of law to  
7 mean according to the general rules governing appeals. On  
8 appeal from the final order of the probate court, the  
9 circuit court should apply the same standard of review  
10 that the Court of Appeals would apply to hearing the  
11 appeal. A decision to grant or deny a motion for relief  
12 from judgment, which is what was brought and what's on  
13 appeal here today under Rule 60 of the South Carolina  
14 Rules of Civil Procedure, the decision to grant or deny a  
15 relief from judgment lies within the sound discretion of  
16 the trial court and will not be disturbed on appeal absent  
17 an abuse of discretion, so the standard of review today,  
18 Your Honor, is an abuse of discretion standard. The  
19 Golina case goes on to define an abuse of discretion as a  
20 situation where the Judge issuing the order -- that would  
21 be Judge Rogers in this case -- was controlled by an error  
22 of law or where the order is based on factual conclusions  
23 that are without evidentiary support. So that's the  
24 standard that we have here today, Your Honor. And before  
25 I go into my argument, Your Honor, we -- we have addressed

1 the issues that were recorded on appeal in the appellant's  
2 brief. We did discuss further issues at the underlying  
3 hearing, and those have all been fully addressed in our  
4 brief as well for the Court's edification, and if the  
5 Court has any questions about those grounds, I'll be more  
6 than happy to answer them today, but I am restricting my  
7 oral argument to the issues that were raised on appeal in  
8 the appellant's brief.

9 THE COURT - Why -- unless -- I mean if you don't  
10 want to argue the other one for some other reason, that's  
11 okay, but I'd rather you just address everything.

12 MR. PIERCE - Yes, Your Honor.

13 THE COURT - Okay. I just feel like -- you only  
14 get one chance at oral argument from the Court's  
15 prospective. This is my chance to ask questions. I  
16 understand your arguments and I prefer if you'd addressed  
17 it all.

18 MR. PIERCE - Yes, Your Honor.

19 Your Honor, starting with the first issue that  
20 was raised on appeal in the appellant's brief, we consent  
21 that there is, in fact, evidence establishing a lack of  
22 due diligence in discovering and filing the original Last  
23 Will and Testament of Jonathan Ray Mattox. That's  
24 statement of issue on appeal number one as provided by the  
25 appellant. Rule 62(B)(2) of the South Carolina Civil

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1 Procedure allows the Court to relieve a party from final  
2 judgment on the basis of newly discovered evidence, and  
3 the operative phrase, Your Honor, is which by due  
4 diligence could not have been discovered in time to move  
5 for a new trial. Your Honor, we have also cited the  
6 Lanier case. Lanier case provides that due diligence is  
7 defined as not when a litigant actually discovers or  
8 finds, but what they could have discovered or found by  
9 putting in the time and effort to do so. Appellant,  
10 specifically, argues that Judge Roger's finding of Rule 60  
11 does not apply because of a lack of due diligence is  
12 without evidentiary support. At the October 5th, 2018  
13 hearing where we argued the motion on the Rule 60 --  
14 argued the Rule 60(B) motion, respondent through Mr.  
15 Gettys and I, specifically, addressed the issue of due  
16 diligence repeatedly relying largely on the affidavit of  
17 Peggy Ann Mattox who's the mother of the appellant and the  
18 decedent and we ---

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THE COURT - Is that affidavit in the record?

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MR. PIERCE - It is in the record, Your honor,  
21 and it starts at page 27.

22

THE COURT - Hold on one moment. Okay, I'm  
23 there.

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MR. PIERCE - Okay. The pertinent points in that  
25 affidavit, Your Honor, are that, one, Peggy -- and we're

1 going to refer to Peggy Ann Mattox as Peggy -- knew the  
 2 decedent had executed a Will, and while we do not agree  
 3 that 62- -- 62-3-412 is necessarily a proper issue on  
 4 appeal here today, I do believe that flies in the face of  
 5 the lack of knowledge of a Will requirement from that  
 6 statute. So Peggy knew the decedent had executed a Will.  
 7 Peggy was named as the PR of the decedent's estate in that  
 8 Will. Peggy found the Will in a safe in her home on or  
 9 after October of 2017, and the decedent, appellant and  
 10 Peggy all knew the location and combination to the safe.  
 11 We argued these points as well as the fact that a safe is  
 12 a natural and obvious place to keep important documents at  
 13 the October 5th, 2018 hearing. So that was the evidence  
 14 that we offered against the due diligence put in by the  
 15 appellant. I hope that was clear, Your Honor, but that  
 16 was our argument that due diligence had not been -- had  
 17 not been put in in this case.

18 THE COURT - Is Mr. Foster right that the person  
 19 whose due diligence is in question is David Mattox?

20 MR. PIERCE - I believe it'd be the party, Your  
 21 Honor, who was seeking -- who was seeking relief from the  
 22 judgment.

23 THE COURT - Right, but that would be David --  
 24 David Mattox. Right?

1 MR. PIERCE - Yes, he is the party in this case,  
2 and I believe that if you are bringing the Rule 60(B)  
3 motion, it is incumbent on you.

4 THE COURT - So but -- and so it's not the  
5 mother, it's the surviving son, it's his -- his due  
6 diligence is the issue. Right?

7 MR. PIERCE - That's correct. She was named as  
8 the PR in the original Will, ---

9 THE COURT - Right.

10 MR. PIERCE - --- and she has a duty to -- she  
11 would have a duty to produce if that Will were to be -- to  
12 be brought forward.

13 THE COURT - Right, but the question -- the  
14 question for me is as far as exercising due diligence in a  
15 Rule 60 is David Mattox's due diligence, not the mom's.  
16 Right?

17 MR. PIERCE - That's -- that is correct, Your  
18 Honor. It's David's due diligence, because it is his  
19 motion to be relieved from the judgment issued by the  
20 Court.

21 THE COURT - Okay. Your argument is under the  
22 affidavit at the very least it's -- it supports the fact  
23 that he knew his mom kept a safe and that he knew that --  
24 I mean he and his brother had the combination to it.

25 MR. PIERCE - Correct.

Jun 26 2020 27

SC Court of Appeals

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1 THE COURT - And that -- that is enough to say,  
2 well, he should've checked the safe?

