SHARTSIS FRIESE

www.sflaw.com

John J. Stein

PARTNER

415-421-6500 jstein@sflaw.com



John “JJ” Stein is a trust, estate and probate litigator who handles complex and high-stakes disputes.

An experienced trial lawyer, JJ represents clients in a wide range of trust, estate, and probate disputes. His work includes actions regarding the validity of will, trust, and other estate planning instruments, actions relating to the proper interpretation and implementation of estate planning instruments, breach of trust and fiduciary duty claims, elder abuse actions, creditor’s claims and contested conservatorship proceedings.

JJ represents trustees, executors, beneficiaries, heirs, creditors, corporate entities, and nonprofit organizations, appearing in courts throughout the Bay Area and beyond. He advances client priorities through thoughtful pre-litigation counseling, resolving cases through negotiated settlements and, when needed, taking cases to trial or arbitration.

JJ has spent the overwhelming majority of his career focused on trust, estate, and probate litigation with a particular emphasis on challenging, complex, technical, and high-stakes cases. As a result, he has had the opportunity to serve as both a skilled advocate for and trusted advisor to his clients.

AREAS OF EXPERTISE

Litigation

Trust & Estate Disputes

Trust & Estate Administration

EDUCATION

University of California College of the Law, San Francisco (formerly University of California Hastings College of the Law); J.D., *cum laude*, 2007

University of California, Irvine; B.A., political science, *magna cum laude*; 2004

BAR ADMISSIONS

California

All California State Courts

U.S. District Court for the Northern, Central and Southern Districts of California

Ninth Circuit Court of Appeals

ACCOLADES

JOHN J. STEIN 2027 RECOGNIZED BY Best Lawyers

© 2026 Shartsis Friese LLP | All Rights Reserved |

Experience

- Obtained judgment after a multi-week trial invalidating a trust amendment that purported to remove the trustor's children as beneficiaries of the trust holding millions of dollars in real estate assets.
- Secured suspension of a trustee alleged to have misappropriated trust assets, including a significant entertainment award that had been bestowed upon a Hollywood-icon member of the family.
- Secured suspension of the trustee of multiple family trusts on the first day of trial, resulting in a favorable settlement shortly thereafter.
- Successfully represented a surviving spouse that had been omitted from an estate plan in pursuing a pretermitted spouse claim, which entitled her to 50 percent of the estate.
- Represented a beneficiary in challenging an agreement she had signed releasing the trustee and secured hundreds of thousands of dollars of additional assets through a negotiated settlement.
- Despite various vigorous objections, aided a daughter in securing conservatorships over both of her parents, thereby helping to preserve their estates and ensuring that their health and well-being were protected.
- Represented a Bay Area family foundation, the charitable remainder beneficiary of a trust, in an action to compel two individuals to acknowledge their removal as trustees and transfer all trust assets to the foundation, relief the former trustees acceded to shortly after the petition was filed.
- Represented the named executors and various beneficiaries against a will contest and creditor's claims initiated by decedent's surviving spouse, the result of which was the surviving spouse abandoned her attempts to invalidate the decedent's will and accepted a settlement involving a minimal distribution of assets.
- Represented the trustee of a trust containing more than $350 million in assets and secured court approval for the trustee to make nearly $90 million in tax-efficient gifts on behalf of the trust's beneficiary.

© 2026 Shartsis Friese LLP | All Rights Reserved |