USC Gould School of Law

FRIDAY, NOVEMBER 21, 2025

WESTIN BONAVENTURE HOTEL & SUITES LOS ANGELES, CALIFORNIA

USC GOULD SCHOOL OF LAW

51ST ANNUAL TRUST AND ESTATE CONFERENCE

THE ESSENTIAL DAY-LONG CONFERENCE FOR **TRUST, ESTATE PLANNING, PROBATE** AND **ELDER LAW PROFESSIONALS**

CE CREDIT AVAILABLE FOR ATTORNEYS (MCLE/LEGAL SPECIALIZATION), ACCOUNTANTS (CPE), PROFESSIONAL FIDUCIARIES (PFB), FINANCIAL PLANNERS (CFP® PROFESSIONALS), AND BANKERS/TRUST OFFICERS (CTFA)

#USCTrust

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51ST ANNUAL TRUST AND ESTATE CONFERENCE

program

7:00 AM
Check-In and Networking

8:25 AM – 8:30 AM
Welcome and Opening Remarks

Terrence M. Franklin
Conference Chair
Sacks, Glazier, Franklin, Lodise, McMurtrey & Scheerer, LLP

8:30 AM – 10:00 AM
Annual Update: Recent Developments in Probate and Trust and their Practical Applications

Take advantage of the analyses of our expert panelists as they review critical recent California legislation and case law and Federal tax law. Both new and experienced practitioners will benefit from their insights on current developments in wills, trusts and estate, and gift taxation.

Jeffrey A. Dennis-Strathmeyer
Attorney at Law

David Lane
Lecturer in Law
USC Gould School of Law

Amy L. McEvoy
Partner
Sheppard, Mullin, Richter & Hampton LLP

Erin L. Prouty
Partner
Lagerlof, LLP

10:00 AM - 10:20 AM
Networking Break

10:20 AM – 11:20 AM
Tax Considerations in Trust and Estate Dispute Resolution and Trust Modifications

Disputes involving trusts and estates often trigger complex income and transfer tax consequences. This session will explore the distinct tax implications that arise in the context of trust and estate disputes and dispute resolution. Whether resolving a will contest, fiduciary breach, or trust dispute, the structure of a settlement can significantly affect the allocation of tax liabilities—and the overall value of the resolution to the respective parties. Panelists will address key tax considerations in structuring settlement agreements, including income tax, estate tax, gift tax, and generation skipping transfer tax (GST). Attendees will gain practical insights into how strategic tax planning can prevent unintended shifts in tax burdens and optimize settlement outcomes.

Adam M. Ansari
Member
Clark Hill PLC

Jeryll Cohen
Partner
Saul Ewing LLP

11:30 AM – 12:30 PM
Trusts in Transit: Is It Time to Move Your Trust to Another State?

This panel will explore the most common reasons for changing the situs of a trust, with a focus on transferring trusts out of California to more favorable trust jurisdictions. It will discuss the mechanics of changing trust situs and related modifications you may want to consider. Finally, it will highlight collateral obstacles you may encounter, including future potential conflict of law issues.

Catherine C. Bott
Senior Wealth Advisor
Northern Trust

Mark E. Doyle
Senior Wealth Advisor
Northern Trust

12:30 PM – 1:05 PM
Luncheon

Luncheon Presentation
1:05 PM – 1:50 PM
Checks, Balances and Best Interests–Ethics for Legal and Financial Professionals in Complex Cases

Attorneys, fiduciaries and financial advisors involved in the representation of vulnerable clients have perspectives which do not always align with the protective role of the Court. The panelists will review the ethics for legal and financial professionals in the context of a case study involving court oversight at various points in the litigation.

Paul Bartschi
First Vice President, Senior Financial Advisor
Merill Lynch Wealth Management

Yevgeny L. Belous, Esq.
Partner
Rodnunsky & Associates

Hon. Ana Maria Luna (Ret.)
Los Angeles County Superior Court

Hon. Jonathan Rosenbloom
Assistant Supervising Judge,
Probate and Mental Health Divisions
Los Angeles County Superior Court

e 0.75 hours of MCLE legal ethics credit

1:55 PM – 2:55 PM
Death and Debt: Navigating Post-Mortem Debt in Probate, Non-Probate, and Trust Estates

In this session, Sara Pike and Lisa Roper discuss treatment of different kinds of debt in the post-mortem context, covering the spectrum of modest to millionaire estates and the issues that arise – for fiduciaries, beneficiaries and creditors alike – when a decedent dies with debt. The speakers will cover the basics on post-mortem treatment of different types of secured and unsecured debt, priority for payment, the creditor claims process, and pitfalls in probate, as well as tips for low-asset estates. They will also discuss dealing with debt in trust administrations, including complex issues such as related party loans, trustee liability, and estate tax considerations such as deductibility of debt, valuation issues, and generating liquidity for encumbered estates.

