

WILSHIRE GRAND LOS ANGELES  
LOS ANGELES, CALIFORNIA

FRIDAY  
NOVEMBER 18, 2011

USC | LAW UNIVERSITY of  
SOUTHERN CALIFORNIA

USC GOULD SCHOOL OF LAW

# 37TH ANNUAL TRUST AND ESTATE CONFERENCE

The essential day-long conference for  
**TRUST, PROBATE** and **ESTATE PLANNING**  
**PROFESSIONALS**



REGISTER ONLINE NOW! <http://law.usc.edu/cle/te>

## why attend?

### High-Quality Education

For almost 40 years, USC Law's estate planning conference has provided high-quality continuing education, customized for trust, estate and probate 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, client relationships and law practice economics. Speakers typically share "how to" techniques and forms used in their practices.

### Networking

Over 450 of your peers typically register to attend the Conference – join us to learn from both the speakers and your professional colleagues.

## who should attend?

The Conference is specially tailored for attorneys, paralegals, trust officers, accountants, financial institution executives, underwriters, insurance advisors, wealth management professionals, fiduciary officers and other professionals in the trust and estate planning field.

## register now and benefit

Registration includes all sessions, breaks, the luncheon presentation and searchable CD-ROM and print versions of the practical Conference Syllabus and popular Resource Guide.

 REGISTER ONLINE <http://law.usc.edu/cle/te>

MCLE/Legal Specialization/CPE/PFB credits available.  
A Provider of CE credits for CFP® Certificants.

## contact information



USC Gould School of Law  
Continuing Legal Education  
1149 South Hill Street, Suite 340  
Los Angeles, California 90015

Telephone: (213) 743-1772  
Facsimile: (213) 743-1830  
Email: [cle@law.usc.edu](mailto:cle@law.usc.edu)

Office hours: Monday through Friday  
9:00 AM to 5:00 PM Pacific time

Visit our website at <http://law.usc.edu/cle>

## quick program guide

FRIDAY, NOVEMBER 18, 2011

7:30 AM	<b>Continental Breakfast and Registration</b>
8:50 AM	<b>Welcome and Introduction</b>
9:00 AM	<b>Annual Update:</b> Recent Developments in Probate and Trust and their Practical Applications
10:45 AM	<b>Networking Break</b>
11:00 AM	<b>Death and Taxes:</b> No Longer a Certainty. A View of Estate Planning When the Federal Estate Tax Is Not an Issue
12:15 PM	<b>Luncheon Presentation: How to Deal with the Media in High Profile Cases</b>
1:30 PM	<b>Rumors of their Death may be Exaggerated:</b> Conservatorships and Pre-Death Litigation
2:45 PM	<b>Networking Dessert Break</b>
3:00 PM	<b>20 Ways Your Individual Trustee (Client) Can Get in Trouble and How to Avoid Them</b>
4:00 PM	<b>Family Law and Estate Planning Crossover Issues</b>
4:45 PM	<b>Adjournment</b>

## sponsors

USC Law and the Planning Committee of the 37th Annual Trust and Estate Conference gratefully acknowledge the generous contributions of:

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USC GOULD SCHOOL OF LAW

37TH ANNUAL

# TRUST AND ESTATE CONFERENCE

START >>>

# 08:50

**8:50 AM**

## Welcome and Introduction

**Kenneth S. Wolf**

Conference Chair  
Hoffman, Sabban & Watenmaker

**Leeanna Izuel**

Conference Executive Director  
Assistant Dean  
Continuing Legal Education  
Adjunct Assistant Professor of Law  
USC Gould School of Law

**9:00 AM**

**Annual Update:** Recent Developments in Probate and Trust and their Practical Applications

Join popular returning speakers Professor Jack Barcal, Jeffrey Dennis-Strathmeyer and long-time

Conference favorite David Lane, as they review recent critical 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 the useful information and insights shared by these experts.

**Jack Barcal, J.D.**

Associate Professor of Accounting  
USC Leventhal School of Accounting

**Jeffrey A. Dennis-Strathmeyer**

Attorney at Law  
Lafayette, CA

**David Lane**

Law Offices of David Lane

**10:45 AM**

## Networking Break

## can't attend?

Purchase the Conference Syllabus and practical Resource Guide. The Syllabus is an up-to-date reference volume containing outlines, articles, forms and practical information prepared by our speakers, and includes the Resource Guide, an Estates and Trusts Professional Directory covering Los Angeles, Orange and San Diego Counties. The purchase price of \$150 includes both a binder of printed material and a searchable CD-ROM. For more information, email [cle@law.usc.edu](mailto:cle@law.usc.edu), or purchase online at <http://law.usc.edu/cle/te>.

