



THE STATE BAR OF CALIFORNIA  
TRUST AND ESTATES SECTION

Earn 6.5  
Hours of MCLE and  
Legal Specialization Credits



# 2016 Summer Education Conference

FRIDAY, JUNE 24, 2016  
**Sheraton Grand Sacramento Hotel**  
1230 J Street  
Sacramento, CA 95814  
(916) 447-1700

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

# PROGRAM SCHEDULE

## Registration Opens

8 a.m.

## Opening Remarks

8:25 a.m.

## Establishing a Conservatorship Based Upon Undue Influence (1.5 Hrs.)

8:30 a.m. - 10 a.m.

The program will provide a start-to-finish guide for the practitioner to establish a conservatorship based upon undue influence. The speakers will explore tips and strategies to effectively prove undue influence to establish the conservatorship. The practitioner will learn how to overcome procedural and evidentiary hurdles to successfully litigate the conservatorship proceeding.

**Speakers:**            **David G. Knitter**  
                              **Mary K. deLeo**

## BREAK

10 a.m. - 10:15 a.m.

## Estate Planning for Farms, Ranches and Vineyards (2.0 Hrs.)

10:15 a.m. - 12:15 p.m.

This program will focus on the special considerations in planning for agricultural properties, including: the pros and cons of using special use valuations of 2032A; estate tax considerations; planning techniques such as IDGTs, conservation easements, discounts and entities; appropriate provisions for revocable trusts; financing; property tax planning; and tips for maintaining the plan.

**Speakers:**            **David Gaw**  
                              **Jeffrey P. Stephens, James D. Watson**

## Networking Lunch – meal provided

12:15 p.m. - 1:15 p.m.

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

**Creditors' Rights in Decedents Estates, including Non Probate Transfers (1.5 Hrs.)****1:15 p.m. - 2:45 p.m.**

The program will provide a review of current developments including:

- 1) Does publication satisfy Mullane/Tulsa in 2016;
- 2) Creditors' rights and non-rights with respect to non-probate transfers at death; and
- 3) Gaps and exceptions to self-executing statutes of limitations including Section 366.2

**Speakers:**        **Terence S. Nunan**  
                          **Margaret Hand**  
                          **Nathaniel Sterling**

**BREAK****2:45 p.m. - 3 p.m.****Recovering and Defeating Attorney fees in Trust/Probate Litigation (1.5 Hrs.)****3 p.m. - 4:30 p.m.**

This program will explore all of the provisions and methods for recovering attorneys fees or defending against them in Trust and Probate litigation, including the following: the American Rule basis for attorneys fees; an overview of fee statutes in Probate Code; attorney fee entitlements under common law/case law; the importance of case law interpretation of the statutes; proving "bad faith" in fee proceeding; proving "unreasonable" prosecution or defense of Creditor's claims under PC 9354(c); and the "clear & convincing" burden of proof in elder financial abuse cases.

**Speakers:**        **B. James Brierton**  
                          **Carlana L. Tapella**

**Networking Wine and Cheese Reception****4:30 p.m. - 6 p.m.**

# REGISTRATION INFORMATION

## **CANCELLATIONS/REFUND POLICY:**

Cancellations and requests for refunds must be received in writing no later than June 17, 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.



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

# 2016 Summer Education Program

Friday, June 24, 2016 • Sheraton Grand Sacramento Hotel

## 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 6.5 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)

**\$295** Trust and Estates Section Members

**\$390** Non-Section Members  
(includes enrollment in the Trust and Estates Section for 2016)

\*\*Onsite registration fees are \$295 for Section Members and \$390 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 June 17, 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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Trust and Estates Section  
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San Francisco, California 94105

First Class PRSRT Mail  
U.S. POSTAGE  
**PAID**  
Documentation

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