

Edward J. Corey, Jr.

Shareholder

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Education

J.D., McGeorge School of Law,
University of the Pacific, 1989

M.P.A., University of Arizona,
1985

Phi Alpha Alpha Honor Society

B.S.P.A., University of Arizona,
1982

Bar Admissions

California

Affiliations & Accolades

American College of Trust and
Estate Counsel - Fellow

State Bar of California, Trusts
and Estates Section - Executive
Committee Member,
2004-2015

State Bar of California, Trusts
and Estates Section - Executive
Committee Chair, 2011- 2012

State Bar of California,
Litigation and Trusts and
Estates Section

American Trial Lawyers
Association

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PRACTICE AREAS

Trusts and Estates

- Trust and Estate Litigation
- Elder Abuse and Fiduciary Abuse Litigation
- Conservatorships
- Trust and Probate Administration
- Mediation/Arbitration Services (Alternative Dispute Resolution)
- Retained Consultant/Expert in Trust and Estate Litigation, Elder Financial Abuse, Fiduciary Abuse, Breach of Fiduciary Duty and Standard of Care

Ed is a shareholder in the firm's Trusts and Estates: Planning, Administration, and Litigation group. Ed's practice focuses on estate and trust litigation, fiduciary abuse, elder financial abuse, contested trust administrations, probate, and contested conservatorships. Ed has extensive trial, arbitration, mediation and appellate experience, and has successfully litigated a number of high-profile trust and elder financial abuse cases in Northern California.

With his background and experience, Ed is able to counsel clients on matters involving family or personal conflict. He works with clients in advising them of their rights, duties, and responsibilities. Ed looks for cost-effective ways of resolving client conflicts, including utilizing dispute resolution alternatives, such as mediation. If a contested matter cannot be resolved, Ed will take the matter to trial.

Ed is one of the foremost experts in trust and estate litigation and elder financial abuse. He speaks regularly on matters of trust and estate law and elder financial abuse. Ed has assisted in drafting relevant legislation, and testifies before the legislature on topics related to trust and estate matters, conservatorships, and elder financial abuse.

Experience:

- Prosecutes and defends trust contests and will contests, including disputes involving mental capacity, undue influence, breach of fiduciary duty, and elder financial abuse
- Represents corporate fiduciaries in trust and estate disputes, trust administration, and contested accountings

ATTORNEY PROFILE

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**Affiliations & Accolades
(Cont.)**

Sacramento County Bar
Association, Probate and
Estate Planning Section

Sacramento Estate Planning
Council

SacFast (Sacramento Financial
Abuse Specialty Team) -
Founding Member and Chair

Meritas, Sacramento -
Member

*The Best Lawyers in
America*®, 2018-2020
*Sacramento, Litigation – Trusts
and Estates*

*Sacramento Magazine's Top
Lawyers List, 2015-2019
Estate Planning and Probate*

*Sacramento Magazine's Top
Lawyers List, 2017- 2019-
Mediation, Alternative Dispute
Resolution*

Northern California Super
Lawyers, 2004 - 2019

Top 25 Sacramento Super
Lawyers 2016-2019

Top 100: 2016-2019 Northern
California Super Lawyers

- Represents private professional fiduciaries in trust and estate disputes, trust administration, contested accountings, and elder financial abuse
- Represents individual trustees in trust and estate disputes, trust administration, contested accountings, and elder financial abuse
- Represents beneficiaries on matters involving family conflict and assists in asserting beneficiary rights in trust and estate disputes, and claims of financial elder abuse
- Handles contested conservatorships
- Serves as a mediator and assists in resolving conflicts between and among family members, beneficiaries, and/or trustees in contested trust and estate matters
- Retained as consultant and/or testifying expert in matters pertaining to trust and estate litigation, breaches of fiduciary duty, fiduciary abuse, elder abuse, and standard of care

Elder Abuse Prevention Activities

Ed is a founding member and has served as Chair of SacFast (Sacramento Financial Abuse Specialty Team). From 2004 until 2008, Ed was honored as an outstanding volunteer by the Sacramento County Board of Supervisors for his work on the Sacramento Financial Abuse Specialty Team. In addition to his legal work, Ed has testified before the California State Legislature and Sacramento County Board of Supervisors on issues of trusts, estates and elder financial abuse, and has assisted legislators and staff in drafting laws pertaining to elders and in matters relevant to trusts, estates, conservatorships, and suitability of annuity sales to seniors.

