

# EAST BAY TRUSTS & ESTATES LAWYERS

NOVEMBER 2023

## FOURTEENTH ANNUAL LUNCHEON

**THURSDAY, NOVEMBER 16, 2023**

Waterfront Hotel | The Spinnaker Room | 10 Washington Street, Oakland  
(Admission fee includes plated lunch and 3 units of MCLE credit)

YUN TONG | 佟雲



**REGISTER TODAY!**

Annual Lunch  
November 16, 2023

Waterfront Hotel  
Oakland, CA

[ebtel.org/events/annual-lunch/](http://ebtel.org/events/annual-lunch/)

**11:30 a.m.** REGISTRATION

**12:00 p.m.** INTRODUCTORY REMARKS AND UPDATES FROM THE BENCH

**1:00 p.m.** BREAK

**1:15 p.m.** ALMA SOONGI BECK, ESQ.  
HOPKINS & CARLEY

### ***Estate Planning for Unmarried Couples (and More)***

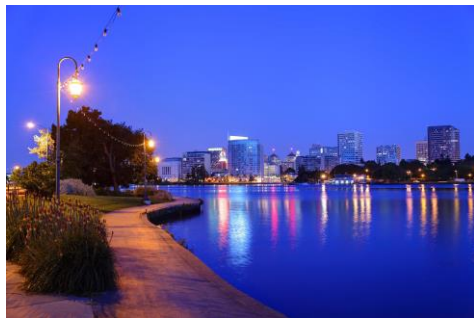
In this era of marriage equality, are we thinking as effectively as we should about the unique issues faced by couples (and more) who choose not to marry? Do our mindsets and our estate planning intake forms address and ask the crucial questions that will help us catch these issues? And how is our ability to plan effectively impacted by the evolution of gender and parentage and the availability of domestic partnership for couples of all genders? This program will address these issues, plus the challenges of separate versus joint trusts, the dynamics of assisting clients on whether to consider marriage or state domestic partnership, and the property tax implications for unmarried couples and other family groups who also choose not to register as state domestic partners.

**2:30 p.m.** BREAK

**2:45 p.m.** JAMES M. WAGSTAFFE, ESQ.  
WAGSTAFFE, VON LOEWENFELDT, BUSCH & RADWICK LLP

### ***Guiding Estate and Probate Clients Through the Difficulties of Litigation***

Jim Wagstaffe is an experienced trust and estate litigator who understands the ins and outs of guiding clients through difficult and sometimes emotional cases. He will be sharing many estate planning litigation tips, such as framing the file for future contests, preservation duties, and playing the role of witness. Jim will also address strategies for success in handling emotion-based disputes, including his experiences in sometimes high-profile disputes such as the Robin Williams' estate battle. In particular, we'll learn about techniques such as listening through tone, managing unrealistic expectations, representing "difficult" clients, achieving successful mediations, and knowing when estrangement is underrated. It promises to be fun and very useful to all our practices.



## 2024 Meeting Schedule

January 10	Elder Law, Conservatorships and Guardianships
January 17	Litigation and Mediation Committee
February TBD	California & Federal Recent Developments
March 13	Estate Planning and Administration Committee
March 20	Elder Law, Conservatorships and Guardianships
April 10	Litigation and Mediation Committee
April 17	Elder Law, Conservatorships and Guardianships
May TBD	Spring Symposium

## 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

Joseph Ferrucci  
(415) 539-3292

David Parnall  
(510) 368-5698

### **2024 OFFICERS**

**President**  
Rachel Dodson  
(510) 824-8100

**Vice President**  
Rachel Rosenfeld  
(925) 386-6885

**Secretary**  
Ana Allec  
(925) 906-1880

**Treasurer**  
Francesca Boyd  
(510) 834-6600

### **2024 COMMITTEES**

Chairs  
<Vice Chairs>

#### **Elder Law, Conservatorships & Guardianships**

Kristen Boney  
(510) 832-3040  
<Nicole Ramos-Takemoto>  
(925) 233-6222

#### **Litigation & Mediation**

David Parnall  
(510) 368-5698  
<Katie Capielo>  
(925) 944-9700

#### **Estate Planning & Administration**

Travis Neal  
(925) 253-1717  
<Lauren Disston>  
(510) 339-7178

#### **Conference of California Bar Associations (CCBA)**

Joseph Ferrucci  
(415) 539-3292

Nathan Pastor  
(925) 322-1012