The 34th Annual Southern California Tax & Estate Planning Forum Agenda
Thursday October 16, 2014 at 8:00 a.m. and to
Saturday Oct 18, 2014 at 1:15 p.m.
This Year's Forum Qualifies for
20 Hours of Continuing Legal Education Credit
Coronado Ballroom Manchester Grand Hyatt Hotel
(on Beautiful San Diego Bay)

Wednesday, October 15, 2014

6:00 P.M. TO 9:00 P.M. – Early Registration

Thursday, October 16, 2014

7:00 A.M. TO 8:00 A.M. – Registration and Continental Breakfast

8:00 A.M. TO 9:00 A.M.

Designating Trusts as IRA Beneficiaries: Drafting and Administration Issues
Michael J. Jones CPA and Author: *Guide to Electing Out of the 2010 Estate Tax (And into Modified Carryover Basis)*
Partner Thompson Jones LLP, Monterey, CA

9:00 A.M. TO 10:00 A.M.

Sunrise, Sunset: Advising a Trustee with Uncertain Capacity
John A. Hartog
Hartog & Baer, A Professional Corporation — Orinda, CA

10:00 A.M. TO 10:15 A.M. Break

10:15 A.M. TO 12:15 P.M

Venn Diagrams: The Intersection of Estate Tax and Income Tax (Planning in the ATRA-Math)
Paul S. Lee
National Managing Director, Bernstein Global Wealth Management
John W. Prokey Partner Ramsbacher Prokey LLP San Jose, CA

12:15 A.M. TO 2:15 P.M. Lunch

2:15 P.M. TO 3:45 P.M.

Representing Clients with Diminishing Capacity, Assessing the Susceptibility to Undue Influence: Evaluation Tools and Interview Techniques
Dr. Vivian Clayton (Phd-Neuropscholgist)
Virginia Palmer, Wendell Rosen Black & Dean LLP — Oakland, CA

3:45 P.M. TO 4:00 P.M. Break

4:00 P.M. TO 5:00 P.M. Break

Managing Family Wealth through a Family Office: Conflicts, Legal Entities, Structures, and Succession Planning
Phillip L. Jelsma
McKenna Long & Aldridge LLP — San Diego, CA

5:00 P.M. TO 6:30 P.M.

Estate Planning Lessons of Life
This session discusses several significant and current wealth transfer issues as illustrated in the movie The Descendants.
Randall W. Roth
Professor University of Hawaii William S. Richardson School of Law

6:30 P.M. TO 8:00 P.M.

Wine and Cheese Reception

Friday, October 17, 2014

7:00 A.M. TO 8:00 A.M. - Continental Breakfast

8:00 A.M. TO 9:00 A.M

A Review of Income Tax Issues for the Estate Planner
Samuel A. Donaldson
Professor of Law, Georgia State University School of Law — Atlanta, GA

9:00 A.M. TO 10:00 A.M

Ethical Issues in Asset Protection Planning: Beware the Tax Traps, Pitfalls, and Liability
Jay Adkisson
Riser & Adkisson, Athens, GA & Newport Beach CA
David J. Slenn
Quarles & Brady LLP — Naples, FL

10:00 A.M. TO 10:15 A.M. Break

10:15 A.M. TO 11:15 A.M.

Refining Portability Elections and Use
Keith Schiller
Schiller Law Group, A Professional Law Corporation, Orinda, CA

11:15 A.M. TO 12:15 P.M.

The View from the Trenches: A Discussion of Issues on the IRS' Radar
John W. Porter
Baker & Botts — Houston, TX

12:15 P.M. TO 2:00 P.M Lunch

2:00 P.M. TO 3:00 P.M. WORKSHOPS

WS#1: California 2014 Legislation Affecting Estate Planning, Trusts, Probate, Conservatorships and Guardianships
James R. Birnberg
Oldman Cooley Sallus Gold Birnberg & Coleman LLP, Encino,

WS#2: Elder Abuse "Soup to Nuts" First Session
Strategies in Commencing an Elder Abuse Case
Charles M. Riffle, Aaron Riechert Carpol & Riffle —Redwood City, CA
Rebeccah B. Miller, Lakin & Spears — Palo Alto, CA
Steven P. Braccini, Hopkins & Carley — San Jose, CA

WS#3: California ING Trusts: A Cautionary Tale of Your Future State Laws?
Matt Brown
Brown & Streza LLP —Irvine, CA

WS#4: Estate Planning for Smaller Estates
Keith Schiller and Michael J. Jones

WS#5: Confronting the Issues of Substance Abuse
Richard P. Green
Estate Planning Officer, Betty Ford Center Foundation [1 hour substance abuse credit]

3:15 P.M. TO 4:15 P.M. WORKSHOPS

WS#6: California Real Property Tax Issues in Estate Planning & Post-Mortem Trust Planning
Matthew F. Burke
Pillsbury — Los Angeles, CA

WS#7: Elder Abuse "Soup to Nuts" Second Session
Successfully Mediating an Elder Abuse Case
Charles M. Riffle, **Rebeccah B. Miller**, and **Steven P. Braccini,**

WS#8: Drafting and Enforcing Advance Health Care Directives
Fay Blix
Law Office of Fay Blix — Laguna Hills, CA

WS#9: Asset Protection Update and the New Uniform Voidable Transactions Act
Jay Adkisson and **David J. Slenn**

Friday, October 17, 2014 CONTINUED

3:15 P.M. TO 4:15 P.M. WORKSHOPS

WS#10: Evolving Issues in Trust and Estate Litigation: Practice Tips from the Front Line
Jessica A. Uzcategui, Sacks, Glazier Franklin & Lodise LLP — Los Angeles, CA
Gabrielle A. Vidal, Loeb&Loeb LLP — Los Angeles, CA

4:30 P.M. TO 5:30 P.M. WORKSHOPS

WS#11: Caring for the Seriously Mentally Ill Who Are Substantially Unable to Care for Themselves in California: The Lanterman-Petris-Short Conservatorship
James C. Harvey
Supervising Deputy County Counsel, Orange County, CA

WS#12: Elder Abuse Soup to Nuts Third Session
Trying an Elder Abuse Case
Charles M. Riffle, **Rebeccah B. Miller**, and **Steven P. Braccini**

WS#13: Practical Workshop with Estate Tax and Gift Tax Return Compliance
Keith Schiller

WS#14: The California POLST (Physician Orders for Life Sustaining Treatment) with Forms
Christine Knutson, RN, MSN
Chair, SD Coalition for Compassion Care, aka POLST Coalition

WS#15: Powers of Appointments: A Primer
Professor Amy Morris Hess
University of Tennessee College of Law

Saturday, October 18, 2014

7:00 A.M. TO 8:00 A.M. - Continental Breakfast

8:00 A.M. TO 11:15 A.M. There will be one break during this session.

Professor Pennell's 2011 Review and Analysis of the Current Tax and Estate Planning Developments
Professor Jeffrey N. Pennell
Richard H. Clark Professor of Law, Emory University School of Law, Atlanta, GA

11:15 A.M. TO 1:15 P.M.

Valuation Update: from Planning to the Courtroom
Judge David Laro, Senior Judge, United States Tax Court
Mark C. Higgins, ASA, President Higgins Marcus & Lovett, Inc. —Los Angeles, CA
John Prokey, Ramsbacher & Prokey — San Jose, CA

1:15 P.M. Adjournment