



THE STATE BAR OF CALIFORNIA
TRUSTS & ESTATES SECTION AND
CALIFORNIA YOUNG LAWYERS ASSOCIATION

Earn 5
Hours MCLE and Legal
Specialization Credit



An Introduction to Practicing Trust and Estates Law

THURSDAY, NOVEMBER 10, 2016

The State Bar of California
845 South Figueroa Street
Los Angeles, CA 90017

Register Online: <http://trustslaw.calbar.ca.gov>

PROGRAM SCHEDULE

Registration Opens

8 a.m.

Opening Remarks

8:25 a.m.

Introduction to Basic Estate Planning (1.0 Hr.)

8:30 a.m. - 9:30 a.m.

This course will discuss the following topics:

- What is probate
- What is a living trust
- How a proper living trust avoids probate
- What estate planning documents are essential in California
- What is a conservatorship and how to avoid it

SPEAKER: Bradley S. Erdosi, Esq., Lake Forrest

Introduction to Probate (1.0 Hr.)

9:30 a.m. - 10:30 a.m.

This program will provide an overview of the CA probate process from start to finish. It will include necessary forms, timelines and tasks to successfully complete a probate.

SPEAKER: Mary P. Kulvinskis, Esq., Westlake Village

Break

10:30 a.m. - 10:40 a.m.

Introduction to Trust Administration (1.0 Hrs.)

10:40 a.m. - 11:40 a.m.

This course will outline the steps for handling a basic trust administration following the death of the Settlor. It will include identifying asset issues, required notices, calendar deadlines, accountings and distributions.

SPEAKERS: Jana Ellerman, Esq., Cameron Park
Katherine Becker, Esq., Santa Paula

Networking Lunch – meal provided

11:40 a.m. - 12:40 p.m.

Introduction to Trust and Estate Litigation (1.0 Hr.)

12:40 a.m. - 1:40 p.m.

This program will focus on will contests, trust petitions filed under Probate Code Section 17200, and petitions filed under Probate Code Section 850 concerning property belonging to an estate or a trust. The speakers will address the issues encompassed in these petitions, and the filing procedures that need to be fulfilled.

SPEAKER: Matthew McMurtrey, Esq., Los Angeles
Katherine McKeon, Esq., Los Angeles

Break

1:40 p.m - 1:50 p.m.

Introduction to Elder Law (1.0 Hr.)

1:50 p.m. - 2:50 p.m.

This course will look at what makes up the field of elder law and the nature of an elder and special needs practice. Special focus on a few key public benefit programs and issues, as well as “special needs” planning: the treatment of trusts by benefits programs and “safe harbor” provisions to maintain benefits.

SPEAKERS: Philip P. Lindsley, Esq., San Diego

Break

2:50 p.m. - 3 p.m.

Open Forum for Trust & Estates Questions

3 p.m. - 4 p.m.

This is a question and answer session for participants to ask the panel of speakers their questions relating to the earlier presentations or any aspect of the Trust & Estate practice.

SPEAKERS: All Speakers will participate

REGISTRATION INFORMATION

CANCELLATIONS/REFUND POLICY:

Cancellations and requests for refunds must be received in writing no later than Thursday, November 3, 2016 and are subject to a \$50 service charge. Refunds will not be available after this date.

QUESTIONS:

For registration information call 415-538-2508. Telephone registrations will not be accepted. For program content and/or Section information call 415-538-2206

SPECIAL ASSISTANCE:

For special assistance, please call 415-538-2206.

ON-SITE:

On-site registration will be on a space available basis. Call to confirm space availability.

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Thursday, November 10, 2016 • Los Angeles, CA

REGISTRATION FORM

Note: One registrant per form. Photocopies may be used.

Bar Number: _____

Name: _____

Firm: _____

Firm Address: _____

City, State: _____ Zip Code: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

(Required for email confirmation)

Program package includes 5 hours of MCLE credit, program materials on USB drive and lunch.

Check here if you do not want your information released.

REGISTRATION FEES

- \$125** CYLA Members
(includes 2017 Trusts & Estates Section membership)
- \$205** Trust and Estates Members
- \$300** Non-Section Members
(includes 2017 Trusts & Estates Section membership)

AMOUNT ENCLOSED OR TO BE CHARGED

\$ _____

REGISTRATION INFORMATION

Deadline: In order to pre-register, your form and check, payable to The State Bar of California, or credit card information, must be received by Thursday, November 3, 2016.

Register Online: <http://trustslaw.calbar.ca.gov/>

Mail To: Program Registrations, The State Bar of California,
180 Howard Street, San Francisco, CA 94105.

Fax To: Program Registration at 415-538-2368. In order to fax your registration, credit card information is MANDATORY.
(Photocopies of checks will NOT be accepted.)

CREDIT CARD INFORMATION (VISA/MASTERCARD ONLY)

I authorize The State Bar of California to charge my program registration to my VISA/MasterCard account. (No other credit card will be accepted.)

Account Number: _____

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The State Bar of California and the Trusts and Estates Section are approved State Bar of California MCLE providers.

Register Online <http://trustslaw.calbar.ca.gov>



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Trusts & Estates Section
180 Howard Street
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