**11:00 AM**

**Death and Taxes: No Longer a Certainty.**

A View of Estate Planning When the Federal Estate Tax Is Not an Issue

Benjamin Franklin once said that "In this world nothing can be said to be certain, except death and taxes." However, under the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010, which raised the Federal estate tax exemption to \$5 million and gave us portability, many reasonably wealthy estate planning clients will not have their estates subject to Federal estate taxes. It is also possible that the Federal estate tax will be repealed entirely. This presentation will explore non-tax issues related to estate planning and discuss why estate planners may now have greater freedom to creatively plan for their clients without being bound by traditional planning techniques that were designed to save on estate taxes. Now, estate planners may emphasize income tax, property tax, creditor protection, and Medicaid planning considerations.

**Chang H. Chae**

Hoffman, Sabban & Watenmaker

**12:15 PM**

**Luncheon Presentation**

**How to Deal with the Media in High Profile Cases**

Join Harvey Levin, founder of TMZ, as he provides tips on dealing with the media.

*This is a can't miss session!*

**Harvey Levin**

Executive Producer

TMZ

**1:30 PM**

**Rumors of their Death may be Exaggerated:**

Conservatorships and Pre-Death Litigation

Many of the most contentious disputes erupt into or occur in the middle of conservatorships. These pitched battles can devolve into the functional equivalent of pre-death will contests. This session will consider aspects of handling litigation of conservatorship disputes, including various claims and defenses that can be raised, the viability of claims for elder abuse in conservatorship proceedings, and using substituted judgment proceedings to resolve disputes.

**Terrence M. Franklin**

Sacks, Glazier, Franklin &

Lodise LLP

**Adam F. Streisand**

Loeb & Loeb LLP

**2:45 PM**

**Networking Dessert Break**

**continued>>>**

3:00 PM

### 20 Ways Your Individual Trustee (Client) Can Get in Trouble and How to Avoid Them

Trustees – and especially individual trustees – get themselves in trouble routinely. The speaker will identify and discuss 20 of the everyday mistakes that trustees make, the reasons why mistakes are made, and general principles to avoid them.

 MCLE legal ethics credit .5 hour

**Shirley L. Kovar**  
Henderson, Caverly, Pum &  
Charney LLP  
San Diego, CA

4:00 PM

### Family Law and Estate Planning Crossover Issues

One of the difficult problems facing estate planning counsel and family law attorneys is knowing how and in what manner the laws of their disciplines are affected by the laws of the other practice area. Both areas of the law are often involved in sophisticated resolution of complex issues ranging from prenuptial agreements to marital dissolutions. This session is designed to help you provide competent guidance and advice in these crossover areas of the law.

**Paul Gordon Hoffman**  
Hoffman, Sabban &  
Watenmaker

**Marshall S. Zolla**  
Law Offices of Marshall S. Zolla,  
A Professional Corporation

**4:45 PM adjournment<<<**

upcoming  
**USC Law programs**

#### **CORPORATE COUNSEL**

Wednesday, December 7, 2011  
Private Club  
Los Angeles, California

#### **TAX**

Monday – Wednesday, January 23 – 25, 2012  
Millennium Biltmore Hotel  
Los Angeles, California

#### **REAL ESTATE LAW AND BUSINESS**

Thursday, March 8, 2012  
Private Club  
Los Angeles, California

#### **INTELLECTUAL PROPERTY**

Thursday, March 15, 2012  
The Beverly Hills Hotel  
Beverly Hills, California

## continuing education credits

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**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 minimum continuing legal education credit in the amount of 6.5 hours, of which .5 hour applies to legal ethics credit.

**e** indicates number of hours of MCLE legal ethics credit available for a particular session.

**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 3.75 hours of Legal Specialization credit in Taxation Law and 6 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 6.5 hours.

**FINANCIAL PLANNERS.** Certified Financial Planners (CFP): 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. The Conference is approved for continuing education units by the Professional Fiduciaries Bureau and meets educational requirements of the Professional Fiduciary Association of California.

