

Sacks Glazier Franklin & Lodise LLP

Litigation for Substantial Trusts and Estates



March 2017

Welcome to the [Sacks, Glazier, Franklin & Lodise](#) newsletter. We are committed to keeping our clients apprised of the latest industry happenings. We welcome your questions and comments. Please contact us at info@trustlitigation.la

FEATURED ARTICLE

Harvard Law
bulletin

WILL POWER

A 19th-century document leads Terry Franklin on a journey of self-discovery



Terry Franklin

Credit: Lorin
Granger, HLS Staff
Photographer

[Terry Franklin](#) '89, a trusts and estates litigator, knows the importance of wills to those left behind. Recently he has focused on a will executed 170 years ago with enormous bearing on his ancestors' survival and his own existence.

Franklin family lore tells of Grannie Lucie, the "property" of a white man named John Sutton. They were Franklin's great-great-great-grandparents. Franklin had seen an abstract of Sutton's will, which stipulated that his "mulatto slave Lucie" and her eight children and six grandchildren were to be freed after his death. What Franklin did not know, and what gnawed at him, was whether Sutton also had a white wife and children.

Continue reading Terry's interview in *Harvard Law Bulletin* [here](#).

Read Terry's related article, "[Tracing One Family's Path to Freedom, Through Love](#)" in the American Bar Association's *Probate & Property* magazine [here](#).

Five SGFL Partners Selected as 2017 Southern California

Super Lawyers®

Partner Meg Lodise Named to "Top 50 Women" List



Robert
Sacks



Kenneth
Glazier



Terrence
Franklin



Meg
Lodise



Matthew
McMurtrey

Partners Robert Sacks, Kenneth Glazier, Terrence Franklin, Meg Lodise and Managing Partner Matthew McMurtrey have been selected for inclusion on the 2017 *Southern California Super Lawyers* list for their work in the areas of Estate and Trust Litigation. Margaret has also been selected for inclusion on the "Top 50 Women" list.

Robert has been named to the Super Lawyers' list for 14 consecutive years, Terrence for 13 consecutive years, Kenneth for 12 consecutive years and Matthew for three consecutive years. Meg has been named to the Super Lawyers list for 13 consecutive years and "Top 50 Women" for seven consecutive years.



THE AMERICAN COLLEGE OF
TRUST AND ESTATE COUNSEL

Jessica Uzcategui Accepted to American College of Trust and Estate Counsel



Partner [Jessica A. Uzcategui](#) has been accepted as a Fellow by the American College of Trust and Estate Counsel (ACTEC). ACTEC is a nonprofit association of lawyers and law professors with experience in all areas of trust and estate law. Its more than 2,700 members are called "Fellows" and are elected to membership based on their outstanding reputation, exceptional skill, and substantial contributions to the field by lecturing, writing, teaching and participating in bar activities. It is their aim to improve and reform probate, trust and tax laws, procedures, and professional

responsibility.

Matthew McMurtrey Named Managing Editor of *California Trusts and Estates Quarterly*



Managing Partner [Matthew McMurtrey](#) has been named Managing Editor of *California Trusts and Estates Quarterly*, the official publication of the Trusts & Estates section of the California State Bar. The publication features articles and columns written by leading authors, practitioners and scholars, and is distributed to section members. Learn more about the *Quarterly* [here](#).

SPEAKING ENGAGEMENTS



ABA
SECTION OF
REAL PROPERTY | TRUST &
ESTATE LAW

Sacks, Glazier, Franklin & Lodise Partners to Speak at ABA Real Property, Trust & Estate Law 29th Annual Spring Symposia

Partners [Terrence Franklin](#), [Robert Sacks](#) and [Jessica Uzcategui](#) will participate in the [American Bar Association's Real Property, Trust & Estate Law Section's 29th Annual Spring Symposia CLE Meeting](#) being held April 20 - 21, 2017 in Denver.

Mr. Franklin is speaking on the panel "[Ethics and Mediation: The Highs and Lows of Taming Two Broncos](#)" on Thursday, April 20. This program explores ethical issues in negotiating settlements, and the ethical duties of the mediator, counsel and advisor.

Mr. Sacks will be the program moderator for "[Harmonizing the Sometimes Discordant Duties of Trustees Who Also Run the Family Business](#)" on Friday, April 21. This panel explores whether and how an individual simultaneously wearing a trustee hat and a corporate fiduciary hat can successfully serve the beneficiaries of the trust and the shareholders/owners of the company.

Ms. Uzcategui will participate on the panel, "[High Stakes Litigation: When to Bring in the Expert to Win Your Case](#)" on Friday, April 21. The program examines the role of expert witnesses and consultants; do's and don'ts of retaining and working with an expert; considerations for agreeing to be an expert; and related ethics and malpractice issues.

Matthew McMurtrey & Ryan Houck Present to the State Bar of California



Managing Partner [Matthew McMurtrey](#) and Attorney [Ryan Houck](#) presented "[Introduction to Trust and Estate Litigation](#)" at the State Bar of California offices in San Francisco on March 2, 2017 for one-hour of MCLE credit.

The program focused on will contests; trust petitions filed under Probate Code Section 17200; and petitions filed under Probate Code Section 850 concerning property belonging to an estate or a trust. McMurtrey and Houck addressed the issues encompassed in these petitions, and the filing procedures that need to be fulfilled.

Contact Us

Sacks, Glazier, Franklin & Lodise

350 South Grand Avenue, Suite 3500 | Los Angeles, CA 90071

(213) 617-2950 | info@trustlitigation.la

The information you obtain in this newsletter is not intended to be legal advice. You should consult an attorney for advice regarding your individual situation. We invite you to contact us and welcome your calls, letters and electronic mail.

Contacting us does not create an attorney-client relationship. Please do not send any confidential information to us until such time as an attorney-client relationship has been established.

STAY CONNECTED:

