



## Mark J. Phillips

Shareholder

### Contact

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## Practice Groups

- Tax Planning
- Trust & Estate Planning

## Biography

Mark J. Phillips is a Shareholder in our Tax and Trust & Estate Planning Practice Groups. He has been a State Bar of California Board Certified Specialist in Estate Planning, Trust and Probate since 1993.

Mr. Phillips has over 40 years' experience working with families and individuals through all phases of estate planning, including tailoring asset distributions to meet our clients' needs during life, as well as their post-death beneficiaries' needs. Minimizing federal gift and death taxes and other costs is also a key part of Mr. Phillips' strategy.

The mechanisms for meeting all of these goals may include:

- Revocable and Irrevocable Trusts
- Wills
- QTIP (Qualified Terminable Interest Property) Trusts
- Life Insurance Trusts
- Health Care Directives
- Family Partnership or LLC Formation
- Financial Powers of Attorney

- Designated Executors, Trustees, Successors and Alternates
- Designated Guardians

Mr. Phillips also handles post-death trust administration, representing executors, trustees, heirs and other interested parties – managing all of the legal steps necessary to transfer a decedent’s assets through the proper distribution channels. He has successfully guided clients through property title changes, transfers of stock or brokerage accounts, appraisal and distribution of assets.

An experienced negotiator, Mr. Phillips helps disputing parties come to reasonable agreements to resolve conflicts between heirs, trustees and executors.

In addition to the fulltime practice of law, Mr. Phillips has served as an adjunct professor for thirty years at the San Fernando Valley College of Law/University of Laverne/West Los Angeles College of Law, teaching Trusts & Estates. He is the author of more than a dozen scholarly articles in bar journals, primarily in the fields of ethics, trusts and estates, as well as co-author (with his daughter, Aryn Z. Phillips) of *Trials of the Century* (Prometheus, 2016).

Mr. Phillips is admitted to practice in the State of California, U.S. District Court, and U.S. Tax Court.

Named a *Southern California Super Lawyer* each year since 2007, Mr. Phillips has also been selected to the *Top 100 Lawyers in Southern California* for nearly a decade.



## Noteworthy Activities

- Co-Author, *Trials of the Century: A Decade-by-Decade Look at Ten of America’s Most Sensational Crimes*, Prometheus Books, New York, July 2016 (with Aryn Z. Phillips)
- State Bar of California Certified Specialist in Estate Planning, Trust and Probate Law
- Adjunct Professor of Law, Wills and Trusts, San Fernando Valley College of Law/Laverne/West Los Angeles School of Law, 1986-present
- Adjunct Professor of the Year, San Fernando Valley College of Law/Laverne/West Los Angeles School of Law, 1993

- Program Lecturer, National Business Institute, 1992-present
- Co-Presenter, *2019 Year-End Tax Planning* – MCLE and CPE accredited Client Seminar Series, November 2019

## Publications

(partial list)

- Co-Author, *Revisiting the tangled rules for modification of revocable trusts*, Los Angeles & San Francisco Daily Journal, June 2023
- Co-Author, *The Trial of Sam Sheppard: Part 3 The Appeal*, San Antonio Lawyer, a publication of the Texas Bar Federation, May-June 2023
- Co-Author, *Letter from the San Fernando Valley: Part Two*, *Rosemarin Law*, May 2023
- Co-Author, *The Trial of Sam Sheppard: Part 2 The Trial*, San Antonio Lawyer, a publication of the Texas Bar Federation, March-April 2023
- Author, *Survivorship Rules: Simultaneous Death and their Unequal Application*, *Valley Lawyer*, a publication of the San Fernando Valley Bar Association, February 2023
- Co-Author, *The Trial of Sam Sheppard: Part 1 The Crime*, San Antonio Lawyer, a publication of the Texas Bar Federation, January-February 2023
- Co-Author, *A Small Bright Line in the Murky Law of No Contest Clauses*, Los Angeles & San Francisco Daily Journal, January 2023
- Co-Author, *Letter From Brentwood-Part 2*, a publication of the Rosmarin Law Firm, November 2022
- Co-Author, *Letter From Brentwood*, a publication of the Rosmarin Law Firm, October 2022
- Co-Author, *The "Fatty" Arbuckle Case: Hollywood's First Celebrity Trial*, *Valley Lawyer*, a publication of the San Fernando Valley Bar Association, June 2021
- Co-Author, *Charles Manson 50 Years Later - Part III: The Trial*, *San Antonio Lawyer*, a publication of the Texas Bar Federation, March-April 2021
- Co-Author, *Charles Manson 50 Years Later - Part II: The Investigation*, *San Antonio Lawyer*, a publication of the Texas Bar Federation, March-April 2021
- Co-Author, *Strange New World: Restrictions on the Right to Posthumously Procreate*, Los Angeles & San Francisco Daily Journal, May-June 2021
- Co-Author, *Charles Manson 50 Years Later - Part I: The Murders*, *San Antonio Lawyer*, a publication of the Texas Bar Federation, January-February 2021
- Co-Author, *The Trial of Charles Manson: Fifty Years Later*, *Arizona Attorney Magazine*, a