Legislature

As a member of the California State Bar's Trusts and Estates section, Ed is involved in drafting and testifying on significant legislation in the areas of estates and trusts, conservatorships, and elder financial abuse. In 2005, among other legislation, Ed was involved in SB 1018, the Mandatory Bank Reporting Bill, which became effective on January 1, 2007. In 2006, he worked extensively on the Omnibus Conservatorship and Guardianship Reform Act of 2006. In 2007, Ed was appointed to the Judicial Council's Probate and Mental Health Advisory Committee. The Committee's primary duties are to make recommendations to the council for improving the administration of justice in proceedings involving decedents' estates, trusts, conservatorships, guardianships, and mental health and developmental disability issues.

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America's Top 100 Attorneys:
Northern California Lifetime
Achievement Award

Corporate America News Legal
Elite 2015 - Best for Financial
Abuse Matters - California

Top Rated Lawyer™ in Trusts
and Estates Law, 2013, 2014

Sacramento Business Journal's
Best of the Bar, 2013 - 2019

AV Preeminent® Rating by
Martindale-Hubbell®, 2016 - 2020

Speaking Engagements

Ed regularly speaks as a panelist on issues of estate and trust litigation and elder financial abuse. Ed has participated as a panelist for continuing legal education programs in CEB, including the following courses:

- Estate Planning and Administration (23rd through 30th Annual Developments)
- Durable Powers of Attorney
- Litigating Will Contests
- Undue Influence and Capacity Cases
- Assessing Capacity and Undue Influence: Avoiding Will Contests
- Representing Fiduciaries
- Counseling Fiduciaries (Avoiding Minefields) (2006 and 2009)
- Crisis in Conservatorships
- Fundamentals of Trust Administration
- Elder Law Litigation/Remedies for Financial Abuse
- Conducts trainings for Sacramento County Adult Protective Services

Ed has spoken to various county bar associations on issues of estate and trust litigation and elder financial abuse, including the Sacramento County Bar, the Contra Costa County Bar, the Solano County Bar, the Bar Association of San Francisco, and at the Placer County Bar Association's Granlibakken CLE Conference. He presented statewide on various topics involving new legislation in the areas of trust and estates, conservatorships, and elder financial abuse.

Ed worked extensively on SB 1018, the mandatory bank reporting bill on elder financial abuse. He spoke at the 31st Annual Mental Health Aging Conference. He has also taught courses at a local paralegal college, including Wills and Trusts and Legal Research and Writing.

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Publications/Blogs

- Co-authored an article published in the *California Trusts and Estates Quarterly* entitled "Crisis in Conservatorships"
- Co-authored an article published in the *California Trusts and Estates Quarterly* entitled "Contractual Arbitration: Is it Binding on the Victims of Elder Abuse?"
- Co-authored article "Lickter v. Lickter: Taking the Legs from under Elder Abuse Standing," for the *California Trusts and Estates Quarterly*
- Co-authored several articles on attorney malpractice and ethics, published in the *Daily Journal*, including:
 - "When Is Actual Injury Triggered?"
 - "The Repercussions of Ethical Violations"
 - "Meeting the Standard of Care"
 - "To Whom Do the Statutory Recoveries Belong?"
 - "To Whom Does an Attorney Owe a Duty of Care?"
 - "When Opposing Counsel Represents a Client's Affiliate"
 - "Fees for Defending Malpractice Actions by Corporations"
- Contributing author to Weintraub Tobin's Trusts and Estates blog

Community Involvement

Ed spends time giving to the community including participation as a former member of the Board of Directors of Family Support Programs and volunteer fundraising for St. Hope Academy. He is also an active member of Sutter Heritage Advisors and is a graduate of the Sacramento Chamber of Commerce Leadership Sacramento Program. Ed was also a recipient of the American Legion Award and a two-time nominee for the People Helping People Awards. He also served two years as PTA President.