45th Annual Trust and Estate Conference

USC Gould School of Law

The Essential Day-long Conference for Trust, Estate Planning, Probate and Elder Law Professionals

The Westin Bonaventure Hotel
Los Angeles, California

Friday November 22, 2019

New this year: Free WiFi!

CE credit available for Attorneys (MCLE/Legal Specialization), Accountants (CPE), Professional Fiduciaries (PFB) and Financial Planners (CFP® Professionals)

Printed Courtesy of Alternative Resolution Centers (ARC)
why attend?

High-Quality Education
For over 40 years, USC Gould’s Trust and Estate Conference has provided high-quality continuing education customized for trust, estate planning, probate and elder law professionals.

Practical and Realistic Solutions
The Conference has a proven track record of teaching practical and realistic solutions to everyday and unexpected problems in estate planning, trust administration, probate, trust and estate litigation, elder law and client relationships. Speakers often share “how-to” techniques and forms used in their practices.

Unrivaled Networking
Over 500 of your peers registered for the Conference last year for an unrivaled networking and learning opportunity 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 WiFi and an Event App will also be available for attendees at the Conference!

sign up now!
REGISTER ONLINE AT HTTP://GOULD.USC.EDU/CLE/TE

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
WEBSITE: http://gould.usc.edu/cle
Office hours are 9:00 a.m. to 5:00 p.m. Pacific time

(USCGouldCLE)
sponsors and contributors

The USC Gould School of Law and the Planning Committee of the 45th Annual Trust and Estate Conference gratefully acknowledge the generous contributions of:

- Alternative Resolution Centers (ARC)
- Jack Barcal, Esq.
- Berkadia
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- Commercial Loan Corporation
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- Fiduciary Trust International
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- Geffen Real Estate
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- LaRoche Team – Keller Williams Realty
- Professional Fiduciary Association of California
- The Sanborn Team – Berkshire Hathaway HomeServices California Properties
- Signature Resolution
- Strategic Valuation Group, LLC
- True Link
- Trust Properties USA
- Wells Fargo Bank
  Wealth Management Group

Please visit our website at http://gould.usc.edu/cle/te for a complete and up-to-date list of Conference sponsors and supporters.
7:00 AM
Check-In and Continental Breakfast
Sponsored by Signature Resolution

8:25 – 8:35 AM
Welcome and Opening Remarks

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

8:35 – 10:05 AM
Annual Update: Recent Developments in Probate and Trust and their Practical Applications
Join returning 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. So bring your questions!

Jeffrey A. Dennis-Strathmeyer
Attorney at Law
(Pleasant Hill, CA)

David Lane
Retired from Private Practice of Law
Lecturer in Law
USC Gould School of Law

Erin L. Prouty
Hoffman, Sabban & Watenmaker
10:05 – 10:25 AM
Networking Break
Sponsored by Professional Fiduciary Association of California

10:25 – 11:25 AM
Probate Code §2580, et seq.
Whose Judgment Is It Anyway?
Most trusts and estates practitioners are familiar with the term “substituted judgment,” but how many of those practitioners actually know the ins and outs of petitions for substituted judgment? Join our experienced attorneys as they explore and analyze the various purposes and ways a petition for substituted judgment may be used in a conservatorship proceeding. Some examples that will be analyzed include making inter vivos gifts, exercising or releasing a conservatee’s power of appointment, establishing or making changes to existing estate planning documents, and last but not least, an effective tool in pre-death will contests.

Eric M. Tokuyama
Hoffman, Sabban & Watenmaker

Geraldine A. Wyle
Freeman, Freeman & Smiley LLP

11:25 – 12:25 AM
To Decant or Not Decant…That is the Question
With California’s enactment of the Uniform Trust Decanting Act, practitioners have a new means to address issues concerning irrevocable trusts. Is decanting the panacea for changing the terms of an irrevocable trust or is it merely an additional tool that requires comparison and analysis? This presentation will review California’s new decanting statute and contrast it with petitions for modification, petitions for reformation, and petitions for instructions.

Jenny Hill Bratt
Withersworldwide
(San Diego, CA)

Rodney C. Lee
Loeb & Loeb LLP

can’t attend?

Purchase an audio recording of the Conference sessions and download the Conference Syllabus from the Conference for $199 to earn self-study continuing education 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.

For more information or to purchase online, visit http://gould.usc.edu/cle/te, email cle@law.usc.edu or call our office at (213) 821-3580.
12:25 – 1:40 PM
Luncheon Presentation
Sponsored by HCS Equity

Mystery in a Mumu:
What Makes Your Judge Tick?
They juggle huge dockets with minimal support. You feel like you’re rolling a boulder uphill. Join two of our favorite jurists in a 30 minute conversation about how to capture their attention and get them to yes.

Hon. Mitchell L. Beckloff
Los Angeles Superior Court

Hon. Mary Thornton House (Ret.)
Alternative Resolution Centers (ARC)

INTERVIEWER
Adam F. Streisand
Sheppard, Mullin, Richter & Hampton LLP

1:40 – 2:40 PM
Tips and Tricks for Taming Basis
The basic rules of carry over basis and the step-up at death remain unchanged but everything else has shifted. How do we respond to the relatively high estate tax exemptions and our client’s increased focus on income tax planning? What is going on with the new basis consistency regime? The speakers will discuss practical and proactive strategies you can use today to create more efficient and flexible plans for future generations to minimize their total burden across both income and transfer taxes. But that’s not all – what steps can be taken with existing irrevocable trusts to activate them for efficient basis planning? Join us for an up-to-date discussion of tips and tricks for taming basis.