3 MR. PIERCE - Well, and as well, Your Honor, I  
4 mean the affidavit states that the mother knew that a Will  
5 existed, and I think in the exercise of due diligence, you  
6 would ask people close to the decedent, especially, a  
7 mother who is named as the PR in the Will if she had any  
8 knowledge of the documents and where they might be kept.

9 THE COURT - All right.

10 MR. PIERCE - So that was -- that was the  
11 evidence that was offered at the October 5th, 2018  
12 hearing, and based on the argument at that hearing, Judge  
13 Rogers agreed that due diligence was not exercised and,  
14 therefore, relief under Rule 60 was not appropriate, so we  
15 do believe there absolutely was evidentiary support for  
16 Judge Roger's  
17 finding, and that's based on the arguments we've made  
18 here as well as the transcript of the hearing.

19 The next issue that's raised on appeal by the  
20 appellant, Your Honor, is whether the appellant is  
21 precluded from litigation on the grounds of res judicata.  
22 We contend that the appellant is precluded from litigation  
23 on the grounds of res judicata, but it's very important  
24 for us to understand how res judicata, actually, fits into  
25 this case, because we're not here on a motion to dismiss

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1 on the grounds of res judicata. Okay? We're here on an  
2 appeal from denial of a Rule 60 motion.

3 THE COURT - Right.

4 MR. PIERCE - Rule 60(B)(1) requires a -- case  
5 law in South Carolina requires the Court to consider four  
6 things on a 60(B)(1) motion. The first is the promptness  
7 with which relief is sought, promptness within which  
8 relief is sought based on newly discovered evidence, the  
9 reasons for any failure to act promptly, the existence of  
10 a meritorious defense and the prejudice to the non-moving  
11 party. And res judicata fits in solely to the existence  
12 of a meritorious defense here, Your Honor. Here we  
13 contend the omitted spouse statute would serve as a  
14 meritorious defense to the appellant's theoretical new  
15 claim, because regardless of whether a new Will is  
16 probated, the respondent would be considered a omitted  
17 spouse, and, therefore, the outcome of the case would be  
18 the same. The Supreme Court has held in Miles v. Miles,  
19 which is cited at 312 SC 408, that absent specific  
20 language in the Will or sufficient extrinsic evidence that  
21 a bequest is made in contemplation of marriage, a spouse  
22 has not been provided for under the omitted spouse  
23 statute, and, therefore, the omitted spouse statute would  
24 apply, and she would be entitled to her intestate share of  
25 the decedent's estate. In this case, Your Honor, the

1 decedent executed his Will prior to ever meeting the  
2 respondent and then under Miles we believe that that would  
3 be a textbook case of the omitted spouse statute.

4 THE COURT - Okay, but I'm -- maybe I'm being a  
5 little slow this morning, but I -- how's that a res  
6 judicata -- I mean I understand what you're saying, but  
7 even if -- one -- one of the issues whether you should  
8 grant the Rule 60(B) motion is whether they might prevail  
9 if the new evidence is discovered, but -- it doesn't seem  
10 to be res judicata to me, it's just -- it's just an  
11 argument that they would lose anyway.

12 MR. PIERCE - Well, Your Honor, I think -- I  
13 think the argument from the appellant is that they -- they  
14 -- excuse me -- our argument is they could not raise their  
15 defense to the omitted spouse claim, because it's already  
16 been adjudicated.

17 THE COURT - But -- so you're saying, by not  
18 appealing that issue, it's not just an argument, it's --  
19 it's settled law in the case.

20 MR. PIERCE - Correct, Your Honor.

21 THE COURT - Okay. It is sort of a contingent  
22 language, though, doesn't it? I mean that -- that Court  
23 -- the probate court order that sort of says, if I hadn't  
24 ruled this, then this, you know, ---

25 MR. PIERCE - It -- there is ---

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THE COURT - Mr. Foster says it's dicta.

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MR. PIERCE - Well, I don't believe it's dicta, Your Honor. I mean it is in the -- the conclusions of law section of a order signed by a Judge of competent jurisdiction. While there is some contingent language, there is no contingent language as to the Court's -- the Court's analysis of the information that was presented, and that it was insufficient to prove that there was a bequest outside of the Will, and, therefore, the omitted spouse statute would apply.

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THE COURT - So, you're basically arguing that -- that in a normal situation the party argues you don't grant relief because they'd lose anyway, and in your situation it's even a stronger argument, because it's res judicata and they have zero percent chance of winning, because they waived that issue. Is that ---

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MR. PIERCE - Correct, Your Honor.

THE COURT - Okay. All right.

MR. PIERCE - And, Your Honor, and just a -- if I haven't covered this already, res judicata does apply where there's identity of the parties, identity of the subject matter and adjudication of the issue in the prior suit. Further, Your Honor, in Hilton Head Center of South Carolina, Inc., v. Public Service Commission of South Carolina -- that's cited at 259 SC 9 -- a litigant is

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1 barred from raising in a subsequent trial any issues which  
2 were adjudicated in the former suit and any issues which  
3 might have been raised in the former suit. I think that  
4 holding in that case combined with Judge Roger's order  
5 would show that the omitted spouse statute was an issue  
6 that was directly at issue in the underlying case might  
7 have been raised and was raised in some way, shape or form  
8 and the Judge issued an analysis of the -- of the evidence  
9 that was presented, so we -- we don't believe that ---

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THE COURT - Okay.

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MR. PIERCE - --- the issue of the omitted spouse  
12 statute contends to be in order.

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THE COURT - All right.

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MR. PIERCE - Finally, Your Honor, the final  
15 issue on appeal from the appellant is that they've  
16 demonstrated a prima facie -- they've demonstrated prima  
17 facie evidence for equitable relief sought, and I'm not  
18 sure exactly what equitable relief that is. It's not laid  
19 out in the -- the statement of issue on appeal. However,  
20 they're relying on evidence that was issued at a Rule  
21 60(B) motion as evidence that they can proceed with a  
22 claim. A Rule 60(B) motion, Your Honor, is confined.  
23 There are very limited grounds from which a Rule 60 motion  
24 can be granted. Those are clerical mistakes, mistake in  
25 advertence, surprise or excusable neglect, newly

1 discovered evidence, fraud, mis-presentation or  
2 misconduct, void judgment or satisfied judgment. Those  
3 are the purposes of a Rule 60 -- of Rule 60 motion. A  
4 Rule 60 motion is not an opportunity to bring up issues  
5 that could have or should have been raised at the  
6 underlying trial, so I don't believe that any of the  
7 evidence as it's called in the brief is evidence of  
8 anything really. They were arguments made at a 60(B)  
9 motion. We don't believe they have any legal or  
10 substantive effect on this appeal.

