Jason S. Brookner (Texas Bar No. 240033684)
Andrew K. York (Texas Bar No. 24051554)
Joshua D. Smeltzer (Texas Bar No. 24113859)
J. Reid Burley (Texas Bar No. 24109675)
Drake M. Rayshell (Texas Bar No. 24118507)
GRAY REED
1845 Woodall Rodgers Fwy., Suite 1300
Dallas, Texas 75201
Telephone: (214) 954-4135
Facsimile: (214) 953-1332
Email: jbrookner@grayreed.com
dyork@grayreed.com
jsmeltzer@grayreed.com
rburley@grayreed.com
drayshell@grayreed.com

Counsel to Patrick Daugherty

IN THE UNITED STATES BANKRUPTCY COURT
FOR THE NORTHERN DISTRICT OF TEXAS
DALLAS DIVISION

In re:	§	Chapter 11
HIGHLAND CAPITAL MANAGEMENT, L.P.,[1]	§	Case No. 19-34054 (SGJ)
Reorganized Debtor.	§	
HIGHLAND CAPITAL MANAGEMENT, L.P.,	§	
Plaintiff,	§	
v.	§	Adversary No. 25-03055-bwo
PATRICK HAGAMAN DAUGHERTY,	§	
Defendant.	§	

[1] Highland's last four digits of its taxpayer identification number are (8357). The headquarters and service address for Highland is 100 Crescent Court, Suite 1850, Dallas, TX 75201.

1934054260902000000000003

APPELLANT'S AMENDED DESIGNATION OF ITEMS TO BE INCLUDED IN THE RECORD ON APPEAL AND STATEMENT OF THE ISSUES PRESENTED

Pursuant to Federal Rule of Bankruptcy Procedure 8009(a), Appellant Patrick Daugherty ("Daugherty") hereby submits his amended designation of items to be included in the record on appeal and statement of issues to be presented in connection with his appeal from the July 24, 2026 *Judgment and Memorandum Opinion* [Docket Nos. 138, 139 in Adversary No. 25-03055-bwo]. *See Notice of Appeal* [Docket No. 142 in Adversary No. 25-03055-bwo].

Statement of Issues on Appeal

1. Whether the Bankruptcy Court erred in disallowing Daugherty's Reserved Claim based on the Employment Agreement's termination provisions, when the Court itself found the 2009 Compensation Statement was incorporated into the Employment Agreement and resolved its ambiguity in Daugherty's favor, concluding that Highland Capital Management, L.P. ("Highland") intended to compensate Daugherty for any material deviation in his 2008 tax refund.

2. Whether the Bankruptcy Court erred in applying the "no further liability or obligation" language of Sections 4.5 and 4.6 of the Employment Agreement to extinguish Daugherty's compensation entitlement under the 2009 Compensation Statement, when that language pertains to severance contingent upon execution of a separation agreement and not to earned compensation that accrued during Daugherty's active employment.

3. Whether the Bankruptcy Court erred in holding that James Dondero's oral promises to cover Daugherty's contingent tax liability were unenforceable under Texas's statute of frauds, Tex. Bus. & Com. Code § 26.01, when Highland had a main purpose of its own in making the promise and when the Court failed to consider Daugherty's continued employment and forbearance as adequate consideration.

4. Whether the Bankruptcy Court erred in denying Daugherty's counterclaim for specific performance of the Settlement Agreement's books-and-records provision by construing that provision through the statutory categories of 6 Del. C. § 18-305(a), rather than by the plain meaning of the negotiated Settlement Agreement requiring Highland to "transfer its *interests* in HERA and ERA to Daugherty" "[t]o facilitate [the] recovery of [] potential claims," including "the HERA and ERA books and records (spreadsheet) maintained on HCMLP's system."

5. Whether the Bankruptcy Court abused its discretion by granting Highland Capital Management, L.P.'s Cross Motion pursuant to Fed. R. Civ. P. 60(b)(6) when Highland failed to make a showing of manifest injustice and exceptional circumstances required to rewrite a term of

the parties' bargained-for, court-approved settlement agreement that Highland Capital Management, L.P. entered on a free, deliberate, calculated, and counseled basis.

6. Whether the Bankruptcy Court abused its discretion by granting Highland Capital Management, L.P.'s Cross Motion pursuant to Fed. R. Civ. P. 60(b)(6) when Highland was estopped from seeking such relief after it obtained the benefits of the tolling provision in the settlement agreement, including, inter alia, the parties' negotiation and execution of a series of tolling agreements to the benefit of Highland Capital Management, L.P. regarding its certain claim-objection deadline.

Designation of Record

Daugherty respectfully designates the following items to be included in the appellate record pursuant to Bankruptcy Rule 8009(a):

1. Notice of Appeal for Adversary No. 25-03055-bwo [Docket No. 142].

2. The Judgment Order or Decree appealed from: July 24, 2026 – Judgment [Docket No. 138].

3. July 24, 2026 – Memorandum of Opinion [Docket No. 139].

4. Docket Sheet for Adversary Case No. 25-03055-bwo kept by the Bankruptcy Clerk.

5. Documents listed below for Bankruptcy Case No. 25-03055-bwo:

Filing Date	Docket No.	Description
05/02/2025	1	(16 pgs; 3 docs) Adversary case 25-03055. Complaint by Highland Capital Management, L.P. against Patrick Hagaman Daugherty. Fee Amount $350 (Attachments: # 1 Exhibit A # 2 Adversary Proceeding Cover Sheet). Nature(s) of suit: 81 (Subordination of claim or interest). (Annable, Zachery)
05/05/2025	2	(4 pgs; 2 docs) Summons issued on Patrick Hagaman Daugherty; Answer Due 6/4/2025; (Edmond, Michael)
05/05/2025	3	(2 pgs) Scheduling order setting deadlines. Discovery and all exhibits except impeachment documents: 45 days prior to Docket Call, pre-trial order: 7 calendar days prior to Docket Call, proposed findings of fact and conclusions of law: 7 days prior to first scheduled docket call (RE: related document(s)1 Complaint filed by Plaintiff Highland Capital Management, L.P.). Trial Docket Call date set for 10/6/2025 at 01:30 PM at https://us-