## exhibitor information

USC Law invites you to exhibit at the 37th Annual Trust and Estate Conference. Because exhibitor space is limited, we encourage you to reserve your space as soon as possible. Please call the USC Law Continuing Legal Education office at **(213) 743-1772** or visit our website at <http://law.usc.edu/cle/te> for more information.

# Sign Up Now!

REGISTER ONLINE <http://law.usc.edu/cle/te>

# CONFERENCE faculty



**JACK BARCAL**

**JACK BARCAL** is an associate professor of accounting at the USC Leventhal School of Accounting. Professor Barcal teaches courses in Estate and Gift Taxation, Family Wealth Preservation, Advanced Estate Planning and Tax Theory. Professor Barcal assisted in writing the text *Willis on Partnership Taxation* and is a member of numerous associations, including the American Institute of Certified Public Accountants, the American Taxation Association and the American Bar Association. In addition, Professor Barcal has acted as an expert witness in tax, malpractice, and related matters. Professor Barcal is certified as a specialist in Taxation Law and Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization. Previously, he was a partner in Willis, Butler, Scheifly, Leydorf & Grant in Los Angeles. His current practice focuses on estate planning and taxation.

Professor Barcal received his B.S. degree, *summa cum laude*, in Accounting, from DePaul University, where he was also valedictorian. He received his Certified Public Accounting certificate from Illinois and his J.D. degree from Stanford University Law School.



**CHANG H. CHAE**

**CHANG H. CHAE** is a partner in the law firm of Hoffman, Sabban & Watenmaker, where he practices in the areas of estate planning, probate and trust administration. He is a Certified Specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization. He has been published in *California Trusts and Estates Quarterly* and has given lectures to professional and lay audiences on estate planning and charitable giving. Mr. Chae has served as a member of the board of directors for a community college foundation, as chairperson for a planned giving committee and as a professional advisor to a community foundation. He is a member of the International Society of Trust and Estate Practitioners and on the Professional Advisory Network of the Motion Picture and Television Fund. Mr. Chae has been named by *Law & Politics Magazine* and *Los Angeles Magazine* as one of Southern California's top lawyers ("Super Lawyers," "Rising Stars") in 2006 and 2007 in the area of estate planning and probate.

Mr. Chae earned his B.A. degree, with honors, from Grinnell College and his J.D. degree, with distinction, from the University of Iowa. He also attended the London School of Economics and Political Science.



**JEFFREY A. DENNIS-  
STRATHMEYER**

**JEFFREY A. DENNIS-STRATHMEYER**, now semi-retired from the University of California's Continuing Education of the Bar (CEB) program, engages in private practice in Lafayette, California. Since 1984, he has served as legal editor and principal author of the *CEB Estate Planning & California Probate Reporter*. He has published more than 60 articles on estate planning topics.

He is a graduate of Stanford University (B.A., 1967) and the University of California-Davis School of Law, King Hall (J.D., 1973).



**TERRENCE M. FRANKLIN**

**TERRENCE M. FRANKLIN** is a partner in the law firm of Sacks, Glazier, Franklin & Lodise LLP. Mr. Franklin previously practiced with the Los Angeles office of Morrison & Foerster and as a partner of Ross, Sacks & Glazier. He has extensive trial and appellate experience, including successful published appeals and a California Supreme Court case. Mr. Franklin is a Fellow of the American College of Trust and Estate Counsel and is a member of its Fiduciary Litigation Committee and Program Committee, and is a Director of the ACTEC Foundation. Mr. Franklin is a member of the Planning Committee for this Conference, a Council member of the ABA Real Property, Trust and Estate Law Section, and past Chair of its Ethics and Malpractice Committee. He is also a member of the Diversity Committee of the ABA Real Property, Trust and Estate Law Section and a former member of the Estate Planning, Trust and Probate Law Advisory Committee of the California Board of Legal Specialization.

Mr. Franklin is a 1984 graduate of Northwestern University and a 1989 graduate of Harvard Law School.

# CONFERENCE faculty



**PAUL GORDON HOFFMAN**

**PAUL GORDON HOFFMAN** practices tax and estate planning and charitable planning with the firm of Hoffman, Sabban & Watenmaker. Mr. Hoffman has been recognized as one of the “Top 100 Lawyers” in Los Angeles by *Super Lawyers* and is listed in *Best Lawyers in America*. He is a former chair of the Tax Section of the Beverly Hills Bar Association, and is a Fellow of the American College of Trust and Estate Counsel. He has taught taxation at the UCLA School of Law and trust and estate law at USC Law. Mr. Hoffman has spoken at a wide variety of conferences.

