The essential day-long conference for Trust, Estate Planning, Probate and Elder Law Professionals

42nd ANNUAL TRUST AND ESTATE CONFERENCE

THE WESTIN BONAVENTURE HOTEL
LOS ANGELES, CALIFORNIA
FRIDAY
NOVEMBER 18, 2016

USC GOULD SCHOOL OF LAW

AUDIO RECORDINGS AVAILABLE!

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) and Financial Planners (CFP® Professionals)
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.

Networking
Almost 550 of your peers registered for the Conference last year – 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, private professional fiduciaries, wealth management professionals, fiduciary officers, underwriters, insurance advisors and other professionals in the trust, estate planning, probate and elder law fields.

register now
Registration includes all sessions, breaks, the luncheon presentation, continuing education credit, and print and downloadable copies of the practical Conference Syllabus and popular Resource Guide, a Trust and Estate Professional Directory covering Los Angeles, Orange and San Diego counties.

REGISTER ONLINE AT http://law.usc.edu/cle/te

sponsors
The USC Gould School of Law and the Planning Committee of the 42nd Annual Trust and Estate Conference gratefully acknowledge the generous contributions of:

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Special thanks to the Black Women Lawyers Association of Los Angeles, the East Bay Trusts and Estates Lawyers, and the Los Angeles County Bar Association Trusts and Estates Section for their support.
8:45 AM
Welcome and Introductions

Kenneth S. Wolf
Conference Chair
Of Counsel
Hoffman, Sabban & Watenmaker

Leeanna Izuel
Conference Executive Director
Associate Dean
Continuing Legal Education
USC Gould School of Law

8:50 AM
Annual Update:
Recent Developments in Probate and Trust and their Practical Applications

Join noted Professor Jack Barcal, former CEB author Jeffrey Dennis-Strathmeyer and long-time favorite David Lane 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.

Jack Barcal, Esq.
Associate Professor of Accounting
USC Leventhal School of Accounting
USC Marshall School of Business

Jeffrey A. Dennis-Strathmeyer
Attorney at Law

David Lane
Retired from Private Practice of Law
Adjunct Professor
USC Gould School of Law

10:20 AM  Networking Break
Hosted by the Professional Fiduciary Association of California

contact information

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

TELEPHONE:  (213) 821-3580
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EMAIL:  cle@law.usc.edu
WEBSITE:  http://law.usc.edu/cle

Office hours are 9:00 a.m. to 5:00 p.m. Pacific time
10:35 AM
**Tales from the Other Side:**
What You Need to Know Before, During and After Your Client’s Divorce

Learn about drafting with a possible divorce in mind; the need for a new estate plan during a divorce; the limits imposed by the California Family Code on estate planning for a divorcing client; ethical issues; and where the case goes if a party dies during divorce and why it makes a difference.

*O.25 hour of MCLE legal ethics credit available*

Christopher M. Moore
Moore, Bryan & Schroff LLP

11:35 AM
**Mastering the Art of Mediation in Your Role as Counselor**

Probate and trust litigation is unpredictable and draining, both financially and emotionally. Mediation offers opportunity for creativity so that all parties can be “winners.” Four very experienced probate and trust mediators will address a series of questions designed to assist counsel in maximizing their chances for a successful mediation, including: the best time to schedule the mediation; preparing your client for the mediation experience; presenting effective mediation briefs; dealing with the “emotional” component; and getting the settlement down on paper. Come, listen, and learn.

Judge Aviva K. Bobb (Ret.)
Alternative Resolution Centers (ARC)

Judge Melinda A. Johnson (Ret.)
JAMS

Judge James A. Steele (Ret.)
ADR Services, Inc.

Kenneth S. Wolf
Of Counsel
Hoffman, Sabban & Watenmaker

12:35 PM
**Luncheon Presentation**

**The Year of the Angry Voter:**
What Happened and What Comes Next

Now that the dust has settled after Election Day, join Dan Schnur, Director of the Jesse M. Unruh Institute of Politics at USC, in a 30 minute conversation. It’s important to examine the political landscape and heightened emotions that produced such a contentious and bitter election year. The passions that drove the Trump and Sanders campaigns still run strong among broad swaths of the electorate; how will this widespread anger and frustration affect the ability of the new Administration to tackle the nation’s most pressing challenges in the months and years ahead?

