USC Gould School of Law

47th Annual Trust and Estate Conference

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

CE credit available for Attorneys, Accountants, Professional Fiduciaries, Financial Planners, and Bankers and Trust Officers

#USCTrust
why attend?
For over 46 years, USC Gould’s Trust and Estate Conference has been connecting trust, estate planning, probate and elder law professionals. Talk through practical and realistic solutions to the biggest questions in the field today. Our unmatched lineup of speakers will share valuable insight into the techniques instrumental to the success of their very own practices.

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 for this online conference includes access to the live broadcast and available recordings of the on-demand sessions, continuing education credit, and an electronic copy of the conference syllabus and Annual Resource Guide (a trust and estate professional directory covering Los Angeles, Orange County and San Diego County).

sign up now!
https://cle.usc.edu/estateplanning

upcoming USC Gould School of Law programs

CORPORATE COUNSEL
Wednesday, December 1, 2021
https://cle.usc.edu/corporate

TAX
Monday – Wednesday, January 24-26, 2022
https://cle.usc.edu/tax

Email us at cle@law.usc.edu to join our mailing list and keep up to date with our programs.
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8:25 – 8:30 AM
Welcome and Opening Remarks

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

8:30 – 10:00 AM
Annual Update: Recent Developments in Probate and Trust and their Practical Applications
Join our popular experts, as they review critical recent California legislation and case law and Federal tax law. Encompassing developments in wills, trusts and estate, and gift taxation, both new and experienced practitioners will benefit from their useful information and insights.

Jeffrey A. Dennis-Strathmeyer
Attorney at Law
David Lane
Retired from Private Practice of Law
Erin L. Prouty
Hoffman, Sabban & Watenmaker, APC
Lecturer, USC Gould School of Law

10:00 – 10:15 AM
Break Time
Sponsored by the Professional Fiduciary Association of California
Avoiding Traps of 529 Plans

Even though 529 plans have been around for a while, there are many traps for unwary. Join us to learn about how to educate your clients who may be unaware about the consequences of death during the five-year pre-funding period, rules for changing beneficiaries, permissible tax-free distributions, and whether it makes sense to pay for education personally given taxable distributions from the plans.

Pre-Death Administration

Discussion of best practices and tools for lawyers involving the transfer of information with respect to pre-death administration: Where are the bank accounts and passwords? What kind of information do you need and who has rights to this information?

Overcoming Implicit Biases

Developing cultural competencies is critical for limiting implicit bias and its negative impact across organizations. Join respected speaker, Dr. Douglas Haynes, for his perspectives on minimizing implicit bias. He will share his efforts to mobilize forces to establish the Black Thriving Initiative at University of California at Irvine and how that has created a more inclusive environment.

.5 hour of MCLE elimination of bias credit available.

Post-Death Administration

Join our panelists as they discuss typical post-death administration matters: What steps should be taken to secure or marshal a decedent’s home or tangible personal property? What steps are taken to secure or marshal real property? How is contact initiated with heirs or beneficiaries? What information should be communicated to heirs or beneficiaries? How to handle disposal of estate or Trust assets? What are the steps to take to mitigate potential liability?
2:45 – 3:45 PM
Litigation Issues of Tangible Personal Property and Other Distributions

“But Grandma said that I get the blue ceramic pig!”
Fiduciaries are often put in a position where they are duty-bound to marshal, value, sell, and/or distribute tangible personal property. Unfortunately, either due to the unique circumstances of the property itself or the obstacles or contention created by the governing instrument or family dynamics, executors and trustees can find themselves needing to resolve disputes or, worse yet, to defend their actions or inaction in court proceedings. This presentation explores risk and litigation issues that arise and will also provide tips on how to potentially avoid litigation and liability.

Michael S. Brophy
U.S. Regional Leader,
Private Client and Tax Division
Withers Bergman LLP

Rita M. Diaz
Chair of Litigation Department
Hahn and Hahn LLP

Bryan H. Kelly
Withers Bergman LLP

Angela J. Reddock-Wright
Reddock Law Group

4:00 – 5:00 PM
Addressing Remote Work and Multi-State Issues

Practicing law across state lines may have legal and ethical implications. Do you know the considerations for clients who own assets in multiple jurisdictions? We are also forced to consider the income tax and employment aspects of remote working (i.e. if you want to work from your house in Jackson Hole for part of the year or if your secretary/employee/etc. wants to work remotely). Join the panelists for an engaging discussion!

