

Bringing the Past to Trial

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What's a small firm to do if it aspires to greatness and doesn't want to spend generations building its reputation? Specialize. That's what the partners who formed Sacks Glazier Franklin & Lodise did, and it paid off.

While the seven-attorney firm of Sacks Glazier exclusively handles trusts and estates litigation, this narrow specialty is broader than it seems. The firm's four name partners have been practicing together since 1993, and its attorneys are all graduates of top law schools. While the firm's lawyers have prior big-firm litigation experience in a wide range of areas, the firm's specialization runs deep.

"We chose a narrow specialty and focused on building a team of expert attorneys," says name partner Robert N. Sacks. And while these results entail focus and leadership, the effort has been rewarding, according to name partner Terrence Franklin.

"We have a thriving practice and successful track record" Mr. Franklin says. "We expect our attorneys to be involved in the field of trusts and estates litigation, giving lectures, writing articles, and even shaping the field by developing new laws and policies."

The firm's practice areas are estate, probate, trust, and conservatorship litigation, and related mediation and appeals. The firm emphasizes cost-effectiveness and efficiency, while maintaining quality. Litigation is inherently expensive, however the firm's typical matters involve trusts and estates with substantial assets.

Examples of Sacks Glazier's recent cases include successful trial decisions in favor of the firm's clients in separate matters involving charges of breach of duty by trustees. In one case, the firm successfully defended a corporate fiduciary and an individual co-trustee; in another, the firm obtained a significant award for a client suing her trustee. In addition to individual beneficiaries and trustees, institutional clients have become a large part of the Sacks Glazier client base.

"We will always serve the individual who is involved in a trust or estate dispute, but much of our business also comes from banks and trust companies that serve as trustees, as well as charitable organizations and educational institutions who are the beneficiaries of a trust or estate," Ms. Lodise says.

While most litigation centers on financial disputes, trust and estate litigation has a distinctly personal aspect where emotions run high. Estate disagreements, for example, can include the distribution of property and the true intention of the deceased. The firm handles will contests, beneficiary claims, estate mismanagement issues, and family disputes. In cases involving the validity of a will, the issues can range from fraud, duress, undue influence, and coercion, to lack of capacity, proper will execution, and testamentary intent.

The firm encourages clients to mediate and represents them through the process. "Not only does mediation facilitate a mutually accepted settlement, it's confidential," Mr. Sacks says. "This has a strong appeal to many of our clients."

And when necessary, the firm does appellate work in-house. According to name partner Kenneth Glazier, the firm offers a number of experienced appellate lawyers, and has been involved in many reported decisions.

"We handle our clients' appellate work in-house when we need to take a dispute to the next level," Mr. Glazier says.



Back row L-R: Margaret G. Lodise, Robert N. Sacks, Kenneth M. Glazier, Terrence M. Franklin Front row L-R: Jessica A. Uzcatogui, Matthew W. McMurtrey, Benazeer Roshan