

THERESA ANN LOSS

Attorney at Law

11855 Elwin Lane
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(c) 310-968-2274
tlossesq2014@gmail.com

Experience: Estate Planning and Trust Administration Attorney

At Family Security Law Group, conduct initial client meetings, design basic to complex estate plans for individuals, couples and blended families providing legal peace of mind to ensure their estates avoid probate, minimize tax consequences and enable assets to be transferred pursuant to their desires. Implement estate plans through the trust administration process and handle estate administration for those who pass without an estate plan. July 2016 - present

Estate Planning and Trust Administration Attorney

At Hilliard Hopkins, LLP, managed the estate planning department. Duties included management of the firm's estate plan work flow, client relations, and staff oversight, Handled initial consultations, drafted basic and complex trusts, wills, durable powers of attorney, health care directives and related estate planning documents. Assisted clients with the estate plan implementation process by drafting relevant documents for the transfer of assets to the trust, transfer of real property interests, transfer of business interests and transfers of intellectual property interests among others. For clients in need of trust administration, evaluated trust provisions, fiduciary responsibilities, beneficiary rights, marshalled trust and non-trust assets, determined appropriate asset allocations, resolved tax and creditor issues and finalized distributions. When necessary, drafted Heggstad petitions and other motions to resolve trust administration issues. Also initiated probate proceedings for estate administration including spousal petitions, probate petitions and petitions for an accounting. Have represented both Trustees and beneficiaries in all aspects of court proceedings. Jan. 2014- Feb. 2016

Commercial Claims Legal Consultant

As the Functional Center of Excellence Claims Manager for Farmers Insurance Exchange, evaluated liability and damages exposure for all commercial claims in Southern California to resolve claims and determine litigation exposure, granted settlement and trial authority on a case by case basis and also consulted on commercial claims for other regions as part of the FCOE team. Attended case evaluations, assessed pretrial reports and provided input for catastrophic claims at the director and vice president level. Oversaw commercial claims units consisting of 50+ claims managers and representatives. Jan. 2012 – Dec. 2013

Senior Supervising Trial Attorney

As a senior supervising trial attorney at Selman Breitman, a 100+ attorney Los Angeles insurance defense firm, handled all phases of complex civil litigation from initial case analysis, budgeting, written discovery, law and motion, including motions for summary judgment, depositions of percipient and expert witnesses, and all aspects of trial preparation including conducting trials as first or second chair and appeals. Also performed administrative and supervisory duties including oversight of six junior associates, two paralegals and support staff. Areas of specialty included construction defect, equine liability, products liability, general liability, catastrophic personal injury, and bad faith actions. (Twelve years)

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Litigation Attorney

Attorney at Royal SunAlliance, for their Glendale in-house insurance defense firm, handled all phases of civil litigation from initial response through trial. Cases primarily involved construction defect and general liability. Sept. 1997-April 2001

Additional Experience

Prior experience as a litigation attorney includes Jacobs & Roach (1992-1994) and Kinkle Rodiger & Spriggs (1989-1992); both general civil litigation defense firms.

Acting Assistant City Prosecutor (Phoenix, AZ; 1989)

Acting Asst. U.S. Attorney (Phoenix, AZ; 1988)

Clerked for the Honorable Rudy Gerber, Maricopa Superior Court (Phoenix, AZ; 1985)

Clerked throughout law school in various positions

Admitted: California 1990; Arizona 1999

Admitted to practice before all state courts in California and Arizona, Central District and South District of the United States District Court, and the Ninth Circuit Court of Appeals.

Articles: Authored several articles on construction and equine law

Education: Juris Doctorate

Arizona State University, May 1989

College of Law, Tempe, AZ

Honors: Wm. J. Canby Moot Court Competition

Activities: ASU Moot Court Team 1988-1989

Student Bar Association 1987-1989

B.A. Journalism

Arizona State University, May 1986

Honors: Dean's List

Activities: Staff reporter for The State Press, campus newspaper

Sigma Delta Chi, journalism society 1984-1986

Interests: Tennis, hiking, bicycling