

THE STATE OF SOUTH CAROLINA  
In The Court of Appeals

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APPEAL FROM AIKEN COUNTY  
Court of Common Pleas

Doyet A. Early III, Circuit Court Judge

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Case Nos. 2013-CP-02-02849, 2013-CP-02-02850

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Appellate Case No. 2015-002417

RECEIVED  
AUG 04 2017  
SC Court of Appeals

Tommie Rae Brown.....Respondent,

v.

David C. Sojourner, Jr., in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000, Deana Brown Thomas, Yamma Brown, Venisha Brown, Larry Brown, Terry Brown, and Daryl Brown,

of whom David C. Sojourner, Jr., in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000, is the.....Appellant.

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NOTICE OF SETTLEMENT BETWEEN APPELLANT  
DAVID C. SOJOURNER, JR.  
AND RESPONDENT TOMMIE RAE BROWN AND  
WITHDRAWAL OF APPEAL OF DAVID C. SOJOURNER JR.

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TO: THE HONORABLE CHIEF JUDGE AND THE ASSOCIATE JUDGES OF THE  
SOUTH CAROLINA COURT OF APPEALS:

Appellant David C. Sojourner, Jr., in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000 (“LSA”), and Tommie Rae Brown (“Respondent”) jointly provide notice of a settlement between

the LSA and Respondent, and, pursuant to the terms of the Settlement Agreement attached as **Exhibit 1** (“Settlement Agreement”), the LSA hereby withdraws the LSA’s appeal, filed November 20, 2015 (the “LSA Appeal”).

On January 13, 2015, the Honorable Doyet A. Early, III (the “Lower Court”) filed an order granting Respondent Tommie Rae Brown’s (“Respondent”) Motion for Summary Judgment and denying the LSA’s cross Motion for Summary Judgment. Following the Lower Court’s denial of the LSA’s Motion to Alter, Amend, or Reconsider (collectively, the “Spousal Orders”), the LSA timely appealed on November 20, 2015.

Deanna Brown-Thomas, Yamma Brown, and Venisha Brown filed a Notice of Appeal on November 20, 2015; Terry Brown filed a Notice of Appeal on November 24, 2013; Michael Deon Brown filed a Notice of Appeal on November 24, 2015; and Daryl Brown filed a Notice of Appeal on November 24, 2015. These four appeals, along with the LSA’s appeal, are all part of this appellate proceeding, Case No. 2015-002417.

On March 8, 2017, Respondent, the LSA, and Russell L. Bauknight, as Personal Representative of the Estate of James Brown and Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000, entered into the Settlement Agreement (“Settlement Agreement”), attached as **Exhibit 1**. The Settlement Agreement required the settling parties to take certain actions at the Lower Court and this honorable Court.

On March 8, 2017, the LSA and Respondent filed a Joint Motion to Stay Appeal Pending Consummation of Settlement, attached as **Exhibit 2**, and consistent with the obligations in the Settlement Agreement, simultaneously filed a Joint Motion to Dismiss in Lower Court Case No. 2008-CP-02-01647, providing notice of the settlement to all parties of record and seeking dismissal with prejudice Respondent’s claims to set aside

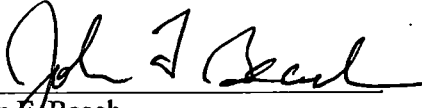
the James Brown 2000 Will and/or Trust, such claims pending in Case No. 2008-CP-02-01647.

The Lower Court heard the parties' Joint Motion to Dismiss on April 26, 2017 and filed an order granting the Joint Motion to Dismiss on May 11, 2017 ("Order of Dismissal"). Since that time, no party has filed for reconsideration or appeal of the Order of Dismissal. Because the time deadlines for reconsideration and appeal have both passed, the Order of Dismissal is now final.

Pursuant to the terms of the parties' Settlement Agreement, the LSA and Respondent jointly notify this Court of their settlement and the LSA hereby withdraws the LSA's appeal and participation as a party in this appellate action. The remaining parties are adequately represented and capable of asserting their appeals in the LSA's absence. The remaining appellants are all beneficiaries of the James Brown 2000 Will and/or Trust, are represented by counsel, have been involved in proceedings before the Lower Court for several years, some more than ten, and are capable of adequately representing their interests in this appeal. Accordingly, the settlement and the LSA's withdrawal of its appeal and participation in the appeal will not conclude this appeal with respect to remaining parties.