Elizabeth R. Glasgow
McDermott Will & Emery

Daniel C. Lorenzen
Fox Rothschild LLP

2:40 – 3:00 PM
Networking Ice Cream Break
Sponsored by Jack Barcal, Esq.
3:00 – 4:00 PM
Assessing Capacity on a Sliding Scale: A Look Into Retrospective and Contemporaneous Evaluations

With an elderly population increasing at record pace, what do we do when we represent clients with diminishing capacity? It may be hard to draw a line, particularly because there are different levels of capacity to consider when assessing a client’s ability to make a certain decision whether it be entering into a contract, making a will, managing a complex trust, or making day-to-day decisions concerning one’s financial affairs. Issues of capacity typically arise in conservatorship disputes and post-death trust and will contests. This is often an area where trust and estate lawyers must rely on experts. This presentation will cover the standards for assessing capacity, with a focus on how to utilize expert advice through contemporaneous evaluations and retrospective review of medical records, in addition to a discussion of ethical considerations in the context of representing clients with diminishing cognition.

4:00 – 5:00 PM
Attorneys and Other Advisors as Counselors: What They Don’t Teach You in Law School

We learn the information we need to be lawyers in law school. We stay informed and knowledgeable by continuous study, reading, and attending conferences to learn from experts. But how do we learn to be emotionally connected to our clients, to listen, be empathetic and exhibit our trustworthiness? This presentation will explore the many situations we are faced with when we need to be a counselor providing psychological aid rather than a lawyer or advisor providing technical advice: the fears of a recent widow; parents’ issues with children with special needs, substance abuse problems, bad marriages, and sibling rivalry; open and honest discussions about end-of-life decisions, especially when your client is faced with a terminal illness; and the crossroads of whether to litigate against family or not. An experienced attorney will provide you with the tools to approach these conversations with your clients in a caring and helpful way.

5:00 PM adjournment

REGISTER ONLINE NOW AT HTTP://GOULD.USC.EDU/CLE/TE
planning committee

Terrence M. Franklin
CONFERENCE CHAIR
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Freeman, Freeman & Smiley LLP
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. 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 7 hours of Legal Specialization credit in Taxation Law and 7 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 7.5 hours.

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 Fiduciary 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 45th Annual Trust and Estate Conference has been approved 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 at 202-633-5092 or certifications@aba.com.

upcoming USC Gould School of Law programs

CORPORATE COUNSEL
December 4, 2019 | The California Club | Los Angeles, California
(courtesy of Club member Ian Campbell)

TAX
January 27-29, 2020 | Millennium Biltmore Hotel | Los Angeles, California

INTELLECTUAL PROPERTY
March 17, 2020 | Fairmont Miramar Hotel & Bungalows | Santa Monica, CA

REAL ESTATE
April 2, 2020 | Jonathan Club | Los Angeles, California

Email us at cle@law.usc.edu to join our mailing list and receive the latest updates about our programs or visit http://gould.usc.edu/cle for more information.
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 the Conference event app. 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). Free WiFi is available for Conference attendees!

AUDIO RECORDINGS
Purchase audio recordings of the Conference when you register and listen to the Conference speakers at your leisure. You cannot claim additional credit for listening to an audio recording of a session you attended in person.

If you are unable to attend the Conference, purchase audio recordings and receive CLE self-study credit for listening to the sessions. Visit our website at http://gould.usc.edu/cle/te 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: (888) 236-2427
Website: https://bit.ly/2T2HPdg

A limited number of discounted sleeping room rates of $184 for a traditional room, $214 for a deluxe room or $285 for a Tower Suite will be available to Conference participants at the hotel. Please contact Rexlene Della at Rexlene.Della@westinbonaventure.com for room reservations at the hotel.

PARKING
Limited valet parking is available for $24 per day with validation or $49 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.

BADGE PICK UP
Badges will be held at Will Call, located in the hotel’s California Ballroom foyer on the second level. No badges will be mailed.

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 diet or have any other questions, please contact us at (213) 821-3580 or cle@law.usc.edu for assistance.

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

EXHIBITORS
Please visit our website at http://gould.usc.edu/cle/te for information on exhibiting or contact Wendy Wiley Willett at (213) 821-3579 or WWiley@law.usc.edu with questions. Exhibitor space is limited, so reserve your space as soon as possible!
registration form

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Friday, November 22, 2019 | The Westin Bonaventure Hotel

Registrant Name: ____________________________________________
Occupation/Title: ____________________________________________
Organization/Law School: ______________________________________
Address: ____________________________________________________
City: ___________________________ State: _____ Zip: ____________
Telephone: ____________________________________________________
Email: ________________________________________________________

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
☐ $509 Early Bird Registration (sent on or before October 25, 2019)
☐ $549 Standard Registration (sent after October 25, 2019)

Professional Fiduciary Association of California (PFAC) Member Registration
☐ $459 Early Bird PFAC Registration (sent on or before October 25, 2019)
☐ $499 Standard PFAC Registration (sent after October 25, 2019)

Special Registration Types
☐ $299 Paralegal or Government Employee Registration
☐ $175 Full-Time Law Student Registration

Conference Audio Recording (Delivered after the Conference)
☐ $99 (Purchase with a Registration)
☐ $199 (Purchase without a Registration)

Select Payment Method

1 Check: Mail checks payable to USC Gould School of Law with the completed form to:
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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 http://gould.usc.edu/cle/te

If you attended one of our recent Conferences, you have an existing account linked to
your email address. Passwords can be reset or sent to you.

Questions? Email cle@law.usc.edu or call (213) 821-3580.
USC Gould School of Law

45th ANNUAL TRUST AND ESTATE CONFERENCE

The essential day-long conference for trust, estate planning, probate and elder law professionals

NEW THIS YEAR: FREE WIFI!

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