11 THE COURT - Okay.

12 MR. PIERCE - And, Your Honor, I am going to  
13 circle back a little bit in interest of Your Honor's  
14 request in addressing all of our issues. I went through  
15 the ones that were, specifically, addressed to the -- to  
16 the brief.

17 THE COURT - Mainly the statutory issues Mr.  
18 Foster spoke about.

19 MR. PIERCE - Yes, Your Honor. Well, the -- that  
20 issue we believe, one, we agree with Your Honor's  
21 interpretation of the statute. That's what we would put  
22 forth.

23 THE COURT - Yeah, I just -- again, I don't know  
24 -- when I ask questions like that, sometimes I'm playing  
25 devil's adv -- I just want to understand, but I -- it does

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1 appear to me that that's -- based on what I've seen today,  
2 that's what the statutory scheme seems to be.

3 MR. PIERCE - Well, and, Your Honor ---

4 THE COURT - And paragraph one regards --  
5 situations where there's an existing Will and paragraph  
6 two is where the order that they're seeking relief from  
7 was an order of intestacy.

8 MR. PIERCE - Yes, Your Honor. Um ---

9 THE COURT - I'm sorry. I apologize for  
10 interrupting you.

11 MR. PIERCE - No, that's okay. I'm -- I'm  
12 pulling up the rule now, Your Honor. And also, Your  
13 Honor, regardless I guess of whether or not the Court's  
14 interpretation or Mr. Foster's interpretation of that rule  
15 stands, you know, it does require that there was no --  
16 there was no knowledge of the existence of the Will. One  
17 way or the other I believe that's clear. And in Peggy Ann  
18 Mattox's affidavit, at paragraph two it says, I knew my  
19 son, Jonathan Ray Mattox, had executed a Will, I saw it in  
20 his truck the day it was executed, I did not see it again  
21 until the events described below. So I believe there was  
22 knowledge that it existed, and regardless of whether it  
23 has to be a second Will or a newly discovered Will at a  
24 later time, I believe that there was knowledge that this

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1 Will existed and 60 -- 62-3-412 wouldn't apply in either  
2 case based on that knowledge.

3 THE COURT - Mr. Foster has a different  
4 interpretation of existence. He argues that if they think  
5 it's destroyed, then the statute's satisfied.

6 MR. PIERCE - I think, Your Honor, existence is  
7 whether or not it existed or did exist and that affidavit  
8 very clearly says that she knew it existed at one point.

9 THE COURT - Anything else, Mr. Pierce?

10 MR. PIERCE - Yes, Your Honor, and, again, just  
11 in the effort of getting all these out here, you know, the  
12 underlying case trial, hearing on this, 60(B)(1), 60(B)(2)  
13 and 60(B)(5) were all alleged as grounds for relief.  
14 60(B)(1) is the only one that's been raised here today and  
15 the only one that was implicated -- or excuse me -- 60(B)  
16 (2) is the only one that's argued here today and raised  
17 ---

18 THE COURT - Well, let me stop you. Let me ask  
19 Mr. Foster that directly. Mr. Foster, what is -- I know  
20 you're -- you said the basis -- your basis for asking for  
21 relief today are the statute, 62-3-412 and what provisions  
22 of Rule 60 are you relying? Is it 60(B)(2)?

23 MR. FOSTER - 60(B)(2) AND 60(B)(5) as I  
24 understand it, sir.

25 THE COURT - Thank you, sir.

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1 MR. PIERCE - So, Your Honor, we've argued the  
2 60(B)(2) issue as far as due diligence and newly  
3 discovered evidence. 60(B)(5), Your Honor, -- 60(B)(5)  
4 provides that a Court may relieve party from judg -- from  
5 final judgment or order of proceeding if the judgment has  
6 been satisfied, released, discharged or a prior judgment  
7 upon which it is based has been reversed or otherwise  
8 vacated or it is no longer equitable that the judgment  
9 should have prospect application. I don't believe that  
10 there is any other judgment or order that has been  
11 satisfied, released, discharged. I believe Mr. Foster  
12 would be relying on the equity of allowing the -- excuse  
13 me -- the order to stay in effect. According to Malarkey  
14 v. Malarkey -- that's 397 SC 182 -- relief under Rule  
15 60(B)(5) is available only in cases of fraud upon the  
16 Court or rare special, exceptional or unusual  
17 circumstances that may warrant equitable relief including  
18 accident or mistake. There's no allegation of fraud in  
19 this case. There are no rare, special, exceptional or  
20 unusual issues present. There's no accident or mistake,  
21 and we don't believe 60(B)(5) would have any application  
22 in this case.

23 THE COURT - Thank you, Mr. Pierce.

24 MR. PIERCE - May I confer with co-counsel?

25 THE COURT - You certainly may.

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1 (WHEREUPON, DISCUSSION IS HELD BETWEEN MR.  
2 PIERCE AND MR. GETTYS WHICH IS NOT REPORTED AND OUT OF THE  
3 HEARING OF EVERYONE)

4 MR. PIERCE - That's it, Your Honor.

5 THE COURT - Thank you, sir.

6 All right, Mr. Foster, you're the appellant; I'm  
7 going to give you the last word.

8 MR. FOSTER - I'll try to be brief.

9 THE COURT - Yes, sir.

10 MR. FOSTER - Let me go through what I believe  
11 counsel said was not in our brief.

12 THE COURT - Okay.

13 MR. FOSTER - We refer to 62-3-412 on page five  
14 and throughout in our discussion of equity. In terms of  
15 the question of the allowability of the Court's taking  
16 judicial notice, I call the Court's attention to our  
17 language on page six, which states, no evidence as to his  
18 present residence or nor of his control of his mother's  
19 premises was presented. The Honorable Probate Court was  
20 without sufficient evidence to make this conclusion. I  
21 believe that statement is broad enough to allow us to  
22 raise the issue of the judicial notice and its propriety.  
23 On the question of general equity, we spend, I believe  
24 most of pages six, eight and nine on that point. (Pause)  
25 I'm sorry. I don't wish to keep the Court waiting.