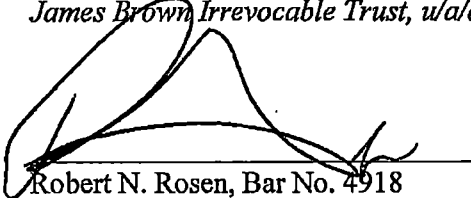
The LSA and Respondent therefore jointly notify this Court of their settlement and the LSA hereby withdraws the LSA's Appeal and ends the LSA's further participation as a party in this appellate action.

*[Signature page to follow.]*



John F. Beach  
Lyndey Ritz Zwingelberg  
ADAMS AND REESE LLP  
1501 Main Street, 5th Floor  
Columbia, South Carolina 29201  
Telephone: (803) 254-4190

*Attorneys for Appellant David C. Sojourner, Jr.,  
Limited Special Administrator of the Estate of  
James Brown and Limited Special Trustee of the  
James Brown Irrevocable Trust, w/a/d August 1, 2000*



Robert N. Rosen, Bar No. 4918  
Rosen Law Firm, LLC  
18 Broad Street, Suite 201  
Charleston SC 29401  
Telephone: (843) 377-1700

S. Alan Medlin  
1713 Phelps Street  
Columbia SC 29205  
Telephone: (803) 777-7465

T. Heyward Carter, Jr.  
Evans, Carter, Kunes & Bennett  
115 Church Street  
Charleston, SC 29401

David L. Michel  
Michel Law Firm, LLC  
192 East Bay Street, Suite 202  
Charleston, SC 29401

Arnold S. Goodstein  
Goodstein Law Firm, LLC  
P.O. Box 2350  
Summerville, SC 29484-2350

*Attorneys for Tommie Rae Brown*

**SETTLEMENT AGREEMENT**

WHEREAS, Decedent James Brown (“Decedent”) died on December 25, 2006, a resident of Aiken County, South Carolina;

WHEREAS, a Last Will and Testament dated August 1, 2000 (“2000 Will”) was submitted for informal probate in the Aiken County Probate Court on January 18, 2007 and assigned Probate Case No. 2007-ES-02-0056;

WHEREAS, December 19, 2007 Tommie Rae Brown (“TRB”) filed petitions to set aside the probate of 2000 Will and to set aside an Irrevocable Trust dated August 1, 2000 (“2000 Trust”) based upon allegations of undue influence and fraud (the “Undue Influence Claim”);

WHEREAS, after removal from the Probate Court to the Court of Common Pleas, the Undue Influence Claims, probate of the 2000 Will, and other matters were consolidated under the present Case No. 2008-CP-02-1647 and have been litigated under that case number through the present;

WHEREAS, on January 31, 2007, TRB filed a petition asserting she is Decedent’s surviving spouse and claiming an omitted spouse’s share of the Estate under S.C. Code Ann., Section 62-2-301 (“Omitted Spouse Claim”) and a surviving spouse’s elective share of the Estate under S.C. Code Ann., Section 62-2-201, et seq. (“Elective Share Claim”) (collectively, TRB’s “Spousal Claims”);

WHEREAS, through orders dated October 1, 2013 and October 10, 2013 (the “Appointment Orders”), the South Carolina Court of Common Pleas and the South Carolina Probate Court appointed Dave C. Sojourner, Jr. as Limited Special Administrator for the Estate of James Brown and as Limited Special Trustee of the James Brown 2000 Irrevocable Trust (the “LSA”), with sole, specific, and exclusive authority to defend the Estate and Trust against, among other claims, TRB’s Undue Influence Claims and Spousal Claims;

WHEREAS, on December 16, 2013, the Court severed the Spousal Claims from the Undue Influence Claims, assigning to them Case Nos. 2013-CP-02-02849 and 2013-CP-02-02850;

WHEREAS, on January 13, 2015 and October 26, 2015 the Court issued orders granting partial summary judgment to TRB and finding her to be Decedent’s surviving spouse (the “Spousal Orders”);

WHEREAS, on November 20, 2015 the LSA appealed the Spousal Orders. The LSA’s appeal of the Spousal Orders is currently pending in the South Carolina Court of Appeals and assigned Appellate Case No. 2015-002417 (the “Surviving Spouse Appeal”);

