

2019 Annual Fall Probate and Trust Seminar



Wednesday, December 11, 2019

Approved for 6.5 CLE credits (5.5 Law and Legal Procedure + 1.0 Ethics)

TUITION:

\$250 - Real Property, Probate and Trust Section Members

\$275 - Standard/Non-Section Members

Washington State Bar Association

Conference Center
1325 Fourth Ave, Suite 600
Seattle, WA 98101

Live WEBCAST Option

Presented in partnership with the WSBA Real Property, Probate and Trust Section

DESCRIPTION:

Join us for our 9th Annual Fall Probate and Trust Seminar! The Seminar will focus on practical guidance for estate planning and estate administration practitioners in Washington. Topics will include privacy issues in home purchases, case law updates, intellectual property issues, study groups, accountings, tips from the bench and ethical issues related to probate and trust practice.

Lunch will be provided by the Real Property, Probate and Trust Section for all in-person attendees!

CO-CHAIRS:

Elizabeth Stephan – Berntson Porter & Company, PLLC, Bellevue

Sheila C. Ridgway – Ridgway Law Group, Seattle

SCHEDULE

8:00 a.m. Check-in • Walk-in Registration

Morning Refreshments

8:25 a.m. Welcome and Introductions by Program Co-Chairs

Elizabeth Stephan – Berntson Porter & Company, PLLC, Bellevue

Sheila C. Ridgway – Ridgway Law Group, Seattle

8:30 a.m. Safe Houses: Privacy and Related Estate Planning Objectives in Real Property Acquisition

Clients seem to be increasingly interested in advice on how to maintain privacy in connection with their real estate purchases. Offering that advice can be much more complicated than it may seem. We will explore strategies, challenges, and pitfalls in advising clients on acquiring residences and other real property without leaving a trace.

Steven Schindler – Perkins Coie, LLP, Seattle

9:30 a.m. Probate and Trust Case Law Update

This session will be a discussion of recent published and unpublished probate and trust litigation cases.

Kristen Fisher – Ridgway Law Group, PS, Seattle

10:30 a.m. BREAK

10:45 a.m. Intellectual Property in Estates and Trusts

Photographers, Artists, Authors and Inventors each generate Intellectual Property during their lifetimes. Misunderstanding the statutory nature of those interests where such interests are not expressly disposed of in the estate or trusts often leads to wasting of those assets. We then have to identify those interests if they exist and then, to determine what is the best or most efficient way to handle these issues.

Mark Lorbiecki – Williams Kastner & Gibbs, Seattle

11:45 p.m. LUNCH hosted by RPPT section

1:00 p.m. What Do You Think?

Estate Planning attorneys can silo themselves in their work. This session will discuss the benefits of interacting with fellow attorneys in your practice area to gain insights and new ideas for your own practice through study groups, listservs, other group discussions, or events. We will end the session exploring a few hypothetical scenarios to demonstrate how reaching out to other attorneys can help identify potential issues—including ethical ones—and determine potential approaches.

Mary Anne Vance – Reed, Longyear, Malnati & Ahrens PLLC, Seattle

Sandra Cairns – Wells Fargo Private Bank, Bellevue

1:45 p.m. Naming Beneficiaries for Retirement Accounts

Taxation of retirement accounts could be an entire seminar in and of itself. This session is a practical guide for naming beneficiaries of retirement accounts. It will focus on the pros and cons of naming individuals versus trusts, different methods of passing the account to a spouse, and when to use conduit versus accumulation trusts. We will discuss the tax effects and provide examples of how different choices can make a huge difference in the assets beneficiaries actually receive.

Kristina Ash – Smith & Zuccarini, Bellevue

Doug Lloyd – Smith & Zuccarini, Bellevue

2:45 p.m. BREAK

3:00 p.m. You be the Judge! Ethical Dilemmas Posed by Current Cases and Ethics Opinions

An interactive presentation that allows you to test your knowledge of ethics rules. The speakers will use hypotheticals to discuss recent cases and ethics opinions across the country addressing ethics issues in the probate and trust practice.

Ann Wilson – Law Offices of Ann T Wilson, Seattle

Karen Boxx – University of Washington School of Law, Seattle

4:00 p.m. Tips from the Bench

Commissioner Judson will review some tips and best practices for presenting motions on the ex-parte calendar.

Commissioner Henry Judson – King County Superior Court, Seattle

4:45 p.m. Complete online evaluations • Adjourn

WSBA CLE 20497 • 12/11/19
2019 Annual Fall Probate and Trust Seminar

REGISTRATION

Please fill out the registration form and mail or fax to WSBA.
To register online, go to www.wsba.org/seminars and enter **20497** in the search box.

First Name _____ M.I. _____ Last Name _____

WSBA No. _____ Firm/Company Name: _____

Street Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Email _____

- Please omit my name from the networking list made available to exhibitors and/or attendees.
If special accommodations are needed, please email cle@wsba.org or call toll-free at 1-800-945-9722.

PAYMENT INFORMATION

Please note: Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions. There is no transaction fee if you mail in your check.

- #20497SEA, attend in Seattle, 12/11/19**
- \$250 – Real Property, Probate and Trust Section Members**
- \$275 – Standard /Non-Section Members**

- #20497WEB, attend via webcast, 12/11/19**
- \$250 – Real Property, Probate and Trust Section Members**
- \$275 – Standard /Non-Section Members**

- Check enclosed payable to WSBA
 Visa MasterCard AmEx

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PAYMENT POLICIES

PAYMENT: Individual registrants must use a separate form, however, payment may be made with a single check or credit card for multiple parties.

NOTE: Please keep a copy of this flier for your records.

REFUNDS: Registration fees may be refunded, less \$25 for handling, for written cancellations postmarked, emailed, or faxed by 5 p.m., up to 3 business days before the seminar. No refunds after that date, but you will receive the coursebook. Canceled registrations may not be transferred to other seminars. You may send a substitute (e.g., someone from your firm) in lieu of canceling.

Mail: WSBA, 1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539

Internet: Register online at www.wsba.org/seminars • Order products online at www.mywsba.org.

Phone: 800-945-9722 or 206-443-9722 with credit card and registration/order form in hand.

Fax: 206-727-8324 Include credit card information

Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site.

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