Mr. Hoffman received his B.S. and Master of Business Administration degrees from the University of California at Berkeley and his J.D. degree from the University of California at Los Angeles.



**SHIRLEY L. KOVAR**

**SHIRLEY L. KOVAR** is a partner in the law firm of Henderson, Caverly, Pum & Charney LLP. Her practice focuses on complex trust and estate disputes, including international trusts and estates litigation. She is a certified specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization. Ms. Kovar is a Fellow of the American College of Trust and Estate Counsel, where she has chaired the Transfer Tax Study Committee. In this capacity she gave oral and written testimony before the U.S. Senate Finance Committee on Federal estate tax reform in 2008. Ms. Kovar has served as Chair of the Litigation Committee for the Executive Committee of the State Bar Trusts and Estates Section (TEXCOM), where she also served as the liaison between TEXCOM and the California Law Revision Commission on no contest clause reform. Ms. Kovar is also an Academician in the International Academy of Estate and Trust Law. Ms. Kovar has been selected as a “Super Lawyer” from 2007 through 2011. Ms. Kovar is co-editor of the recently published *Matthew Bender Practice Guide on California Trust Litigation*.

Ms. Kovar graduated in 1974 from the University of Kansas Law School, where she was elected to the Order of the Coif.



**DAVID LANE**

**DAVID LANE** is in the private practice of law in Encino, California, emphasizing estate planning and trust law. Mr. Lane is the author of several articles dealing with economic analysis of law and evaluating deposit insurance premiums. He has taught courses in gifts, wills and trusts, and estate planning at USC Law. He previously taught at the University of California, Berkeley, and was a Senior Research Associate at the National Bureau of Economic Research at Stanford University and at the Federal Reserve Board in Washington, D.C.

Mr. Lane received his B.A., Masters and Doctorate degrees from the University of California, Berkeley. He received his J.D. degree from the University of California, Berkeley, Boalt Hall School of Law.



**HARVEY LEVIN**

**HARVEY LEVIN** is a prominent producer, investigative reporter, and attorney. Mr. Levin serves as host and executive producer of "TMZ" and managing editor for TMZ.com. Dubbed "the guy who rules Hollywood" by the *New York Daily News* and "the man who may represent the future of celebrity journalism" by *The New York Times*, Mr. Levin has guided TMZ to become one of the fastest growing and most successful brands ever launched on the Internet and the number one entertainment news website in the world.

Prior to TMZ, Mr. Levin created and served as executive producer for the syndicated series "Celebrity Justice" and co-executive producer and consultant for the television show "The People's Court." He spent more than a decade as an investigative reporter for KCBS-TV in Los Angeles and covered numerous high-profile court cases for top CBS stations across the country. Mr. Levin has received nine Emmy® Awards and numerous other local and national awards. He appears regularly on cable news networks and local and national programs. Mr. Levin has been a legal columnist for the *Los Angeles Times* and hosted radio talk shows for KABC-AM and KMPC-AM in Los Angeles.

He has been a professor of law at three universities and served as a consultant for the American Bar Association, on behalf of which he testified before Congress.

Mr. Levin is a graduate of the University of Chicago Law School.

# CONFERENCE faculty



ADAM F. STREISAND

**ADAM F. STREISAND** is a partner in the law firm of Loeb & Loeb LLP and chair of the firm's Trust and Estate Litigation Practice Group. The *Los Angeles* and *San Francisco Daily Journals* named Mr. Streisand one of the "Top 100 Lawyers in California." His expertise in entertainment and intellectual property disputes includes cases involving the estates of Michael Jackson, Ray Charles, Marlon Brando, Michael Crichton, Anna Nicole Smith, Rodney Dangerfield, Dennis Hopper, and William Randolph Hearst. The *Los Angeles Business Journal* named Mr. Streisand one of the "Top 100 Lawyers in Southern California." He was named as one of the "Top 100 Attorneys in Trusts and Estates in America" by *Worth* magazine. He was named one of the "Top 500 Leading Lawyers in America" and one of the "Top 500 Trial Lawyers in America" by *Lawdragon* magazine.

He is a Fellow of the American College of Trust and Estate Counsel, the former Executive Editor of the *California Trusts and Estates Quarterly*, a member of the Executive Committee of the California State Bar Trusts and Estates Section, a member of the Planning Committee for this Conference and an attorney member of the National College of Probate Judges.

