



THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES SECTION
PRESENTS

Earn 6.5 Hours
of CLE and Legal
Specialization Credit



The Thirty-Sixth Annual Fall Program

FRIDAY, SEPTEMBER 14, 2012

Marina del Rey Marriott
4100 Admiralty Way
Marina del Rey, CA 90292
(310) 301-3000
Time: 8:30 am to 4:45 pm
Registration opens at 8:00 am

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

PROGRAM SCHEDULE

FRIDAY, SEPTEMBER 14, 2012

8:00 a.m.

Registration

8:30 a.m. – 10:00 a.m.

Recent Developments in Probate, Trusts, Conservatorships and Guardianships

Specialty Credit: Trust & Estate Law: Estate Planning; Administration of Decedents' Estates
Taxation Law: Estate, Gift Tax and Estate Planning

James R. Birnberg, *Encino*

Mary F. Gillick, *San Diego*

Laurence P. Dugoni, *San Mateo*

10:15 a.m. – 12:15 p.m.

Medi-Cal Long Term Planning Strategies Under the Deficit Reduction Act

Specialty Credit: Trust & Estate Law: Incompetency Planning and Administrative Procedure; Estate Planning

Neil A. Harris, *Chico*

Peter S. Stern, *Palo Alto*

12:15 p.m. – 1:15 p.m.

Networking Lunch

1:30 p.m. – 3:00 p.m.

Culturally Competent Trusts and Estates Practice

Specialty Credit: Trust & Estate Law: Estate Planning

Jayne Chong-Soon Lee, *Berkeley*

Ruben Sundeen, *Oakland*

Judith Tang, *Oakland*

Alonford James Robinson Jr., Ph.D., *Washington D.C.*

3:15 p.m. – 4:45 p.m.

Competently Litigating Competency in Trusts and Estates Matters

Specialty Credit: Trust & Estate Law: Congested Litigation Regarding Above Areas

Jonathan Canick, Ph.D., *San Francisco*

Jeffrey S. Galvin, *Sacramento*

David W. Baer, *Orinda*

This one day comprehensive program will feature the following:

Recent Developments in Probate, Trusts, Guardianships and Conservatorships:

This traditional program, presented each year of the Fall Program, will provide a summary of California and federal cases, statutes, tax rulings and regulations affecting trusts, guardianships, conservatorships and probate.

Medi-Cal Long Term Planning Strategies Under the Deficit Reduction Act:

This program reviews the well established Medi Cal law and regulations regarding long term care eligibility, summarizes the proposed state regulations and the underlying federal law promulgated in the Deficit Reduction Act, and explores strategies for eligibility for single and married persons under both the old and the evolving regulations. The program will also address the situation of same sex couples and registered domestic partners, looking at what measures in California can benefit these persons and how federal law continues to impede their eligibility for many of the opportunities available to other couples. Although California's regulatory adoption of the DRA is just beginning, existing California law has framed the structure of the expected regulations, and the program will show practitioners what to expect as we await full implementation of regulations.

Culturally Competent Trusts and Estates Practice:

In a globalized and multicultural world, developing cultural competence is necessary and profitable to obtaining, keeping and satisfying clients. This course provides tools to help trusts and estates practitioners gain self-awareness about how they encounter culture, the language to talk about it, and the reflective practices to learn from it.

Competently Litigating Competency in Trusts and Estates Matters:

This practical program for planners and litigators will address evidencing and demonstrating a testator's/settlor's capacity to make, amend or revoke estate planning instruments. Specific topics include developing a record anticipating a capacity contest, working with experts, taking useful deposition, and effectively examining lay and expert witnesses at trial.

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than September 7, 2012 and are subject to a \$25 service charge. Refunds will not be available after September 7, 2012.

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.

AUDIO CDS:

Audio CDs of the program will be available with a complete set of written materials from Versa-Tape. To order, please call 1-800-468-2737.



The Thirty-Sixth Annual Fall Program

Friday, September 14, 2012 • Marina del Rey, CA

REGISTRATION FORM

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

Bar Number: _____

Name: _____

Firm: _____

Firm Address: _____

City, State: _____

Zip Code: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

(Required for email confirmation)

Program package includes 6.5 hours of CLE credit and Legal Specialization Credit in Estate Planning, Trust & Probate Law. Lunch is included.

PRE-REGISTRATION FEES (check the appropriate circle)

- \$275** Trusts and Estates Section Members
- \$345** Non-Section Members
(includes enrollment in the Trusts and Estates Section for 2012)

AMOUNT ENCLOSED OR TO BE CHARGED \$ _____

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: _____

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 September 7, 2012

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

Mail To: Program Registrations, 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.)



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San Francisco, California 94105

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