

The 2025 Real Property, Probate and Trust Section Midyear Conference: Probate and Trust Track



ORIGINAL PROGRAM DATE

May 30 – June 1, 2025

AVAILABLE MEDIA TYPES

Video & Audio MP3

*Presented in partnership with the
WSBA Real Property, Probate and Trust Section*

REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live seminar and webcast on May 30 – June 1, 2025, in Blaine, WA. If you attended the live webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

DESCRIPTION

The 2025 RPPT Midyear presents informative sessions full of updates, information and strategies for your practice. This program features the probate and trust track.

AGENDA

1 Real Property Updates

A review of recent case law, legislation and regulatory actions affecting real estate transactions in Washington.

Scott B. Osborne – Foster Garvey PC, Seattle, WA

2 Probate and Trust Updates

This session will focus on the last year of important cases and legislation in the areas of estate planning, probate, and trusts.

Tiffany Gorton – KHBB Law PLLC, Seattle, WA

3 Racial Restrictive Covenants in Washington

The language of racial exclusion and segregation haunts the cities and suburbs of Washington State. Racist restrictions, although now void, remain in the property records of hundreds of neighborhoods, a toxic residue from the decades when segregation and exclusion were allowed, indeed promoted, by local governments and state authorities. This session explores the history of racial segregation as promoted through real property laws and government policies. It will also discuss the after-effects of such laws and policies, including an expanded gap in generational wealth transfers amongst different races and continuing de facto segregation in our communities. Presenters Ari Bleu Conboy and Emma Mantovani will speak about the Racial Restrictive Covenants Project through the Seattle Civil Rights & Labor History Project at the University of Washington.

Ari Bleu Conboy – University of Washington, Seattle, WA

Emma Mantovani – University of Washington, Seattle, WA

Anna M. Cashman – KHBB Law PLLC, Seattle, WA

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4 Valuation Expert Panel for Real Property and Probate Practitioners

A moderated panel featuring two of Puget Sound's preeminent valuation advisors discussing valuation methodologies applicable to estate planning, probate, real property transactions and litigation as well as the interaction between the appraisal of closely held businesses, and real property interests.

Hans Juhl – Ryan, Swanson & Cleveland, PLLC, Seattle, WA

Arik Van Zandt – Alvarez & Marsal Holdings, LLC, Seattle, WA

Anthony Gibbons – Gibbons & Riely, PLLC dba RE◆SOLVE, Bainbridge Island, WA

5 1031 Exchanges – Don't be Afraid to Trade

This overview of IRC Section 1031 exchanges discusses what qualifies, what does not, how to structure deals and some creative applications. The course will cover the basics such as timing, mechanics and fundamental rules. We will cover reverse and improved exchanges, drop and swap, seller financing, leases and 1031 in combination with other code sections.

Craig Gourley – Gourley Law Group, Snohomish, WA

6 Balancing Autonomy and Supportive Protections: Exploring Less Restrictive Alternatives in Uniform Guardianship and Conservatorship

We will explore the principles and application of the Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act, with a particular emphasis on promoting less restrictive alternatives.

Miriam Ayoub – Graunke Ayoub Law, Seattle, WA

Michael Longyear – Reed Longyear Malnati Corwin & Burnett, PLLC, Seattle, WA

7 Garn-St. Germain Act

An overview of when you can transfer property subject to a mortgage.

Nicholas Pleasants – Oseran Hahn PS, Bellevue, WA

8 Voluntary Stopping of Eating & Drinking (VSED) with Palliative Support: A Legal End of Life Option

Voluntarily stopping eating and drinking with palliative support—is a legal end-of-life option for individuals with dementia or other progressive or degenerative diagnoses who do not want to live into the late stages of their diagnosis. This end-of-life choice is especially relevant for people who are not eligible for medical aid in dying (MAiD). This panel will provide an overview of what the VSED process entails, information about legal issues around hastening death via VSED, and personal insights into accompanying a family member through VSED. We will also discuss use of a VSED Advanced Directive that gives individuals the option to direct their future care at a time when they no longer have capacity.

Erin Glass – Chuckanut Law Group PLLC, Bellingham, WA

Kate Christie – Bellingham, WA

9 The Washington Estate Tax: History, Current Landscape, and Practical Planning Tips

This session will provide an overview of the Washington State estate tax, from its inception through present day. Topics include the inflation adjustment and subsequent “freeze” and updates on recent legislative efforts. We will also explore a variety of issues presently facing practitioners, from weighing strategies to address the estate tax together with various other types of tax, to considerations in funding trusts, to planning for estates with LLCs and property located outside Washington.

Jessica Aurelia Carr – North Sound Law Group PLLC, Bellingham, WA

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10 Navigating the Final Frontier: The Incredible Benefits and Terrifying Risks of Using Artificial Intelligence in Your Practice

This presentation will explore the transformative impact of artificial intelligence (AI) on legal practice, highlighting both its potential to revolutionize efficiency and decision-making, as well as the significant ethical and financial risks it poses. Attendees will gain a comprehensive understanding of how AI can be leveraged to enhance legal services while navigating the complex challenges associated with its adoption. The discussion will cover practical implications such as the integration of AI tools in daily legal tasks, improving accuracy and productivity, and the ethical considerations, including maintaining client confidentiality, ensuring unbiased decision-making, and addressing the potential for job displacement within the legal profession.

Devin McComb – Perkins Coie LLP, Seattle, WA

Stephanie Taylor – Randall Danskin PS, Spokane, WA