WHEREAS, on November 20, 2015 Deanna Brown-Thomas, Yamma Brown, and Venisha Brown, on November 23, 2015, Michael Deon Brown, and on November 24, 2015, Terry Brown



and Daryl Brown (collectively, the “Brown Children”) also appealed the Spousal Orders, their appeals being a part of the Surviving Spouse Appeal;

WHEREAS, TRB, the LSA, and Russell L. Bauknight, as Personal Representative of the Estate (the “PR”) (together, the “Settling Parties”), have agreed to settle TRB’s Undue Influence Claims and Spousal Claims through the terms of this agreement (the “Settlement Agreement”);

NOW THEREFORE, the Settling Parties hereby settle TRB’s Undue Influence Claims and Spousal Claims as follows:

1. As more fully set forth below, TRB will withdraw her Undue Influence Claims, Case No. 2008-CP-02-1647, ending those claims with respect to the 2000 Will and 2000 Trust with prejudice. TRB’s withdrawal will fully and finally terminate her challenge to the validity of the 2000 Will and 2000 Trust and, with that withdrawal, she forever relinquishes her alleged right to challenge the validity of the 2000 Will and 2000 Trust. The parties hereto recognize that the Brown Children, other than Terry Brown, have settled their separate contests of the 2000 Will and 2000 Trust, although the settlement is being appealed by Terry Brown, Appellate Case No. 2016-001373.

2. As additional consideration for the PR to join in this Settlement Agreement, the PR and TRB acknowledge the following:

*Termination rights.* In the event TRB is determined to be Decedent’s “surviving spouse,” which will entitle her to 50% of the valuable federal copyright termination rights, TRB will contribute 65% of the proceeds from her federal copyright termination rights to the charitable trust created by the 2000 Trust (“Charitable Trust”). Without contribution by TRB, these federal termination rights proceeds would never belong to the Charitable Trust because, under applicable federal law, these termination rights belong solely to Decedent’s surviving spouse and children (or their issue). The Brown Children, other than Terry Brown, have settled their separate contests of the 2000 Will and 2000 Trust, although the settlement is being appealed by Terry Brown, despite his claim that he wants the 2000 Will and Trust to be upheld.<sup>1</sup> Consequently, the real dispute over TRB’s status as Decedent’s surviving spouse is over the federal termination rights rather than an interest in Decedent’s Estate or Trust. The only way the Charitable Trust will receive any proceeds from the federal termination rights is through TRB’s contribution thereof and TRB will receive the proceeds she will contribute only if she is Decedent’s surviving spouse. The value of the federal termination rights could be worth tens of millions of dollars, a substantial portion of which will inure to the benefit of the Charitable Trust assuming TRB is the surviving spouse.

*The Appointment Orders do not place a duty on the LSA with regard to federal copyright termination rights, which are outside of the probate estate and, therefore, not directly subject to TRB’s Undue Influence Claims and Spousal Claims. Accordingly, the LSA has not confirmed or expended estate funds to study the information set forth in this paragraph.*

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<sup>1</sup> Terry Brown is not contesting the 2000 will or 2000 Trust, although he is appealing the settlement with the remaining Brown children that would dismiss their contests of the 2000 Will and Trust. If that settlement is affirmed, then this settlement with TRB will effectively end all litigation over the validity of the 2000 Will and Trust and ensure the existence of a charitable trust.

3. As more fully set forth below, the LSA will withdraw his appeal of the Spousal Orders and end all participation as an appellant to the Surviving Spouse Appeal.

4. TRB will take the following actions with respect to her Spousal Claims:

(a) Within ten (10) days of a final appellate court decision in the Surviving Spouse Appeal establishing that TRB is or is not Decedent's surviving spouse, TRB will withdraw and/or dismiss with prejudice her Spousal Claims and release the LSA from any and all claims she may have, as surviving spouse or otherwise.

(b) if in the Surviving Spouse Appeal, a final appellate court decision *fails to establish* TRB is or is not the Decedent's surviving spouse but, instead, remands the case to the lower court for further proceedings to determine whether TRB is the Decedent's surviving spouse, then, on remand, TRB and the LSA will join in a motion to bifurcate the issues so that the lower court first tries and/or rules upon the sole question whether TRB is the Decedent's surviving spouse. If a final lower court order, or, if appealed, a final appellate court decision, establishes TRB is the Decedent's surviving spouse, then before the lower court addresses and/or rules upon the remainder of TRB's Spousal Claims, TRB will immediately withdraw and/or dismiss with prejudice her Spousal Claims and release the LSA from any and all claims she may have, as surviving spouse or otherwise. An underlying foundation of this Settlement Agreement is that TRB will relinquish her Spousal Claims and will not pursue her Spousal Claims, regardless of how procedural matters ultimately develop in the trial or appellate court.

