

ROBERT N. SACKS
SACKS, GLAZIER, FRANKLIN, LODISE, McMURTREY & SCHEERER LLP

Specializing in all aspects of trust, estate and conservatorship litigation and mediation.

PROFESSIONAL ASSOCIATIONS

American College of Trust and Estate Counsel, Fellow, 2002 - present; Member, Fiduciary Litigation Committee and Will and Trust Contests Subcommittee, 2003 - present

American Bar Association, Member, Real Property, Trust and Estate Law Section 1991 - present; (Member of the Section's governing Council 2013-2019 and served as Supervisory Council Member for the Litigation, Ethics and Malpractice Group; Co-Vice Chair, Corporate Sponsorship Committee 2010 - 2015 and member 2005 - 2009; Liaison to the National College of Probate Judges 2012 - 2023; Member, National Conference of Lawyers and Corporate Fiduciaries 2019 - 2023; Nominations Committee member 2014 - 2015; Co-Vice Chair, Communications Committee 2009 - 2010; Group Chair, Litigation, Ethics and Malpractice Group 2007 - 2009; Group Vice Chair, Litigation and Controversy Group 2004 - 2007; Chair, Estate and Trust Litigation and Controversy Committee 2000 - 2004; Vice Chair, 1998 - 2000; Member, Committee on Groups and Substantive Committees 2006 - 2009); Member, Litigation Section 1986 - present; (Member, Real Property and Probate Litigation Committee 2000 - 2005; recognized as Outstanding Subcommittee Chair, June 2001 and October 2002; Chair, Probate Litigation Subcommittee 2003 - 2005)

Task Force Updating National Probate Court Standards, 2011 - 2012, member, designated as representative by Amer. Bar Assn. Real Property, Trust and Estate Law Section

California State Bar, Member, Trusts and Estates Section 1991 - present; Member, Litigation Section 1986 - present

Los Angeles County Bar Assn., Member, Trusts and Estates Section 1991 - present; Member, Litigation Section, 1986 - present

Beverly Hills Bar Assn., Member, Probate, Trust and Estate Planning Section 1991 - present

PROFESSIONAL RECOGNITION

Recognized since 2011 in *The Best Lawyers in America* and selected as *Best Lawyers'* 2014 and 2018 Los Angeles Litigation - Trust & Estates, "*Lawyer of the Year*," which is awarded to one

attorney with the highest overall peer-feedback for a specific practice and geographic region

Ranked in Band 1 (the highest rating) in the High Net Worth Rankings for Private Wealth Disputes in California by Chambers and Partners since 2020

Selected as one of the Top Ten Influential California Lawyers in Private Wealth Disputes by Business Today

Named as a Southern California Super Lawyer each year from inception in 2004 - 2017 (featured in February 2023 issue for achieving the twenty year selection milestone)

Named as one of 2025's Top Estate & Wealth Management Attorneys by the Daily Journal

Recognized in LA Magazine's Best of LA Legal 2026

Named as a Legal Visionary in the Los Angeles Times May 2026

SIGNIFICANT PROGRAMS, PANELS AND SPEAKING ENGAGEMENTS

March 2020	Panelist, "Voiding Wills & Trusts Prior to Death: Pre-Mortem Contests," Amer. College of Trust and Estate Counsel Fiduciary Litigation Committee Annual Meeting
June 2018	Panelist, "(Not Your or) My Generation: Litigation Issues Involving Children," Amer. College of Trust and Estate Counsel Summer Meeting
April 2017	Moderator, "Harmonizing the Sometimes Discordant Duties of Trustees Who Also Run the Family Business," Amer. Bar. Assn. Real Property Trust & Estate Law Section's 29 th Annual Spring Symposia
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 21 th 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 20 th Annual Spring Symposia
November 2008	Speaker, "Documents and Filing Issues Explained," USC Law School 34 th Annual Trust and Estate Conference
November 2008	Panelist, "Mock Deposition – Estate and Trust Litigation," The 53 rd 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
February 2007	Speaker, "ADR in Estate Planning Disputes," Professional Education Broadcast Network/Webcredenza