1

1 THE COURT - Okay.

2 MR. FOSTER - Co-counsel points out the fact that  
3 60(B)(1) speaks to mistake, inadvertence, surprise or  
4 excusable neglect. I'm not sure that we need to look at  
5 that in light of newly discovered evidence under (2), but  
6 if we pled it before, I don't wish to exclude it now. I'm  
7 sure as usual as lawyers, Your Honor, I'll think of two  
8 arguments as soon as I sit down, but I -- that's where  
9 we're at. Thank you, sir.

10 THE COURT - All right, well, counsel, if you  
11 think of anymore arguments, I'm going to take this matter  
12 under advisements, and I'll be leaving for Hilton Head in  
13 a day, so if you have any authority or anything you want  
14 to submit, I'll be happy to hear from you. I won't make a  
15 decision until next week. Thank you, counsel.

16 MR. PIERCE - Thank you. Your Honor, before we  
17 go, if I missed -- if I missed that statute, I was  
18 certainly not attempting to misrepresent to the Court if  
19 it was raised in the ---

20 THE COURT - Oh, ---

21 MR. PIERCE - --- because I was thumbing through,  
22 I didn't see it as I was sitting here this morning, Your  
23 Honor.

24 THE COURT - Thank you, Mr. Pierce.

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THE COURT - Mr. Foster, whenever you're ready,  
sir.

MR. FOSTER - Thank you, sir.

Your Honor, we have laid out various grounds in Rule 59. I don't wish to hit any of them unless the Court wishes to go through them, but I don't wish to abandon them by failing to get at them. I did want to emphasize a few points. Um, during argument we raised the question of the Court's -- the probate court's taking judicial notice of what it said was an earlier -- an earlier part of this case in which Mr. Mattox was living with his mother. We objected to that on the grounds that as a judicial notice we were given no chance to respond to it. It was not in the record. It occurred for the first time in her order. I believe there was an objection on the part of counsel that we were, quote, raising a new issue. I would make two comments to the Court. First of all, I believe that our grounds as stated in the appeal are certainly wide enough to cover that ground. I would make the more specific point that it is my understanding of appellate procedure that having raised the question of the propriety of the probate court's finding we are allow upon hearing to add an additional ground to sustain our claim. Now, specifically, sir, if I may go to specifics, in the order

1 of this Court affirming the probate court -- this is on  
2 page four of six, the second full paragraph ---

3 THE COURT - Hold on. Let me bring up our order.  
4 Okay, I'm here. Yeah, page four? Okay.

5 MR. FOSTER - Okay, second full paragraph above  
6 (ii) ---

7 THE COURT - Okay.

8 MR. FOSTER - --- there is the statement in the  
9 middle of the paragraph, the fact that the Will was  
10 discovered in a -- in decedent's mother's safe, comma, is,  
11 comma, in fact, comma, evidence of a lack of due  
12 diligence. I am obliged to point out to the Court that  
13 there is no evidence in this case the safe in question  
14 belonged to my client. The safe in question according to  
15 the affidavit given by Mr. Mattox's mother -- well, the  
16 mother of the decedent and Mr. Mattox, my client -- is  
17 that the safe belonged to his mother and she stated he had  
18 access to the ---

19 THE COURT - Mr. Foster, I -- I apolo -- I mean  
20 that was my drafting, and I apologize if I was un -- that  
21 was the intent. What I was trying to say is, the person  
22 who owned the safe was the mother of your client, the  
23 appellant and the decedent.

24 MR. FOSTER - Sir, I am old enough to when I get  
25 to the age when a Judge tries to apologize to me, I feel

1 that I should start getting religion, but I appreciate the  
2 point.

3 THE COURT - No, no, it's -- that -- if there's  
4 -- that lack of clarity is my drafting there, but I ---

5 MR. FOSTER - I have -- I understand, sir, and my  
6 point is simply to pass it off.

7 THE COURT - Yes, sir.

8 MR. FOSTER - Going to the second point down  
9 below, it says, however, comma, his mother's own affidavit  
10 established that confident (sic) access to his mother's  
11 safe and knew the combination of that safe. Again, trying  
12 to keep the record straight, the affidavit in question  
13 said he had access to the combination to the safe, not  
14 that he knew the combination. To go more specifically,  
15 sir, my second point on this matter -- and I may come back  
16 to this with the Court's permission -- goes to the  
17 question of the applicability of the relevant state  
18 statute dealing with reopening the -- a matter where a  
19 Will has been dealt with, which I recall to make  
20 correctly, as 62-3-412.

21 THE COURT - Okay, hold on one moment.

22 MR. FOSTER - The Court -- it's quoted in our  
23 brief, and I have correctly cited it ---

24 THE COURT - Okay, let me find it. One moment  
25 here.

1 MR. FOSTER - I can hand it up if the Court  
2 wishes.

3 THE COURT - If you have a copy, that will be  
4 helpful.

5 MR. FOSTER - If I can find it --- (pause) ---  
6 I'm afraid that's the only one I've got.

7 (WHEREUPON, DOCUMENT HANDED UP TO THE COURT)

8 MR. FOSTER - Judge, I've handed -- thank you,  
9 ma'am.

10 THE COURT - Thank you, Mr. Foster.

11 MR. FOSTER - Sorry I was so slow.

12 If I may go ahead or should I ---

13 THE COURT - Yes, sir. No, I've got it.

14 MR. FOSTER - Thank you.

15 Your Honor, we've cited this language in the  
16 statute, the specific part of this, and I would take the  
17 Court's permission to read. It states, subject to appeal  
18 and subject to vacation as provided herein and in Section  
19 62-3-413, a formal testacy order under Section 62-3-409  
20 through 62-3-411 including an order the decedent left no  
21 valid Will and determining errors is final, etcetera,  
22 except that, and then number one, the one we've been  
23 talking about, is the Court should entertain a petition  
24 for modification of its order and probate of another Will  
25 of the decedent to be shown of the proponents of later