5. Within ten (10) days of the Settling Parties' execution of this Settlement Agreement, the Settling Parties will jointly seek a status conference with the lower court, at which the Settling Parties will announce this settlement to the Court, place the executed Settlement Agreement into the record, and submit to the lower court a proposed consent order of dismissal, dismissing the Undue Influence Claims with prejudice.

6. Within ten (10) days of a final order dismissing the Undue Influence Claims with prejudice (as described in the immediately preceding paragraph of this Settlement Agreement), the Settling Parties will jointly submit to the South Carolina Court of Appeals a Notice of Settlement and Withdrawal of LSA's Notice of Appeal, informing the Court the Settling Parties have reached a settlement, withdrawing the LSA's appeal of the Spousal Orders, and stating that the Brown Children, as the remaining appellants in the Spousal Appeal, are adequately represented and capable of asserting their appeal of the Spousal Orders in the LSA's absence as an appealing party. The Notice of Settlement and Withdrawal of Appeal will include this executed Settlement Agreement as an Exhibit.

7. Each signatory to this Settlement Agreement hereby warrants that he or she is fully authorized to execute this Settlement Agreement on behalf of his or her client, has explained this

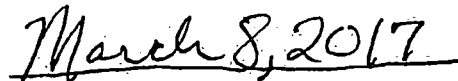
settlement to his or her client, and that his or her client fully understands and agrees, by the respective signature, to be bound by all terms set forth herein.

*[Signature pages to follow]*

By signing below, I hereby bind my client to this Settlement Agreement:

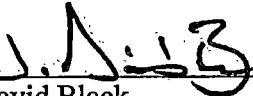


John F. Beach, Bar No. 595  
Lyndey Ritz Zwingelberg, Bar No. 11506  
Adams and Reese LLP  
1501 Main Street, 5th Floor  
Columbia, South Carolina 29201  
Telephone: (803) 254-4190



*Attorneys for David C. Sojourner, Jr., Limited Special Administrator of the Estate of James Brown and Limited Special Trustee of the James Brown Irrevocable Trust, w/a/d August 1, 2000*

By signing below, I hereby bind my client to this Settlement Agreement:



---

David Black

Freddie L. Kingsmore, Jr.

Nexsen Pruet LLC

1230 Main Street, Suite 700

Columbia, South Carolina 29201

Telephone: (803) 771-8900

*Attorneys for Russell L. Bauknight, Personal Representative  
of the Estate of James Brown and Trustee of the  
James Brown Irrevocable Trust, u/a/d August 1, 2000*

By signing below, I hereby bind my client to this Settlement Agreement:



---

Robert N. Rosen, Bar No. 4918  
Erin C. Casey, Bar No. 101935  
Rosen Law Firm, LLC  
18 Broad Street, Suite 201  
Charleston SC 29401  
Telephone: (843) 377-1700

S. Alan Medlin  
1713 Phelps Street  
Columbia SC 29205  
Telephone: (803) 777-7465

T. Heyward Carter, Jr.  
Andrew W. Chandler  
M. Jean Lee  
Evans, Carter, Kunes & Bennett  
115 Church Street  
Charleston, SC 29401

David L. Michel  
Michel Law Firm, LLC  
192 East Bay Street, Suite 202  
Charleston, SC 29401

Arnold S. Goodstein  
Goodstein Law Firm, LLC  
P.O. Box 2350  
Summerville, SC 29484-2350

*Attorneys for Tommie Rae Brown*

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MAR 08 2017

SC Court of Appeals

APPEAL FROM AIKEN COUNTY  
Court of Common Pleas

Doyet A. Early III, Circuit Court Judge

Appellate Case No. 2015-002417

Tommie Rae Brown, ..... Respondent,

v.

