



THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES SECTION
PRESENTS

6.5 Hours MCLE
and
Legal Specialization Credit
Included



Estate Planning Through Administration The Exam & You

FRIDAY, JUNE 14, 2013

The State Bar of California
180 Howard Street
San Francisco, California

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

THIS ONE DAY COMPREHENSIVE WILL FEATURE THE FOLLOWING

The program will be interactive, provide an overview of California Trust and Estate Law with an eye on the specialization exam, and cover the following areas:

1. Introduction
 - A. Background of exam—tips and hints
 - B. Review of exam questions and answers
 - C. Source material-CEB books
2. Estate Planning
3. Elder Law; Conservatorships/Guardianship
4. Tax Issues: Estate, Gift, Income and Property
5. Trust and Estate Administration
6. Litigation
7. Reformation

This one day comprehensive exam preparation program will feature presentations by two highly qualified experts in the field of legal specialization, including:

PATRICK A. KOHLMANN is a Certified Specialist in Estate Planning, Trust and Probate Law, California State Bar Board of Legal Specialization and is a Fellow of the American College of Trust and Estate Counsel (ACTEC). He is currently a Member of the Executive Committee of the State Bar of California, Trusts and Estates Section, and is actively involved in the monitoring, drafting, and critiquing of legislation which affects trusts and estates practitioners. Mr. Kohlmann is also licensed as a CPA by the California State Board of Accountancy and is rated AV[®] Preeminent[™] by Martindale Hubbell. Mr. Kohlmann is a frequent lecturer at professional education programs for the State Bar of California, the California Continuing Education of the Bar (CEB), and CalCPA. He has published a variety of articles on estate planning, probate, and trust law, including the

PROGRAM

following articles for the California Trusts and Estates Quarterly: “Kwok v. Transnation Title Insurance Company: Another Thing for Estate Planners to Worry About”, “The Trust Creditors Claims Procedure: To Do or Not To Do, That Is The Question”, and “Carrying on in 2010: The Modified Carryover Basis Regime and Complying With Reporting Requirements”.

Mr. Kohlmann’s areas of practice include Estate Planning, Wills, Trusts, Probate, Conservatorships, and Related Litigation, Arbitration and Mediation.

DAVID B. GAW is a Certified Specialist in Estate Planning, Probate and Trust Law. He is also a Certified Elder Law Attorney by the National Academy of Elder Law Attorneys, accredited by the American Bar Association. He serves as a Member on the Council of Advanced Practitioners, National Academy of Elder Law Attorneys.

Mr. Gaw’s roles and affiliations have included: Vice President of LAWFACT, international association of independent business law firms. Member of the Napa County Bar Association (President 1994), and member of its Estate Planning, Probate and Trust Law Section (Chairman 1982–1986). Chairman, Board of Directors, North Bay Bancorp holding company. Member, Board of Trustees and Chairman, Donor Cultivation Committee, Queen of the Valley Hospital Foundation. Member, Board of Directors, NorthBay Healthcare Group. Member, Board of Directors, Solano Community Foundation.

Mr. Gaw is a frequent lecturer for the State Bar of California, the Continuing Education of the Bar (CEB), the California CPA Education Foundation, and various private groups. He is a contributor to *California Trust Administration*, published by the Continuing Education of the Bar, and author of *CEB Action Guides*, “Marital Deduction Subtrust Funding,” and “Administering a Single-Person Trust After Settlor’s Death,” published by the Continuing Education of the Bar.

PROGRAM SCHEDULE

FRIDAY, JUNE 14, 2013

8:30 a.m.

Registration

SESSION ONE

9:00 a.m. – 10:30 a.m.

1.5 units CLE Credit

10:30 a.m. – 10:45 a.m.

Break

SESSION TWO

10:45 a.m. – 12:15 p.m.

1.5 units CLE Credit

12:15 p.m. – 1:00 p.m.

Lunch

Note: This will be a networking lunch and does not include a presentation

SESSION THREE

1:00 p.m. – 3:00 p.m.

2.0 units CLE Credit

3:00 p.m. – 3:15 p.m.

Break

SESSION FOUR

3:15 p.m. – 4:45 p.m.

1.5 units CLE Credit

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY: Cancellations and requests for refunds must be received in writing no later than June 7, 2013 and are subject to a \$25 service charge. Refunds will not be available after June 7, 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: _____

(Required for email confirmation)

Program package includes 6.5 hours of MCLE and legal specialization credits, program materials, continental breakfast and lunch.

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 2013)

***Onsite registration fees are \$275 for Section Members and \$345 for Non-Section Members*

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 no later than June 7, 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>