THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES SECTION
PRESENTS

Earn 6.5 Hours of MCLE and Legal Specialization Credit

The Thirty-Seventh Annual Fall Program

FRIDAY, NOVEMBER 15, 2013

Marina del Rey Marriott
4100 Admiralty Way
Marina del Rey, CA 90292
Time: 9:00 am to 4:45 pm

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

PROGRAM SCHEDULE

FRIDAY, NOVEMBER 15, 2013

8:30 a.m.

Registration

9:00 a.m. – 10:00 a.m.

Did You Know Revocable Trusts are Post-Mortem Asset Protection Plans?

Specialty Credit: Trust & Estate Law: Administration of Decedent's Estates

Patrick Kohlmann, *San Jose*

10:00 a.m. – 12:00 p.m.

Medi-Cal Long Term Planning Strategies Under the Deficit Reduction Act and California's New and Proposed Regulations

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

Neil A. Harris, *Chico*

Peter S. Stern, *Palo Alto*

12:00 p.m. – 1:00 p.m.

Networking Lunch – Lunch will be provided

1:00 p.m. – 3:00 p.m.

Recent Developments in Probate, Trusts, Guardianship and Conservatorships

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

James R. Birnberg, *Encino*

Mary F. Gillick, *San Diego*

Laurence P. Dugoni, *San Mateo*

3:15 p.m. – 4:45 p.m.

Identifying Financial Elder Abuse and Advising Your Client in Pursuit of Legal Remedies

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

Vivian Thoreen, *Los Angeles*

David Knitter, *Vacaville*

This one day comprehensive program will feature the following:

Did You Know Revocable Trusts are Post-Mortem Asset Protection Plans?

Trustees rarely owe duties to creditors. They are not a decedent's proxy and may not be the proper party for a creditor to sue. The program will offer practical planning and practice tips to apply when assisting trustees in administering trusts.

Medi-Cal Long Term Planning Strategies Under the Deficit Reduction Act and California's New and Proposed Regulations

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.

Recent Developments in Probate, Trusts, Guardianship 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.

Identifying Financial Elder Abuse and Advising Your Client in Pursuit of Legal Remedies

This program will provide an introduction to financial elder abuse and how to assist clients in obtaining a remedy. Learn how to identify financial abuse, advise clients, and pursue action to avoid litigation, or if litigation is necessary, obtain extraordinary remedies such as injunctive relief.

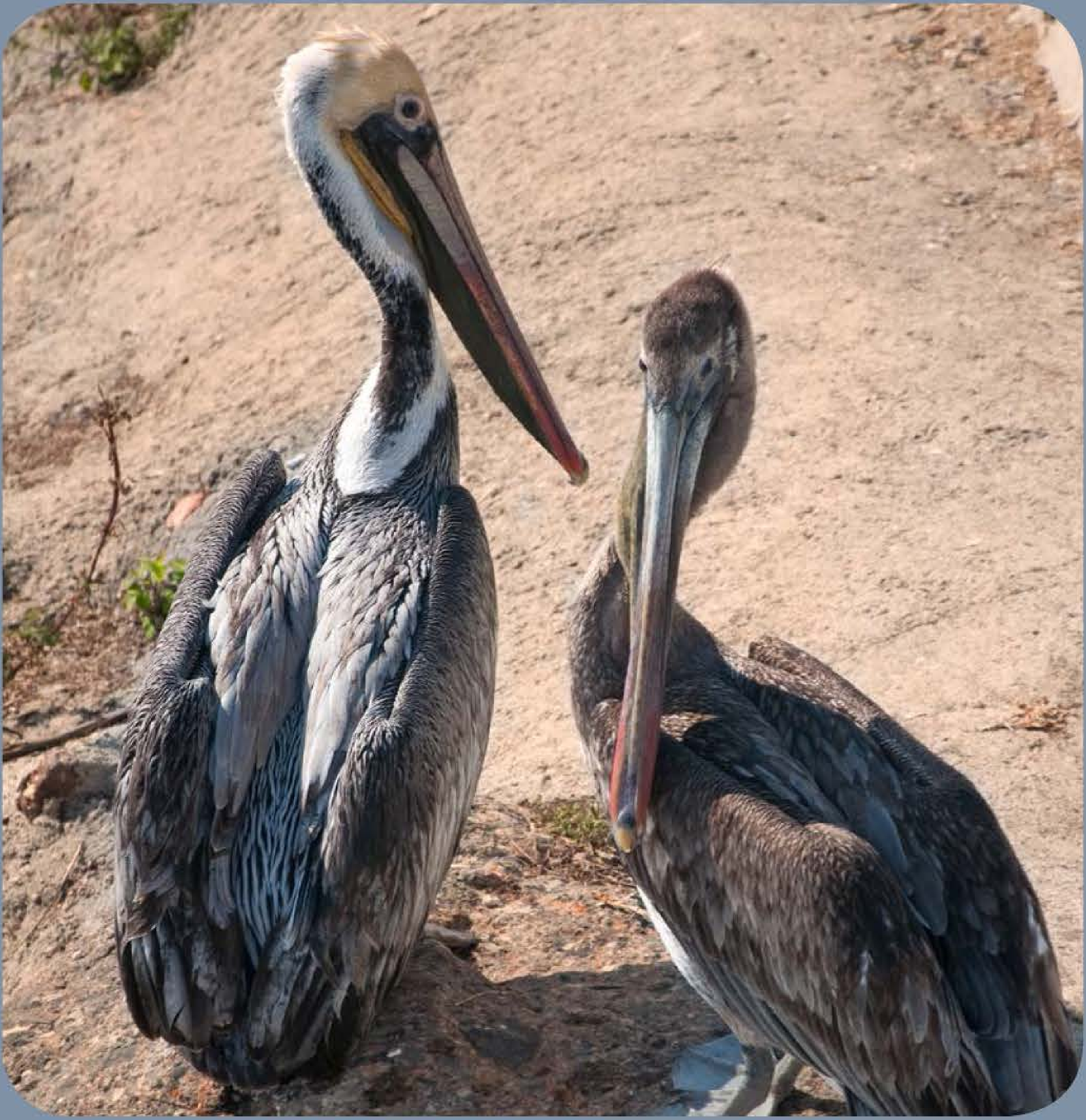
REGISTRATION INFORMATION

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



The Thirty-Seventh Annual Fall Program

Friday, November 15, 2013 • 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 MCLE credit and Legal Specialization Credit in Estate Planning, Trust & Probate Law. Lunch is included.

PRE-REGISTRATION FEES (check the appropriate circle)

- o **$275** Trusts and Estates Section Members
- o **$345** Non-Section Members (includes enrollment in the Trusts and Estates Section for 2014)

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 November 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