		courts.webex.com/meet/jerniga. Trial will be held during the week of 10/20/2025. Entered on 5/5/2025 (Edmond, Michael)
05/06/2025	4	(4 pgs) Summons service executed on Patrick Hagaman Daugherty 5/5/2025 (Annable, Zachery)
06/04/2025	5	(13 pgs; 2 docs) Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty (Attachments: # 1 Proposed Order) (York, Andrew)
06/16/2025	6	(5 pgs) Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)3 Standing scheduling order in an adversary proceeding). (Annable, Zachery)
06/20/2025	7	(10 pgs) Order approving stipulation concerning Scheduling Order (RE: related document(s)6 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Entered on 6/20/2025 (Okafor, M.)
06/22/2025	8	(12 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)7 Order approving stipulation concerning Scheduling Order (RE: related document(s)6 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Entered on 6/20/2025 (Okafor, M.)) No. of Notices: 1. Notice Date 06/22/2025. (Admin.)
07/18/2025	9	(13 pgs; 2 docs) Response opposed to (related document(s): 5 Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty) filed by Plaintiff Highland Capital Management, L.P.. (Attachments: # 1 Proposed Order) (Annable, Zachery)
07/18/2025	10	(13 pgs; 2 docs) Highland Capital Management, L.P.'s CROSS MOTION FOR RELIEF FROM A FINAL ORDER PURSUANT TO BANKRUPTCY RULE 9024 filed by Plaintiff Highland Capital Management, L.P. (Attachments: # 1 Proposed Order) (Annable, Zachery) Modified TEXT on 7/21/2025 (hsj).
07/18/2025	11	(43 pgs; 5 docs) Declaration re: *(Declaration of John A. Morris in Support of Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)9 Response, 10 Motion for leave *(Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)*). (Attachments: # 1 Exhibit 1 # 2 Exhibit 2 # 3 Exhibit 3 # 4 Exhibit 4) (Annable, Zachery)

07/28/2025	12	(4 pgs) Certificate of service re: Objection, Objection, & Declaration Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)9 Response opposed to (related document(s): 5 Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty) filed by Plaintiff Highland Capital Management, L.P.. (Attachments: # 1 Proposed Order) filed by Plaintiff Highland Capital Management, L.P., 10 Highland Capital Management, L.P.'s CROSS MOTION FOR RELIEF FROM A FINAL ORDER PURSUANT TO BANKRUPTCY RULE 9024 filed by Plaintiff Highland Capital Management, L.P. (Attachments: # 1 Proposed Order) (Annable, Zachery) Modified TEXT on 7/21/2025 (hsj). filed by Plaintiff Highland Capital Management, L.P., 11 Declaration re: *(Declaration of John A. Morris in Support of Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)9 Response, 10 Motion for leave *(Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)*). (Attachments: # 1 Exhibit 1 # 2 Exhibit 2 # 3 Exhibit 3 # 4 Exhibit 4) filed by Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
07/30/2025	13	(3 pgs) Notice of hearing filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)5 Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty, 10 Motion for leave filed by Plaintiff Highland Capital Management, L.P.). Hearing to be held on 9/4/2025 at 09:30 AM at https://us-courts.webex.com/meet/jerniga for 10 and for 5, (York, Andrew)
07/31/2025	14	(6 pgs; 2 docs) Amended Notice of hearing filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)5 Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty, 10 Motion for leave filed by Plaintiff Highland Capital Management, L.P.). Hearing to be held on 9/4/2025 at 09:30 AM at https://us-courts.webex.com/meet/jerniga for 10 and for 5 and for 10, (Attachments: # 1 Exhibit A)(York, Andrew)
08/08/2025	15	(13 pgs) Reply to (related document(s): 9 Response filed by Plaintiff Highland Capital Management, L.P.) *and Response to Plaintiff's Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024* filed by Defendant Patrick Hagaman Daugherty. (York, Andrew)
08/15/2025	16	(5 pgs) Reply to (related document(s): 15 Reply filed by Defendant Patrick Hagaman Daugherty) *(Highland Capital Management, L.P.'s Reply in Further Support of Its Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)* filed by Plaintiff Highland Capital Management, L.P.. (Annable, Zachery)

08/18/2025	17	(3 pgs) Notice of Appearance and Request for Notice by Melissa S. Hayward filed by Plaintiff Highland Capital Management, L.P.. (Hayward, Melissa)
08/19/2025	18	(3 pgs) Certificate of service re: *Highland Capital Management, L.P.s Reply in Further Support of its Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)16 Reply to (related document(s): 15 Reply filed by Defendant Patrick Hagaman Daugherty) *(Highland Capital Management, L.P.'s Reply in Further Support of Its Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)* filed by Plaintiff Highland Capital Management, L.P.. filed by Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
08/29/2025	19	(225 pgs; 12 docs) Witness and Exhibit List *for Hearing Scheduled for September 4, 2025 at 9:30 a.m.* filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)5 Motion to dismiss adversary proceeding , 9 Response, 10 Motion for leave *(Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)*). (Attachments: # 1 Exhibit # 2 Exhibit # 3 Exhibit # 4 Exhibit # 5 Exhibit # 6 Exhibit # 7 Exhibit # 8 Exhibit # 9 Exhibit # 10 Exhibit # 11 Exhibit) (York, Andrew)
09/04/2025	20	(48 pgs; 2 docs) Witness and Exhibit List filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)5 Motion to dismiss adversary proceeding , 10 Motion for leave *(Highland Capital Management, L.P.'s (A) Objection to Patrick Daugherty's Motion to Dismiss and (B) Cross Motion for Relief from a Final Order Pursuant to Bankruptcy Rule 9024)*). (Attachments: # 1 Exhibit 1) (Annable, Zachery)
09/05/2025	23	(3 pgs) Order (A) denying Patrick Daugherty's motion to dismiss adversary proceeding (related document # 5), and (B) granting Highland Capital Management's cross motion for relief from a final order. (related document # 10). Pursuant to Bankruptcy Rule 9024(b)(6), the Settlement Order is hereby modified to provide that the Stay Provision is stricken from the Settlement Agreement. Entered on 9/5/2025. (Okafor, M.)
09/07/2025	24	(5 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)23 Order (A) denying Patrick Daugherty's motion to dismiss adversary proceeding (related document 5), and (B) granting Highland Capital Management's cross motion for relief from a final order. (related document 10). Pursuant to Bankruptcy Rule 9024(b)(6), the Settlement Order is hereby modified to provide that the Stay Provision is stricken from the Settlement Agreement. Entered on 9/5/2025. (Okafor, M.)) No. of Notices: 1. Notice Date 09/07/2025. (Admin.)

