

**IN THE UNITED STATES BANKRUPTCY COURT
FOR THE DISTRICT OF DELAWARE**

<p>In re:</p> <p>WOODBIDGE GROUP OF COMPANIES, LLC, <i>et al.</i>,¹</p> <p style="text-align: center;">Remaining Debtors.</p>	<p>Chapter 11</p> <p>Case No. 17-12560 (JKS)</p> <p>(Jointly Administered)</p>
<p>MICHAEL GOLDBERG, as Liquidating Trustee of the Woodbridge Liquidation Trust, successor in interest to the estate of Woodbridge Group of Companies, LLC, <i>et al.</i>,</p> <p style="text-align: center;">Plaintiff,</p> <p>v.</p> <p>(SEE <u>EXHIBIT 1</u> ATTACHED HERETO),</p> <p style="text-align: center;">Defendant.</p>	<p>Adv. Proc. Case Nos. (SEE <u>EXHIBIT 1</u>)</p>

STATUS REPORT WITH RESPECT TO CERTAIN ADVERSARY MATTERS

Michael Goldberg, in his capacity as Liquidating Trustee of the Woodbridge Liquidation Trust, plaintiff in the above-referenced cases, hereby submits this status report pursuant to the scheduling orders dated September 3, 2020 and September 15, 2020.

Attached hereto is the status for the above-referenced cases associated with Woodbridge Group of Companies, LLC, *et al.*, Case No. 17-12560 (JKS).

¹ The Remaining Debtors and the last four digits of their respective federal tax identification numbers are as follows: Woodbridge Group of Companies, LLC (3603) and Woodbridge Mortgage Investment Fund 1, LLC (0172). The Remaining Debtors' mailing address is 201 N. Brand Blvd., Suite M, Glendale, California 91203.

Dated: January 12, 2023

PACHULSKI STANG ZIEHL & JONES LLP

/s/ Colin R. Robinson

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*Counsel to Plaintiff Michael Goldberg, as Liquidating
Trustee of the Woodbridge Liquidation Trust*

STATUS CATEGORY E: List all cases that have settled or resolved, but a notice or stipulation of dismissal cannot yet be filed.

Defendant(s)	Adv. Case No.	Comment
Russell Bullis, Betsy Bullis	19-50310	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.
Hart Placement Agency, Inc.	19-50847	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Michael Kandravi	19-50914	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Kim Butler	19-50917	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
John Fagan	19-50947	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Harris Financial Management and John G. Harris	19-51011	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.
IRA Services Trust Company, Custodian for the Benefit of Dwight L. Atherton IRA, Dwight L Atherton	19-50581	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Christ Temple Baptist Church	19-50756	This matter has been settled and paid in full. A dismissal is in process.
IRA Services Trust Company, Custodian for the Benefit of Lynette Eddy IRA, Lynette Eddy	19-50808	This matter has been settled. Dismissal in process.
IRA Services Trust Company, Custodian For The Benefit of Earl Eddy IRA, Earl Eddy	19-50814	This matter has been settled. Dismissal in process.
Frontier Advisors Group LLC, David Nichols	19-50945	Mediated but did not settle.
Gerard J. O'Neill	19-50964	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.
Joseph W. Isaac	19-50976	This matter has been settled. Plaintiff intends to file a dismissal once the

Defendant(s)	Adv. Case No.	Comment
		settlement payment has been received in full.
Donovan Knowles	19-50980	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
John J. McNamara	19-50998	This matter has been settled Plaintiff intends to file a dismissal once the settlement payment has been received in full.
David Valencia, Valencia Financial Services, LLC	19-51000	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Bette Tydings	19-51002	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Dan Reisinger	19-51007	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Searchlight Financial Advisors, LLC, Caroline Rakness	19-51022	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Basic Financial Services Inc., Basic Wealth Advisors, Inc., Fred C. Johnson	19-51039	This matter has been settled. Plaintiff intends to file a dismissal once the settlement payment has been received in full.
Ascensus, LLC, Custodian for the Benefit of Gail Marie Bush IRA, Gail Marie Bush, Gail Marie Bush as Trustee of the Gail Marie Bush Trust Dated 12/21/2001	19-51133	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.
Retirement Services LLC	19-50931	This matter has been settled. Dismissal in process.
Christopher Longworth	19-50928	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.
George T. Iwahiro, Charlene M. Iwahiro	19-50319	This matter has been settled and paid in full. Plaintiff intends to file a dismissal.

STATUS CATEGORY F: List all cases where service is complete, answer has been filed, discovery/disclosures are underway, and expected date of completion of discovery/disclosure.

Defendant(s)	Adv. Case No.	Comment
Maxwell Financial Group, Inc.	19-50915	The defendant submitted initial disclosures on 4/15/21. Defendant has given plaintiff an extension to submit initial disclosures.
Uma Gajavada	19-51046	Discovery exchanged. Parties are working through discovery issues with production of documents and deposition. Parties will seek to amend the Scheduling Order.
Stefan Kolosenko	19-50301	Discovery exchanged and settlement discussions ongoing.
Kenneth Halbert	19-51027	Discovery is ongoing.

