

**USC Gould**  
School of Law

TUESDAY  
NOVEMBER 19, 2024

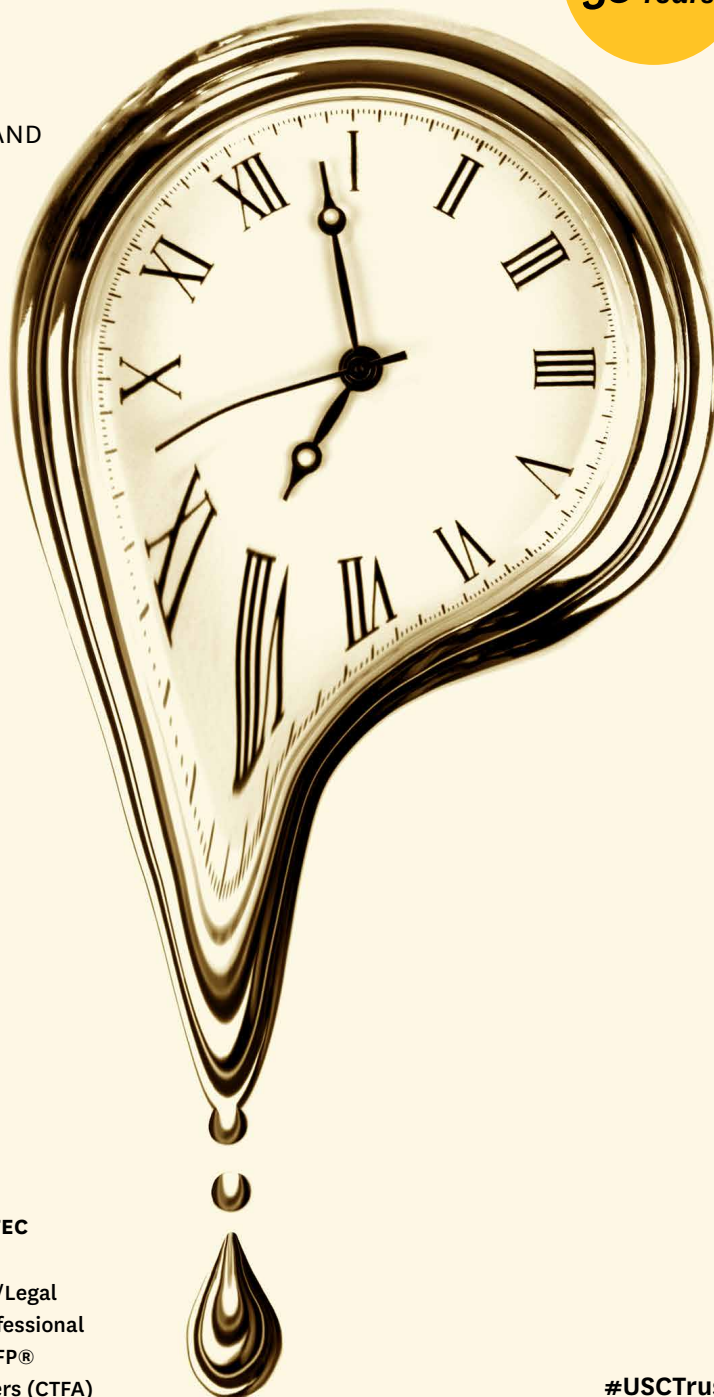
WESTIN BONAVENTURE  
HOTEL & SUITES  
LOS ANGELES, CALIFORNIA

USC GOULD SCHOOL OF LAW

*50th Annual*  
**TRUST AND ESTATE  
CONFERENCE**

**Celebrating  
50 Years!**

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



**REGISTER NOW**

<https://gould.law/TEC>

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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The USC Gould School of Law and Planning Committee of the 50th Annual Trust and Estate Conference gratefully acknowledge the generous contributions of:

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Please visit our website at <https://gould.law/TEC> for a complete and up-to-date list of Conference sponsors and supporters.

## When?

The 50th Annual Trust and Estate Conference will take place on Tuesday, November 19, 2024, at the Westin Bonaventure Hotel and Suites in Downtown Los Angeles.

## Why Attend?

For 50 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.

## What's Included?

Registration includes all sessions, continental breakfast, networking breaks, luncheon presentation, continuing education credit, and print and downloadable copies of the practical Conference Syllabus, including the popular Resource Guide, a Trust and Estate Professional Directory covering Los Angeles, Orange and San Diego counties. **Free Wi-Fi will also be available for attendees at the Conference!**

## Sign Up Now!

REGISTER ONLINE AT

<https://gould.law/TEC>

# 50th Annual TRUST AND ESTATE CONFERENCE

# Program

7:00 AM

Check-In and Continental Breakfast

8:25 AM – 8:30 AM

Welcome and Opening Remarks



**Terrence M. Franklin**  
Conference Chair  
Sacks, Glazier, Franklin & Lodise 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

10:00 AM – 10:20 AM    **Networking Break**

10:20 AM – 11:20 AM

**Wisdom for the Aged:**

**Smart Estate Planning for Elder Clients**

The panel will discuss estate planning issues that arise with elder clients such as characterization of property used to fund trusts, issues related to determination of competency, what constitutes isolation, selection of successor Trustee(s) and the potential for conflict if they are also a beneficiary, and the definition and application of the HEMS standard.



