

# Sacks Glazier Franklin & Lodise

## Litigation for Substantial Trusts and Estates

Contact Us: 213-617-2950



### Robert N. Sacks

Partner

**Phone:** 213-617-7360

**Fax:** 213-617-9350

**Email:** [Email Me](#)

Robert N. Sacks practices exclusively in the area of trust, estate and conservatorship litigation. With more than 30 years' experience, Mr. Sacks handles cases across the full spectrum of trust, estate and conservatorship law, including prosecuting or defending traditional contests challenging the validity of a will or trust, breach of fiduciary duty claims involving trustees and other fiduciaries, and challenges to estate plans and other issues in conservatorship proceedings. He represents both fiduciaries and beneficiaries, ranging from corporate trustees to charities and high-net-worth individuals, in such matters through trial and appeal. Mr. Sacks also serves as a mediator in such disputes.

Mr. Sacks' recent representative trial matters include successfully defending a family trust against claims that a family member had pledged \$18 million to a charity shortly before his death; successfully representing a trustee in a complex dispute involving claims of interpretation, execution, powers to amend or revoke, and breach of fiduciary duty; and successfully representing a charitable foundation as beneficiary against proposed amendments to the trust that would have negatively impacted the charity.

He has been a Member of the American Bar Association's (ABA) Real Property Trust and Estate Law Section for more than two decades, and holds multiple positions as a Member of the Section's governing Council, on which he serves as the Supervisory Council Member for the Litigation, Ethics and Malpractice Group of Committees, and as Section Liaison to the National College of Probate Judges.

Mr. Sacks was ranked by Chambers and Partners High Net Worth guide in the Private Wealth Disputes category for 2018. He is also named to the list of The Best Lawyers in America and is recognized as Best Lawyers' 2014 and 2018 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. Additionally, he has been named to the list of Southern California Super Lawyers every year since the honor's inception in 2004.

He is frequently called upon to speak to various organizations, including the National College of Probate Judges, the ABA, the University of Miami's Annual Heckerling Institute on Estate Planning, Stanford University, USC Law School's Annual Trust and Estate Conference and more. In addition, he has authored articles that have been published in *Private Wealth*, *The Journal of Gift Planning*, and *Estate Planning* magazines.

Mr. Sacks earned his J.D. from University of California, Los Angeles School of Law, and his B.A. from the University of Wisconsin, where he graduated with distinction. Prior to his work with Sacks Glazier Franklin & Lodise, he was a Founding Partner of Ross, Sacks & Glazier, LLP and a Litigation Associate at the law firm of Morrison & Foerster. He is conversant in Spanish.

## Areas of Practice

- Trust, Estate and Conservatorship Litigation
- Mediation
- Appeals

## Bar Admissions

- California, 1986

## Education

- **University of California at Los Angeles School of Law, Los Angeles, California**
  - J.D. - 1986
- **University of Wisconsin**
  - B.A. - 1981
  - Honors: With Distinction

## Honors and Awards

- Chambers and Partners High Net Worth 2018: Southern California, Private Wealth Disputes

- Best Lawyers' 2014 and 2018 Los Angeles Litigation – Trust & Estates, &quot;Lawyer of the Year&quot;;
- The Best Lawyers in America®, 2011 - Present
- Southern California Super Lawyers, 2004 - Present

## Professional Associations and Memberships

- American College of Trust and Estate Counsel (ACTEC), Fellow
- ACTEC, Member, Fiduciary Litigation Committee
- ACTEC, Member, Will and Trust Contests Subcommittee
- American Bar Association (ABA) Real Property, Trust and Estate Law Section, Member
- ABA Real Property, Trust and Estate Law Section, Council Member
- ABA Real Property, Trust and Estate Law Section, Liaison to the National College of Probate Judges
- State Bar of California, Estate Planning, Trust & Probate Law Section, Member
- State Bar of California, Estate Planning, Trust & Probate Law Section, Litigation Section
- Los Angeles County Bar Association, Trusts and Estates Section, Member
- Los Angeles County Bar Association, Litigation Section Member
- Beverly Hills Bar Association, Probate, Trust and Estate Planning Section , Member