1 offered Will unaware of its existence at the time. The  
2 Court, as I understand it, in accordance with counsel's  
3 argument, reads the exception as bearing entirely upon the  
4 question of, quote, another Will. I would argue, Your  
5 Honor, in terms of the underlying section that I read out  
6 of the first part of this statute, the obvious intent of  
7 the statute, however poorly stated, is to include all  
8 instances where there was no valid Will. In this case  
9 that was, specifically, what the probate court found.  
10 There was an allegation there was a Will; it could not be  
11 found; the probate court determined there was no valid  
12 Will. I would suggest that to read any other matter into  
13 this is effectively to say, to have the statute say, here  
14 is the general situation, but we are only going to allow a  
15 -- a -- sorry, Your Honor -- we're only going to allow you  
16 to repair the situation, if, in fact, there was, quote,  
17 another Will. This is perhaps poor drafting, but I  
18 believe I am correct in stating that any reasonable  
19 reading of the probate code, and we've cited the general  
20 language of what it intends, is that it intends to allow a  
21 remedy in all such situations. Now, if that is the case,  
22 we've argued that the existence of the Will, obviously,  
23 was unknown, at least its presence was unknown, as was  
24 determined of the original probate court, it could not be  
25 found. Therefore, we believe that 62-3-412, as well as

1 the point that opposing counsel makes about independent  
2 actions in equity is broad enough to cover a situation of  
3 this kind. Might I hand up one piece of authority, Your  
4 Honor?

5 THE COURT - You may.

6 (WHEREUPON, DOCUMENT HANDED UP TO THE COURT)

7 MR. FOSTER - This is Ashburn vs. Rogers in the  
8 Court of Appeals in 2017. The point that we have -- if  
9 I'm not going too fast ---

10 THE COURT - Let me ---

11 MR. FOSTER - --- the point that we have marked  
12 on this is dicta and is the footnote, but it is the Court  
13 finding in that -- or Court of Appeals finding in that  
14 case, that the usage of an independent action -- and I  
15 would say that is analogous to 62-3-412 in its intent --  
16 is not limited to the grounds used under Rule 60(B).  
17 That, essentially, is where we're coming from. The Court,  
18 I believe, reads, the case we cited, Lanier, as  
19 essentially saying, Mr. Mattox was at fault because he did  
20 not go into his mother's safe and find the Will. Well,  
21 first of all, we would challenge the question of whether  
22 he even lived in the household. There is, in my opinion,  
23 no admissible evidence that he did so.

1 THE COURT - Let me, if you don't mind, let me  
2 stop you, Mr. Foster. That was certainly not a basis for  
3 my order.

4 MR. FOSTER - Okay, sir.

5 THE COURT - I mean I understand that was a fact  
6 recited by the probate judge. Was that a basis for her  
7 order, that he lived -- they lived in the same house?

8 MR. FOSTER - That was our argument, sir, that  
9 she -- she put that in her order denying our motion and  
10 action to reopen the case, and we argued at the hearing of  
11 your -- before you, Your Honor, that, essentially, that  
12 was her taking judicial notice of a point that we were  
13 given no ability to respond to. I ---

14 THE COURT - My -- I'm sorry, go ahead.

15 MR. FOSTER - I appreciate the Court's comments.  
16 As you know I have the duty to make it clear as to what  
17 issues we're talking about, however, the Court may decide.  
18 Our view is that under authority such as Ashburn and under  
19 authority such as Lanier, the duty to search does not  
20 extend to the level, with the greatest respect, that I  
21 understand the Court's decision goes to. We're talking  
22 about a safe owned by Mr. Mattox's mother to which he did  
23 know the combination, or pardon, knowed (sic) where to  
24 find the combination, very much like senior citizens will  
25 do, if I may say, and because of that, he is precluded

1 from making this claim. Ms. Mattox, the mother, stated  
2 clearly in her affidavit she had no idea the thing was in  
3 her safe. Consequently, we believe under Lanier, the duty  
4 does not extend to that limit. Basically, there was no  
5 reason to say that he was not acting reasonably in  
6 searching for a thing that he did not know could be  
7 present in that location. Lanier also cites cases, which  
8 we -- and we've handed up the case to the Court -- I can  
9 hand it up again -- in which under general equitable  
10 principles, a later discovered Will was allowed in.  
11 Beyond that, Your Honor, and hoping I'm not trying the  
12 Court's patience, I would emphasize one other thing.  
13 We're not here to say we win; we're here to say, there's  
14 an issue that needs to be tried. We believe that Ms.  
15 Mattox received sufficient property from her dead husband  
16 to satisfy the matter of a spouse's  
17 share, and that given that fact and given the existence of  
18 the Will, the remainder of his estate should be awarded to  
19 my client, the loadstar, if I may say, of all probate  
20 jurisprudence which is to fulfill the Will in question.

21           Your Honor, I think we've hit the main points  
22 there. If there's anything I can add, I'm happy to do so.

23           THE COURT - Thank you, Mr. Foster. Let me hear  
24 from Mr. Pierce.

1           MR. PIERCE - Your Honor, I'm going to try and be  
2 brief. I think it's important to understand what we  
3 actually are here to talk about today; it's a motion to  
4 alter or amend judgment. This Court's mandate under the  
5 case law and the statutes and its appellate capacity at  
6 the initial appellate hearing was to review the facts and  
7 the law of the case on an abuse of discretion basis,  
8 therefore, because the right to grant a Rule 59(E) motion  
9 is -- it lies within the sound discretion of the Court  
10 that heard the underlying matter. It seems that the issue  
11 here is whether or not Your Honor believes that your order  
12 is incorrect in finding that Judge Rogers did not commit  
13 an abuse of discretion and, therefore, was affirmable.  
14 That's what we're here to talk about today. We're not  
15 here to talk about whether there's an issue to be tried or  
16 whether he wins. The issue was whether or not Your  
17 Honor's order is correct based on the prescribed standard  
18 of review. That being the case, Your Honor, we believe  
19 this Court's order affirming Judge Roger's -- found that  
20 Judge Roger's  
21 findings in the underlying trial and at the motion for  
22 relief from judgment or Rule 60(B) were supported by  
23 facts, namely that Rule 60(B)(1) and 60(B)(5) do not apply  
24 in this case based on the facts and law cited by Your  
25 Honor in your order affirming -- further that under 60(B)

