



THE STATE BAR OF CALIFORNIA
TRUSTS AND ESTATES SECTION

Earn 6.0 Hours
of MCLE and Legal
Specialization Credits

THE 40th ANNUAL FALL PROGRAM

4



FRIDAY, OCTOBER 28, 2016

Julia Morgan Ballroom

465 California Street

San Francisco, CA 94104

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

PROGRAM SCHEDULE

Registration Opens

8 a.m.

Opening Remarks

8:25 a.m.

California's New Revocable Transfer on Death Deed In Depth (1.5 Hrs.)

8:30 a.m. – 10 a.m.

Beginning in 2016, California law authorizes a statutory revocable transfer on death deed, a new method of non-probate transfer for eligible California real property. This program will review the new statute in depth, including identifying possible pitfalls for attorneys and clients. Practical advice will be given for practitioners counseling clients about revocable transfer on death deeds.

SPEAKERS: **Mark S. Poochigian, Esq., Fresno**
 Erin L. Prouty, Esq., Los Angeles

Break

10 a.m. – 10:15 a.m.

Should Your Client Sign That? Helping You Survive Your Client's Changing Capacity (1.5 Hrs.)

10:15 a.m. – 11:45 a.m.

Attorneys are routinely faced with the issue of representing clients with diminished capacity. This program will examine the legal standards of capacity, ethical issues of representing clients with diminished capacity, evaluation of clients with impairment, and ways to protect a client's valid decisions from competency challenges.

SPEAKERS: **Herbert A. Stroh, Esq., San Luis Obispo**
 Vivian L. Thoreen, Esq., Los Angeles

Networking Lunch – Meal Provided

11:45 a.m. – 12:45 p.m.

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

Recent Developments – Trusts and Estates (1.5 Hrs.)

12:45 p.m. – 2:15 p.m.

This program will review the most recent developments in estate planning, trusts, probate, estate tax, and related litigation. It will provide descriptions and a brief commentary on the most recent legislation and important decisions in each of these areas of the law. The intent will be to bring the practitioner up to date on the most current law and to provide materials for more in depth review.

SPEAKERS: **James R. Birnberg, Esq., Encino**
 Daniel G. Brown, Esq., Burlingame
 Mary Gillick, Esq., San Diego

Break

2:15 p.m. – 2:30 p.m.

Assessing and Litigating Pre-Death Trust Contests—Perils, Pitfalls and Strategies (1.5 Hrs.)

2:30 p.m. – 4 p.m.

The program will provide practical tips the practitioner can use to handle the unique issues presented in assessing when to bring, and how to pursue, pre-death trust contests. Through use of hypotheticals, insight will be provided into the circumstances requiring consideration of a pre-death contest, hurdles presented and strategies to effectively litigate the contest.

SPEAKERS: **David G. Knitter, Esq., Vacaville**
 Howard L. Horwitz, Esq., Beverly Hills
 Mary deLeo, Esq., Sacramento

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than October 21, 2016 and are subject to a \$50 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.

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 common 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**

**Available for \$85.00 at
The State Bar of California
Sections Bookstore**

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Friday, October 28, 2016 • San Francisco, CA

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 and legal specialization credits, program materials, continental breakfast and lunch.

Check here if you do not want your information released.

PRE-REGISTRATION FEES (check the appropriate circle)

\$325 Trusts and Estates Section Members

\$420 Non-Section Members
(includes enrollment in the Trust and Estates Section for 2017)

**Onsite registration fees are \$325 for Section Members and \$420 for Non-Section Members

AMOUNT ENCLOSED OR TO BE CHARGED

\$ _____

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 October 21, 2016.

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: _____

The State Bar of California and the Trust and Estates Section are approved State Bar of California MCLE providers.

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



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