October 2006	Speaker, "Measuring Damages in Fiduciary Litigation: A Review of Decisions and Trends," Amer. Bar. Assn. Real Property, Probate and Trust Law and Taxation Sections' Joint Fall CLE Meeting
July 2006	Panelist, "Becoming Your Deceased Client's Best Witness," Amer. College of Trust and Estate Counsel Business Planning Comm. Meeting
May 2006	Speaker, "Liability Issues for Trustees," Professional Education Broadcast Network/Webcredenza
January 2006	Panelist, "Trust Law and Order: A Mock Trial Demonstration Ripped From The Headlines," The 40 th Heckerling Institute on Estate Planning, University of Miami School of Law
December 2005	Speaker, "2005 Fiduciary Litigation Update," Professional Education Broadcast Network/Webcredenza
November 2004	Speaker, "Trust Contests: The Interrelationship Between the Civil and Probate Sides," USC Law School 2004 Probate and Trust Conference
May 2004	Speaker, "Pitfalls and Potholes: Lack of Capacity, Undue Influence and Other Litigation Issues," Stanford University Conference on Charitable Giving 2004
May 2004	Panelist, "Preparing for the Potential Probate Contest Before and After Death," Amer. Bar. Assn. Real Property Probate and Trust Law Section's 15 th Annual Spring Symposia
May 2004	Panelist, "Estate Planning for the Life Cycle of a Business Owner: Post-Mortem Planning and Litigation Issues," Amer. Bar. Assn. Real Property Probate and Trust Law Section's 15 th Annual Symposia (Materials only)
September 2003	Speaker, "Current Trends in Estate and Trust Litigation," Planned Giving Roundtable of Southern California
June 2003	Speaker, "Litigation Issues Focusing on Undue Influence and Lack of Capacity," Pasadena Planned Giving Group
April 2003	Speaker, "What Every Estate Planner Should Know About Probate Litigation," Amer. Bar. Assn. Real Property Probate and Trust Law Section's 14 th Annual Spring Symposium
March 2003	Panelist, "Using Alternate Dispute Resolution in Estate and Trust Disputes," Amer. Bar Assn. Alternate Dispute Resolution Section's Insight for Inspired Practice Conference

November 2002	Panelist, "When Trustees Go Bad/When Beneficiaries Attack," sponsored by Beverly Hills Bar Assn. Trusts and Estates Section
April 2002	Panelist, "Remedies in Fiduciary Litigation," sponsored by Los Angeles Co. Bar Assn. Trusts and Estates Section as part of 2002 Trusts and Estates Symposium
April 2002	Program Chair, "Getting Sued With Your Client: Developing Law For Collusion With Fiduciaries," Amer. Bar. Assn. Real Property Probate and Trust Law Section's Spring Symposia
October 2001	Speaker, "He's Not Heavy, He's My Trustee," sponsored by the Beverly Hills Bar Assn. Probate, Trust & Estate Planning Section
August 2001	Program Chair and Panelist, "Suing and Defending Fiduciaries," Amer. Bar Assn. Annual Meeting, jointly sponsored by Real Property, Probate and Trust Law Section and Litigation Section
January 2001	Speaker, "Hot Topics in Trust and Estate Litigation," Law Education Institute's National CLE Conference, Estate Planning Law
July 2000	Program Chair and Panelist, "Estate Tax and Trust Litigation: A Potpourri," Amer. Bar Assn. Annual Meeting, sponsored by Real Property, Probate and Trust Law Section
March 2000	Panelist, "Post Mortem Estate Administration and Litigation: A Comprehensive Discussion of Will/Trust Contests," sponsored by Bev. Hills Bar Assn. Probate, Trust & Estate Planning Section
February 2000	Speaker, "Current Trends in Trust Litigation," sponsored by Los Angeles Co. Bar Assn. Trusts and Estates Section
May 1999	Program Chair and Panelist, "Mediation in Estate and Trust Litigation," Amer. Bar. Assn. Real Property Probate and Trust Law Section's Spring Symposia
April 1999	Speaker, "Challenges of Trust Practice: Advising the Nonprofessional Trustee," Matthew Bender & Co. (also May 1998)

ARTICLES AND OTHER WRITINGS

Author, "Family Feuds: How To Make A Lawsuit Less Likely," published in PRIVATE WEALTH, December 2008 / January 2009

Author, "Pitfalls and Potholes: Lack of Capacity and Undue Influence," published in THE JOURNAL OF GIFT PLANNING, Vol. 6, No. 4, Fourth Quarter 2002

Author, "Mediation: An Effective Method to Resolve Estate and Trust Disputes," published in ESTATE PLANNING, June 2000

Author, "Probate Court - Supervised Mediation Program Guide for Attorneys and Parties," distributed for many years by the Probate Department of the Los Angeles County Superior Court

Author or Co-Author of numerous program materials for all or most of the above programs

EMPLOYMENT AND EDUCATION

Sacks, Glazier, Franklin & Lodise LLP, Founding Partner, 2001

Ross, Sacks & Glazier, LLP, Founding Partner, 1991 - 2001

Morrison & Foerster, Los Angeles, Litigation Associate, 1986-1991

Juris Doctor, UCLA School of Law, 1986 (Teaching Assistant, Legal Research and Writing course 1984-1985; Member, Moot Court Honors Program)

Bachelor of Arts, With Distinction, University of Wisconsin, 1981

Successfully completed the Trial Attorney Project, sponsored by the Los Angeles Co. Bar Assn.

Successfully completed intensive mediation training for estate and trust mediation, and on the Los Angeles Superior Court's panel of mediators for probate disputes from its inception in 1998 until program concluded