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1 (2), due diligence was not exercised, and the same facts  
2 that were presented to Your Honor at the appellate hearing  
3 were presented to Judge Rogers at the Rule 60 hearing,  
4 Your Honor found those facts to be persuasive that -- and  
5 along with the case law in Lanier and Jamison that due  
6 diligence was not exercised. Further, Your Honor, based  
7 on the Mr. T case, 62-3-412 does not apply in this  
8 instance. Your Honor found that correctly. The statute  
9 that I believe was cited was 62-3-412(1). If there's  
10 another statute that addresses this particular set of  
11 facts where there's an intestate share and it supports the  
12 appellant's argument, that statute was not cited and is  
13 not properly raised today on a Rule 59(E) motion, three  
14 steps removed from the underlying trial. And  
15 backtracking, Your Honor, just, specifically, noting that  
16 due diligence was not exerted in this case, your Court  
17 (sic) -- Your Honor finding that there was no,  
18 specifically, targeted search as required under Jamison,  
19 that the Will was discovered in appellant's mother's safe  
20 and that appellant had access to the safe and to the  
21 combination, and the fact that he either knew the  
22 combination or knew where to find the combination I  
23 believe is distinction without difference here. He had  
24 access to it and could've opened the safe. Your Honor, I  
25 believe that taking into account the standard of review

1 that this Court was required to apply in putting forth its  
2 order that Your Honor found correctly, this Court found  
3 correctly, and there are no grounds for Your Honor to  
4 reverse yourself on this Rule 59(E) motion and would ask  
5 that it be denied.

6 THE COURT - Mr. Foster, give me the last word.

7 MR. FOSTER - Briefly, sir, if I may. Whether  
8 Your Honor's powers are analogous to a full scale  
9 appellate matter before the Court of Appeals or the  
10 Supreme Court or whether it is under Rule 59, we take the  
11 view that we are well within your authority to raise the  
12 points we raised. So that's, basically, all I can say.  
13 With respect to co-counsel, who certainly knows what he's  
14 doing, I didn't hear any citations, though he did refer  
15 generally to the law to say, you are so limited because  
16 here is the statute, here is the regulation. Beyond that,  
17 I would say again, we believe we have satisfied the  
18 requirements of a Rule 60(B). If we have not, we have  
19 cited 62-3-412; we have cited the action for an  
20 independent action equity. Those actions -- we've handed  
21 up Ashburn -- are sufficient to allow this Court to reach  
22 the question of whether this Will should be allowed into  
23 probate and we should be allowed to move forward on this  
24 litigation. I'll be happy to add anything else the Court  
25 wishes.

1 THE COURT - Thank you, Mr. Foster.

2 Mr. PIERCE - Your Honor, I did fail to mention I  
3 filed a memorandum in opposition yesterday. I'm not sure  
4 if you got a copy but I can hand ---

5 THE COURT - Ms. Strait is very efficient, and  
6 she prepares our binders several days in advance, so  
7 anything that's filed right before the hearing I don't  
8 typically get, that's ---

9 MR. PIERCE - Thank you, Your Honor.

10 And if I may respond, Your Honor, briefly,  
11 unless you're -- don't want to hear from me.

12 THE COURT - I think I've -- I mean if you think  
13 -- go ahead. Yeah, go ahead.

14 MR. PIERCE - Well, Your Honor, only to say that  
15 the standard of review is well settled. It is cited in my  
16 memorandum in opposition, and the standard for review in  
17 the underlying appellate argument was also cited in my  
18 memorandum or my brief and was also addressed at the  
19 hearing, so I'm not conjuring standards of review.

20 THE COURT - I'm going to deny the motion. The  
21 basis for the Court's ruling is I still -- it's a Rule 59  
22 -- I'm sorry -- lost my train of thought. It's a Rule  
23 60(B)(2) motion and there has to be a diligence and I --  
24 although there is an issue -- I mean sounds like there's a  
25 factual issue as to where -- whether he stayed with his

1 mother and the Court's opinion, that's not a material  
2 fact. It's undisputed that he had access to the  
3 combination to the safe and the Court's view -- and it was  
4 in the probate court's view that's the place they  
5 should've looked. As far as 62-3-412, it's still the  
6 Court's view that, although it's not the most clearly  
7 drafted statute, there are -- in the Court's view there  
8 are -- one and two are the different -- number one is the  
9 situation where there is a Will that's been probated and  
10 number two is the intestate provision, and so we will be  
11 under the intestate provision in this case, and so there's  
12 no provision for finding a Will after -- after the probate  
13 court's found there's been intestacy.

14           So, Mr. Foster, you are right that I made an  
15 error in my order where I said that the, um, -- that he  
16 knew the combination, when, in fact, the evidence was he  
17 had access to the combination. I'll be happy -- what I'll  
18 do is a Form 4. I will make that correction and say, but  
19 ---

20           MR. FOSTER - Your Honor is correct. If I may be  
21 allowed? The statement that it was his safe ---

22           THE COURT - Okay. I mean do you want me to  
23 reword that -- that quote? I mean I ---

24           MR. FOSTER - Well, the earlier statement says  
25 that the safe belonged -- I'm characterizing -- the safe

1

1 was his and his mother's. I don't believe that's accurate  
2 in terms of the evidence in ---

3 THE COURT - But that was just -- again, that --  
4 but what I -- what I said was it was appellant and  
5 decedent's mother's safe, meaning that the -- the  
6 appellant's mother's safe and I was just trying to  
7 identify who -- maybe I'm -- am I lacking an apostrophe,  
8 just ---

9 MR. FOSTER - The fact that I still -- I have a  
10 beard now does not mean the Court has to apologize to me.

11 THE COURT - No, it's -- I mean I -- I want to  
12 write it clear, because what I'm trying to say is that the  
13 mother is the mother of the appellant and the decedent and  
14 it's her safe.

