

Joseph Matuk

San Diego, California
Senior Counsel

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Areas of Practice & Industry Specialties

Tax, Benefits and Estate Planning; Corporate Law; Trust and Estate Litigation



Mr. Matuk is a member of the Tax Benefits & Estate Planning practice group in the Firm's San Diego office. Mr. Matuk's practice includes estate planning, trust/probate litigation, and business and real estate litigation. Often times, Mr. Matuk advises and guides clients during difficult times such as the loss of a loved one, or when elderly family members need legal assistance.

He has represented a wide variety of clients including small business owners, trustees, beneficiaries, doctors, financial planners, certified public accountants, and realtors.

Representative Matters

- Demurrer sustained without leave to amend on all causes of action brought in response to negligence action.
- Successfully opposed a leave to amend complaint, resulting in failure of six figure creditor's claim and dismissal of entire lawsuit against estate.
- Lead counsel in successful contempt action for violation of court order.
- Lead counsel in disqualifying co-executor.
- Lead counsel in obtaining favorable settlement for co-trustees in removal action.
- Numerous petitions throughout California resulting in court orders deeming assets omitted from trusts as trust assets, thereby avoiding probate (*Heggstad* Petitions).
- Successful suspension of executor.
- Numerous successful petitions throughout California to compel trust accountings.

Education

Mr. Matuk earned his J.D. from University of Oregon School of Law where he was Operations Editor of the *Oregon Law Review*. He earned his B.A. from Columbia University. During law school, Mr. Matuk externed for the Honorable Justice Patricia D. Benke at the Fourth District Court of Appeal, Division One.

Bar Admissions

- California

Court Admissions

- U.S. District Court, Southern District of California

Community

- San Diego County Bar Association
- Volunteer Mock Trial Judge- San Diego High School Mock Trial Competition
- Volunteer Mock Trial Judge- Grossmont High School