



CALIFORNIA LAWYERS ASSOCIATION
TRUSTS & ESTATES SECTION WITH THE
SOLO AND SMALL FIRM SECTION

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MCLE Credit



The Business of a Trust & Estates Practice – A Practical Guide for Sole Practitioners and Small Firms

FRIDAY, JUNE 29, 2018

The State Bar of California

180 Howard Street

San Francisco, CA, 94105

Register Online: <http://CALawyers.org/Trusts>

PROGRAM SCHEDULE

Registration and Continental Breakfast

8:00 a.m. - 8:30 a.m.

Opening Remarks

8:30 a.m. - 8:45 a.m.

What is a Meme!? – Ethics Rules and Social Media

8:45 a.m. - 9:45 a.m.

This program will assist trusts and estates lawyers in navigating the social media landscape. The topics covered will include: (1) a discussion of the general ethical issues for practitioners in trusts and estates; (2) a review of the problems which have arisen for trusts and estates attorneys using social media; and (3) a primer on “best practices”, including tips to be a social media savvy trusts and estates attorney.

SPEAKER:

Jennifer F. Scharre, San Jose

Networking Break

9:45 a.m. - 10:00 a.m.

Report from the Trenches: Practical Tips on Running a Successful Trust & Estates Practice from Experienced Practitioners

10:00 a.m. - 11:00 a.m.

Running a Trust & Estate practice is always a balancing act—staying on top of a large volume of cases with many varied deadlines, keeping up with changes in the law, and managing employees and office systems (which most of us never trained to do). This panel of experienced practitioners will share their pointers for staying abreast of the law, managing their cases and their practices, and keeping it meaningful, profitable and fun.

SPEAKERS:

Yvonne Ascher, Monterey
Carlana Tapella, Sacramento

Networking Break

11:00 a.m. - 11:15 a.m.

Estate Planning and New Technology

11:15 a.m. - 12:15 p.m.

What a lawyer must consider when setting up and/or modifying an estate plan. This encompasses changes based on the new tax code. What new technology (computer programs) are available to assist a practitioner when creating or modifying an estate plan? Finally, what happens to your digital life after death?

SPEAKERS:

Robert M. Klein, Los Angeles

Susan B. Share, Encino

Lunch Break

12:15 p.m. - 1:00 p.m.

The Business of Being an Employer . . . A Survival Guide for Solo & Small Firms

1:00 p.m - 2:30 p.m.

This presentation will focus on the following topics to educate and guide solo's and the small firms on the need to understand and comply with the complexities of employment law, including the ramifications of the newly decided California Supreme Court ruling re independent contractor test in *Dynamex Operations West, Inc. v. Superior Court*.

- I. Brief Introduction to Employment Law
- II. Employees vs. Independent Contractor, *Dynamex v. Superior Court*
- III. Pre-Hire, New Hire & Benefits
- IV. Wage and Hour Issues
- V. Best Practices for Separation of Employment

SPEAKER:

Cynthia Elkins, Woodland Hills

Networking Break

2:30 p.m. - 2:45 p.m.

An Estate Planner's Penultimate Plan: Retirement

2:45 p.m. - 3:45 p.m.

This program will cover issues that you should consider in closing your legal practice at retirement. It will include discussing the risks and rewards of succession planning for your practice, malpractice insurance guidelines that you should know, the legal notices required under the Rules of Professional Conduct, and suggestions for storage of files and original documents. The program will also discuss the psychology of retiring.

SPEAKERS:

Tracy Potts, Sacramento

Susan Kilano, San Diego

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than Friday, June 22, 2018 and are subject to a \$50 service charge. Refunds will not be available after this date.

QUESTIONS:

For registration information call 415-795-7025. Telephone registrations will not be accepted. For program content and/or Section information call 415-795-7195.

SPECIAL ASSISTANCE:

For special assistance, please call 415-795-7195.

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 5.5 hours of MCLE credit, program materials on a USB drive and lunch.

Check here if you do not want your information released.

PRE-REGISTRATION FEES (check the appropriate circle)

- \$245** Members of the Trusts & Estates Section or Solo & Small Firms Section
- \$340** Non-Section Members
(includes enrollment in your choice of T&E or Solo Section for 2018)
 - Trusts & Estates Section
 - Solo & Small Firms Section
- \$75** Students (non-attorney)
- \$125** CYLA—California Young Lawyers Association

**Onsite registration fees are \$245 for Section Members and \$340 for Non-Section Members

AMOUNT ENCLOSED OR TO BE CHARGED

\$ _____

REGISTRATION INFORMATION

Deadline: In order to pre-register, your form and check, payable to California Lawyers Association, or credit card information must be received by Friday, June 22, 2018.

Register Online: <http://CALawyers.org/Trusts>

Mail To: Program Registrations, California Lawyers Association
180 Howard Street, Suite 410, San Francisco, CA 94105

Email To: Program Registrations at ProgramRegistrations@CALawyers.org.
In order to email your registration, credit card information is **MANDATORY. Photocopies of checks will NOT be accepted.**

CREDIT CARD INFORMATION (VISA/MASTERCARD ONLY)

I authorize California Lawyers Association 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 California Lawyers Association, the Trusts & Estates Section and the Solo and Small Firms Section are approved State Bar of California MCLE providers.

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CALIFORNIA LAWYERS ASSOCIATION
Workers' Compensation Section
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