09/19/2025	25	(9 pgs; 2 docs) Notice of appeal . Fee Amount $298 filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave). Appellant Designation due by 10/3/2025. (Attachments: # 1 Exhibit A)(York, Andrew)
09/23/2025	27	(13 pgs; 3 docs) Certificate of mailing regarding appeal (RE: related document(s)25 Notice of appeal . Fee Amount $298 filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave). Appellant Designation due by 10/3/2025. (Attachments: # 1 Exhibit A) filed by Defendant Patrick Hagaman Daugherty) (Attachments: # 1 Service List) (Almaraz, Jeanette)
09/23/2025	28	(2 pgs) Notice regarding the record for a bankruptcy appeal to the U.S. District Court. (RE: related document(s)25 Notice of appeal filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave). (Almaraz, Jeanette)
09/23/2025	30	(6 pgs) Notice of docketing notice of appeal. Civil Action Number: 3:25-cv-02584-E. (RE: related document(s)25 Notice of appeal filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave) filed by Defendant Patrick Hagaman Daugherty) (Almaraz, Jeanette)
09/25/2025	31	(7 pgs) Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)3 Standing scheduling order in an adversary proceeding, 7 Order (generic)). (Annable, Zachery)
09/25/2025	32	(4 pgs) BNC certificate of mailing. (RE: related document(s)28 Notice regarding the record for a bankruptcy appeal to the U.S. District Court. (RE: related document(s)25 Notice of appeal filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave).) No. of Notices: 0. Notice Date 09/25/2025. (Admin.)
09/26/2025	33	(44 pgs; 2 docs) Motion to stay pending appeal (related documents 23 Order on motion to dismiss adversary proceeding, Order on motion for leave) filed by Defendant Patrick Hagaman Daugherty (Attachments: # 1 Exhibit A) (York, Andrew)
09/29/2025	34	(1 pg) Request for Transcript regarding a hearing held on 9/4/2025. The requested turn-around time is hourly. filed by Plaintiff Highland Capital Management, L.P.. (Hayward, Melissa)

09/30/2025	35	(36 pgs) Transcript regarding Hearing Held 09/04/2025 before Judge Stacey G.C. Jernigan (36 pages) RE: Motion to Dismiss Adversary Proceeding (5); Cross-Motion for Relief (10). THIS TRANSCRIPT WILL BE MADE ELECTRONICALLY AVAILABLE TO THE GENERAL PUBLIC 90 DAYS AFTER THE DATE OF FILING. TRANSCRIPT RELEASE DATE IS 12/29/2025. Until that time the transcript may be viewed at the Clerk's Office or a copy may be obtained from the official court transcriber. Court Reporter/Transcriber Kathy Rehling, kathyrehlingtranscripts@gmail.com, Telephone number 972-786-3063. (RE: related document(s) 21 Hearing held on 9/4/2025. (RE: related document(s)5 Motion to dismiss adversary proceeding filed by Defendant Patrick Hagaman Daugherty (Attachments: # 1 Proposed Order)) (Appearances: A. York and J. Smeltzer for P. Daugherty; J. Morris for Reorganized Debtor. Evidentiary hearing. Motion denied for reasons stated orally. Counsel to upload order.), 22 Hearing held on 9/4/2025. (RE: related document(s)10 Highland Capital Management, L.P.'s CROSS MOTION FOR RELIEF FROM A FINAL ORDER PURSUANT TO BANKRUPTCY RULE 9024 filed by Plaintiff Highland Capital Management, L.P. (Attachments: # 1 Proposed Order) (Annable, Zachery) Modified TEXT on 7/21/2025 (hsj).) (Appearances: A. York and J. Smeltzer for P. Daugherty; J. Morris for Reorganized Debtor. Evidentiary hearing. Motion granted for reasons stated orally. Counsel to upload order.)). Transcript to be made available to the public on 12/29/2025. (Rehling, Kathy)
10/01/2025	36	(6 pgs) Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)33 Motion to stay pending appeal (related documents 23 Order on motion to dismiss adversary proceeding, Order on motion for leave)). (Annable, Zachery)
10/01/2025	37	(14 pgs) Order Approving Stipulated Scheduling Order (RE: related document(s)1 Complaint filed by Plaintiff Highland Capital Management, L.P., 31 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Evidentiary Hearing to be held on 4/8/2026 at 09:30 AM Dallas Judge Jernigan Ctrm for 1, Entered on 10/1/2025 (Okafor, M.)
10/01/2025	38	(11 pgs) Order Approving Stipulation Regarding Highland Capital Managment L.P.'s Deadline to File Response to Patrick Daughtery's Motion for Stay Pending Appeal (RE: related document(s)36 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Entered on 10/1/2025 (Okafor, M.)
10/03/2025	39	(45 pgs; 2 docs) Answer to complaint , Counterclaim by Patrick Hagaman Daugherty against Highland Capital Management, L.P. filed by Patrick Hagaman Daugherty. (Attachments: # 1 Exhibit A)(York, Andrew)

