

Sacks Glazier Franklin & Lodise

Litigation for Substantial Trusts and Estates

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Margaret G. Lodise

Partner

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Margaret G. Lodise has more than 20 years' experience representing beneficiaries and trustees, conservators, individuals and institutional clients in connection with a range of matters pertaining to estate, trust and conservatorship litigation. In addition, she handles estate, trust and conservatorship administration.

Ms. Lodise handles appellate work concerning trusts, estates and conservatorships, and has been appointed by the court as a guardian ad litem in connection with significant matters. Her recent representative matters include successfully defending a trustee from claims of surcharge and improper investments; representing a professional trustee in connection with a dispute over the distribution of a trust; and representing a beneficiary of a disputed family trust, in which the beneficiary prevailed at trial and on the appellate level in having significant assets resulting from the sale of the family business transferred to her.

Actively involved in the legal community, Ms. Lodise is a fellow of the American College of Trust and Estate Counsel (ACTEC), serves on the Executive Committee for the Trust and Estate Section of the State Bar of California, and is a current member and former President of the Women Lawyers Association of Los Angeles. She also attended Pomona College, where she graduated cum laude in 1985.

Ms. Lodise serves as an expert witness and is frequently called upon to speak on estate and trust-related issues before bar and community organizations, including ACTEC, the Los Angeles and Beverly Hills Bar Associations, the Professional Fiduciary Association of California, the Practicing Law Institute and California CEB. She is an adjunct professor at Loyola Law School.

Meg was named Best Lawyers' 2012 Los Angeles Litigation - Trust & Estates "Lawyer of the Year," awarded to individual attorneys with the highest overall peer feedback for a specific practice area and geographic region. Only one attorney is recognized as the "Lawyer of the Year" for each specialty and location. She has also been named to the list of Best Lawyers in America® since 2011 and Southern California Super Lawyers since 2005. Los Angeles Business Journal has recognized her on the list "Who's Who in L.A. Law."

After earning her Bachelor's degree from Pomona College, Ms. Lodise received her law degree in 1988 from the University of California at Los Angeles and her LL.M. in taxation from Loyola Law School in 2002. Prior to joining Sacks Glazier Franklin & Lodise, she was a partner with Ross, Sacks & Glazier, LLP and prior to that she worked at Orrick, Herrington & Sutcliffe.

Areas of Practice

- Estate, Trust and Conservatorship Litigation

Bar Admissions

- California, 1988

Education

- **Loyola Law School, Los Angeles, California**
 - LL.M. - 2002
 - Major: Taxation
- **University of California at Los Angeles School of Law, Los Angeles, California - 1988**
 - Honors: Member, Moot Court Honors Program
- **Pomona College, Pomona, California - 1985**
 - Honors: cum laude

Honors and Awards

- "Lawyer of the Year" Litigation – Trust & Estates, Los Angeles - Best Lawyers 2012
- "Who's Who in L.A. Law" - Los Angeles Business Journal
- Southern California Super Lawyers, 2005 - Present
- Best Lawyers in America®, 2011 - Present
- "Top 50 Women" - Southern California Super Lawyers 2011-Present

Professional Associations and Memberships

- State Bar of California, Trusts and Estates Executive Committee Member, Past Chair
- Los Angeles County Bar Association, Trust and Estate Section, Member, Past Chair
- Women Lawyers' Association of Los Angeles, Member, Past President
- American College of Trust and Estate Counsel (ACTEC), Fellow

Past Employment Positions

- Orrick, Herrington & Sutcliffe
- Ross, Sacks & Glazier, Partner

Pro Bono Activities

- Board of Trustees, Pomona College
- Torchbearers Board, Pomona College
- Probate Volunteer Panel, Los Angeles County Superior Court
- Board of Governors, City Club of Los Angeles
- Chair, Pomona College Presidential Search Committee

Classes/Seminars

- Co-Speaker, Riding the Practical and Ethical Waves of Acting as Court Appointed Counsel, The Conservatorship, Guardianship & Protective Proceedings section of the Orange County Bar Association

- Panelist, "Beneficiaries and Trustees Behaving Badly", Los Angeles County Bar Association 2014 Trusts and Estates Symposium
- Co-Speaker, "Ethics & Malpractice Issues: Protection Tips for Estate and Trusts Attorneys", Continuing Education of the Bar (CEB)
- Adjunct Professor, Loyola Law School, "Estate and Probate Litigation", Summer Term, 2012 - 2013
- Adjunct Professor, "Probate and Estate Litigation", Loyola Law School
- Speaker, Various Trust and Estate Issues, Los Angeles County Bar Association
- Speaker, Various Trust and Estate Issues, Beverly Hills Bar Association
- Speaker, Various Trust and Estate Issues, Professional Fiduciary Association of California
- Speaker, Various Trust and Estate Issues, California CEB
- Speaker, Various Trust and Estate Issues, Practising Law Institute
- Speaker, USC Gould School of Law Trusts and Estates Conference
- Speaker, "Clients with Diminished Capacity," 40th Annual UCLA/CEB Estate Planning Institute

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Super Lawyers





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