Sara A. Pike
Senior Associate
Withers

Lisa B. Roper, Esq.
Partner
Henderson, Caverly & Pum LLP

2:55 PM – 3:15 PM
Networking Ice Cream Break

Sponsored by Jack Barcal, Esq./THINK TAX

THINK TAX Jack Barcal, Esq.

3:15 PM – 4:15 PM
Estate Planning Traps: Lessons from Litigation and Planning Experts

Probate litigators know that merely executing a will or trust does not guarantee that its instructions will be implemented upon its creator's death. This presentation will explore the common pitfalls encountered by litigators and how they may be avoided, while also exploring the perspective of an estate planning attorney with the goal of limiting the possibility of litigation for the intended beneficiaries and increasing the likelihood that a client's true intentions will be effectuated after their death.

Katie C. Gose
Partner
McDermott Will & Schulte

Lindsey F. Munyer
Partner
Keystone Law Group, P.C.

4:20 PM – 5:20 PM
Legal Advice or Elder Abuse? Ethical Dilemmas When Advising the Elderly

With an aging population living longer than ever and initiating the largest wealth transfer in history, elderly clients need sound legal advice from trust and estate lawyers. The recent case of *Herren v. George S.* may discourage lawyers from advising those clients when capacity is in question, for fear of being accused of elder abuse. The panelists will discuss the framework for liability under California's Elder Abuse and Dependent Adult Civil Protection Act, how it may apply to lawyers when advising elderly clients, and best practices for advising the elderly without becoming a defendant in an elder abuse case.

e 1 hour of MCLE legal ethics credit

Jenny Hill Bratt
Partner
Sheppard, Mullin, Richter & Hampton LLP

Matt Owens
Partner
Sheppard, Mullin, Richter & Hampton LLP

5:20 PM
Adjournment

Continuing Education Credits

LAWYERS. Minimum Continuing Legal Education (MCLE): USC Gould School of Law's application for MCLE credit is pending with the State Bar of California. We certify that this activity qualifies for MCLE credit in the amount of **7.25 hours**, including **1.75 hours of ethics** credit. This event may or may not meet the requirements for continuing legal education in other states. Please check with the bar association or Supreme Court in the state in which you are seeking credit to determine if this event is eligible.

LEGAL SPECIALIZATION CREDIT: USC Gould School of Law's application for Legal Specialization credit is pending with the State Bar of California. We certify that this activity has been approved for **7.25 hours** of Legal Specialization credit in Taxation Law and **7.25 hours** of Legal Specialization credit in Estate Planning, Trust and Probate Law.

ACCOUNTANTS. Continuing Professional Education (CPE): This program meets the guidelines for Continuing Professional Education credit set by the California State Board of Accountancy in the amount of **435 minutes.** The maximum CPE credit that may be claimed is **8.5 hours.** No CPE credit is available for watching Videos On Demand.

FINANCIAL PLANNERS. CFP® Professionals: The USC Gould School of Law is a registered CFP Board CE Sponsor. Attendance will be reported electronically following the Conference.

PROFESSIONAL FIDUCIARIES. This program meets the guidelines for continuing education credit set by the California Professional Fiduciaries Bureau (PFB). The California MCLE credits provided for the program are accepted as meeting the continuing educational requirements of the Professional Fiduciary Association of California.

BANKERS AND TRUST OFFICERS. Certified Trust and Financial Advisor (CTFA): ABA Professional Certifications is dedicated to promoting the highest standards of performance and ethics within the financial services industry. The USC Gould School of Law 51st Annual Trust and Estate Conference application for credit is pending. This statement is not an endorsement of this program or its sponsor. Please log into your record at aba.csod.com to submit credit. If you have any questions regarding continuing education for your ABA Professional Certification, please contact at 202-633-5092 or certifications@aba.com.

Frequently Asked Questions

REGISTRATION

Your registration fee includes all sessions, continental breakfast, luncheon, networking refreshment breaks, continuing education credit, the Conference Syllabus (in print and electronic download formats), and access to the Conference event platform. The Conference Syllabus highlights and expands upon the sessions and includes a copy of our annual Resource Guide (a Trust and Estate Professional Directory covering Los Angeles, Orange and San Diego counties). Videos On Demand will be available until February 27, 2026, for California MCLE credit.

Video recordings of all sessions are included with each ticket purchase. You cannot claim additional credit for viewing a recording of a session you also attended in person. If you are unable to attend the Conference, purchase Videos On Demand and receive MCLE credit for viewing the sessions. Visit our website at https://gould.law/TEC for more information.

CANCELLATIONS

All registrations and purchases are final and non-refundable.