10/03/2025	40	(3 pgs) Notice of Appearance and Request for Notice by Jeffrey Reid Burley filed by Defendant Patrick Hagaman Daugherty. (Burley, Jeffrey)
10/03/2025	41	(6 pgs) Appellant designation of contents for inclusion in record on appeal and statement of issues on appeal. filed by Defendant Patrick Hagaman Daugherty. Appellee designation due by 10/17/2025. (York, Andrew)
10/04/2025	42	(16 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)37 Order Approving Stipulated Scheduling Order (RE: related document(s)1 Complaint filed by Plaintiff Highland Capital Management, L.P., 31 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Evidentiary Hearing to be held on 4/8/2026 at 09:30 AM Dallas Judge Jernigan Ctrm for 1, Entered on 10/1/2025 (Okafor, M.)) No. of Notices: 1. Notice Date 10/04/2025. (Admin.)
10/04/2025	43	(13 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)38 Order Approving Stipulation Regarding Highland Capital Managment L.P.'s Deadline to File Response to Patrick Daughtery's Motion for Stay Pending Appeal (RE: related document(s)36 Stipulation filed by Plaintiff Highland Capital Management, L.P.). Entered on 10/1/2025 (Okafor, M.)) No. of Notices: 1. Notice Date 10/04/2025. (Admin.)
10/06/2025	44	(29 pgs) Objection to (related document(s): 33 Motion to stay pending appeal (related documents 23 Order on motion to dismiss adversary proceeding, Order on motion for leave) filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty) filed by Plaintiff Highland Capital Management, L.P.. (Annable, Zachery)
10/09/2025	45	(3 pgs) Notice of Appearance and Request for Notice by Jeffrey Nathan Pomerantz filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Pomerantz, Jeffrey)
10/09/2025	46	(3 pgs) Notice of Appearance and Request for Notice by John A Morris filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Morris, John)
10/09/2025	47	(3 pgs) Notice of Appearance and Request for Notice by Hayley R Winograd filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Winograd, Hayley)
10/09/2025	48	(3 pgs) Notice of Appearance and Request for Notice by Gregory V. Demo filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Demo, Gregory)
10/13/2025	49	(9 pgs) Reply in support filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)33 Motion to stay pending appeal (related

		documents 23 Order on motion to dismiss adversary proceeding, Order on motion for leave)). (York, Andrew) Modified text to match pdf on 10/15/2025 (mdo).
10/21/2025	50	(1 pg) Clerk's correspondence requesting File an amended designation from attorney for Appellant. (RE: related document(s)41 Appellant designation of contents for inclusion in record on appeal and statement of issues on appeal. filed by Defendant Patrick Hagaman Daugherty. Appellee designation due by 10/17/2025.) Responses due by 10/24/2025. (Blanco, J.)
10/22/2025	51	(6 pgs) Amended appellant designation of contents for inclusion in record on appeal and statement of issues on appeal. filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)41 Appellant designation). (York, Andrew)
10/22/2025	53	(1 pg) Transmittal of record on appeal to U.S. District Court . Complete record on appeal. Transmitted: Volume 1, Mini Record. Number of appellant volumes: 1 . Civil Case Number: 3:25-cv-02584-E (RE: related document(s)25 Notice of appeal filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave) filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty) (Almaraz, Jeanette)
10/22/2025	54	(1 pg) Notice of docketing COMPLETE record on appeal. Civil Case Number: 3:25-cv-02584-E(RE: related document(s)25 Notice of appeal filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)23 Order on motion to dismiss adversary proceeding, Order on motion for leave). (Almaraz, Jeanette)
10/22/2025	55	(3 pgs) Certificate of service re: Stipulated Scheduling Order Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)31 Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)3 Standing scheduling order in an adversary proceeding, 7 Order (generic)). filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
10/24/2025	56	(8 pgs) Answer to counterclaim *(Highland Capital Management, L.P.'s Answer to Patrick Daugherty's Original Counterclaim)* filed by Highland Capital Management, L.P.. (Annable, Zachery)
11/21/2025	57	(7 pgs) DISTRICT COURT Stipulation concerning supplement to record on appeal re: 3:25-cv-02584-E (RE: related document(s)51 Amended appellant designation of contents for inclusion in record on appeal and statement of

		issues on appeal. filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)41 Appellant designation). filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty) (Almaraz, Jeanette) (Entered: 11/24/2025)
12/18/2025	58	ELECTRONIC ORDER: I, the presiding judge, will recuse myself in this adversary proceeding No. 25-03055, effective immediately. The Bankruptcy Clerk of Court will re-assign this adversary proceeding to a different bankruptcy judge in this district in accordance with his normal protocols. Ordered by Bankruptcy Judge Stacey G.C. Jernigan on 12/18/2025. (Almaraz, Jeanette)
12/19/2025		Judge Brad W Odell assigned. Involvement of Judge Stacey G Jernigan terminated (Okafor, M.)
12/19/2025	59	(11 pgs) Subpoena on Hunton Andrews Kurth LLP filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Annable, Zachery)
12/24/2025	60	(14 pgs; 2 docs) Motion to compel re: discovery Production of Audio Recordings, Transcripts, and Related Documents *(Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (Attachments: # 1 Proposed Order) (Annable, Zachery)
12/24/2025	61	(156 pgs; 7 docs) Declaration re: *(Declaration of Hayley R. Winograd in Support of Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)60 Motion to compel re: discovery Production of Audio Recordings, Transcripts, and Related Documents *(Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)*). (Attachments: # 1 Exhibit 1 # 2 Exhibit 2 # 3 Exhibit 3--Part 1 # 4 Exhibit 3--Part 2 # 5 Exhibit 4 # 6 Exhibit 5) (Annable, Zachery)
12/29/2025	62	(3 pgs) Notice of hearing *(Notice of Hearing on Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)60 Motion to compel re: discovery filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Hearing to be held on 1/14/2026 at 03:30 PM via WebEx for 60, (Annable, Zachery)Modified on 12/29/2025 (sdw).

