



THE STATE BAR OF CALIFORNIA
TRUSTS & ESTATES LAW SECTION
PRESENTS

Earn 7.0
Hours of MCLE & Legal
Specialization Credits



TRUSTS & ESTATES LAW SECTION

2014 SUMMER EDUCATION CONFERENCE

MAY 30, 2014

Marina del Rey Marriott

4100 Admiralty Way

Marina del Rey, CA 90292

(310) 301-3000

Register Online: trustslaw.calbar.ca.gov

SUMMER PROGRAM SCHEDULE

DATES, TOPICS AND SPEAKERS

8:45 – 10:15 a.m.

ATTORNEYS FEES IN PROBATES, TRUSTS AND CONSERVATIONSHIPS—PART 1 (1.5 hour)

SPEAKERS: Ellen McKissock, Esq., San Jose
Steven P. Braccini, Esq., San Jose
Rebecca Weisman, Esq., San Jose

Under the American Rule, attorney's fees are recoverable pursuant to contract, statute and certain actions in equity. This seminar will discuss all the various avenues available to recover attorney's fees on behalf of fiduciaries, beneficiaries and others with regard to estates, trusts and conservatorships by statute and in equity. Procedural hurdles, best practices, standards of review and the effect of recent case law will be covered.

10:15 – 10:30 a.m.

Break

10:30 a.m.– 12:00 p.m.

ATTORNEYS FEES IN PROBATES, TRUSTS AND CONSERVATIONSHIPS—PART 2 (1.5 hour)

A continuation of the above program with the same speakers

12:00 – 12:45 p.m.

Lunch

This will be a 45 minutes lunch and does not include a presentation. Food will be provided

AFTERNOON SESSION—ESTATE PLANNING FOR SPECIALIZED ASSETS

12:45 – 1:45 p.m.

A PRIMER ON TAX AND OTHER ISSUES RELEVANT TO ART COLLECTORS AND THEIR ADVISORS (1.0 hour)

SPEAKER: Paul N. Frimmer, Esq., Los Angeles

A review of the tax and other issues that collectors face when selling art, buying art, lending art, giving art to family and charity, and dying with art.

1:45 – 2:45 p.m.

ESTATE PLANNING FOR THE ENTERTAINMENT INDUSTRY: COPYRIGHTS, ROYALTIES, NAME AND LIKENESS RIGHTS, MEMORABILIA AND OTHER ENTERTAINING INTANGIBLES (1.0 hour)

SPEAKER: Paul Gordon Hoffman, Esq., Los Angeles

Individuals in the entertainment industry often own assets unique to that industry, and this presentation will familiarize you with those assets and how to deal with them in estate planning.

2:45 – 3:00 p.m.

Break

3:00 – 4:00 p.m.

PROVIDING FOR YOUR ANIMAL COMPANIONS IN YOUR ESTATE PLAN (1.0 hour)

SPEAKER: Veronica K. Cerruti, Esq., San Francisco

Pet animals play a significant role in the life of many individuals. Often, pets are treated as additional members of the family. It is still rare, however, to find provisions in estate planning documents for the care of these companion animals. This presentation will cover a variety of estate planning options for individuals to ensure the short-term care of such animals in the event of the individual's incapacity and the long-term care of their companion animals in the event of the individual's death. California's Pet Trust statute (Probate Code section 15212) will be discussed in detail.

4:00 – 5:00 p.m.

GUN LAWS: A GUIDE TO LAWS AFFECTING THE TRANSFER OF FIREARMS IN CALIFORNIA FROM DECEDENTS' ESTATES AND TRUSTS (1.0 hour)

SPEAKER: Richard A. Gorini, Esq., San Jose

Frequently decedents' estates and trusts contain firearms. Although clients may consider the transfer of firearms to be a casual transaction, both federal and California law treat them as anything but. The failure to comply with the applicable laws and regulations can create not only civil liability for the fiduciary, but criminal liability as well, with expected adverse consequences for the fiduciary's legal counsel. This program will review the laws that govern the transfer of the various types of firearms, the qualifications required of permissible recipients of firearms, the permissible possession and transportation of firearms by fiduciaries, and whether the concept of a gun trust, as implemented within other states, is effective under California law.

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY: Cancellations and requests for refunds must be received in writing no later than May 23, 2014 and are subject to a \$25 service charge. Refunds will not be available after May 23, 2014

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 7.0 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 2014)

**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 May 23, 2014.

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

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 if Purchased before
May 31, 2014**

Regularly priced at \$85.00 at The State Bar of California
Sections Bookstore www.calbar.org/ethics-guide

