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Lucille Ball: Dangers of Being the First to Die

I Love Lucy star Lucille Ball passed away 35 years ago. Decades after her death, important lessons can be learned from a court battle over some cherished heirlooms between Ball's daughter and the widow of Ball's second husband.

Remarriage can pose emotional as well as legal challenges. When a client remarries, they need to carefully consider to whom they are leaving their personal property, especially if the personal property at issue is from a previous spouse. While monetary inheritances can be valuable, personal property is often invaluable to surviving family members and can spark fierce disagreements over who is the rightful heir.

No Laughing Matter: The Legal Fight over Lucille Ball Memorabilia

Actress and comedy icon Lucille Ball had two children with actor Desi Arnaz: Lucie Arnaz and Desi Arnaz Jr.

The couple divorced in 1960, and Ball married comedian Gary Morton in 1962. Following her passing in 1989, her estate was split between Lucie, Desi Jr., and Morton.

After Lucy died, Morton married professional golfer Susie McAllister. They remained married until Morton's death in 1999, at which point McAllister inherited items that had belonged to Morton and Ball, including love letters, photos, and a Rolls Royce. McAllister also ended up in possession of several of Ball's personal items. Among them were her personal address book, portable backgammon boards, and lifetime achievement awards.

Ten years after Morton's death, McAllister put the items up for auction as she prepared to remodel her home. And that is when the trouble started between McAllister and Lucie.¹

Lucie asked that certain items be returned to her and threatened legal action to stop the sale if they were not. McAllister then sued Lucie and sought a judge's ruling allowing the auction to proceed. In another twist to the case, the two women agreed that the possessions were left to Lucie in Ball's will, but McAllister contended in her lawsuit that Lucie never claimed them from Ball's estate, so they passed to McAllister.

A judge ultimately ruled in favor of Lucie and said that the auction could be stopped—but only if Lucie posted a \$250,000 bond. Lucie could not afford it, but her legal team reached an agreement with the auction house to have the lifetime achievement awards returned. The other items went up for sale.²

¹ *Lucille Ball Memorabilia from the Estate of Gary Morton—Including Love Letters, Rolls Royce, Awards and Artwork—at Auction in Beverly Hills*, Heritage Auctions (July 6, 2010), <https://news.cision.com/heritage-auctions/r/lucille-ball-memorabilia-from-the-estate-of-gary-morton---including-love-letters--rolls-royce--awards-and-artwork---at-auction-in-beverly-hills,g502294>.

² Jason Pham, *Here's Where Lucille Ball's Kids Are Now & How Much They Inherited after Their Mom's Death*, Yahoo! Fin. (Mar. 7, 2022), <https://finance.yahoo.com/news/where-lucille-ball-kids-now-133309434.html>.

Lessons Learned from the Lucille Ball Estate Kerfuffle

It is unclear why Lucie might have abandoned the personal possessions her mother allegedly left to her. There do not appear to be any media reports disputing this claim by McAllister. But if true, it raises the first takeaway from the legal battle: your clients need to claim any assets left to them as an estate beneficiary. Unclaimed inheritances pass to the next beneficiary in line—in this case, presumably Gary Morton, who then passed the forfeited items to McAllister following his death.

Morton, however, is not blameless in this situation. He left items to McAllister that were originally intended for Lucie. While he may not have explicitly known the intentions of his late wife regarding her prized possessions, he probably should have known that they were better off in the hands of his stepdaughter.

According to the auction house, McAllister kept the items for more than ten years out of respect for Ball and Morton. But she can hardly be blamed for wanting to eventually clean house and be rid of them.

The second takeaway from this legal battle, then, is that if your client has remarried and has personal property from a previous spouse, they need to give due consideration to who should inherit it. Morton might have asked himself what McAllister would do with love letters between himself and Ball other than sell them, or why his new wife would want Ball's personal address book or backgammon boards. The whole messy legal battle could have been avoided had he asked himself a few simple questions during the administration process.

Advisors Help Clients Avoid Common Mistakes

Part of being a good advisor is knowing what questions to ask your clients. This perspective is honed through years of hands-on experience, trial and error, and learning from the mistakes of others.

Advisors working in different specialties that overlap can also learn from one another, synergizing their knowledge to deliver the best possible client experience, to the mutual benefit of all parties.

Schedule a meeting and let's talk about finding out how we can help you provide more value to your clients.



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