



CALIFORNIA LAWYERS ASSOCIATION
TRUSTS AND ESTATES SECTION

Earn 5 Hours
MCLE Credit
Includes Legal Specialization



2019 Summer Trusts and Estates Education Conference

FRIDAY, JUNE 28, 2019

Pacific McGeorge School of Law
3200 5th Avenue, Classroom C
Sacramento, CA 95817

Register Online: <https://calawyers.org/section/trusts-and-estates/>

PROGRAM SCHEDULE

Registration and Continental Breakfast

8:30 a.m. – 9:00 a.m.

Probate One Day Evidentiary Hearings for Non-Litigators

9:00 a.m. – 10:00 a.m.

This program is intended to help non-litigators prepare for one-day evidentiary hearings in probate court by learning practices skills and tips from experienced litigators. This is a quick nuts & bolts overview of the following topics: (1) preparing for the hearing, including exhibits, witnesses, motions in limine, (2) pre-hearing subpoenas, (3) witness preparation, (4) opening statements, (5) presenting evidence, (6) objecting to evidence, (7) closing arguments, (8) statement of decision, and (9) post-trial motions and appeals.

SPEAKERS: **Jeremy Moffit (Withers Bergman LLP, San Diego)**
 Judy Bae (Miller, Monson, Peshel & Hashaw, San Diego)

Break

10:00 a.m. – 10:15 a.m.

Specific Issues in Undue Influence Litigation

10:15 a.m. – 11:15 a.m.

This program will provide tips on how to extend undue influence liability to others, handle difficult discovery issues, and litigate post judgment no contest proceedings.

SPEAKER: **David Knitter (Knitter & Knitter, LLP, Vacaville)**

Break

11:15 a.m. – 11:30 a.m.

Sour Grapes – When Decanting Gives Rise to Litigation

11:30 a.m. – 12:30 p.m.

As the practice of trust decanting becomes more widely accepted throughout the United States, and with the recent enactment of the Uniform Trust Decanting Act in California, trustees, financial advisors, and trust and estate attorneys should be cognizant of the attendant risks of litigation that may arise from using this estate planning tool. This presentation provides a general overview of decanting, and frequently litigated issues in this emerging area of law.

SPEAKERS: **Lydia L. Lockett (Holland & Knight, Los Angeles)**
 Lindsey Kernan (Holland & Knight, Los Angeles)

Lunch

12:30 p.m. – 1:30 p.m.

Marrying into Elder Abuse

1:30 p.m – 2:30 p.m.

Increasingly we are seeing caregivers and others marry elders in order to access their wealth. This seminar discusses the difficulties in trying to prevent such a marriage or to challenge it once it has occurred. We will explore the capacity required for divorce, legal avenues to void a senior's marriage before or after death, and what constitutes undue influence. We will also examine the current state of the law and possible new developments, and we will look at ways to protect seniors from these abusive marriages.

SPEAKER: Ellen McKissock (Hopkins & Carley, San Jose)

Break

2:30 p.m. – 2:45 p.m.

Omitted Family Members, Putative Spouses, and Adopted Children: Do I Get a Share and How?

2:45 p.m – 3:45 p.m.

In the age of the growing modern family, do omitted relatives, putative spouses, and adopted children get a share, and, if so, how? This program will examine this from both an estate planning and litigation perspective.

SPEAKER: Erin Kolko (Temmerman Cilley & Kohlmann LLP, San Jose)



REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than June 20, 2019 and are subject to a \$50 service charge. Refunds will not be available after this date.

QUESTIONS:

For registration information call 916-516-1757. Telephone registrations will not be accepted. For program content and/or Section information call 916-516-1755.

SPECIAL ASSISTANCE:

For special assistance, please call 916-516-1755.

ON-SITE:

On-site registration will be on a space available basis. Call to confirm space availability.

PROGRAM MATERIALS:

Registrants will receive a USB storage device with an electronic version of all program materials the day of the conference. Before the Conference, Registrants will receive a link with information on how to review and download the program materials. **Wi-Fi will not be made available inside the conference rooms.** It may be helpful to review a program's reference material before the class. This website is not available to the public, and access is given only to Conference registrants. Late-breaking supplemental materials not available before the Conference will be added at a later date. No printed materials will be provided at the conference.



Friday, June 28, 2019 • Sacramento, 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 5 hours of MCLE credit, 5 hours of Estate Planning, Trust and Probate Law Specialization credit, program materials on a USB drive, continental breakfast and lunch.

Check here if you do not want your information released

This event may be recorded. By attending this event, you consent to be photographed, filmed, and/or otherwise recorded, and to any use, by the CLA, of your likeness, voice, and name in any and all media including social media. If you do not want your name or photo to be used, please let us know in advance. We cannot, however, honor requests to opt out of the use of your image or voice if you choose to ask a question during one of the event sessions.

PRE-REGISTRATION FEES (check the appropriate circle)

- \$250 Members of the Trusts and Estates Section
- \$345 Non-Section Members
(Includes enrollment in the Trusts and Estates Section for 2019)
- \$150 CYLA—California Young Lawyers Association
(Includes enrollment in the Trusts and Estates Section for 2019)

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 June 20, 2019.

Register Online: <https://calawyers.org/section/trusts-and-estates/>

Mail To: Program Registrations, California Lawyers Association
400 Capitol Mall, Suite 650, Sacramento, CA 95814

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 is an approved State Bar of California MCLE provider.

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