**Sasha M. Bass**  
Senior Counsel  
Loeb & Loeb LLP



**Hon. Reva G. Goetz (Ret.)**  
Mediator  
JAMS



**Alexandra A. Letzel**  
Partner  
Loeb & Loeb LLP

11:30 AM – 12:30 PM

**Alphabet Soup: From the UPAIA to the UFIPA**

On January 1, 2024, California became the seventh State to Adopt the Uniform Fiduciary Income and Principal Act (UFIPA), which wholly replaced the prior Uniform Principal and Income Act (UPAIA). This program will discuss the reasons and policies behind the new UFIPA; what actually changes in California law with the new act; and an overview of practical issues that arise in trust administrations with principal and income interests.



**Thomas Aikin**  
Partner  
Saul Ewing LLP



**Jeryll Cohen**  
Partner  
Saul Ewing LLP



**Contact Information**

USC Gould School of Law – Continuing Legal Education  
699 Exposition Boulevard, Suite 326  
Los Angeles, California 90089-0071

TELEPHONE: (213) 821-3580      EMAIL: [cle@law.usc.edu](mailto:cle@law.usc.edu)  
WEBSITE: <https://gould.law/TEC>

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

(@USCGouldCLE)

**1:10 PM – 1:55 PM**

**AI and Estate Planning**

Join Tracy Potts, Principal at Legacy Law Group, for a 45-minute discussion on the impact of artificial intelligence (AI) on trust and estate law. Discover what you need to know about how AI is transforming estate planning, enhancing legal efficiency, and shaping the future of trust management.



**Tracy M. Potts**  
Principal  
Legacy Law Group

**1:55 PM – 2:00 PM**

**Passing Period**

**2:00 PM – 3:00 PM**

**Directed Trusts in California:  
Better Late Than Never?**

For many years, directed trusts have been used to separate fiduciary powers and duties among different officeholders. However, many California attorneys have been reluctant to plan with them without clear statutory guidance. Now, with the passage of the California Uniform Directed Trust Act, effective January 1, 2024, the wait is over. Join Aubrey Van de Wetering, Philip Hayes and Michael Rosen-Prinz to learn about the new act and how directed trusts can benefit your clients.



**Philip J. Hayes**  
Senior Vice President,  
Regional Wealth Advisor  
Northern Trust



**Michael Rosen-Prinz**  
Partner  
Loeb & Loeb LLP



**Aubrey Van de Wetering**  
Associate  
Hoffman, Sabban & Watenmaker, APC

**3:00 PM – 3:20 PM**

**Networking Ice Cream Break**  
Sponsored by Jack Barcal, Esq.

**Jack Barcal,**  
**Esq.**

**3:20 PM – 4:20 PM**

**Navigating Probate Settlements: Insights from a Litigator, Planner, and the Bench**

Explore ways to resolve the unique aspects of probate litigation. The presenters will highlight how litigation strategy, tax planning, and judicial oversight can each in different ways facilitate resolution. The program will focus on how the litigator, planner and the bench can bring people together through a fair agreement that honors the settlor's legacy while safeguarding the interests of all those impacted.



**Elizabeth G. Acevedo**  
Shareholder / Director  
Weinstock Manion, A Law Corporation



**Hon. David J. Cowan**  
Los Angeles Superior Court



**Shawn S. Kerendian**  
Managing Partner  
Keystone Law Group, P.C.

**4:30 PM – 5:30 PM**

**Navigating the Fiduciary Landscape: Challenges, Solutions, and Best Practices for Trustees in Today's Dynamic Environment**

This presentation is focused on current issues of fiduciary duties - loyalty, impartiality, prudent investing, keeping beneficiaries informed, avoiding conflicts, preserving property, enforcing claims, defending actions, etc. The panelists will address problems being faced by corporate trustees, professional fiduciaries and charitable trustees, based on current economic conditions, trends of behavior, and changes in law. They will also discuss the bifurcation and delegation of fiduciary duties, coordination among the parties of the fiduciary relationship and how to avoid the viscous circle of depleting assets through conflict and misunderstanding. In doing so, the panel aims to provide practical answers on topics such as values-based investing, handling of complex or unique assets, and balancing tax optimization with the mechanics of proper administration.