He is a frequent author and speaker on topics related to trust and estate litigation.



MARSHALL S. ZOLLA

**MARSHALL S. ZOLLA** is a certified specialist in the field of Family Law by the Board of Legal Specialization of the State Bar of California. With more than 40 years of experience, his expertise includes complex marital dissolution proceedings, prenuptial agreements, division of retirement plan benefits, complex business valuations, issues concerning business, real estate and estate planning and religious differences in child custody matters.

Mr. Zolla has served for many years as a mediator for the Family Law Department of the Los Angeles Superior Court. Mr. Zolla frequently lectures before legal and professional associations on family law issues and has published extensively in the field of family law. He serves as an editorial consultant and commentator for *California Family Law Monthly* and a practice consultant for the *California Family Law Trial Guide*, both published by Matthew Bender.

Mr. Zolla is listed in the *Martindale-Hubbell Bar Register of Preeminent Lawyers*, 2005-2011, and is also listed as a Super Lawyer in the *Southern California Super Lawyers*, 2007-2011.

Mr. Zolla majored in Economics at the University of California, Los Angeles, graduating *cum laude* in 1960. He received his J.D. degree from Boalt Hall School of Law at the University of California, Berkeley in 1963.

## planning committee

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# frequently asked questions

## REGISTRATION INFORMATION

The Conference registration fees are outlined on the registration form on the inside back cover of this brochure. Your fee includes the Conference program, luncheon, refreshment breaks, and a copy of the Conference Syllabus in print and searchable CD-ROM. The Conference Syllabus is a volume of outlines, articles, forms and practical information prepared by our speakers, and includes the Resource Guide, an Estates and Trusts Professional Directory covering Los Angeles, Orange and San Diego Counties.

All name badges will be held at Will Call, located in the Hotel's Pacific Ballroom Foyer.

**Paralegals: take advantage of the Conference's discounted registration, set forth on the inside back cover of this brochure.**

## REFUNDS

All refund requests will be processed following the Conference and must be postmarked, faxed or emailed to us on or before **November 4, 2011**. Refund requests may be mailed to: USC Gould School of Law, CLE – TEC Refund, 1149 South Hill Street, Suite 340, Los Angeles, California 90015. Refund requests may also be faxed to **(213) 743-1830** or emailed to **cle@law.usc.edu**. All refund requests must be accompanied by the registrant's Social Security Number (or Federal Identification Number if the refund is for a firm or corporation). A processing fee of \$100 (\$25 for student registrations) will be deducted from all refunds.

**Register early, as space is limited!**

## CONFERENCE INFORMATION

Wilshire Grand Los Angeles

930 Wilshire Boulevard, Los Angeles, CA 90017

Information: (213) 688-7777

Maps and other Hotel information are available on the Hotel website at [www.wilshiregrand.com](http://www.wilshiregrand.com).

## ROOMS

If you require hotel accommodations, please call the Hotel directly at **(888) 773-2888** and mention the USC Gould School of Law Trust and Estate Conference for preferred rates or visit the hotel's website at [www.wilshiregrand.com](http://www.wilshiregrand.com) and enter the code **1111USCGO** for online reservations.

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There are several parking options from which you can choose. **Valet parking** is available at the Hotel garage on a first come, first served basis for \$12 with validation. The entrance to the Hotel garage is located on Francisco Street near its intersection with Seventh Street. Validation may be obtained in the registration area of the Conference.

**Self-parking** is available at the 1000 Wilshire Boulevard garage (the Wedbush Building garage). The entrance is located directly across Francisco Street from the Hotel valet parking entrance. Parking at the 1000 Wilshire Boulevard garage will cost \$10 if you arrive by 9:00 AM or \$15 if you arrive after 9:00 AM, in both cases with validation. Validation may be obtained in the registration area of the Conference. Self-parking is also available at the Ernst & Young garage, located at the intersection of Francisco Street and Seventh Street for \$12 with validation.

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Please contact the USC Gould School of Law at **(213) 743-1772** for assistance with any dietary or access needs.

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NOVEMBER 18, 2011 | WILSHIRE GRAND LOS ANGELES

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#### Basic Registration:

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- \$238 Paralegal Early-Bird Registration (postmarked or faxed **on or before November 4, 2011**)
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