



THE STATE BAR OF CALIFORNIA
TRUSTS & ESTATES LAW SECTION

Earn 6.0 Hours of
MCLE credit including
Legal Ethics and Legal
Specialization Credit in Estate
Planning, Trust & Probate Law



The Thirty-Ninth Annual Fall Program

FRIDAY, NOVEMBER 20, 2015

Julia Morgan Ballroom

465 California Street

San Francisco, CA 94104

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

PROGRAM SCHEDULE

REGISTRATION OPENS

7:30 A.M.

OPENING REMARKS

8:25 A.M. – 8:30 A.M.

ESTATE PLANNING TO AVOID LITIGATION: STRATEGIES TO TURN WHAT MAY SEEM INEVITABLE TO AVOIDABLE. (1.5 HRS.)

8:30 A.M. – 10:00 A.M.

- Disagreements regarding the disposition of a deceased family member's assets are becoming increasingly prevalent. Failing to address the anticipated areas of discontent will inevitably result in the lawyers becoming the unintended beneficiaries of a decedent's estate plan. Learn estate planning strategies to avoid expensive and protracted litigation among family members.
- **Vivian L. Thoreen, Esq., Los Angeles**
- **Stacie P. Nelson, Esq., San Francisco**
- **Eric M. Tokuyama, Esq., Los Angeles**

BREAK

10:00 A.M. – 10:15 A.M.

THE "GUIDE TO THE RULES OF PROFESSIONAL CONDUCT FOR ESTATE PLANNING, TRUST AND PROBATE COUNSEL" (1.5 HRS. OF LEGAL ETHICS)

10:15 A.M. – 11:45 A.M.

- This program will review the recently released Third Edition of The Guide to the California Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel. Panelists will discuss recent ethical developments and the trend toward liability to non-clients, to successor fiduciaries occupying the office of the 'client', and the difficult issues surrounding "incapacitated" clients and representation of "families."
- **Patrick A. Kohlmann, Esq., San Jose**
- **Yvonne Ascher, Esq., Monterey**
- **James P. Lamping, Esq., San Francisco**

LUNCH

11:45 A.M. – 12:45 P.M.

- This will be a 1 hour lunch and does not include a presentation. Food will be provided.

UNDERSTANDING THE REMEDIES AVAILABLE FOR FINANCIAL ELDER ABUSE. (1.5 HRS.)

12:45 P.M. – 2:15 P.M.

- This program will provide an overview of the remedies available to address different forms of elder financial abuse. Panelists will provide guidance and tips on when and how to get social services or law enforcement involved; how to resolve the problem without litigation; and what remedies are available under the consumer protection statutes, elder abuse statutes and the Probate Code.
- **David Knitter, Esq., Vacaville**
- **Vivian L. Thoreen, Esq., Los Angeles**
- **Christopher Carico, Esq., El Segundo**

BREAK

2:15 P.M. – 2:30 P.M.

RECENT DEVELOPMENTS IN TRUST AND ESTATES LAW. (1.5 HRS.)

2:30 P.M. – 4:00 P.M.

- This program will review the recent developments in trust and estate planning, estate tax, and related litigation. Panelists will provide summary descriptions and a brief discussion of the important decisions in each of these areas of the law, with the intended outcome of bringing the practitioner up-to-date on the most current law and providing the necessary materials for more in depth review.
- **Mary Gillick, Esq., San Diego**
- **James R. Birnberg, Esq., Encino**
- **Laurence Dugoni, Esq., San Mateo**

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than November 13, 2015 and are subject to a \$25 service charge. Refunds will not be available after November 13, 2015.

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.

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REGISTRATION FORM

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

Bar Number: _____

Name: _____

Firm: _____

Firm Address: _____

City, State: _____ Zip Code: _____

Phone Number: _____

Email Address: _____

(Required for email confirmation)

Program package includes 6 hours of MCLE, legal ethics and legal specialization credits, program materials, continental breakfast and lunch.

Check here if you do not want your information released.

REGISTRATION FEES (Check the appropriate circle)

\$325 Trusts and Estates Section Members

\$420 Non-Section Members
(includes enrollment in the Trusts and Estates Section for 2016)

REGISTRATION INFORMATION

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 13, 2015.

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

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: _____