



THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES LAW
SECTION PRESENTS

6.5 Hours MCLE
and
Legal Specialization Credit
Included



The Exam and You—Estate Planning Through Administration and Litigation

FRIDAY, JUNE 26, 2015

The Westin San Francisco Airport

1 Old Bayshore Hwy

Millbrae, CA 94030

(650) 692-3500

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

PROGRAM SCHEDULE

FRIDAY, JUNE 26, 2015

8:00 a.m.

Registration

SESSION I

8:30 a.m. – 10:00 a.m.

1.5 units CLE Credit

Session I will review the format of the Exam and its grading. The presenters will discuss study tips, and approaches to answering questions. The presenters will provide an introduction to the subject areas and cover the first area, professional responsibility.

10:00 a.m. – 10:15 a.m.

Break

SESSION II

10:15 a.m. – 11:45 a.m.

1.5 units CLE Credit

Session II will cover tax planning matters, tax procedures and tax returns. Tax planning through the use of QPRTs, GRATs, IDGTs, and generation-skipping trusts will be covered.

11:45 a.m. – 12:30 p.m.

Lunch

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

SESSION III

12:30 p.m. – 2:30 p.m.

2.0 units CLE Credit

Session III will cover estate and incapacity planning, and administration procedures. The speakers will cover wills, trusts, powers of attorney, Medi-Cal planning, conservatorships, and the duties owed by a trustee. Emphasis will be placed on trust administration procedures.

2:30 p.m. – 2:45 p.m.

Break

SESSION IV

2:45 p.m. – 4:15 p.m.

1.5 units CLE Credit

Session IV will cover additional administrative procedures, probate, selected litigation, and creditor's claims.

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 Vice-Chair 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 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.

Member, Executive Committee of the Trusts and Estates Section of The State Bar of California (2007-2013).

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, North Bay 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.

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY: Cancellations and requests for refunds must be received in writing no later than June 19, 2015 and are subject to a \$25 service charge. Refunds will not be available after this date.

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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June 26, 2015 | The Westin San Francisco Airport

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.

Check here if you do not want your information to be released.

PRE-REGISTRATION FEES (check the appropriate circle)

\$275 Trusts and Estates Section Members

\$370 Non-Section Members
(includes enrollment in the Trusts and Estates Section for 2015)

***Onsite registration fees are \$275 for Section Members and \$370 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 19, 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.)



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Trusts and Estates Section
180 Howard Street
San Francisco, California 94105

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