12/29/2025	63	(3 pgs) Notice of hearing filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (RE: related document(s)33 Motion to stay pending appeal filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty). Hearing to be held on 1/14/2026 at 03:30 PM via WebEx for 33, (Burley, Jeffrey)Modified on 12/30/2025 (sdw).
12/30/2025	64	(19 pgs) Stipulation by Patrick Hagaman Daugherty, Patrick Hagaman Daugherty and. filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (RE: related document(s)37 Order to set hearing). (York, Andrew)
12/30/2025	65	(3 pgs) Notice to take deposition of Patrick Hagaman Daugherty filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Annable, Zachery)
12/30/2025	66	(14 pgs) Stipulation by Patrick Hagaman Daugherty, Patrick Hagaman Daugherty and. filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (RE: related document(s)37 Order to set hearing). (York, Andrew)
12/31/2025	67	(14 pgs) Agreed Protective Order (RE: related document(s)66 Stipulation filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty). Entered on 12/31/2025 (Okafor, M.)
01/02/2026	68	(16 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)67 Agreed Protective Order (RE: related document(s)66 Stipulation filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty). Entered on 12/31/2025 (Okafor, M.)) No. of Notices: 0. Notice Date 01/02/2026. (Admin.)
01/05/2026	69	(12 pgs) Response opposed to (related document(s): 60 Motion to compel re: discovery Production of Audio Recordings, Transcripts, and Related Documents *(Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.) filed by Defendant Patrick Hagaman Daugherty. (York, Andrew)
01/05/2026	70	(10 pgs; 2 docs) Declaration re: filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)69 Response). (Attachments: # 1 Exhibit 1) (York, Andrew)
01/08/2026	71	(10 pgs) Reply to (related document(s): 69 Response filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty) *(Highland Capital Management, L.P.'s Reply in Support of Motion*

		to Compel Production of Audio Recordings, Transcripts, and Related Documents) filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Annable, Zachery)
01/12/2026	72	(4 pgs) Certificate of service re: *Documents Served on or After December 19, 2025* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)59 Subpoena on Hunton Andrews Kurth LLP filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 60 Motion to compel re: discovery Production of Audio Recordings, Transcripts, and Related Documents *(Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (Attachments: # 1 Proposed Order) filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 61 Declaration re: *(Declaration of Hayley R. Winograd in Support of Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)60 Motion to compel re: discovery Production of Audio Recordings, Transcripts, and Related Documents *(Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)*). (Attachments: # 1 Exhibit 1 # 2 Exhibit 2 # 3 Exhibit 3--Part 1 # 4 Exhibit 3--Part 2 # 5 Exhibit 4 # 6 Exhibit 5) filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 62 Notice of hearing *(Notice of Hearing on Highland Capital Management, L.P.'s Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)60 Motion to compel re: discovery filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Hearing to be held on 1/14/2026 at 03:30 PM via WebEx for 60, (Annable, Zachery)Modified on 12/29/2025 (sdw). filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 65 Notice to take deposition of Patrick Hagaman Daugherty filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 71 Reply to (related document(s): 69 Response filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty) *(Highland Capital Management, L.P.'s Reply in Support of Motion to Compel Production of Audio Recordings, Transcripts, and Related Documents)* filed by Plaintiff

		Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
01/12/2026	73	(3 pgs) Certificate of service re: *Highland Capital Management, L.P.s Answer to Patrick Daughertys Original Counterclaim* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)56 Answer to counterclaim *(Highland Capital Management, L.P.'s Answer to Patrick Daugherty's Original Counterclaim)* filed by Highland Capital Management, L.P.. filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
01/15/2026	74	(2 pgs) Order granting Highland's motion to compel production of audio recordings, transcripts, and related documents (related document # 60) Entered on 1/15/2026. (Hyden, Kara)
01/17/2026	76	(4 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)74 Order granting Highland's motion to compel production of audio recordings, transcripts, and related documents (related document 60) Entered on 1/15/2026.) No. of Notices: 0. Notice Date 01/17/2026. (Admin.)
01/23/2026	77	(16 pgs) Agreed Protective Order Concerning Subpoena to Third-Party Hunton Andrews Kurth LLP(RE: related document(s)59 Subpoena filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Entered on 1/23/2026 (Ecker, C.)
01/25/2026	78	(18 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)77 Agreed Protective Order Concerning Subpoena to Third-Party Hunton Andrews Kurth LLP(RE: related document(s)59 Subpoena filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Entered on 1/23/2026 (Ecker, C.)) No. of Notices: 0. Notice Date 01/25/2026. (Admin.)
01/26/2026	79	(13 pgs) Memorandum of opinion (RE: related document(s)33 Motion to stay pending appeal filed by Counter-Claimant Patrick Hagaman Daugherty, Defendant Patrick Hagaman Daugherty). Entered on 1/26/2026 (Hyden, Kara)
01/26/2026	80	(13 pgs) Order denying motion to stay pending appeal (related document # 33) Entered on 1/26/2026. (Hyden, Kara)
01/28/2026	81	(15 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)79 Memorandum of opinion (RE: related document(s)33 Motion to stay pending appeal filed by Counter-Claimant Patrick Hagaman

		Daugherty, Defendant Patrick Hagaman Daugherty). Entered on 1/26/2026) No. of Notices: 0. Notice Date 01/28/2026. (Admin.)
01/28/2026	82	(15 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)80 Order denying motion to stay pending appeal (related document 33) Entered on 1/26/2026.) No. of Notices: 0. Notice Date 01/28/2026. (Admin.)
02/09/2026	84	(4 pgs) Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)59 Subpoena). (Annable, Zachery)
02/09/2026	85	(7 pgs) Order Approving Stipulation as to the Authenticity of Documents Produced by Hunton Andrews & Kurth LLP (RE: related document(s)59 Subpoena filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 84 Stipulation filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Entered on 2/9/2026 (Okafor, M.)
02/11/2026	86	(9 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)85 Order Approving Stipulation as to the Authenticity of Documents Produced by Hunton Andrews & Kurth LLP (RE: related document(s)59 Subpoena filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P., 84 Stipulation filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Entered on 2/9/2026 (Okafor, M.)) No. of Notices: 0. Notice Date 02/11/2026. (Admin.)
02/25/2026	87	(3 pgs) Notice to take deposition of T.J. Liles-Tims filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P.. (Annable, Zachery)
02/27/2026	88	(2 pgs) Order Resetting Trial Date (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Trial date set for 4/17/2026 at 09:00 AM at Dallas Judge Jernigan Ctrm. Entered on 2/27/2026 (Okafor, M.)
03/01/2026	89	(4 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)88 Order Resetting Trial Date (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Trial date set for 4/17/2026 at 09:00 AM at Dallas Judge Jernigan Ctrm. Entered on 2/27/2026 (Okafor, M.)) No. of Notices: 2. Notice Date 03/01/2026. (Admin.)