**Janette A. Brooks**  
Principal and Fiduciary  
D4 Fiduciary, Business Advisory and  
Family Office Services, Inc.



**Bryan D. Kirk**  
Development Legal Counsel  
Stanford University



**Anna Soliman**  
Trust Counsel and Managing Director /  
Chief Fiduciary Officer of FTIC  
Fiduciary Trust International of California

**5:30 PM**  
**Adjournment**

## Planning Committee

### **Terrence M. Franklin**

CONFERENCE CHAIR  
Partner  
Sacks, Glazier, Franklin & Lodise LLP

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Shareholder / Director  
Weinstock Manion, A Law Corporation

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Associate Professor of Accounting  
USC Leventhal School of Accounting  
USC Marshall School of Business

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Partner  
Brown & Streza LLP

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### **Sandra J. Chan**

Lawyer

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Alumni Relations and  
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Sheppard, Mullin, Richter & Hampton LLP

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Managing Member  
Hoffman, Sabban & Watenmaker, APC

### **Kenneth S. Wolf**

CONFERENCE CHAIR EMERITUS  
Principal  
Law Office of Kenneth S. Wolf

### **Geraldine A. Wyle**

Partner  
Saul Ewing LLP

## 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! The Conference Syllabus is a volume of outlines, articles, forms and practical information prepared by our speakers, including the Resource Guide, a Trust and Estate Professional Directory covering Los Angeles, Orange and San Diego counties.

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

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



# 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**. 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 50th 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](http://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](mailto:certifications@aba.com)**.

## Upcoming USC Gould School of Law Programs

### CORPORATE COUNSEL

December 4, 2024

The California Club – Los Angeles, California *(courtesy of Club members Robert & Kathleen Campos)*

### TAX

January 27-29, 2025

Sheraton Grand Los Angeles – Los Angeles, California

### REAL ESTATE

February 27, 2025

Jonathan Club – Los Angeles, California

### INTELLECTUAL PROPERTY

March 17-18, 2025

Fairmont Miramar Hotel & Bungalows – Santa Monica, CA

Subscribe to our mailing list and keep up-to-date on our programs! <https://bit.ly/GouldCLEmailingList>

# 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 also 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 19, 2025, for California MCLE credit.

## 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.

## PROGRAM RECORDINGS

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.

## 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=1722530325439&key=GRP&app=resvlink>

Reservation Group Name: **USC GOULD**

A limited number of discounted sleeping rooms will be available to Conference participants at the hotel and will be held until October 28, 2024. Room rates are as follows: **\$199** for a Traditional room or **\$249** for a City View room. Please use the Reservations link above to book your room under our special group rate.

## PARKING

Limited valet parking is available for **\$24** 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, a vegetarian/vegan/gluten-free/kosher meal, or have any other questions, please contact us at **(213) 821-3580** or [cle@law.usc.edu](mailto:cle@law.usc.edu) for assistance. To request a special luncheon meal, complete the alternate meal form at <https://gould.law/tec24dietary>

## CANCELLATIONS

All registrations and purchases are final and non-refundable.

## SPONSORSHIP AND EXHIBITING

Please visit our website at <https://gould.law/TEC> for information on sponsorship or exhibiting. Please contact Wendy Wiley Willett at **(213) 821-3579** or [WWiley@law.usc.edu](mailto:WWiley@law.usc.edu) with questions. **Space is limited, so reserve your space as soon as possible!**

# Registration Form

## USC GOULD SCHOOL OF LAW

### 50TH ANNUAL TRUST AND ESTATE CONFERENCE

Tuesday, November 19, 2024 | The Westin Bonaventure Hotel

Registrant Name: \_\_\_\_\_

Occupation/Title: \_\_\_\_\_

Organization/Law School: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Mobile Phone\*: \_\_\_\_\_

Email: \_\_\_\_\_

*(\*to receive verification code for site entry only) Please Type or Print Clearly*

I prefer not to share my contact information with Conference contributors.

I am a USC Gould alumnus. Class Year: \_\_\_\_\_

#### SELECT REGISTRATION TYPE

##### General Registration

**\$549** Standard Registration **In-Person**

**\$599** Standard Registration **Virtual**

##### Recent Grad (2014-2024) Registration

**\$494** Recent Grad Registration **In-Person**

**\$544** Recent Grad Registration **Virtual**

##### Professional Fiduciary Association of California (PFAC) Member Registration

**\$449** PFAC Registration **In-Person**

**\$499** PFAC Registration **Virtual**

##### Special Registration Types

**\$409** Paralegal or Government Employee Registration **In-Person**

**\$439** Paralegal or Government Employee Registration **Virtual**

**\$300** Full-Time Law Student Registration **In-Person**

**\$330** Full-Time Law Student Registration **Virtual**

#### BRING YOUR OWN BINDER



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#### LUNCHEON MEAL - ALTERNATIVE/SPECIAL REQUEST

To request a special luncheon meal, complete the alternate meal form at <https://gould.law/tec24dietary>

Check here to request a vegan and gluten-free luncheon meal.

#### SELECT PAYMENT METHOD

**1 Check:** Mail checks payable to **USC Gould School of Law** with the completed form to:

USC Gould School of Law CLE – Trust and Estate Registration

699 Exposition Boulevard, Suite 326, Los Angeles, CA 90089-0071

Enclosed Check # \_\_\_\_\_ \$ \_\_\_\_\_

**2 Credit Card:** Register and pay online at <https://gould.law/TEC>

*(Recommended for faster service)*

**Questions?** Email [cle@law.usc.edu](mailto:cle@law.usc.edu) or call **(213) 821-3580**.