STATUS CATEGORY G: Mediator has been selected or appointed.

Defendant(s)	Adv. Case No.	Appointed/Selected Mediator and (as necessary) Additional Comments
Joseph Lin	19-50334	Ian Conner Bifferato, Esq. Matter settled in mediation but defendant refused to execute settlement agreement.
Ascensus, LLC, Custodian for the Benefit of Deborah J. Murphy IRA, Deborah J. Murphy	19-50583	Derek C. Abbott, Esq. Mediation was held but the matter did not settle.
Marcella P. Best	19-50819	Leslie Berkoff, Esq. Mediation was held and the parties continue to work towards resolving this matter.
John J. Begley	19-50830	Defendant is deceased and the Trust is working with defendant's estate to proceed to mediation.
Peter Greenberg	19-50855	Ian Conner Bifferato, Esq. Mediated but settlement not reached.
Chris Dantin Financial Services, LLC, Chris A. Dantin, Sr.	19-50922	Derek C. Abbott, Esq. Stipulation for Judgment in process.
James Lamont	19-50952	Ian Conner Bifferato, Esq. Mediation was held, and the mediator is continuing to work with the parties to resolve this matter.
James E. Campbell Jr. Inc. (d/b/a Campbell Financial Corp.), and James E. Campbell, Jr.	19-50965	Lucian B. Murley, Esq. Mediated but did not settle.
Dennis Drake, Mid-Atlantic Brokers, Inc.	19-51006	Ian Conner Bifferato, Esq. Mediation was held and the parties continue to work towards resolving this matter.
Gaulan Financial LLC	19-51012	Derek C. Abbott, Esq. Matter proceeded to mediation but did not settle.
Legacy Financial Network and Retirement Services, Inc. and Jeffrey Nimmow	19-51016	Lucian B. Murley, Esq. Pre-mediation settlement discussions in process. Matter to proceed to mediation.
TWH Annuities & Insurance Agency, Inc., Gryphon Financial Services	19-51042	Derek C. Abbott, Esq. Mediation was held and the parties continue

Defendant(s)	Adv. Case No.	Appointed/Selected Mediator and (as necessary) Additional Comments
		to work towards resolving this matter.
Jay N. Brown	19-51047	Derek C. Abbott, Esq. Mediation was held but did not settle.
Deb Brundage	19-51069	Lucian B. Murley, Esq. Mediation was held, but matter did not settle.
Sylvan R. Jutte, Jeannette E. Jutte	19-50308	Ian Conner Bifferato, Esq. Mediation dates have been set for pending matters.
Brian D. Korkus, Robin L. Korkus	19-50309	Ian Conner Bifferato, Esq. Mediation was held, and the mediator is continuing to work with the parties to resolve this matter.
Floyd G Davis, Lavonne J. Davis	19-50317	Ian Conner Bifferato, Esq. Mediation dates have been set for pending matters.
Toomas Heinmets, Pamela Heinmets	19-50322	Ian Conner Bifferato, Esq. Mediation was held, but matter did not settle.
Janet V. Dues	19-50328	Ian Conner Bifferato, Esq. Mediation dates have been set for pending matters.
Dena Falkenstein	19-50329	Ian Conner Bifferato, Esq. Mediation was held, and the mediator is continuing to work with the parties to resolve this matter.
Christian Lester	19-50332	Ian Conner Bifferato, Esq. Mediation was held but the matter did not settle.
Jane Marshall	19-50335	Ian Conner Bifferato, Esq. Mediation dates have been set for pending matters.
Jennifer Tom	19-50342	Ian Conner Bifferato, Esq. Mediation was held, and the mediator is continuing to work with the parties to resolve this matter.
Anita Bedoya, Mark Bedoya	19-50343	Ian Conner Bifferato, Esq.

Defendant(s)	Adv. Case No.	Appointed/Selected Mediator and (as necessary) Additional Comments
		Mediation was held but the matter did not settle.
Anita Bedoya, Julian Duran	19-50344	Ian Conner Bifferato, Esq. Mediation was held but the matter did not settle.
Ronald Cole	19-50346	Ian Conner Bifferato, Esq. Mediation was held but the matter did not settle.
Ronald Draper	19-50347	Ian Conner Bifferato, Esq. Mediation dates have been set for pending matters.
Mary Ellen Nuhn	19-50829	Judith Fitzgerald, Esq. Mediation was held; matter did not settle.

STATUS CATEGORY H: List all cases that are ready for trial.

