

**Eric T. Lodge, Partner**

Practice Areas Trust, Estate and Probate

Admissions California

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Professional Summary

Eric T. Lodge is the leader of the Trust, Estates and Probates Practice Group. Mr. Lodge's practice focuses on estate planning, trust and probate matters out of the firm's Carlsbad office.

Prior to joining Procopio in 2002, Mr. Lodge was a principal in the law firm of Lodge & Heller in Carlsbad, California.

Representative Matters

- ❑ Counseled clients in planning estates and prepared related documents including wills, revocable living trusts, irrevocable trusts, durable powers of attorney and advance health care directives
- ❑ Counseled families in planning for the orderly succession of businesses
- ❑ Guided individual and corporate trustees regarding the proper administration of trusts
- ❑ Advised beneficiaries of trusts and estates with respect to their rights
- ❑ Supervised the preparation of state and federal estate tax returns
- ❑ Served as a mediator and arbitrator with respect to contested estates and trusts
- ❑ Advised clients in planning for the distribution of large retirement plans

Education, Distinctions & Community Involvement

Mr. Lodge received his undergraduate education at Trinity College, Hartford, Connecticut, and his law degree from the University of Southern California where he was Note and Comment Editor of the *Southern California Law Review*. He was admitted to practice in California in 1969. Mr. Lodge is a specialist in probate, estate planning and trust law as certified by the California Board of Legal Specialization of the State Bar of California.

Mr. Lodge is a frequent lecturer for continuing education of the Bar on estate planning subjects. In 1997 Mr. Lodge served as president of the San Diego County Bar Association. Mr. Lodge is also past chair of the Probate and Estate Planning Section of the Bar Association of Northern San Diego County and is a member of the Real Property, Probate and Trust Law Section of the American Bar Association.

Mr. Lodge has been active in community affairs, having previously served as a trustee for the Solana Beach School District, on the San Diego County Air Pollution Control District Hearing Board, on the Citizens Advisory Board for Scripps Memorial Hospital, Encinitas, and as a board member of the National Conflict Resolution Center. He is on the board of directors for the San Diego chapter of the Arthritis Foundation, a member and past president of the Carlsbad Hi-Noon Rotary Club, on the advisory board for the San Dieguito River Valley Conservancy, and is past president of the San Diego Chapter of the Trinity College Alumni Club.

Mr. Lodge is also a member of the Planned Giving Executive Committees for both the University of California, San Diego and the Tri-City Hospital Foundation. Mr. Lodge was chosen Attorney of the Year for 2003 by the Bar Association of Northern San Diego County. He is an AV rated attorney by Martindale-Hubbell.

News, Publications & Events

Recent Articles/Publications

- "Estate Planning for Executives", Interviewed by Leslie Stevens-Huffman, [Smart Business San Diego](#), May 2007

Recent Seminars and Speeches

- "What's New in Charitable Giving", November 2006
- "Secrets of Wealth Transfer", May 2006