THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES SECTION
PRESENTS

6.0 Hours CLE and Legal Specialization Credit

Conservatorships: Subjects Not Often Discussed

FRIDAY, MARCH 15, 2013

State Bar of California
180 Howard Street, 4th Floor
San Francisco, California 94105
Time: 9:00 am to 4:15 pm

Registration opens at 8:30 am

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

PROGRAM SCHEDULE

FRIDAY, MARCH 15, 2013

8:30 a.m.

Registration

9:00 a.m. – 12:00 p.m.

Undue Influence: What Conservators and Litigators Should Know

Speaker: *Bennett Blum, M.D., Tucson, AZ*

12:00 p.m. – 1:00 p.m.

Networking Lunch

1:00 p.m. – 2:00 p.m.

Limited Conservatorships: The Basics and Beyond

Speaker: *Thomas Beltran, Los Angeles, CA*

2:00 p.m. – 2:30 p.m.

What you Need to Know if a Professional Fiduciary is Involved in one of your Cases

Speaker: *Barry K. Matulich, Sacramento, CA*

2:45 p.m. – 3:15 p.m.

Fees: Get them Approved

Speaker: *Barry K. Matulich, Sacramento, CA*

3:15 p.m. – 3:45 p.m.

Sales: Do them Properly

Speaker: *Carlena L. Tapella, Sacramento, CA*

3:45 p.m. – 4:15 p.m.

Substituted Judgment: What Can I Request and Can I Get an Order

Speaker: *Carlena L. Tapella, Sacramento, CA*

THIS ONE DAY COMPREHENSIVE PRO
WILL FEATURE THE FOLLOWING:

Undue Influence: What Conservators and Litigators Should Know

Elder abuse and undue influence claims are rising. Designed specifically for conservators and litigators, this session will cover the current understandings of undue influence; the differences between mental capacity and undue influence assessments; the medical advancements in neurology and brain function related to undue influence; behavior-based methods for evaluating evidence regarding undue influence; the victim's experience of undue influence; and undue influence in human-subject experiments.

Limited Conservatorships: The Basics and Beyond

Thomas E. Beltran will discuss the basics of limited conservatorships, including when to use a limited conservatorship and how to determine what powers to request. Mr. Beltran will also discuss Regional Centers, the reports Regional Centers must submit to the court, how to deal with the reports from the Regional Centers, and various other issues that arise in limited conservatorships.

What you Need to Know if a Professional Fiduciary is Involved in one of your Cases

There are specific requirements that apply to professional fiduciaries involved in conservatorship cases. Whether you represent the professional fiduciary or another party in a case involving a professional fiduciary, you need to know those requirements. Barry K. Matulich will discuss intricacies of the requirements.

Fees: Get them Approved

Don't find out fees or your client's fees were not approved as a result of being improper or requested improperly. Barry K. Matulich shares information to help you avoid some of the pitfalls that may result in fees not being approved.

Sales: Do them Properly

If it becomes necessary to sell property belonging to a conservatee, what steps must be followed by a conservator? Carlena L. Tapella will discuss the procedural requirements relating to sales of both personal property and real property in conservatorship proceedings.

Substituted Judgment: What Can I Request and Can I Get an Order

Addressing issues relating to a conservatee's estate plan, gifting, insurance, annuities, and investments can be complicated and may require a court order to substitute the judgment the conservatee previously exercised. Ms. Tapella will discuss obtaining a court order to authorize or require the conservator to take a proposed action.

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY: Cancellations and requests for refunds must be received in writing no later than March 8, 2013 and are subject to a $25 service charge. Refunds will not be available after March 8, 2013.

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.

REGISTRATION FORM

One registrant per form.
Photocopies may be used.

Bar Number: ______________________

Name: ______________________

Firm: ______________________

Firm Address: ______________________

City, State: ______________________

Zip Code: ______________________

Phone Number: ______________ Fax Number: ______________

Email Address: ______________________

Program package includes 6 hours of CLE credit, materials and lunch

(Required for email confirmation)

PRE-REGISTRATION FEES (check the appropriate circle)

- o **$195** Trusts and Estates Section Members
- o **$265** Non-Section Members
  (includes enrollment in the Trusts and Estates Section for 2013)

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 March 8, 2013.

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.)

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

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