

**EAST BAY
TRUSTS
&
ESTATES
LAWYERS**

AUGUST 2022

LITIGATION AND MEDIATION

Wednesday, August 10, 12:00 - 1:30 p.m. via Zoom webinar.

INSIGHTS FROM JUDGE BEAN

Please join the Litigation & Mediation Section for insights from the Hon. Sandra Bean. We anticipate that Judge Bean will devote a portion of this program to opening and closing statements. We also aim to leave room for Judge Bean to share her perspective on other issues, as well as her thoughts on common deficiencies and the most problematic errors the court encounters. Should you have any specific questions for Judge Bean, please send them to Rachel Rosenfeld (rachel@heislerrosenfeldlaw.com) or David Parnall (dp@davidparnell.com) ahead of time.

RSVP REQUIRED BY 10AM August 8. Email to admin@EBTEL.org with "**August 10 Meeting RSVP**" in the Subject line *and a Zoom code will be provided.*

ELDER LAW, CONSERVATORSHIPS & GUARDIANSHIPS

Wednesday, August 17, 12:00 - 1:30 p.m. via Zoom webinar.

Meredith Taylor, CLPF, MFT, will discuss conservatorships under the Lanterman Petris-Short Act (otherwise known as "LPS" conservatorships") for individuals with mental health disorders. Her presentation will compare LPS conservatorships to probate conservatorships, outline LPS case procedures, and discuss psychiatric advance directives.

Meredith Taylor has been working in the fiduciary field since 1994. She has her master's degree in Psychology and is a licensed Marriage and Family Therapist and a California Licensed Professional Fiduciary. In 2009 she became a partner of IMT Associates and now serves as the sole owner and fiduciary. Meredith is the President of the Professional Fiduciary Association of California. She has a particular interest in serving the mentally ill population and working with families during difficult transitions. Her fiduciary practice is located in San Leandro and serves all surrounding counties.

RSVP REQUIRED BY 10AM August 15. Email to admin@EBTEL.org with "**August 17 Meeting RSVP**" in the Subject line *and a Zoom code will be provided.*

SAVE THE DATE!

September 16, 2022

**Estate Planning Boot
Camp**

Details to be announced soon!





EBTEL Networking Event: August 25!

Please join your fellow EBTEL members for a Happy Hour Gathering!

Date: Thursday, August 25, 2022

Time: 5:00pm - 7:00pm

Location: Mad Oak Bar 'n' Yard, 135 12th Street, Oakland, CA 94607

EBTEL cordially invites you to our second live and in-person networking event since early 2020. Please join us at Mad Oak in Oakland for some in-person networking and socializing with EBTEL members. We have reserved the rooftop at Mad Oak. EBTEL will be providing two drink tickets per person as well as light bites for those who RSVP.

Contact Us

East Bay Trusts & Estates Lawyers

P.O. Box 29321

Oakland, CA 94604-9321

admin@ebtel.org

www.ebtel.org

Mad Oak does require proof of vaccination, which will be checked by Mad Oak staff at the door. This event is free to attend. Face masks are optional.

Please RSVP by 10AM on August 22, 2022.

Email to admin@EBTEL.org with "**August 25 Happy Hour RSVP**" in the Subject line.

2022 Meeting Schedule

September 16 (Via Zoom Webinar)	<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>

2022 OFFICERS

President
Jodi Phillips
(510) 430-1518

Vice President
Jeff Tachiki
(415) 344-7109

Secretary
Alex Chen
(925) 906-1880

Treasurer
Heather Hoekstra
(510) 616-0760

2022 COMMITTEES

Chairs
<Vice Chairs>

Elder Law, Conservatorships & Guardianships
Christina Nalchajian
(510) 239-5951
<Kristen Boney>
(510) 832-3040

Litigation & Mediation
Rachel Rosenfeld
(925) 386-6885
<David Parnall>
(925) 253-1717

Estate Planning & Administration
Rachel Dodson
(510) 824-8100
<Francesca Boyd>
(510) 834-6600

Conference of California Bar Associations (CCBA)

Philip Batchelder
(510) 368-3698

Kristen Boney
(510) 832-3040

Heather Hoekstra
(510) 616-0760

David Parnall
(925) 253-1717