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— attorney Beti Bergman

Einar Johnson, Beti Bergman and Thomas F. Quilling. | Photo by Brad Jacobson

Peninsula Law's Beti Bergman: Starter and finisher

by Robb Fulcher

Beti Bergman, a principal of the firm Peninsula Law, is a triple-threat. She puts asset plans together, administers them, and, when necessary, champions her clients in court.

"Some attorneys in this field work only on the planning side, or only on the litigation side," she said. "I do all three phases – planning, administration and litigation – so I see the issues from each perspective. To be a good litigator, you have to know why a plan was put together the way it was, and to be a good planner you have to know how it can come apart at the end."

"It's a tough, adversarial life being a litigator," she said. "You have to be really sharp. You have to be fast on your feet. You have to be a gladiator."

Although she's not averse to battle, Bergman said many of her clients' courtroom fights could have been avoided through more careful estate planning.

In some cases, the person with the estate might have worked up a will on his or her own, or with the help of a paralegal rather than an attorney. Such a document is usually not prepared properly, and either is voidable or leads to controversy amongst the beneficiaries as to the validity of the document or how the estate should be distributed.

"Unfortunately, too often I see estate plans that are not prepared properly. Then it gets litigated, and it's a mess," Bergman said.

"For a relatively small investment, you can have an attorney prepare a proper estate plan. Or, if it's not done properly, your beneficiaries can pay an attorney tens of thousands of dollars to fight for the proper distribution of your estate," she said.

In the course of her work, Bergman sees the abuse of seniors who can no longer handle their affairs, and she sees abuses by those who administer the assets of the deceased.

"When someone is old, they can be taken advantage of by an adult child or perhaps a neighbor, who will take them to an attorney and get them to leave everything to them.

"It is not uncommon that elderly citizens are taken advantage of, unfortunately," Bergman said.

She also sees battles between beneficiaries, triggered by an adult child going "rogue" and dealing unfairly with relatives.

"It can stem from family dynamics – they have resentment toward each other, or they don't trust each other. They don't think things are being distributed fairly, and they fight over the estate," Bergman said.

"It behooves every trustee and executor to seek the advice of counsel before administering a trust or estate. There is a lot of liability to beneficiaries that most fiduciaries do not consider," Bergman said. She handles cases on both sides: protecting the trustee and vindicating the rights of beneficiaries.

Bergman is also very much involved with the community. She is a founding member of the Asian Pacific American Women Lawyers Alliance, and a past board member for the Multi-Cultural Bar Alliance and UCLA Asian Pacific Alumni. She is a past president of the Southern California Chinese Lawyers Association, has served on its board of governors for eight years, and led its virtual reality trial skills workshop for four years.

She serves on a Los Angeles Superior Court Probate Volunteer Panel, the court's Guardianship Volunteer Panel, and as a volunteer mediator for Superior Court in Torrance.

Bergman, the mother of two children, deftly balances family with her career, which includes running her firm as well as her casework.

Asked how she manages her firm while also raising two children, she answered, "I don't waste a single minute of my day," she said. "There is no downtime."