



→ Matthew R. Owens

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Matthew Owens is a partner in the Business Trial Practice Group in the firm's San Diego (Del Mar) office.

Areas of Practice

Matt focuses his practice on trust, estate, and inheritance disputes. He has prosecuted and defended a wide range of matters in probate court, including trust contests, elder abuse actions, accountings, contested conservatorships and claims involving breach of fiduciary duty. His clients include high net worth individuals and families, corporate trustees, and private professional fiduciaries.

Matt is a certified specialist in estate planning, trust, and probate law by the State Bar of California Board of Legal Specialization. He frequently speaks and writes on trust and estate litigation topics, is a member of the Executive Committee of the Trusts and Estates Section of the California Lawyers Association (TEXCOM), and served as Chair of the Executive Committee of the San Diego County Bar Association's Estate Planning, Trust, and Probate Law Section. He was recognized in the Chambers High Net Worth Guide 2023 for Private Wealth Disputes – California, has been recognized as a Best Lawyers "Ones to Watch" each year since 2021, has been a Super Lawyers Rising Star each year since 2013, and was on Legal Week's Private Client "Ones to Watch" list in 2020-2021. Matt holds a B.A. from the University of Mississippi and a J.D. from Santa Clara University.

Honors

High Net Worth, Private Wealth Disputes, Chambers, 2023

Ones to Watch, Best Lawyers, 2021-2024

Ones to Watch, Private Client, 2018-2021

Rising Stars, Super Lawyers, 2013-2023

Articles

- Co-Author, *'Roadblocks on the Road to Probate Trials'*, California Lawyer's Association's California Trusts and Estates Quarterly, Volume 28, Issue 4, September 2022
- Co-Author, *'Let's Get Digital! ESI in Trust and Estate Litigation, Part II'*, California Lawyer's Association's California Trusts and Estates Quarterly, Volume 27, Issue 3, September 2021
- Co-Author, *'Let's Get Digital! ESI in Trust and Estate Litigation, Part I'*, California Lawyer's Association's California Trusts and Estates Quarterly, Volume 27, Issue 2, June 2021

- Author, "*Contested Nonprobate Transfers: When the Estate Plan Trumps*," California Trusts & Estates Quarterly 2020, Vol. 26, Issue 3, October 2020
- Co-Author, "*Litigation Alert*," California Trusts & Estates Quarterly
- Co-Author, "*New Case Alerts*," California Lawyers Association, Trusts and Estates Section
- Update Editor, "*CEB - Chapter 29*," Actions by and Against Personal Representative

Speaking Engagements

Speaker, "Recent Developments in Trust, Estate, and Conservatorship Law," San Luis Obispo County Bar Association, March 20, 2024

Speaker, "Probate and Trust Litigation Year in Review," Bar Association of San Francisco, January 23, 2024

Speaker, "Trust Protectors: Guardians of the (Trust) Galaxy," San Diego Estate Planning Council, January 16, 2024

Speaker, "2023 Annual Update on New Cases and Legislation (Trusts and Estates)," San Diego County Bar Association, January 8, 2024

Speaker, "What Planners and Litigators Need to Know for 2024," North County Estate Planning Council, January 2, 2024

Speaker, "Estate Planning for Intellectual Property Rights," myLawCLE, November 27, 2023

Speaker, "Why You Shouldn't Steal from Dead People," The Probate Realtor Show, September 27, 2023

Co-Presenter, "Guardians of The (Trust) Galaxy: Trust Protectors Defined, Explained and Explored," Professional Fiduciary Association of California (PFAC), June 2, 2023

Co-Presenter, "Trust Protectors," Independent Trustee Alliance (ITA) Annual Conference, May 11, 2023

Co-Presenter, "Trust Protectors," California Lawyers Association, April 4, 2023

Co-Presenter, "Estate planning, trust, and probate law: 2022 year in review," Probate Attorneys of San Diego (PASD), March 15, 2023

Speaker, "If There's a Trust, Why Is There a Fight?," The Ron Greenwald Show, February 28, 2023