03/10/2026	91	(3 pgs) Certificate of service re: *Stipulation as to the Authenticity of Documents Produced by Hunton Andrews & Kurth LLP* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)84 Stipulation by Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)59 Subpoena). filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
03/17/2026	93	(5 pgs) Stipulation by Highland Capital Management, L.P., Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)37 Order to set hearing, 88 Order to set hearing). (Annable, Zachery)
03/19/2026	94	(8 pgs) Order Approving Second Stipulated Scheduling Order (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Hearing to be held on 4/17/2026 at 09:00 AM Dallas Judge Jernigan Ctrm for 1, Entered on 3/19/2026 (Okafor, M.) MODIFIED to correct hearing location on 3/20/2026 (mdo).
03/20/2026	95	(3 pgs) Certificate of service re: *[Proposed] Second Stipulated Scheduling Order* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)93 Stipulation by Highland Capital Management, L.P., Highland Capital Management, L.P. and Patrick Hagaman Daugherty. filed by Plaintiff Highland Capital Management, L.P., Counter-Defendant Highland Capital Management, L.P. (RE: related document(s)37 Order to set hearing, 88 Order to set hearing). filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
03/21/2026	96	(10 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)94 Order Approving Second Stipulated Scheduling Order (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Hearing to be held on 4/17/2026 at 09:00 AM Dallas Judge Jernigan Ctrm for 1, Entered on 3/19/2026 (Okafor, M.) MODIFIED to correct hearing location on 3/20/2026 (mdo).) No. of Notices: 1. Notice Date 03/21/2026. (Admin.)
04/02/2026	97	(8 pgs) Witness and Exhibit List *(Highland Capital Management, L.P.'s Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)1 Complaint). (Annable, Zachery)

04/02/2026	98	(8 pgs) Witness and Exhibit List filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)1 Complaint). (York, Andrew)
04/08/2026	99	(9 pgs) Objection to (related document(s): 97 List (witness/exhibit/generic) filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.) filed by Defendant Patrick Hagaman Daugherty. (York, Andrew)
04/10/2026	100	(28 pgs) Proposed pre-trial order filed by Plaintiff Highland Capital Management, L.P.. (Annable, Zachery)
04/13/2026	101	(28 pgs) Joint Pre-Trial order (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). Entered on 4/13/2026 (Hyden, Kara)
04/13/2026	102	(21 pgs) Brief in support filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)94 Order to set hearing). (York, Andrew)
04/14/2026	103	(8 pgs) Amended Witness and Exhibit List filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)98 List (witness/exhibit/generic)). (York, Andrew)
04/14/2026	104	(8 pgs) Amended Witness and Exhibit List *(Highland Capital Management, L.P.'s Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)97 List (witness/exhibit/generic)). (Annable, Zachery)
04/15/2026	105	(1782 pgs; 95 docs) Amended Witness and Exhibit List *2nd* filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (RE: related document(s)103 List (witness/exhibit/generic)). (Attachments: # 1 Exhibit PD-01 # 2 Exhibit PD-02 # 3 Exhibit PD-03 # 4 Exhibit PD-04 # 5 Exhibit PD-05 # 6 Exhibit PD-06 # 7 Exhibit PD-07 # 8 List of 20 Largest Creditors PD-08 # 9 Exhibit PD-09 # 10 Exhibit PD-10 # 11 Exhibit PD-11 # 12 Exhibit PD-12 # 13 Exhibit PD-13 # 14 Exhibit PD-14 # 15 Exhibit PD-16 # 16 Exhibit PD-16 # 17 List of 20 Largest Creditors PD-17 # 18 Exhibit PD-18 # 19 Exhibit PD-19 # 20 Exhibit PD-20 # 21 Exhibit PD-21 # 22 Exhibit PD-22 # 23 Exhibit PD-23 # 24 Exhibit PD-24 # 25 Exhibit PD-25 # 26 Exhibit PD-26 # 27 Exhibit PD-27 # 28 Exhibit PD-28 # 29 Exhibit PD-29 # 30 Exhibit PD-30 # 31 Exhibit PD-31 # 32 Exhibit PD-32 # 33 Exhibit PD-33 # 34 Exhibit PD-34 # 35 Exhibit PD-35 # 36 Exhibit PD-36 # 37 Exhibit PD-37 # 38 List of 20 Largest Creditors PD-38 # 39 List of 20 Largest Creditors PD-39 # 40 Exhibit PD-40 # 41 List of 20 Largest Creditors PD-41 # 42 Exhibit PD-42 # 43 Exhibit PD-43 # 44 Exhibit PD-44 # 45 Exhibit PD-45 # 46 Exhibit PD-46 # 47 Exhibit PD-47 # 48 Exhibit PD-48 # 49 Exhibit PD-49 # 50 Exhibit PD-50 # 51 Exhibit PD-51 # 52 Exhibit PD-52 # 53 Exhibit PD-53 # 54 Exhibit PD-54