Dan Schnur
Director
Jesse M. Unruh Institute of Politics
University of Southern California

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**can’t attend?**

Purchase the Conference audio recording and downloadable syllabus for $199 (delivered after the Conference) and receive 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. Print and downloadable versions of the syllabus are also available for purchase.

For more information or to purchase online, visit our website at [http://law.usc.edu/cle/te](http://law.usc.edu/cle/te).
1:45 PM  
**Collaborative Estate Planning:** How to Avoid the Sandbox Fight

Two well-known taboo subjects are death and money. However, people often do not discuss end-of-life issues and estate planning with their families and loved ones. As a result, when an individual passes away, family members are left scrambling trying to figure out why certain decisions were made, often creating conflict between family members and resentment toward a deceased parent. What if this conflict could be avoided? An experienced attorney and family therapist will provide you with legal and psychological tools to approach these conversations with clients and to help your clients approach these discussions with their children and loved ones.

Megan Ferkel Earhart  
Hoffman, Sabban & Watenmaker

Debbi Molnar, LMFT, LPPC  
Licensed Marriage and Family Therapist

2:45 PM  
**Networking Ice Cream Break**

Hosted by Jack Barcal, Esq.

3:00 PM  
**Raising Trusts from the Ashes:** The Undead Trust

Although the typical revocable living trust for a married couple provides for a division into subtrusts when a trustor dies, the actual funding of subtrusts is often delayed or never accomplished. Trustees, oftentimes family members, frequently neglect their duties to fund these trusts. Two experts will address the legal issues and logistical challenges that arise when confronted with these scenarios, and help you find solutions.

Jeffrey P. Geida  
Weinstock Manion, A Law Corporation

Neil Solarz  
Weinstock Manion, A Law Corporation

4:00 PM  
**All About Non-Pro Rata Distributions**

Review key considerations in dividing property among beneficiaries, including income and transfer tax issues, distributive mechanics and special problems with California real property. Spousal allocations among survivor’s, marital and credit shelter trusts raise special issues relating to community property and preserving income tax benefits. Allocations to subsequent generations raise a whole host of separate issues, including how to preserve property tax benefits and basis reporting under both old and new IRS regulations. These experienced practitioners will help you navigate these issues.

Elizabeth R. Glasgow  
Venable LLP

Daniel C. Lorenzen  
Venable LLP

5:00 PM  
adjournment
JACK BARCAL, ESQ. is an associate professor of accounting at the USC Leventhal School of Accounting, where he 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 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 at Willis, Butler, Scheifly, Leydorf & Grant. His current practice focuses on estate planning and taxation. He is also a member of the planning committee of this Conference.

Professor Barcal received his B.S. degree, summa cum laude, in Accounting from DePaul University, and his J.D. degree from Stanford University Law School.

JUDGE AVIVA K. BOBB (RET.) is in the private practice of dispute resolution with Alternative Resolution Centers. She was a judicial officer for 28 years, serving as Presiding Judge of the Los Angeles Municipal Court and Supervising Judge of the Los Angeles Family Law Courts. Prior to serving as a judge, Judge Bobb was Executive Director of the San Fernando Valley Neighborhood Legal Services and then Executive Director of the Legal Aid Foundation of Los Angeles.

Judge Bobb is the recipient of numerous awards and honors and has served as a member of the Judicial Council of California and of the Judicial Council's Probate and Mental Health Advisory Committee and the Family and Juvenile Law Advisory Committee.

She is a graduate of Wellesley College and the University of California, Berkeley School of Law.

JEFFREY A. DENNIS-STRATHMEYER practices law in Lafayette, California. From 1984 through 2011 he was the primary author and "publisher editor" of the CEB Estate Planning and California Probate Reporter, then edited by Professor Edward C. Halbach, Jr. He has authored more than 60 published articles on estate planning topics and authored and co-authored numerous chapters of various CEB estate planning books. He is certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization.