## Past Employment Positions

- Morrison & Foerster, Litigation Associate, 1986 - 1991
- Ross, Sacks & Glazier, Founding Partner, 1991 - 2001

## Languages

- Spanish

## Classes/Seminars

- June 2018 Panelist, “(Not Your Or) My Generation: Litigation Issues Involving Children,” ACTEC 2018 Summer Meeting
- March 2016 Panelist, “Tortious Interference With Expected Inheritance,” Amer. Law Institute and cosponsored by Amer. College of Trust and Estate Counsel
- June 2015 Speaker, “Hot Topics in Estate, Trust and Conservatorship Litigation; Contests after Death, Pre-death Contests, and Intentional Interference with Expected Inheritance (Among Other Things),” Amer. Law Institute - CLE Educational Session At Univ. of Wisconsin Estate Planning in Depth 2015 Summer Program

- January 2015 Program Chair and Panelist, "Grandma, Here's Your Deposition Subpoena: Contested Guardianship Issues," The 49th Heckerling Institute on Estate Planning, University of Miami School of Law
- March 2014 Panelist, "Tortious Interference With Expected Inheritance," Amer. College of Trust and Estate Counsel Fiduciary Litigation Committee Annual Meeting
- November 2012 Speaker, "Hot Topics in Trust and Estate Litigation: Capacity, Pre-Death Contests, and Intentional Interference With Expected Inheritance," National College of Probate Judges Fall Conference
- June 2012 Speaker, "Can You Protect the Gift? Capacity, Undue Influence and Substituted Judgment Issues in Planned Giving," 2012 Western Regional Planned Giving Conference
- October 2010 Panelist, "Mediation and Alternative Dispute Resolution from the Inside Out - - What Every Estate Lawyer Needs to Know," Amer. College of Trust and Estate Counsel Fall Meeting
- May 2010 Speaker, Plenary Session, "Ethical and Practical Considerations in Estate Planning," Stanford University/Silicon Valley Community Foundation Conference on Charitable Giving
- May 2010 Panelist, "Escaping Bleak House - How to Select the Best Dispute Resolution Alternatives to Full Scale Litigation," Amer. Bar. Assn. Real Property Trust & Estate Law Section's 21th Annual Spring Symposia
- April 2009 Program Chair and Moderator, "Last Beneficiary Standing: Identifying the Proper Parties in Breach of Fiduciary Duty Cases," Amer. Bar. Assn. Real Property, Trust and Estate Law Section's 20th Annual Spring Symposia
- November 2008 Speaker, "Documents and Filing Issues Explained," USC Law School 34th Annual Trust and Estate Conference
- November 2008 Panelist, "Mock Deposition – Estate and Trust Litigation," The 53rd Annual Estate Planning Seminar, Seattle WA, sponsored by the Washington State Bar Assn and the Estate Planning Council of Seattle
- January 2008 Panelist, "A Mock Trial - The Attorney as Witness: What You Say May Be Used Against You in a Court of Law (and Otherwise): Deposition Strategies and a Mock Deposition," The 42nd Heckerling Institute on Estate Planning, University of Miami School of Law

## Published Works

- Author, "Family Feuds: How To Make A Lawsuit Less Likely", Private Wealth, December 2008/January 2009
- Author, "Pitfalls and Potholes: Lack of Capacity and Undue Influence", The Journal of Gift Planning, Vol. 6 No. 4, Fourth Quarter, 2002
- Author, "Mediation: An Effective Method to Resolve Estate and Trust Disputes", Estate Planning Magazine, June, 2000
- Author, "Probate Court - Supervised Mediation Program Guide for Attorneys and Parties", Los Angeles County Superior Court, Probate Department

✉ EMAIL US FOR RESPONSE

## Sacks Glazier Franklin & Lodise

350 South Grand Ave.

Suite 3500

Los Angeles, California 90071-3475

Phone: 213-617-2950

[Map & Directions](#)



## Super Lawyers