Co-Presenter, "Overview of Trusts and Estates Practice," University of San Diego School of Law, February 23, 2023

Co-Presenter, "Trust protectors," Professional Fiduciary Association of California (PFAC), January 11, 2023

Co-Presenter, "Recent Developments in California Trusts and Estate Law," California Lawyers Association Annual Meeting, September 17, 2022

Co-Presenter, "Recent Updates on Cases, Statutes and Fiduciary Regulations in Trust and Estate Law," Professional Fiduciary Association of California (PFAC), May 6, 2022

Co-Presenter, "Virtual Lunch with Lawyers," California Western School of Law, August 16, 2022

Co-Presenter, "The Britney Effect: AB 1194 and Conservatorships in 2022," Orange County Bar Association, April 22, 2022

Co-Presenter, "Let's Get Digital! E-Discovery in Trust and Estate Litigation," California Lawyers Association (CLA), April 14, 2022

Co-Presenter, "What's Sacramento Up To? 2021 Legislation and its Impact on Fiduciaries," PFAC, San Diego Region, March 23, 2022

Co-Presenter, "Let's Get Digital! E-Discovery in Trust and Estate Litigation," San Mateo County Bar Association (SMBCA), March 17, 2022

Co-Presenter, "Recent Developments in Estate, Trust, and Probate Law," Probate Attorneys of San Diego (PASD), March 16, 2022

Co-Presenter, "Case and Statutory Updates in Estate, Trust and Probate Law and California Fiduciary Regulations," The 26th Annual PFAC Educational Conference, August 26, 2021

Co-Presenter, "E-Discovery in Trust and Estate Litigation," California Lawyers Association, Trust & Estate section 'Trust Me' podcast, May 6, 2021

Co-Presenter, "Estate Planning, Trust & Probate Law: 2020 Year in Review," Trust & Estate Section of the San Diego Bar Association webinar, April 1, 2021

Co-Presenter, "Estate Planning, Trust & Probate Law: 2020 Year in Review," Estate Planning, Trust & Probate Law Section of the La Jolla Bar Association webinar, March 11, 2021

Co-Presenter, "Contested Nonprobate Transfers - When the Estate Plan Trumps," California Lawyers Association, February 26, 2021

Co-Presenter, "Estate Planning, Trust & Probate Law: 2019 Year in Review," Estate Planning, Trust & Probate Law Section of the San Diego County Bar Association webinar, July 15, 2020

Co-Presenter, "Contested Nonprobate Transfers: When the Estate Plan Trumps," Professional Fiduciary Association of California PFAC 2020 Annual Conference, June 4, 2020

Co-Presenter, "Wine Not? California's New Decanting Act," San Mateo County Bar Association Estate Planning & Probate Section, October 10, 2019

Co-Presenter, "Probate Court: New Attorney Fundamentals," San Diego County Bar Association, September 13, 2019

Co-Presenter, "Estate Planning, Trust & Probate Law: 2018 Year in Review," San Diego County Bar Association, March 14, 2019

Co-Presenter, "Wine Not? California's New Decanting Act," First American Trust, February 4 and 6, 2019

Co-Presenter, "Estate Planning, Trust and Probate Law: 2017 Year in Review," San Diego County Bar Association, March 1, 2018

Co-Presenter, "Incapacity & Undue Influence," PCT Associate Training, Estate Planning Series, December 14, 2017

Events

29th Annual PFAC Educational Conference
Annual Update on New Legislation and Case Law
Town & Country Resort, San Diego, CA, 05.17.2024

Roadblocks on the Road to Probate Trials
Webinar, 04.03.2024

Memberships

- San Diego Probate Bench-Bar Committee, 2021 Chair
- California Lawyers Association, Trusts and Estates Section, Member of Executive Committee (TEXCOM)
- San Diego County Bar Association, 2020 Chair of Estate Planning, Trust and Probate Law Section Executive Committee
- Probate Attorneys of San Diego

Practices

Litigation

Private Wealth and Fiduciary Litigation

Education

J.D., Santa Clara University, 2011

B.A., University of Mississippi, Honors College, 2007, *cum laude*

Admissions

California