He is a graduate of Stanford University and the University of California, Davis School of Law, King Hall.

MEGAN FERKEL EARHART is an attorney at Hoffman, Sabban & Watenmaker where she practices in the areas of estate planning, probate, trust administration and related income, gift and estate tax matters. Ms. Earhart has authored estate planning articles in the Los Angeles Daily Journal and has been recognized as a “Southern California Super Lawyer” Rising Star and a “Southern California Top Female Attorney.”

Ms. Earhart received her B.A. degree from the University of Michigan, her J.D. degree from Loyola University Chicago School of Law, and her LL.M. degree in Taxation from Loyola Law School.

JEFFREY P. GEIDA is a shareholder at Weinstock Manion where he practices in the areas of estate planning, charitable planning and family foundations, business succession planning and estate and trust administration. He advises high net worth individuals on all aspects of their estate tax, gift tax and charitable planning. Mr. Geida is certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization.

He received his B.S. degree from Bryant University, his J.D. degree from Pepperdine University, and his LL.M. degree from New York University School of Law.
ELIZABETH R. GLASGOW is a partner at Venable LLP where she practices in the areas of estate planning and wealth management. She works with high net worth individuals to implement strategies that maximize the preservation of wealth by mitigating income, estate, gift and generation-skipping transfer taxes and managing the exposure of a family’s wealth and business assets to future creditors. Ms. Glasgow is a fellow of the Young Leaders Program of the American College of Trust and Estate Counsel (ACTEC) and the Co-Chair of the ABA Tax Section’s Current Developments in Estate & Gift Taxation.

She received her B.A. degree from Northwestern University, her J.D. degree from Georgetown University Law Center, and her LL.M. degree in Taxation from New York University School of Law.

JUDGE MELINDA A. JOHNSON (RET.) is currently a Neutral with JAMS. She was the first woman to be appointed to the Ventura Superior Court in 1982, acting as Presiding Judge of the court from 1994 to 1995. Judge Johnson is experienced in family law, land use, complex toxic tort, employment, probate and product liability cases.

Judge Johnson received her B.A. degree from Stanford University and her J.D. degree, Order of the Coif, from USC Gould.

DAVID LANE is retired from the private practice of law. His practice emphasized 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 is an Adjunct Professor of Law at USC Gould, where he teaches courses in gifts, wills and trusts, and estate planning. He previously taught at the University of California, Berkeley, and was a Senior Research Associate at the National Bureau of Economics 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 and his J.D. degree from the University of California, Berkeley School of Law.

DANIEL C. LORENZEN is counsel at Venable LLP where he focuses on tax and wealth planning, corporate law and trust and estate litigation. He has advised on the implementation of strategies including irrevocable life insurance trusts, generation skipping trusts and sales to defective grantor trusts, and has represented trustees, executors and beneficiaries in the administration of trusts and estates, including the litigation and settlement of disputes between trustees and beneficiaries.

Mr. Lorenzen received his B.A. degree from Brigham Young University and his J.D. degree from the University of Michigan Law School.

DEBBI MOLNAR is a Licensed Marriage and Family Therapist, Licensed Professional Clinical Counselor and Professional Coach in private practice. Her practice specialties include working with couples, parents and people in transition, including recent graduates, empty nesters and retirees. Ms. Molnar is a certified relationship therapist and grief recovery specialist, and her training and certifications include Accomplishment Coaching, Coaches Training Institute, Imago Relationships International, the Grief Recovery Institute, Prepare/Enrich, CAMFT, Attachment Focused EMDR and the EEG Institute.

She received her B.A. degree from the University of California, Santa Cruz and her M.A. degree from Phillips Graduate University.
CHRISTOPHER M. MOORE is a principal of Moore, Bryan & Schroff LLP. He is a contributing author to *Crossover Issues in Estate Planning & Family Law*, and was selected as the 2015 Lawyer of the Year for Family Law in Los Angeles by Best Lawyers®. He is certified as a specialist in both Family Law and Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization, and is a fellow of both ACTEC and the American Academy of Matrimonial Lawyers.