BONUS WEBINAR
Sponsored by Manufacturers Bank
Fiduciary and Trust & Estate Banking: Is Your Bank Providing the Products and Services You Need?
The program will discuss banking solutions to help you and the Trustee reduce and eliminate uncertainties over the administration of the Trust or estate. Topics include increasing the value of the estate by reducing expenses, maximizing FDIC insurance coverage, and how to effectively partner with a specialized trust and estate banker to avoid delays and unforeseen pitfalls.
What you don’t know can hinder your efforts!

Wes Bryant II
Vice President and Senior Relationship Manager
Manufacturers Bank

Max Damm
IntraFi Network

5:00 PM
Adjournment
Dr. Douglas M. Haynes is the inaugural Chief Diversity Officer and Vice Chancellor for Equity, Diversity, and Inclusion at the University of California, Irvine. In this role he provides executive leadership to empower students and employees to maximize their potential in an affirmative learning and working environment at UCI. Through the Office of Inclusive Excellence (OIE) he leads a team of inclusive excellence champions to advance institutional transformation. To this end, OIE drives accountability through data-driven metrics; mounts a suite of capacity building courses and training modules; engages in research and evidence-based best practices to promote a thriving organization; and leverages external partnerships to accelerate change at UCI and throughout the University of California. In 2021, UCI received the SeaChange Bronze Institutional Award from American Association for the Advancement of Science (AAAS) based on an unprecedented institutional self-assessment and action plan to promote diversity, equity, and inclusion.

Dr. Douglas M. Haynes is a Professor of Modern European History and African American Studies. His research advances understanding about the knowledge, authority, and power of modern medicine, science, and technology in terms of the fault-lines of race, gender, and class in society. This framework animates of two single authored books entitled *The Conquest of Tropical Disease* and *Fit to Practice*. In 2014, Haynes also led the establishment of the Center for Medical Humanities and served as the inaugural director for 5 years. The center represents an unprecedented collaboration among deans and faculty in three schools: arts, humanities, and medicine. Central to this collaboration is an enduring commitment to the multi-disciplinary understanding of health, healing, and well-being. A native of San Francisco, Douglas Haynes graduated from Pomona College in Claremont, California. Returning to the Bay Area, he completed his Ph.D. in Modern European History at the University of California, Berkeley. He was a Fulbright Scholar and a recipient of the University of California President’s Postdoctoral Fellowship.
planning committee

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Registration for the virtual conference includes access to the live broadcast and available recordings of the on-demand sessions, continuing education credit, and an electronic copy of the conference syllabus and Annual Resource Guide (a trust and estate professional directory covering Los Angeles, Orange County and San Diego County).

CANCELLATIONS
All registrations and purchases are final and non-refundable.

VIRTUAL LOCATION
The 47th Annual Trust and Estate Conference will be broadcast online at the Conference website at https://cle.usc.edu/estateplanning

ON DEMAND ACCESS (AFTER THE CONFERENCE)
Unable to attend the Conference? Purchase on demand access to available Conference session recordings and syllabus to receive California MCLE credit for viewing the sessions. Visit our website at https://cle.usc.edu/estateplanning for more information or email cle@law.usc.edu.

continuing education credits

LAWYERS. Minimum Continuing Legal Education (MCLE): USC Gould School of Law, a State Bar of California-approved MCLE provider, certifies that this activity qualifies for MCLE credit in the amount of 7 hours of which .50 hour may apply to elimination of bias 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, a State Bar of California-approved Legal Specialization provider, certifies that this activity has been approved for 6.5 hours of Legal Specialization credit in Taxation Law and 6.5 hours of Legal Specialization credit in Estate Planning, Trust and Probate Law.

ACCOUNTANTS. Continuing Professional Education (CPE): The live broadcast of the program meets the guidelines for Continuing Professional Education credit set by the California State Board of Accountancy in the amount of 8 hours.

FINANCIAL PLANNERS. CFP® Professionals: Credit Application Pending. 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 47th Annual Trust and Estate Conference has applied for 8 CTFA credits. 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 202-633-5092 or certifications@aba.com.
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   (Recommended for faster service)

2 Check: Please make checks payable to USC Gould School of Law and mail with completed form to:
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contact information

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EMAIL: cle@law.usc.edu
WEBSITE: http://cle.usc.edu

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