publication of the Arizona Bar Association, December 2020

- Quoted, *Tax Law Specialist Had Fun and Meaningful Life, Friends Recalled*, Los Angeles & San Francisco Daily Journal, October 2020
- Author, *Reformation of Unambiguous Wills in Light of Estate of Duke*, Los Angeles & San Francisco Daily Journal, June 2020
- Co-Author, *Trials of the Century: A Decade-by-Decade Look at Ten of America's Most Sensational Crimes*, Prometheus Books, New York, July 2016 (with Aryn Z. Phillips)
- Co-Author, *The Trial of Charles Manson: Fifty Years Later, Valley Lawyer*, a publication of the San Fernando Valley Bar Association, September 2019
- Author, *Unreconciled: Differing Tests of Mental Capacity for Wills and Trusts, Valley Lawyer*, a publication of the San Fernando Valley Bar Association, June 2018
- Co-Author, *Creditors' Access to Trust Distributions*, April 7, 2017
- Author, *Redstone's Small (for Him) Tax Victory*, Los Angeles Daily Journal, December 28, 2015
- Author, *Plain Ambiguity*, Los Angeles Lawyer, a publication of the Los Angeles County Bar Association, November 2015
- Co-Author, *Long-Awaited Answer to Will Reformation*, Los Angeles Daily Journal, July 31, 2015
- Author, *Change in Testamentary Capacity Rules: A Practice View*, Los Angeles Daily Journal, April 24, 2015
- Author, *Accessing Safe Deposit Boxes After Death*, Los Angeles Daily Journal, May 15, 2012
- Author, *Tulsa, Yool, Dacey and the Lingering Uncertainty in Claims Against Decedents in California*, California Trusts and Estate Quarterly, Volume 17, Issue 3/4, Fall/Winter 2011
- Co-Author, *Factoring Risk for Breach of Trust*, Valley Lawyer, a publication of the San Fernando Valley Bar Association, May 2011
- Co-Author, *Factoring Risk into the Measurement of Damages*, Los Angeles Daily Journal, April 7, 2011
- Co-Author, *Give and Take: Donative Transfers to Caregivers*, Los Angeles Lawyer, a publication of the Los Angeles County Bar Association, April 2011
- Co-Author, *New Legislation Brings Some Clarity to Estate Planning, Part II*, Los Angeles Daily Journal, January 19, 2011
- Co-Author, *New Legislation Brings Some Clarity to Estate Planning*, Los Angeles Daily

*Journal*, November 8, 2010

- Author, *Inheritance Rights of Posthumously Conceived Children in California*, *California Trusts and Estates Quarterly*, Volume 15, Issue 4, Winter 2010
- Author, *Time of Death: Does It Matter?*, *California Bar Journal*, a publication of the State Bar of California, August, 2010
- Author, *Liability for Attorney's Fees in Trust Dispute Shifts*, *Los Angeles Daily Journal*, May 5, 2010

## Memberships

- State Bar of California
- Los Angeles County Bar Association (Member, Section on Trusts and Estates)
- San Fernando Valley Bar Association (Member, Probate Section)
- San Fernando Valley Estate Planning Council
  - Member, Board of Directors
  - President, 1996-97
- Warner Center Estate Planning Council

## Education

### University of California at Los Angeles

- Bachelor of Arts, 1976
- Juris Doctor, 1979

### New York University

- Master of Laws, Tax, 1980