

EAST BAY TRUSTS & ESTATES LAWYERS

JANUARY 2022

ESTATE PLANNING AND ADMINISTRATION

Wednesday, January 12, 12:00 - 1:30 p.m. via Zoom webinar.

What CPAs Want Estate Planning Attorneys and Fiduciaries to Know

Please join us for the first lunch talk of the year with CPA Margaret E. Schopp, founder of Schopp & Co. Margaret will cover what CPAs want all estate planning attorneys and fiduciaries to know about estate tax returns and trust income tax returns, including filing requirements and deadlines, valuations, DNI calculation quirks, taxable simple trusts, tax allocations to beneficiaries, distribution or withholding of estimated tax, and form K-1. Please come with all your questions! This CLE qualifies for specialization credit.

RSVP REQUIRED BY 10AM January 10. Email to admin@EBTEL.org with "**January 12 Brown Bag RSVP**" in the Subject line and a Zoom code will be provided.

ELDER LAW, CONSERVATORSHIPS & GUARDIANSHIPS

Wednesday, January 19, 12:00 - 1:30 p.m. via Zoom webinar.

Understanding Medicare: An Overview of Coverage and Options

- Provides an overview of the Medicare program including eligibility, costs, benefits, and any recent changes
- Explains various options for supplementing Medicare such as Medicare Supplement Plans (Medigaps), Medicare Advantage Plans, and Medi-Cal
- Provides information on Medicare's prescription drug benefit
- Explains eligibility for low income assistance programs
- Reviews ways to detect and report Medicare fraud and abuse

Janet Van Deusen is the Manager of the Health Insurance Counseling and Advocacy Program (HICAP) at Legal Assistance for Seniors. She oversees staff and volunteer Counselors who provide Medicare counseling throughout Alameda County and serves on local and state committees to further education and advocacy for Medicare beneficiaries. Janet graduated from the University of Santa Clara in 1981 with degrees in Spanish and Gerontology and has also provided both direct and administrative services in adult day health care, residential care, and home health care settings. Janet loves working with the HICAP volunteers and continuously draws inspiration from their commitment to helping others navigate the "Medicare Maze!"

RSVP REQUIRED BY 10AM January 17. Email to admin@EBTEL.org with "**January 19 Brown Bag RSVP**" in the Subject line and a Zoom code will be provided.

SAVE THE DATE!

February 9, 2022

California & Federal
Recent Developments

Details to be announced soon!





2022 Meeting Schedule

February 9	<i>California & Federal Recent Developments</i>
March 9	<i>Estate Planning and Administration</i>
March 16	<i>Litigation and Mediation</i>
April 13	<i>Estate Planning and Administration</i>
April 20	<i>Elder Law, Conservatorships and Guardianships</i>
May TBD	<i>Spring Symposium</i>
June 8	<i>Estate Planning and Administration</i>
June 15	<i>Litigation and Mediation</i>
July 13	<i>Litigation and Mediation</i>
July 20	<i>Elder Law, Conservatorships and Guardianships</i>
August 10	<i>Litigation and Mediation</i>
August 17	<i>Elder Law, Conservatorships and Guardianships</i>
September TBD	<i>Estate Planning Boot Camp</i>
October 12	<i>Litigation and Mediation</i>
October 19	<i>Elder Law, Conservatorships and Guardianships</i>
November TBD	<i>Annual Lunch</i>

Contact Us

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