

EAST BAY TRUSTS & ESTATES LAWYERS

SAVE THE DATE!

Spring Symposium

May 18, 2023

12:00-4:30 p.m.

Preservation Park, Oakland

MARCH 2023

ESTATE PLANNING AND ADMINISTRATION

Wednesday, March 8, 12:00 - 1:30 p.m. via Zoom webinar.

Recent Developments in Estate and Gift Tax

Kyle Martin of the IRS will discuss the recent developments in Estate and Gift Tax with topics including: Portability of the Deceased Spouses Unused Exemption Amount, Closing Letters, the use of electronic communications during audits, and the importance of obtaining a good appraisal.

RSVP REQUIRED BY 10AM March 6. Email to admin@EBTEL.org with "**March 8 Meeting RSVP**" in the Subject line *and a Zoom code and materials will be provided.*

LITIGATION AND MEDIATION

Wednesday, March 15, 12:00 - 1:30 p.m. via Zoom webinar.

Tips and Tricks for Trust and Estate Litigation

Richard Bryan is a 1960 graduate of the University of California, Berkeley. He obtained his J.D. degree from UC Berkeley in 1963 and was admitted to the California State Bar in January of 1964. Upon graduation, he became the Law Clerk to Judge Alfonso Zirpoli of the U. S. District Court in San Francisco.

He was then appointed as Assistant Public Defender in Alameda County. Thereafter he became the first associate and the first non-founder partner of the San Francisco law firm of Farella, Braun & Martel. He later formed his own firm, and in 1996, the firm became known as Bryan and Hinshaw, where he continues to practice at this time.

Mr. Bryan has focused on trial advocacy, litigation, negotiations, and acted as a mediator and arbitrator in several areas of the law. He has tried many cases to verdict in criminal law, construction law, and professional malpractice in earlier years. Over several decades, he focused on probate and trust litigation, family law, and general civil litigation. He was honored by election to the American Board of Trial Advocates, and the Presidency of the Barristers Club of San Francisco. He served as a member of the Board of Directors of the Bar Association of San Francisco and a Delegate to the Conference of Delegates of the State Bar of California.

He has lectured and taught frequently in continuing education classes, on trial advocacy, negotiation, mediation, and arbitration. Most notably for several decades he served on the faculty of the Rutter Group basic class on Civil Procedure with Judge Ira Brown and Judge Richard Kramer of the San Francisco Superior Court.

RSVP REQUIRED BY 10AM March 13. Email to admin@EBTEL.org with "**March 15 Meeting RSVP**" in the Subject line *and a Zoom code and materials will be provided.*





2023 Meeting Schedule

March 8	Estate Planning and Administration Committee
March 15	Litigation and Mediation Committee
April 12	Litigation and Mediation Committee
April 19	Elder Law, Conservatorships and Guardianships
May 18	Spring Symposium <i>Preservation Park, Oakland</i>
June 14	Estate Planning and Administration Committee
June 21	Litigation and Mediation Committee
July 12	Litigation and Mediation Committee
July 19	Elder Law, Conservatorships and Guardianships
August 9	Estate Planning and Administration Committee
August 16	Elder Law, Conservatorships and Guardianships
September TBD	Litigation Boot Camp
October 11	Estate Planning and Administration Committee
October 18	Elder Law, Conservatorships and Guardianships
November 16	Annual Lunch <i>Waterfront Hotel, Oakland</i>

Contact Us

East Bay Trusts & Estates Lawyers

P.O. Box 29321

Oakland, CA 94604-9321

admin@ebtel.org

www.ebtel.org

2023 OFFICERS

President
Jeff Tachiki
(510) 622-7574

Vice President
Rachel Dodson
(510) 824-8100

Secretary
Christina Nalchajian
(510) 239-5951

Treasurer
Rachel Rosenfeld
(925) 386-6885

2023 COMMITTEES

Chairs
<Vice Chairs>

Elder Law, Conservatorships & Guardianships
Kristen Boney
(510) 832-3040
<Ana Allec>
(925) 906-1880

Litigation & Mediation
David Parnall
(510) 368-5698
<Donald Slater>
(925) 314-9999

Estate Planning & Administration
Francesca Boyd
(510) 834-6600
<Debbie Chin>
(510) 451-3300

Conference of California Bar Associations (CCBA)

Philip Batchelder
(510) 368-3698

Kristen Boney
(510) 832-3040

Joseph Ferrucci
(415) 539-3292

David Parnall
(510) 368-5698