



THE STATE BAR OF CALIFORNIA
TRUSTS & ESTATES SECTION

Earn 5.0
Hours of MCLE and
Legal Specialization Credits



Trusts & Estates Section 2016 Spring Education Conference

APRIL 22, 2016
The Westin South Coast Plaza
686 Anton Boulevard
Costa Mesa, CA 92626
(714) 540-2500

Register Online: <http://trustslaw.calbar.ca.gov>

PROGRAM SCHEDULE

8:30 A.M.

REGISTRATION OPENS

8:55 A.M.

OPENING REMARKS

9:00 A.M. – 10:00 A.M.

WHAT CALIFORNIA TRUST ATTORNEYS NEED TO KNOW ABOUT NEVADA TRUSTS (1.0 Hr.)

SPEAKER: Julia Gold, Esq., Reno, NV

Dynasty trusts, asset protection trusts, protective LLC statutes, decanting.... More and more California attorneys are being asked about these planning options and having to look to other jurisdictions. These are all available in Nevada. What should we as California attorneys know about them to address our clients' needs? This program will explore the options available, their uses and limitations, and the pros and cons of utilizing Nevada trusts or submitting to administration in Nevada.

10:00 A.M. – 10:15 A.M.

BREAK

10:15 A.M. – 11:45 A.M.

JUDICIAL REFERENCES AND ARBITRATIONS—ESSENTIAL INFORMATION FOR TRUST & PROBATE ATTORNEYS (1.5 Hrs.)

SPEAKERS: Hon. Joseph Biderman, Los Angeles
Lynard C. Hinojosa, Esq., Los Angeles
Hon. James A. Steele, Los Angeles

This program will provide an overview of judicial references and arbitrations in the trust and estates context, explore the differences between references and arbitrations, compare the benefits and burdens of each of these procedures as compared to each other and to court resolution, review procedures for getting a referee or arbitrator appointed, discovery in references and arbitrations, discuss the role of the court in references and in arbitrations, and go over the hearing process.

11:45 A.M. – 12:45 P.M.

LUNCH

This will be a 1 hour lunch and does not include a presentation. Food will be provided.

12:45 P.M. – 1:45 P.M.

APPELLATE ISSUES IN TRUSTS AND ESTATES MATTERS (1.0 Hr.)

SPEAKERS: Matthew W. McMurtrey, Esq., Los Angeles
Ryan D. Houck, Esq., Los Angeles
Ciarán O'Sullivan, Esq., San Francisco

The panel will discuss the following issues concerning an appeal in probate court: the final judgment rule, the deadline to file an appeal, the various appellate statutes involved in perfecting an appeal, and the issues raised by Probate Code Section 1310 (including the Sterling case).

1:45 P.M. – 2:00 P.M.

BREAK

2:00 P.M. – 3:30 P.M.

CROSSOVER ISSUES IN ESTATE PLANNING AND FAMILY LAW (1.5 Hrs.)

SPEAKERS: Eric Tokuyama, Esq., Los Angeles
Peter Walzer, Esq., Woodland Hills

This presentation focuses on how family law may impact estate planning during the various stages of marriage - 1) before marriage; 2) during marriage; 3) when separation occurs; 4) when a divorce action is filed; and 5) after the divorce is final.

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY: Cancellations and requests for refunds must be received in writing no later than April 15, 2016 and are subject to a \$50 service charge. Refunds will not be available after this date.

QUESTIONS: For registration information call (415) 538-2508. Telephone registrations will not be accepted. For program content and/or Section information call (415) 538-2206.

SPECIAL ASSISTANCE: For special assistance, please call (415) 538-2206.

ON-SITE: On-site registration will be on a space available basis. Call to confirm space availability.

INFORMATION ABOUT ETHICS GUIDE

THIRD EDITION

"Guide to the California Rules of Professional Conduct for Estate Planning, Trust & Probate Counsel"

This Third Edition is offered by the Trusts and Estates Section of The State Bar of California to provide both general and fact-specific guidance to estates and trusts lawyers facing coming and unusual ethical issues and problems, with an emphasis on the application of California-specific rules. The updated Guide is an essential addition to the library of every California trust and estate lawyer.

**\$40.00 Discount for Trusts & Estates
Section Members**

**Available for \$85.00 at The State Bar of
California Sections Bookstore**

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REGISTRATION FORM

Note: One registrant per form. Photocopies may be used.

Bar Number: _____

Name: _____

Firm: _____

Firm Address: _____

City, State: _____ Zip Code: _____

Phone Number: _____

Email Address: _____

(Required for email confirmation)

Program package includes 5.0 hours of MCLE and legal specialization credits, program materials, continental breakfast and lunch.

Check here if you do not want your information released.

PRE-REGISTRATION FEES (check the appropriate circle)

\$275 Trusts and Estates Section Members

\$370 Non-Section Members
(includes enrollment in the Trusts and Estates Section for 2016)

**Onsite registration fees are \$275 for Section Members and \$370 for Non-Section Members

AMOUNT ENCLOSED OR TO BE CHARGED

\$ _____

REGISTRATION INFORMATION

Deadline: In order to pre-register, your form and check, payable to The State Bar of California, or credit card information, must be received by April 15, 2016.

Register Online: <http://trustslaw.calbar.ca.gov>

Mail To: Program Registrations, The State Bar of California,
180 Howard Street, San Francisco, CA 94105.

Fax To: Program Registration at 415-538-2368. In order to fax your registration, credit card information is MANDATORY.
(Photocopies of checks will NOT be accepted.)

CREDIT CARD INFORMATION (VISA/MASTERCARD ONLY)

I authorize The State Bar of California to charge my program registration to my VISA/MasterCard account. (No other credit card will be accepted.)

Account Number: _____

(VISA or MasterCard only)

Expiration Date: _____

Cardholder's Name: _____

Cardholder's Signature: _____

The State Bar of California and the Trusts and Estates Section are approved State Bar of California MCLE providers.

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