BRING YOUR OWN BINDER

USC is committed to sustainability and eliminating single-use plastics. As a result, syllabus materials will not include a binder. The materials will be delivered as a packet of recyclable paper at Will Call. No print materials will be supplied for Virtual registrations.

LOCATION AND ACCOMMODATIONS

The Trust and Estate Conference will be held at:

The Westin Bonaventure Hotel & Suites
404 South Figueroa Street, Los Angeles, CA 90071
Information: **(213) 624-1000**
Reservations: https://www.marriott.com/event-reservations/reservation-link.mi?id=1749167196235&key=GRP&app=resvlink
Reservation Group Name: **USC GOULD** / Use code **USCUSCG**

A limited number of discounted sleeping rooms will be available to Conference participants at the hotel and will be held until November 6, 2025. Room rates are as follows: **$209** for a Traditional Single or Double room.

PARKING

Limited valet parking is available for **$27** per day with validation or **$35** per night for overnight guests at the Conference hotel. Nearby **self-parking** is also available at the City National Plaza Garage (located across the street from the hotel at 444 South Flower Street) for **$40** per day. No validations are available for offsite parking lots.

BADGE PICK UP

Badges will be held at Will Call, located in the hotel's California Ballroom foyer on the second level.

DRESS CODE

We recommend business casual attire and comfortable shoes for walking around the hotel.

SPECIAL REQUIREMENTS

USC Gould School of Law welcomes the participation of individuals with special needs at our continuing legal education events. If you require special accommodations or have any other questions, please contact us at **(213) 821-3580** or **cle@law.usc.edu** for assistance.

Registration

USC Gould School of Law
51st Annual Trust and Estate Conference
Friday, November 21, 2025 | The Westin Bonaventure Hotel

REGISTER AND PAY ONLINE AT **https://gould.law/tec25**

CONSENT TO USE OF IMAGE

Attendance at, or participation in, the Trust and Estate Conference constitutes agreement to the Conference's use and distribution of the attendee's or participant's image in photographs, video, and electronic media for educational and promotional purposes.

FORMAT

The Conference is being offered in person with a concurrent livestream. Videos On Demand will be available until February 27, 2026. The recording of sessions by individuals is not permitted.

CANCELLATIONS

All registrations are final and non-refundable.

PAYMENT

The USC Gould School of Law accepts Credit Cards and Checks for **In-Person** or **Virtual** Registrations.

To request a special luncheon meal, please check the appropriate box in the online registration form. The Conference cannot accommodate special meal requests without advance notification.

General Registration

- ☐ **$549** Standard Registration **In-Person**
- ☐ **$599** Standard Registration **Virtual**

Special Registration Types

- ☐ **$409** Paralegal or Government Employee Registration **In-Person**
- ☐ **$439** Paralegal or Government Employee Registration **Virtual**

PFAC Members: Ask PFAC for a discount code to get the Paralegal Rates.

Recent Grad (2015-2025) Registration

- ☐ **$494** Recent Grad Registration **In-Person**
- ☐ **$544** Recent Grad Registration **Virtual**
- ☐ **$300** Full-Time Law Student Registration **In-Person**
- ☐ **$330** Full-Time Law Student Registration **Virtual**

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QUESTIONS? Email **cle@law.usc.edu** or call **(213) 821-3580.**

What if I choose the In-Person ticket option and need to switch to the Virtual ticket option?
We can accommodate a change in ticketing for an additional $50 fee. The Virtual ticket will also give you access to the replays.

Can I receive credit for watching the replays in the event platform?
The In-Person Conference is available for MCLE, LSMCLE, CPE, CFP, PFB, and CTFA credits. Watching the livestream and replays are only available for MCLE and CPE credit.

planning committee

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CONFERENCE CHAIR
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Saul Ewing LLP

Register Online At:
https://gould.law/TEC

Why attend?

For 51 years, USC Gould's Trust and Estate Conference has been delivering **practical and real-life solutions** from speakers with a **proven track record** of addressing unexpected problems in estate planning, probate, and trust administration. The Conference typically attracts over 300 of your peers for **unrivaled networking** in person and over 200 watching virtually. Join us to engage in learning opportunities from both the speakers and your professional colleagues!

Who should attend?

The Conference is specially tailored for **trust, estate planning, probate and elder law professionals** including attorneys, paralegals, trust officers, accountants, financial institution executives, private professional fiduciaries, wealth management professionals, fiduciary officers, underwriters and insurance advisors.

Can't Attend?

Purchase Videos On Demand (VOD) of the Conference sessions and download the Conference Syllabus from the Conference to earn participatory MCLE credit!

Note: In-Person and Virtual registrations already include recordings of all the sessions.

For more information or to purchase online, visit https://gould.law/TEC, **email cle@law.usc.edu** or call our office at **(213) 821-3580.**

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Office hours are 9:00 a.m. to 5:00 p.m. Pacific Time