		# 55 Exhibit PD-55 # 56 Exhibit PD-56 # 57 Exhibit PD-57 # 58 Exhibit PD-58 # 59 Exhibit PD-59 # 60 Exhibit PD-60 # 61 Exhibit PD-61 # 62 Exhibit PD-62 # 63 Exhibit PD-63 # 64 Exhibit PD-64 # 65 Exhibit PD-65 # 66 Exhibit PD-66 # 67 Exhibit PD-67 # 68 Exhibit PD-68 # 69 Exhibit PD-69 # 70 Exhibit PD-70 # 71 Exhibit PD-71 # 72 Exhibit PD-72 # 73 Exhibit PD-73 # 74 Exhibit PD-74 # 75 Exhibit PD-75 # 76 Exhibit PD-76 # 77 Exhibit PD-77 # 78 Exhibit PD-78 # 79 Exhibit PD-79 # 80 Exhibit PD-80 # 81 Exhibit PD-81 # 82 Exhibit PD-82 # 83 Exhibit PD-83 # 84 Exhibit PD-84 # 85 Exhibit PD-85 # 86 Exhibit PD-86 # 87 Exhibit PD-87 # 88 Exhibit PD-88 # 89 Exhibit PD-89 # 90 Exhibit PD-90 # 91 Exhibit PD-91 # 92 Exhibit PD-92 # 93 Exhibit PD-93 # 94 Exhibit PD-94) (York, Andrew)
04/15/2026	106	(11 pgs) Joint Motion to file document under seal. *Exhibits* filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (York, Andrew)
04/15/2026	107	(696 pgs; 66 docs) Amended Witness and Exhibit List *(Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)97 List (witness/exhibit/generic), 104 List (witness/exhibit/generic)). (Attachments: # 1 Exhibit 1 # 2 Exhibit 2 # 3 Exhibit 3 # 4 Exhibit 4 # 5 Exhibit 5 # 6 Exhibit 6 # 7 Exhibit 7 # 8 Exhibit 8 # 9 Exhibit 9 # 10 Exhibit 10 # 11 Exhibit 11 # 12 Exhibit 12 # 13 Exhibit 13 # 14 Exhibit 14 # 15 Exhibit 15 # 16 Exhibit 16 # 17 Exhibit 17 # 18 Exhibit 18 # 19 Exhibit 19 # 20 Exhibit 20 # 21 Exhibit 21 # 22 Exhibit 22 # 23 Exhibit 23 # 24 Exhibit 24 # 25 Exhibit 25 # 26 Exhibit 26 # 27 Exhibit 27 # 28 Exhibit 28 # 29 Exhibit 29 # 30 Exhibit 30 # 31 Exhibit 31 # 32 Exhibit 32 # 33 Exhibit 33 # 34 Exhibit 34 # 35 Exhibit 35 # 36 Exhibit 36 # 37 Exhibit 37 # 38 Exhibit 38 # 39 Exhibit 39 # 40 Exhibit 40 # 41 Exhibit 41 # 42 Exhibit 42 # 43 Exhibit 43 # 44 Exhibit 44 # 45 Exhibit 45 # 46 Exhibit 46 # 47 Exhibit 47 # 48 Exhibit 48 # 49 Exhibit 49 # 50 Exhibit 50 # 51 Exhibit 51 # 52 Exhibit 52 # 53 Exhibit 53 # 54 Exhibit 54 # 55 Exhibit 55 # 56 Exhibit 56 # 57 Exhibit 57 # 58 Exhibit 58 # 59 Exhibit 59 # 60 Exhibit 60 # 61 Exhibit 61 # 62 Exhibit 62 # 63 Exhibit 63 # 64 Exhibit 64 # 65 Exhibit 65) (Annable, Zachery)
04/15/2026	108	(5 pgs) Order granting Plaintiff Highland Capital Management, L.P.'s and Defendant Patrick Hagman Daugherty's motion to seal certain exhibits (related document # 106) Entered on 4/15/2026. (Okafor, M.)
04/15/2026	109	SEALED document regarding: Exhibit 14 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital

		Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	110	SEALED document regarding: Exhibit 21 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	111	SEALED document regarding: Exhibit 22 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	112	SEALED document regarding: Exhibit 23 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	113	SEALED document regarding: Exhibit 24 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	114	SEALED document regarding: Exhibit 25 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	115	SEALED document regarding: Exhibit 26 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	116	SEALED document regarding: Exhibit 27 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)

04/15/2026	117	SEALED document regarding: Exhibit 28 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	118	SEALED document regarding: Exhibit 35 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	119	SEALED document regarding: Exhibit 36 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	120	SEALED document regarding: Exhibit 37 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	121	SEALED document regarding: Exhibit 57 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	122	SEALED document regarding: Exhibit 61 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	123	SEALED document regarding: Exhibit 62 of Highland Capital Management, L.P.'s Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026 per court order filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)108 Order on motion to seal). (Annable, Zachery)
04/15/2026	124	(30 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)101 Joint Pre-Trial order (RE: related document(s)1 Complaint filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff

		Highland Capital Management, L.P.). Entered on 4/13/2026) No. of Notices: 0. Notice Date 04/15/2026. (Admin.)
04/16/2026	126	(64 pgs; 5 docs) Support/supplemental document *Supplemental 2nd Amended Witness and Exhibit List* filed by Defendant Patrick Hagaman Daugherty, Counter-Claimant Patrick Hagaman Daugherty (RE: related document(s)105 List (witness/exhibit/generic)). (Attachments: # 1 Exhibit PD-95 # 2 Exhibit PD-96 # 3 Exhibit PD-97 # 4 Exhibit PD-98) (York, Andrew)
04/16/2026	127	(3 pgs) Certificate of service re: *[Proposed] Joint Pretrial Order* Filed by Claims Agent Kurtzman Carson Consultants, LLC d/b/a Verita Global (related document(s)100 Proposed pre-trial order filed by Plaintiff Highland Capital Management, L.P.. filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.). (Kass, Albert)
04/17/2026	128	(15 pgs; 2 docs) Witness and Exhibit List *(Highland Capital Management, L.P.'s First Supplement to Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)1 Complaint). (Attachments: # 1 Exhibit 66) (Annable, Zachery)
04/17/2026	129	(7 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)108 Order granting Plaintiff Highland Capital Management, L.P.'s and Defendant Patrick Hagman Daugherty's motion to seal certain exhibits (related document 106) Entered on 4/15/2026. (Okafor, M.)) No. of Notices: 0. Notice Date 04/17/2026. (Admin.)
04/20/2026	130	(9 pgs; 2 docs) Witness and Exhibit List *(Highland Capital Management, L.P.'s Second Supplement to Second Amended Witness and Exhibit List with Respect to Trial to Be Held on April 17, 2026)* filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)1 Complaint). (Attachments: # 1 Exhibit 67) (Annable, Zachery)
04/21/2026	132	(1 pg) Court admitted exhibits date of hearing 4/17/2026 (RE: related document(s)1 Adversary case 25-03055. Complaint by Highland Capital Management, L.P. against Patrick Hagaman Daugherty. Fee Amount $350 (Attachments: # 1 Exhibit A # 2 Adversary Proceeding Cover Sheet). Nature(s) of suit: 81 (Subordination of claim or interest). filed by Counter-Defendant Highland Capital Management, L.P., Plaintiff Highland Capital Management, L.P.) (Noble, Nicholas)
05/13/2026	133	(1 pg) Request for Transcript regarding a hearing held on 4/17/2026. The requested turn-around time is hourly. filed by Plaintiff Highland Capital Management, L.P.. (Hayward, Melissa)