15 MR. FOSTER - Yes, sir.

16 THE COURT - That was what I was trying to write.

17 MR. FOSTER - Yes, sir.

18 THE COURT - So grammatically, what -- how can I  
19 make that more clear?

20 MR. FOSTER - I defer to the Court.

21 THE COURT - Okay.

22 MR. FOSTER - I believe you stated it for the  
23 record, sir.

24 THE COURT - Okay. Well, that's -- and I'll be  
25 happy to put that -- um -- and for the -- I'll put in the

THE STATE OF SOUTH CAROLINA  
In The Circuit Court

FILED RECEIVED

APPEAL FROM YORK COUNTY PROBATE COURT

2018 DEC 5 PM 4: 25

The Honorable Carolyn W. Rogers, Judge of Probate  
CAROLYN W. ROGERS  
JUDGE OF PROBATE  
YORK COUNTY, SC

Case File No. 2016-ES-46-01230

Case No. 2018-CP-46-\_\_\_\_\_

In the Matter of JONATHAN MATTOX,

DAVID J. MATTOX, Appellant,

vs.

LISA JO BARE MATTOX, Respondent.

NOTICE OF APPEAL

David J. Mattox appeals the Order on Omitted Spouse Claim of the Honorable Carolyn W. Rogers, Judge of the Probate Court, dated and filed November 21<sup>st</sup>, 2018. Appellant received written notice of entry of this order on November 26<sup>th</sup>, 2018.

Michael L. Brown, Jr.  
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Zachary M. Merritt  
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December 5, 2018

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ELECTRONICALLY FILED - 2018 Dec 05 10:37 AM - YORK - COMMON PLEAS - CASE#2018CP4603672

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STATE OF SOUTH CAROLINA

IN THE PROBATE COURT  
CASE FILE NO.: 2016ES4601230

COUNTY OF YORK

IN THE MATTER OF JONATHAN MATTOX

CAROLYN W. ROGERS  
JUDGE OF PROBATE  
YORK COUNTY, SC

2018 NOV 21 AM 10:00

JUDGMENT

David J. Mattox

Lisa Jo Bare Mattox

PETITIONER(S)

RESPONDENT(S)

CHECK ONE:

DECISION BY THE COURT. This action came to trial or hearing before the court.  
The issues have been tried or heard and a decision rendered.

ACTION DISMISSED \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

IT IS ORDERED AND ADJUDGED:  See attached order;  Statement of judgment by the court.

Dated at York, South Carolina, this 21 day of November, 2018.

*Carolyn W Rogers*

Carolyn W. Rogers  
Judge of Probate

This judgment was entered on the 21st day of November, 2018, and a copy mailed first class this 21st day of November, 2018, to attorneys of record or to parties (when appearing *pro se*) as follows:

John Martin Foster, Esquire  
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Rock Hill, SC 29731

John P. Gettys, Jr., Esquire  
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Rock Hill, SC 29731

Zachary M. Merritt, Esquire  
Post Office Box 1025  
Rock Hill, SC 29731

J. Nathaniel Pierce, Esquire -  
Post Office Box 707  
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NOV 26 2018



resident of York County and passed away on October 1, 2016.

2. The Decedent met his wife, now widow, Lisa Mattox, in 2006 and they were wed in 2011.

3. The Respondent filed an informal application for appointment on October 13, 2016, indicating the Decedent had died without a Will.

4. The Respondent was appointed Personal Representative of the estate on October 13, 2016.

5. Petitioner filed a Summons, Complaint and Petition for Formal Appointment on April 28, 2017.

6. Petitioner offered for probate a copy of a Will signed in Gwinnett County, Georgia, in 2005 by the Decedent, but was unable to produce the original Will.

7. A hearing was held on August 9, 2017.

8. At the August 9 hearing, both the Petitioner and Respondent had the opportunity to address the omitted spouse issue and the issue was thoroughly addressed.

9. The Court issued an order on September 26, 2017 denying Petitioner's application to be appointed Personal Representative of the Estate (the "Order").

10. The Order further states in paragraph G that the question of the omitted spouse share was rendered moot because Jonathan Mattox died intestate, and further states in paragraph H that there was no credible evidence presented to the Court that Jonathan Mattox provided for his surviving spouse outside of the Will or in lieu of a testamentary disposition.

11. Subsequently, the purported original Will was found in Decedent's mother's house in Pawley's Island, South Carolina.

12. Petitioner testified at the hearing held on August 9, 2017, that he lived with his mother in Pawley's Island where the Will was discovered.

#2 of 4  
CWK

CONCLUSIONS OF LAW

1. Jurisdiction of this Court in the above matter is properly established and venue is properly laid in York County, South Carolina, and all parties were timely served with the Summons, Petition and Notice of Hearing.

2. For the following reasons, Petitioner did not exercise due diligence in discovering the original Will and is not entitled to relief under South Carolina Rule of Civil Procedure 60:

- a. Petitioner testified at the August 2017 hearing that he lived with his Mother in Pawley's Island, which is where the original Will was discovered;
- b. The original Will was discovered in a safe in the Mother's residence – a natural and obvious place for important papers to be placed; and
- c. Petitioner submitted an affidavit from his mother in which she affirms she knew the original Will existed.

3. It is well settled law in South Carolina that when a testator fails to provide by Will for his surviving spouse who married the testator after the execution of the Will, the omitted spouse shall receive the same share of the estate she would have received if the decedent left no Will. See *In Re Timmerman*, 331 S.C. 455, 502 S.E. 2d 920 (1998).

4. The Petitioner presented no credible evidence to the Court that the Decedent was contemplating marriage when the Will was executed in 2005. See *In Re Miles*, 440 S.E. 2d 882, 312 S.C. 408 (1994).

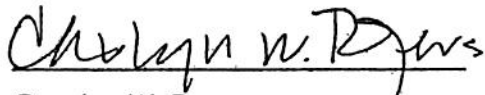
5. Because the Respondent established her entitlement to an omitted spouse share pursuant to S.C. Code Ann. § 62-3-301 in that she proved (1) the omission was not intentional as Mr. Mattox and Respondent did not know each other when the Will was executed, and (2) Mr. Mattox made no in-lieu provisions

#3 of 4  
CWR

for her, the discovery and probate of Mr. Mattox's original Will would not change the outcome of the 2017 proceeding. See *Southeastern Housing Foundation v. Smith*, 380 S.C. 621, 670 S.E.2d 680 (Ct. App. 2008).

