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Emotional Rollercoaster

The lawyers at Los Angeles' Sacks, Glazier, Franklin & Lodise operate as a litigation firm that specializes in bitterly contested battles over trusts and estates, and they take many of their cases to trial.

By Kylie Reynolds
Daily Journal Staff Writer

LOS ANGELES — Southern California is a breeding ground of sorts for the trusts, estates and conservatorship disputes that are the heart of Sacks, Glazier, Franklin & Lodise LLP's litigation practice, partner Robert N. Sacks says. Between nontraditional relationships, high levels of wealth and a large retiree population, the Southland is never without a high-profile family feud.

"You couldn't have a firm like this in a lot of smaller communities; there just wouldn't be the level of work," Sacks said. "But there is a lot of estates, trusts and conservatorship litigation in Southern California."

Yet, for all the dysfunctional relationships the firm's attorneys regularly see, they themselves come across as a well-honed team. They routinely finish each other's thoughts and, on any given day, you will likely find them gathered in the firm's conference room eating lunch together.

"When I joined the firm, I thought it was the strangest thing. 'You're kidding me. I have to eat lunch with these people every day?'" said partner Jessica A. Uzcategui, laughing. "Now it's just normal."

Four attorneys founded Los Angeles-based Sacks Glazier in 2001 from a previous boutique, Ross, Sacks & Glazier, which launched a decade earlier. Despite a couple of iterations on the team, the firm has always stuck to its same niche: trusts and estates litigation.

But make no mistake, these attorneys are not trust and estate planners.

"We're a litigation firm that specializes in trust and estates, as opposed to trust and estate lawyers who do litigation," partner Kenneth

M. Glazier said. "That may seem like a distinction without a difference, but we're litigators first and foremost."

So it should come as no surprise that litigation capability is paramount to trusts and estates experience when it comes to bringing on new attorneys, Uzcategui said. The firm typically hires young associates from large firms who have cut their teeth on some cases.

That experience proves beneficial, as the firm's attorneys tend to see more cases go to trial than get resolved. It's not for lack of trying, they contend, but just the fact that many of the disputes that come across their desks are based more on emotion than economics.

Sacks Glazier represents both sides of the equation in trusts, estates and conservatorship disputes, and it counts major universities, charities and banks among its clients. The firm often defends trustees in breach of fiduciary duty claims and handles sibling quarrels over assets.

One of the more publicized matters

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the firm has taken on involves late musician Michael Jackson. Partner Margaret G. Lodise was appointed by a court in 2009 to serve as the guardian for the case to Jackson's three children, where she represents their financial interests in Jackson's estate.

"I don't usually act as a guardian ad litem," Lodise said. "But in this particular case, the issue was lots of disputes going on in the estate and somebody having to sort of stand up and represent those interests and make recommendations to the judge."



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From left, Kenneth M. Glazier, Margaret G. Lodise, Robert N. Sacks and Terrence M. Franklin of Sacks, Glazier, Franklin & Lodise LLP

For many of the firm's clients, the emotions or principles behind going to trial outweigh the economic reasoning behind settling. Not to mention certain familial disputes, such as which sibling will provide the best care to an ill parent, are difficult to put a price tag on, Lodise said.

While it advises clients about the financial and emotional costs of going forward with litigation in family matters, partner Terrence M. Franklin

example, is the new "hot topic" in their practice, Lodise said.

"When you die, what happens to your Facebook account or your Yahoo account?" she said. "Did you leave your passwords to get into your bank account to the right people, so they can access them? That's going to create a lot of issues."

The practice does lend stability to the long-standing firm. In a way, it's "recession-proof," Franklin said, because there will always be fights in the wake of someone's death or concerns over money.

But the attorneys at Sacks Glazier have yet to get bored with the disputes they've been handling for years. There is always a new set of "crazy facts and circumstances," Franklin said, that keep them busy talking over their daily lunches.

"It's not one insurance company fighting against another ... it's some individual who really cares about the fact they think their stepmother is improperly holding onto money she shouldn't," he said. "Who's sleeping with whom and what's going on with that makes for factually interesting cases."

said, the firm will ultimately go to trial for clients if that's what they choose.

"Lots of times you just have to go into court and the judge has to say one way or another," Lodise said.

The firm has grown from four attorneys to nine since the boutique opened its doors more than a decade ago. With the increase of non-nuclear families and longer life spans, the firm has had to expand to meet rising client demand, Sacks said.

It also has to keep up on new trusts and estates issues that pop up as society evolves. Digital assets, for

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