David C. Sojourner, Jr., in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000, Deanna Brown Thomas, Yamma Brown, Venisha Brown, Larry Brown, Terry Brown, and Daryl Brown,

of whom David C. Sojourner, Jr., in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000, is the ..... Appellant

APPELLANT DAVID C. SOJOURNER, JR.'S AND  
RESPONDENT TOMMIE RAE BROWN'S  
MOTION TO STAY APPEAL PENDING CONSUMMATION OF SETTLEMENT

David C. Sojourner, Jr., Esquire, in his capacity as Limited Special Administrator of the Estate of James Brown, a/k/a James Joseph Brown, and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000 ("Appellant"), and Tommie Rae Brown ("Respondent"), hereby move for an order staying the above-captioned appeal pending establishment of Appellant's settlement with Respondent.

This appeal arises out of an order from the lower court, dated January 13, 2015,



concluding Respondent is Decedent's surviving spouse as a matter of law. The lower court's order granted Respondent's motion for partial summary judgment and denied Appellant LSA's and others' cross motions for summary judgment which requested the court conclude Respondent was not Decedent's surviving spouse. Appellant LSA and other appellants to this appeal timely filed notices of appeal with this Court. Since that time, the appeal has been pending before this Court and is not yet fully briefed.<sup>1</sup>

On March 8, 2017, Appellant LSA, Respondent, and Russell L. Bauknight, as Personal Representative of the Estate of James Brown ("PR") entered into the Settlement Agreement attached as **Exhibit A** ("Settlement Agreement"). The Settlement Agreement requires the settling parties to take certain actions at the lower court and the appellate court. Consistent with those obligations, simultaneous with the filing of this Motion, the parties filed a joint motion in the lower court providing notice of the settlement and moving for dismissal of Respondent's petitions and amended petitions to set aside the probate of Decedent's 2000 Will and to set aside Decedent's Irrevocable Trust dated August 1, 2000 based upon claims of undue influence and fraud ("Respondent's Undue Influence Claims").

Upon issuance of the lower court's final order dismissing Respondent's Undue Influence Claims, the LSA and Respondent will notify the Court that the LSA withdraws his participation as an appellant in this matter and state that the remaining parties are adequately represented and capable of asserting their appeal in the LSA's absence as an appealing party. Accordingly, the settlement will not conclude this appeal with respect to

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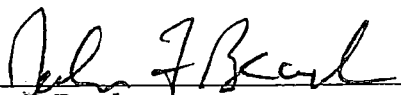
<sup>1</sup> On February 9, 2017, the Court granted a consent order resolving Appellant LSA's Motion to Exclude Irrelevant Documents from the Record on Appeal and a Motion to Strike Irrelevant and Prejudicial Statements from the Initial Brief. The Consent Order permitted Respondent to file a revised initial brief on or before March 10, 2017.

remaining parties.

CONCLUSION

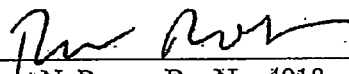
For the reasons stated, LSA and Respondent respectfully request the Court stay the above-captioned appeal until the lower court issues a final order on their joint motion to dismiss Respondent's Undue Influence Claims. The parties intend to advise this Court as soon as a final order is issued with respect to the pending joint motion before the lower court.

Respectfully submitted,

  
John F. Beach  
Lynsey Ritzi Zwingelberg  
Adams and Reese LLP  
1501 Main Street, 5th Floor  
Columbia, South Carolina 29201  
Telephone: (803) 254-4190

*Attorneys for Appellant David C. Sojourner, Jr., Limited Special Administrator of the Estate of James Brown and Limited Special Trustee of the James Brown Irrevocable Trust, u/a/d August 1, 2000*

March 8, 2017.

  
Robert N. Rosen, Bar No. 4918  
Erin C. Casey, Bar No. 101935  
Rosen Law Firm, LLC  
18 Broad Street, Suite 201  
Charleston SC 29401  
Telephone: (843) 377-1700

S. Alan Medlin  
1713 Phelps Street  
Columbia SC 29205  
Telephone: (803) 777-7465

T. Heyward Carter, Jr.  
Andrew W. Chandler  
M. Jean Lee  
Evans, Carter, Kunes & Bennett  
115 Church Street  
Charleston, SC 29401

David L. Michel  
Michel Law Firm, LLC  
192 East Bay Street, Suite 202  
Charleston, SC 29401

Arnold S. Goodstein  
Goodstein Law Firm, LLC  
P.O. Box 2350  
Summerville, SC 29484-2350

*Attorneys for Tommie Rae Brown*

THE STATE OF SOUTH CAROLINA  
In the Court of Appeals

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APPEAL FROM AIKEN COUNTY  
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Doyet A. Early III, Circuit Court Judge

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Appellate Case No. 2015-002417

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Tommie Rae Brown, .....Respondent,

v.

