



Bette Epstein, Esq.

Mediator / Discovery Referee



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Bette Epstein, Esq. has been mediating trust and estate disputes since 2000. Following a remarkable career as a trust and estate litigator, she turned her focus to alternative dispute resolution 22 years ago and has been helping parties settle their disputes ever since. She is now available as a full-time mediator and discovery referee.

Ms. Epstein is highly regarded as one of the Bay Area's leading probate specialists. In conjunction with her work as a mediator, she spent nearly three decades handling trust and estate disputes, contested conservatorships, elder abuse claims, and serving as an expert witness in conservatorship, trust & estate litigation proceedings. She represented individuals, banks and private professional fiduciaries. As an associate and partner at Crosby Heafey Roach & May (now Reed Smith), she was responsible for building up its trust and estate litigation practice, and eventually went on to become a managing partner of its Oakland office in 2007.

AREAS OF SPECIALIZATION

- Breach of Fiduciary Duty
- Contested Conservatorships
- Financial Elder Abuse
- Trust and Estate Accounting Disputes
- Real Property Transfers
- Trust Contests
- Trust Administration Disputes
- Will Contests

LEGAL EXPERIENCE

Reed Smith	
Partner, Senior Counsel	2003-2017
Managing Partner, Oakland Office	2007-2012
Crosby Heafey Roach & May	
Shareholder, Director	1993-2002
Associate Attorney	1986-1992

PROFESSIONAL EXPERIENCE

Clinic for Adults and Children	
Licensed Psychotherapist, Director of Geriatric Counseling	1979-1983

EDUCATION

University of San Francisco, J.D. with honors	1986
California State University at Hayward, M.S. Counseling	1979
University of Southern California, B.S. Psychology	1965

MEDIATION TRAINING

Straus Institute for Dispute Resolution, Pepperdine University	2013
Appellate Mediation, Richard Birke and Dana Curtis	2001
Advanced Mediation, John Paul Jones Group	2001
Comprehensive Mediation, John Paul Jones Group	1999

PROFESSIONAL RECOGNITION

AV Preeminent Rating , <i>Martindale-Hubbell Peer Review Ratings</i>	1996-Present
Fellow, <i>American College of Trust and Estate Counsel (ACTEC)</i>	2002-Present
Top 100 Super Lawyers in Northern California	2010-2012
Northern California Super Lawyer	2004-2021
Woman of Distinction, <i>San Francisco Business Times</i>	2009
Best Lawyers in America	2009
Woman of Distinction, <i>East Bay Business Times</i>	2008

PUBLICATIONS

Continuing Education of the Bar Action Guide, Co-Editor for 7 editions <i>Capacity and Undue Influence: Assessing, Challenging and Defending</i>	1999-2014
Aspatore Books, Contributor <i>Best Practices for Structuring Trusts and Estates</i>	2014

SPEAKING ENGAGEMENTS

Ms. Epstein has lectured at the University of San Francisco School of Law and Golden Gate University Law School on the subject of legal ethics and is a frequent MCLE presenter on the topic of mediating trust and estate disputes.