Mr. Moore received his A.B. degree from Stanford University and his J.D. degree from Harvard Law School.

DAN SCHNUR is the Director of the Jesse M. Unruh Institute of Politics at USC. He is also the founder and Director of the USC Dornsife College of Letters, Arts and Sciences/ *Los Angeles Times* poll series. He has worked on four presidential and three gubernatorial campaigns and is one of California’s leading political strategists. Mr. Schnur was appointed Chairman of the California Fair Political Practices Commission (FPPC) in 2010, where he implemented groundbreaking campaign finance disclosure requirements for independent committees. He was also a founder and co-chairman of the Voices of Reform project, the bi-partisan statewide effort whose work laid the foundation for California’s landmark redistricting reform.

Professor Schnur received his B.A. degree from American University.

NEIL SOLARZ is a shareholder at Weinstock Manion, where he practices in the areas of estate planning, wealth transfer and estate and trust administration. He has significant experience in business transactions, specifically business succession strategies. Mr. Solarz has been recognized as one of the “Top 100 Lawyers” in Southern California by Super Lawyers and has been listed in *The Best Lawyers in America* each year since 2013. He is certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization.

Mr. Solarz received his B.A. degree from UCLA and his J.D. degree from the University of San Francisco School of Law.

JUDGE JAMES A. STEELE (RET.) is a Neutral affiliated with ADR Services, Inc. He has over 35 years of legal experience including in-house counsel roles for major private and publicly-held corporations and private law firm practice. Judge Steele served on the Los Angeles Superior Court’s Central District Probate Division and was Probate Judge for the Northwest District, sharing his time between probate and general/unlimited civil matters. Judge Steele was honored with the Administration of Justice Award as a result of his development of the Central District’s Pro Bono Probate Settlement Program.

Judge Steele received his B.A. degree from San Diego State University, his M.B.A. degree from USC and his J.D. degree from California Western Law School.

KENNETH S. WOLF is Of Counsel at Hoffman, Sabban & Watenmaker, where he practices in the areas of estate planning, probate and trust administration, with emphasis on the resolution of probate and trust disputes. In addition, he recently joined the Probate and Trust mediation/arbitration panel of the Alternative Resolution Centers (ARC). Mr. Wolf is a fellow of ACTEC and is certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization. He is a former member of the Executive Committee of the State Bar of California’s Trusts and Estates Section.

Mr. Wolf is one of the founding members of this Conference and has served as its Chair since 1993. He is listed in the current edition of *The Best Lawyers in America* published by Woodward/White, Inc., and has also been designated as a Super Lawyer for Los Angeles County in Estate Planning and Trust Litigation in each year from 2004 to the present.

He is a graduate of the University of Cincinnati and Harvard Law School.
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Your registration fee includes all sessions, the luncheon, refreshment breaks, continuing education credit and the Conference Syllabus in both print and electronic download formats. The Conference Syllabus is a volume of outlines, articles, forms and practical information prepared by our speakers, and includes the Resource Guide, a Trust and Estate Professional Directory covering Los Angeles, Orange and San Diego counties.

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You can purchase audio recordings of the Conference when you register and receive CLE self-study credit for listening to sessions you did not attend in person. You cannot claim additional credit for listening to an audio recording of a session you attended in person. If purchased, you will receive an email with instructions on accessing the audio recordings once available.

If you are unable to attend the Conference, you can purchase audio recordings eligible for self-study credit. For more information, visit our website at http://law.usc.edu/cle/te.

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

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: (800) 937-8461
Website: www.thebonaventure.com

For accommodations, please call the hotel’s reservations number or visit the hotel’s website.

PARKING
Limited valet parking is available for $24 per day with validation. Self-parking is available at the City National Garage (adjacent to the hotel at 400 S. Flower Street) for $15 with validation. Validations can be obtained at Will Call.

BADGE PICK UP
Badges will be held at Will Call, located in the hotel’s California Ballroom.

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