

**EAST BAY
TRUSTS
&
ESTATES
LAWYERS**

SEPTEMBER 2022

ESTATE PLANNING BOOT CAMP

FRIDAY, SEPTEMBER 16, 2022

(virtual event)

Andrew De Vries, MBA

Residential, Commercial, Probate, Trust
& Conservatorship Real Estate Broker

Probate Agent Real Estate Services



PENINSULA BAY
TRUST COMPANY



Mechanics Bank
Where Relationships Matter

SAVE THE DATE!

November 17, 2022

Annual Lunch!

Details to be announced soon!

This all-day workshop will focus on the basics of estate planning. The program is geared for new practitioners and other attorneys seeking to expand their practices, as well as fiduciaries and paralegals new to estate planning. Extensive materials will be provided in electronic format, including sample estate planning documents and other resource materials. Leading practitioners will cover a broad range of topics, with an orientation towards acquiring practical knowledge.

Speakers:

Alexandra M. Ayoub, *Ayoub & Dodson*

First Steps: How to work with new clients, from the initial call through your first meeting

Emily Nashban and Toni Coaston, *Talbot Law Group*

Estate Planning Alternatives to the Revocable Trust: When to use a will instead of a trust, assets that pass by operation of law, beneficiary designations, and small estates

Sophia L. Johnson, *Roisman Henel + Adams*

Death & Taxes: Estate, income, and property tax issues to consider when planning estates

Francesca K. Boyd and Heidi L. Imsand, *Fennemore Wendel*

The Revocable Trust: The basics of a trust, and planning for individuals or for Survivor's Trusts

Lin Ruan, *Perkins Coie*

And Then There Were Two: Preparing a revocable trust for a married couple, including considering separate and community property, and split on the first death

Lisa M. Zaragoza, *Acuña Regli*

You're Not Done Yet!: Pour-over wills and how to fund the trust, including the transfer of real property

Nathan D. Pastor, *Pastor Law Group*

You're Not Dead Yet!: Planning for incapacity with powers of attorney and health care directives





MCLE: 7 hours of credit, including 1/2 hour of legal ethics credit

WHEN: Friday, September 16, 2022, 9:00 a.m. to 5:00 p.m. (1/2 hour lunch break)

WHERE: Virtual event, hosted via live webinar

COST: Members: \$250 / Non-members: \$300

HURRY: Law students and attorneys admitted fewer than two years ago: \$100 (limited to the first 15 to register)

REGISTRATION: Mail the registration form attached with your check payable to **EBTEL** no later than **September 9, 2022** to: EBTEL, P.O. Box 29321, Oakland, CA 94604-9321 **OR** register online now at <https://ebtel.org/events/boot-camp/> .

Contact Us

East Bay Trusts & Estates Lawyers

P.O. Box 29321

Oakland, CA 94604-9321

admin@ebtel.org

www.ebtel.org

The Materials and a Zoom Registration Link will be emailed the day before the event. After you register with Zoom you will receive the Zoom Webinar ID and a unique password from Zoom. If you have questions, please email admin@ebtel.org

2022 Meeting Schedule

October 12	<i>Litigation and Mediation</i>
October 19	<i>Elder Law, Conservatorships and Guardianships</i>
November 17	<i>Annual Lunch</i>

2022 OFFICERS

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Vice President
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(925) 906-1880

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Christina Nalchajian
(510) 239-5951
<Kristen Boney>
(510) 832-3040

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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

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Sign me up for the Estate Planning Boot Camp on Friday, September 16, 2022 via Webinar.

Name(s): _____

Email(s): _____

State Bar #: _____ Phone #: _____

MCLE: CLE Specialization Both

_____ EBTEL Member(s) @ \$250 _____ Non-member(s) @ \$300 _____ Law Student/Newly Admitted @ \$100
Total Enclosed: \$ _____

Law student or attorney admitted after 9/16/2020: yes _____ no _____

Please mail registration form and check payable to EBTEL by September 9, 2022:
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