David C. Sojourner, Jr., in his capacity as Limited Special Administrator and Limited Special Trustee, Deanna Brown-Thomas, Yamma Brown, Venisha Brown, Larry Brown, Terry Brown, and Daryl Brown, Respondents below,

of whom David C. Sojourner, Jr., in his capacity as Limited Special Administrator and Limited Special Trustee, Deanna Brown-Thomas, Yamma Brown, Venisha Brown, Terry Brown, Michael Deon Brown and Daryl Brown are the ..... Appellants.

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PROOF OF SERVICE

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The undersigned hereby certifies that he has served the Notice of Settlement Between Appellant David C. Sojourner, Jr. and Respondent Tommie Rae Brown and Withdrawal of Appeal of David C. Sojourner, Jr. and this Proof of Service by depositing a copy of same in the United States Mail, postage prepaid on August 4, 2017 and addressed as follows:

Robert N. Rosen, Esq.  
Erin C. Casey, Esq.  
Rosen Law Firm, LLC  
18 Broad Street, Suite 201  
Charleston SC 29401  
*Attorneys for Tommie Rae Brown*

S. Alan Medlin, Esq.  
USC School of Law  
1713 Phelps Street  
Columbia SC 29205  
*Attorney for Tommie Rae Brown*

Louis Levenson, Esq.  
Levenson & Associates  
125 Broad Street, SW  
Atlanta GA 30303  
*Attorney for Deanna Brown Thomas,  
Yamma Brown, Venisha Brown and Larry  
Brown*

David B. Bell, Esq.  
David Bell Law Firm  
619 Greene Street  
Augusta GA 30903  
*Attorney for Michael Deon Brown and Lisa  
Sims*

Matthew Day Bodman, Esq.  
Matt Bodman, PA  
1500 Calhoun Street  
Columbia SC 29201  
*Attorney for Michael Deon Brown*

John A. Donsbach, Esq.  
Donsbach & King, LLC  
504 Blackburn Drive  
Augusta GA 30907  
*Attorney for Terry Brown and Forlando  
Brown*

William Joseph Barr, Esq.  
Barr Law LLC  
108 N. Academy Street  
Kingstree SC 29556-3422  
*Attorney for Tonya Brown a/k/a Sarah  
LaTonya Brown-Fegan, Jeanette Mitchell  
and Ciara Petitt and Cherquarius Williams  
for LaRhonda Petitt*

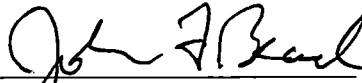
Itriss Jenkins, Esquire  
Itriss J. Jenkins, LLC  
652 Rutledge Avenue, Suite A  
Charleston, SC 49403  
*Attorney for Tonya Brown a/k/a Sarah  
LaTonya Brown-Fegan, Jeanette Mitchell  
and Ciara Petitt and Cherquarius Williams  
for LaRhonda Petitt*

A. Peter Shahid, Jr., Esquire  
Shahid Law Office  
89 Broad Street  
Charleston, SC 29401  
*Attorney for Guardian ad Litem, Stephen  
M. Slotchiver*

Robert C. Byrd, Esquire  
Parker Poe Adams & Bernstein LLP  
200 Meeting Street, Suite 301  
Charleston, SC 29401  
*Attorneys for Appellants, Deanna Brown-  
Thomas, Dr. Yamma Brown and Venisha  
Brown*

Vera Gilford, Esquire  
Post Office Box 12553  
Miami, Florida 33101  
*Attorney for Tonya Brown a/k/a Sarah  
LaTonya Brown-Fegan, Jeanette Mitchell  
and Ciara Petitt and Cherquarius Williams  
for LaRhonda Petitt*

Daryl Brown  
2223 Birnam Place  
Augusta, GA 30904



John F. Beach  
Lyndey R. Zwing  
Adams and Reese LLP

1501 Main Street, Fifth Floor  
Post Office Box 2285 (29202)  
Columbia, South Carolina 29201  
(803) 254-4190

*Attorneys for Appellant David C. Sojourner,  
Jr., Limited Special Administrator of the  
Estate of James Brown and Limited Special  
Trustee of the James Brown Irrevocable  
Trust, w/a/d August 1, 2000*

August 4, 2017

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