EAST BAY TRUSTS & ESTATES LAWYERS

KURNIADI REALTY
Residential & Probate Real Estate

PHILLIPS BONDING & INSURANCE AGENCY, INC.

TRUST ADMINISTRATION BOOT CAMP

FRIDAY, SEPTEMBER 18, 2026

9:00 AM to 5:00 PM

Preservation Park | Niles Room | 668 13th Street, Oakland

This all-day workshop will focus on the basics of the administration of trusts. The program is intended for new practitioners and other attorneys seeking to expand their practices, as well as fiduciaries and paralegals new to trust administration. Presentation materials will be provided in electronic format prior to the event. Leading practitioners will cover a broad range of topics, with an orientation towards acquiring practical knowledge.

Speakers:

ALEXANDRA M. AYOUB, Partner, *Ayoub & Dodson*
WHAT IS A TRUST ADMINISTRATION, INITIAL CONSIDERATIONS, AND OVERVIEW OF THE TRUST ADMINISTRATION PROCESS

TRAVIS NEAL, Partner, *Brothers Smith LLP*
DUTIES AND POWERS OF TRUSTEES

ALEX CHEN, Principal, *Alex Chen P.C.*
POST-MORTEM TRUST ADMINISTRATION: MARSHALLING AND DISTRIBUTING ASSETS

JEFFERY B. LEVI, Director, *Fennemore LLP*
MONICA DELL'OSSO, Director, *Fennemore LLP*
SUBTRUST FUNDING AND ADMINISTERING ONGOING TRUSTS

KYLE HAAS, Senior Director, *Fiduciary Accounting Services, LLC*
RECORD KEEPING AND ACCOUNTING

CHRISTINA WEED, Principal Attorney, *Weed Law Group, PC*
DIANA LOPEZ, Associate Attorney, *Weed Law Group, PC*
INCOME TAX CONSIDERATIONS IN TRUST ADMINISTRATION

DANIEL B. NEWBOLD, Partner, *Donahue Fitzgerald*
COURT PROCEEDINGS: MODIFICATION, REVOCATION, AND TERMINATION OF TRUSTS; HEGGSTAD PETITIONS

EAST BAY TRUSTS & ESTATES LAWYERS

KURNIADI REALTY
Residential & Probate Real Estate

PHILLIPS BONDING & INSURANCE AGENCY, INC.

TRUST ADMINISTRATION BOOT CAMP

FRIDAY, SEPTEMBER 18, 2026

9:00 AM to 5:00 PM

Preservation Park | Niles Room | 668 13th Street, Oakland

WHEN : Friday, September 18, 2026, 9:00am to 5:00pm (½ hour lunch break)

MCLE : 7 Hours of General MCLE Credit

WHERE : Preservation Park, Niles Room, 668 13th Street, Oakland, California

COST (includes lunch) :

Members: $325 / Non-members: $375
Law Students & Attorneys admitted after 9/18/2024: $100
(the student rate is limited to the first 10 registrations received)

No Refunds After 9/11/2026
(registration may be transferable to another person)

Please complete the registration form below and mail it with a check payable to **EBTEL** no later than **September 8, 2026** to: EBTEL, P.O. Box 29321, Oakland, CA 94604-9321 or **register now at https://ebtel.org/events/boot-camp/**



REGISTRATION FORM

SEPTEMBER 18, 2026

TRUST ADMINISTRATION BOOT CAMP (COURSE ID#20260918)

Name: _____

State Bar#: _____

Email: _____

_____ EBTEL Member @ $325 _____ Non-Member @ $375 _____ Student @ $100

Total Enclosed $_____