6. All of the elements of *res judicata* as to the omitted spouse issue are satisfied – (1) the identity of the parties, (2) identity of the subject matter, and (3) a previous adjudication. See *Plum Creek Development Co., Inc. v. City of Conway*, 334 S.C. 30, 512 S.E.2d (1999).

IT IS HEREBY ORDERED, ADJUDGED AND DECREED that the Decedent died intestate without children, leaving his spouse as his sole heir pursuant to S.C. Code Ann. § 62-2-301 (1986, as amended). Petitioner's Notice, Motion and Petition for Relief from Judgment and For Stay of Enforcement is denied.

  
Carolyn W. Rogers  
Judge of Probate, York County, SC

York, South Carolina  
November 21, 2018.

#4 of 4  
CWR

THE STATE OF SOUTH CAROLINA  
In The Circuit Court

FILED RECEIVED

APPEAL FROM YORK COUNTY PROBATE COURT 2018 DEC 5 PM 4: 26

The Honorable Carolyn W. Rogers, Judge of Probate  
CAROLYN W. ROGERS  
JUDGE OF PROBATE  
YORK COUNTY, SC

Case File No. 2016-ES-46-01230

Case No. 2018-CP-46-\_\_\_\_\_

In the Matter of JONATHAN MATTOX,

DAVID J. MATTOX,

Appellant,

vs.

LISA JO BARE MATTOX,

Réspondent.

PROOF OF SERVICE

I certify that I have served the Notice of Appeal dated December 5, 2018, on the following counsel or persons of record:

John P. Gettys, Jr.  
J. Nathaniel Pierce  
Morton & Gettys  
Post Office Box 707  
Rock Hill, S.C. 29731

by depositing the same with the United States mail, with sufficient first class postage attached, properly addressed to the clerk of the Court, and with a copy also directed to the respective last known address(es) of those attorney(s) and/or persons set out above, pursuant to Rule 262(b), S.C.A.C.R.

December 5, 2018

/s/ John Martin Foster  
Post Office Box 106  
Rock Hill, S. C. 29731-6106  
803 324-8100  
Attorney for Appellant

THE STATE OF SOUTH CAROLINA  
In The Court of Appeals

APPEAL FROM YORK COUNTY  
In The Circuit Court

William A. McKinnon, Circuit Court Judge

Case No. 2017-CP-46-03672

David J. Mattox,

Appellant,

v.

Lisa Jo Bare Mattox,

Respondent.

NOTICE OF APPEAL

**RECEIVED**  
OCT 30 2019  
SC Court of Appeals

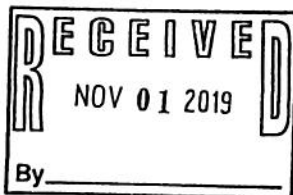
David J. Mattox appeals the following orders:

Order Affirming Probate Court, filed September 3, 2019, by the Honorable William A. McKinnon; and

Order denying Plaintiffs' Motion to Alter or Amend Judgment, filed October 2, 2019, by the Honorable William A. McKinnon.

Appellants received written notice of entry of the final Order listed above on October 2, 2019.

Michael L. Brown, Jr.  
Zachary M. Merritt  
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Rock Hill, S.C. 29731  
803 328-8822



John Martin Foster  
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803 324-8100

Attorneys for Appellant

By:   
John Martin Foster

October 28, 2019

Rock Hill, South Carolina

Other Counsel of Record:

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J. Nathaniel Pierce  
Morton & Gettys  
Post Office Box 707  
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Attorneys for Respondent  
803 366-3388

THE STATE OF SOUTH CAROLINA  
In The Court of Appeals

APPEAL FROM YORK COUNTY  
In The Circuit Court

William A. McKinnon, Circuit Court Judge

Case No. 2017-CP-46-03672

**RECEIVED**  
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SC Court of Appeals

David J. Mattox,

Appellant,

v.

Lisa Jo Bare Mattox,

Respondent.

CERTIFICATE OF SERVICE

The undersigned, counsel for Appellants in the civil appeal above, hereby certifies that on the date written below he served copies of the following pleadings or documents in the above-captioned and numbered civil action:

Notice of Appeal, with referenced Orders; and  
this Certificate of Service

the original of which was sent to be filed with the Clerk of the Court for the Court named above,

by depositing the same with the United States Postal Service on the date above, with sufficient postage affixed and directed to the respective last known address(es) of those attorney(s) and/or persons set out below, or

by hand delivering copies of the same to the following persons, or by leaving the same at that person's office with that person's clerk or some other person in charge thereof, or by leaving it in a conspicuous place therein; or if the office was closed or the person to be served has no office, by leaving a copy at that person's dwelling place or usual place of abode with some person of suitable

age and discretion then residing therein:

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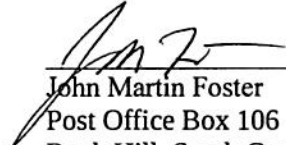
By:   
John Martin Foster

October 28, 2019

Rock Hill, South Carolina

**CERTIFICATE OF COUNSEL**

The undersigned hereby certifies that this Record on Appeal contains all material proposed to be included by any of the parties and not any other material.

  
\_\_\_\_\_  
John Martin Foster  
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(803) 324-8100  
Attorney for Appellant

June 26, 2020

THE STATE OF SOUTH CAROLINA  
In The Court of Appeals

APPEAL FROM YORK COUNTY  
In The Circuit Court

William A. McKinnon, Circuit Court Judge

Appellate Case No. 2019-001827

DAVID J. MATTOX,

v.

LISA JO BARE MATTOX,

CERTIFICATE OF SERVICE

I certify that I have, on the date below, served one (1) copy of the Record on Appeal, on the following party of record:

John P. Gettys, Jr.  
J. Nathaniel Pierce  
Morton & Gettys  
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Rock Hill, S.C.29731  
Attorneys for Respondent

by using opposing counsels' e-mail addresses listed in the Attorney Information System (AIS), as allowed by Section (g)(3) of the Amended Order of the Appellate Courts during the Coronavirus Emergency (As Amended May 29, 2020).

June 26, 2020

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By:  \_\_\_\_\_

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Jun 26 2020

SC Court of Appeals