05/18/2026	135	(327 pgs) Transcript regarding Hearing Held 4/17/26 RE: 1 Adversary case 25-03055. Complaint by Highland Capital Management, L.P. against Patrick Hagaman Daugherty.. THIS TRANSCRIPT WILL BE MADE ELECTRONICALLY AVAILABLE TO THE GENERAL PUBLIC 90 DAYS AFTER THE DATE OF FILING. TRANSCRIPT RELEASE DATE IS 08/17/2026. Until that time the transcript may be viewed at the Clerk's Office or a copy may be obtained from the official court transcriber. Court Reporter/Transcriber Cindy Sumner, Telephone number 2148027196. (RE: related document(s) 131 Hearing held on 4/17/2026. **Matter taken under advisement; each side to file proposed Findings of Fact and Conclusions of Law no later than June 5, 2026.** (RE: related document(s)1 Adversary case 25-03055. Complaint by Highland Capital Management, L.P. against Patrick Hagaman Daugherty. Fee Amount $350 (Attachments: # 1 Exhibit A # 2 Adversary Proceeding Cover Sheet). Nature(s) of suit: 81 (Subordination of claim or interest).)). Transcript to be made available to the public on 08/17/2026. (Sumner, Cindy)
06/05/2026	136	(47 pgs) Proposed findings of fact and conclusions of law filed by Plaintiff Highland Capital Management, L.P. (RE: related document(s)1 Complaint). (Annable, Zachery)
06/05/2026	137	(19 pgs) Proposed findings of fact and conclusions of law filed by Defendant Patrick Hagaman Daugherty (RE: related document(s) 131 Hearing held). (York, Andrew)
07/24/2026	138	(2 pgs) Judgment. Entered on 7/24/2026 (Grandstaff, Travis)
07/24/2026	139	(25 pgs) Memorandum of opinion (RE: related document(s)138 Judgment). Entered on 7/24/2026 (Grandstaff, Travis)
07/26/2026	140	(4 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)138 Judgment. Entered on 7/24/2026) No. of Notices: 0. Notice Date 07/26/2026. (Admin.)
07/26/2026	141	(27 pgs) BNC certificate of mailing - PDF document. (RE: related document(s)139 Memorandum of opinion (RE: related document(s)138 Judgment). Entered on 7/24/2026) No. of Notices: 0. Notice Date 07/26/2026. (Admin.)
08/07/2026	142	(7 pgs; 2 docs) Notice of appeal . Fee Amount $298 filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)138 Judgment). Appellant Designation due by 08/21/2026. (Attachments: # 1 Exhibit A)(York, Andrew)
08/11/2026	144	(9 pgs; 3 docs) Certificate of mailing regarding appeal (RE: related document(s)142 Notice of appeal . filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)138 Judgment). Appellant Designation

		due by 08/21/2026. (Attachments: # 1 Exhibit A)) (Attachments: # 1 Service List) (Whitaker, Sheniqua)
08/11/2026	145	(2 pgs) Notice regarding the record for a bankruptcy appeal to the U.S. District Court. (RE: related document(s)142 Notice of appeal . filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)138 Judgment). Appellant Designation due by 08/21/2026. (Attachments: # 1 Exhibit A)) (Whitaker, Sheniqua)
08/11/2026	146	(4 pgs) DISTRICT COURT Notice of docketing notice of appeal. Civil Action Number: 3:26-cv-02664-S. (RE: related document(s)142 Notice of appeal . Fee Amount $298 filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)138 Judgment). Appellant Designation due by 08/21/2026. (Attachments: # 1 Exhibit A)) (Whitaker, Sheniqua)
08/13/2026	147	(4 pgs) BNC certificate of mailing. (RE: related document(s)145 Notice regarding the record for a bankruptcy appeal to the U.S. District Court. (RE: related document(s)142 Notice of appeal . filed by Defendant Patrick Hagaman Daugherty (RE: related document(s)138 Judgment). Appellant Designation due by 08/21/2026. (Attachments: # 1 Exhibit A))) No. of Notices: 0. Notice Date 08/13/2026. (Admin.)

Reservation of Rights

Daugherty expressly reserves the right to amend or supplement this designation and/or to object, or otherwise supplement or move to strike or modify, some or all of any designations filed by any other party to this appeal. This filing is made expressly subject to, and without waiver of, any and all rights, remedies, challenges and objections.

Respectfully submitted this 2nd day of September, 2026,

GRAY REED

By: */s/ Andrew K. York*

Jason S. Brookner
Texas Bar No. 240033684
Andrew K. York
Texas Bar No. 24051554
Joshua D. Smeltzer
Texas Bar No. 24113859
J. Reid Burley
Texas Bar No. 24109675
Drake M. Rayshell
Texas Bar No. 24118507

1845 Woodall Rodgers Fwy., Suite 1300
Dallas, Texas 75201
Telephone: (214) 954-4135
Facsimile: (214) 953-1332
Email: jbrookner@grayreed.com
dyork@grayreed.com
jsmeltzer@grayreed.com
rburley@grayreed.com
drayshell@grayreed.com

Counsel to Patrick Daugherty

CERTIFICATE OF SERVICE

I hereby certify that a true and accurate copy of the foregoing instrument was served on all Parties or counsel of record herein on this 2nd day of September 2026, via the CM/ECF system and/or email.

/s/ Andrew K. York
ANDREW K. YORK