Defendant(s)	Adv. Case No.	Comment
All Mark Insurance Services, Inc., Cameron Johnson	19-50921	In accordance with the mediator's report filed by the mediator (Leslie Berkoff), the matter has not been resolved and should proceed to trial.
Gregg W. Butler	19-50958	After not responding to default notices, Defendant appeared telephonically before the Court and is communicating with Plaintiff's counsel and the mediator (Leslie Berkoff) to try to resolve this matter.
Harold Plain	19-50974	Defendant has not responded to default notices. Plaintiff's counsel is investigating whether Defendant (or his estate if Defendant is deceased) is capable of proceeding in connection with this matter.
Joseph A. Loox	19-50978	After not responding to default notices, Defendant appeared telephonically before the Court and is communicating with Plaintiff's counsel and the mediator (Leslie Berkoff) to try to resolve this matter.
Ascensus, LLC, Administrator and Custodian for the Benefit of Christopher M. Soulier Roth IRA, Christopher M. Soulier	19-51050	An initial pre-trial conference was held on 2/8/22 and rescheduled to a date to be determined. A proposed judgment has been submitted and will be entered by the Court upon failure of the Defendant to appear at the pre-trial conference and cooperate in the preparation of a final pre-trial order.

STATUS CATEGORY J: List all cases which are stayed by the filing of another bankruptcy action affecting a party in this matter.

Defendant(s)	Adv. Case No.	Comment
Randy Robertson	19-50977	Defendant filed for ch. 7 bankruptcy.

EXHIBIT 1

Defendant(s)	Adv. Case No.
Christopher Longworth	19-50928
Stefan Kolosenko	19-50301
Sylvan R. Jutte, Jeannette E. Jutte	19-50308
Brian D. Korkus, Robin L. Korkus	19-50309
Russell Bullis, Betsy Bullis	19-50310
Floyd G Davis, Lavonne J. Davis	19-50317
George T. Iwahiro, Charlene M. Iwahiro	19-50319
Toomas Heinmets, Pamela Heinmets	19-50322
Janet V. Dues	19-50328
Dena Falkenstein	19-50329
Christian Lester	19-50332
Joseph Lin	19-50334
Jane Marshall	19-50335
Jennifer Tom	19-50342
Anita Bedoya, Mark Bedoya	19-50343
Anita Bedoya, Julian Duran	19-50344
Ronald Cole	19-50346
Ronald Draper	19-50347
IRA Services Trust Company, Custodian for the Benefit of Dwight L. Atherton IRA, Dwight L Atherton	19-50581
Ascensus, LLC, Custodian for the Benefit of Deborah J. Murphy IRA, Deborah J. Murphy	19-50583
Christ Temple Baptist Church	19-50756
IRA Services Trust Company, Custodian for the Benefit of Lynette Eddy IRA, Lynette Eddy	19-50808
IRA Services Trust Company, Custodian For The Benefit of Earl Eddy IRA, Earl Eddy	19-50814
Marcella P. Best	19-50819
Mary Ellen Nuhn	19-50829
John J. Begley	19-50830
Hart Placement Agency, Inc.	19-50847
Peter Greenberg	19-50855
Michael Kandravi	19-50914
Maxwell Financial Group, Inc.	19-50915
Kim Butler	19-50917
All Mark Insurance Services, Inc., Cameron Johnson	19-50921
Chris Dantin Financial Services, LLC, Chris A. Dantin, Sr.	19-50922
Retirement Services LLC	19-50931
Frontier Advisors Group LLC, David Nichols	19-50945
John Fagan	19-50947
James Lamont	19-50952
Gregg W. Butler	19-50958

Defendant(s)	Adv. Case No.
Gerard J. O'Neill	19-50964
James E. Campbell Jr. Inc. (d/b/a Campbell Financial Corp.), and James E. Campbell, Jr.	19-50965
Harold Plain	19-50974
Joseph W. Isaac	19-50976
Randy Robertson	19-50977
Joseph A. Loox	19-50978
Donovan Knowles	19-50980
John J. McNamara	19-50998
David Valencia, Valencia Financial Services, LLC	19-51000
Bette Tydings	19-51002
Dennis Drake, Mid-Atlantic Brokers, Inc.	19-51006
Dan Reisinger	19-51007
Harris Financial Management and John G. Harris	19-51011
Gaulan Financial LLC	19-51012
Legacy Financial Network and Retirement Services, Inc. and Jeffrey Nimmow	19-51016
Searchlight Financial Advisors, LLC, Caroline Rakness	19-51022
Kenneth Halbert	19-51027
Basic Financial Services Inc., Basic Wealth Advisors, Inc., Fred C. Johnson	19-51039
TWH Annuities & Insurance Agency, Inc., Gryphon Financial Services	19-51042
Uma Gajavada	19-51046
Jay N. Brown	19-51047
Ascensus, LLC, Administrator and Custodian for the Benefit of Christopher M. Soulier Roth IRA, Christopher M. Soulier	19-51050
Deb Brundage	19-51069
Ascensus, LLC, Custodian for the Benefit of Gail Marie Bush IRA, Gail Marie Bush, Gail Marie Bush as Trustee of the Gail Marie Bush Trust Dated 12/21/2001	19-51133