



## Probate and Trust - Fall 2025

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### ORIGINAL PROGRAM DATE

December 10, 2025

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

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### REPORTING YOUR CREDIT

This on-demand program was a live seminar presented on December 10, 2025. If you attended or viewed the original presentation, please note that WSBA members may not claim credit for the same CLE sessions if repeated within their three-year reporting period.

### DESCRIPTION

In this on-demand CLE, you'll gain practical and real-life solutions and strategies from fellow practitioners that you can incorporate into your practice immediately. Hear tips and best practices for the unexpected as well as typical complications in estate planning, probate, and trust administration.

### AGENDA

#### 1 Washington Estate and Capital Gains Tax Update

The session will cover estate and capital gains tax updates including review of the new tax rates, new exemption amounts and some thoughts on planning under the law changes.

*Rachel Roberson - Sweeney Conrad, P.S., Kirkland, WA*

*Melanie Abigania - Sweeney Conrad, P.S., Kirkland, WA*

#### 2 Ethical Issues Regarding AI

Explore the ethical issues which arise when lawyers use AI.

*Sandra Schilling - Washington State Bar Association, Seattle, WA*

#### 3 In re CES 2007 Trust: What Delaware's DAPT Ruling Means (and doesn't) for Washingtonians

A recent Delaware decision, *In re CES 2007 Trust*, upheld a domestic, self-settled asset protection trust. In this one-hour program, we will discuss the facts and holdings and then put them through a Washington lens: Does a Delaware DAPT actually work for a Washington resident? If not (or even if it does), what are the Washington-centric alternatives when a DAPT isn't your best move?

*Colin Ley - Lay Roots Law LLC, Seattle, WA*

#### 4 Charitable Gifts of Complex Assets

This program discusses the structure and income, estate and gift tax consequences of charitable gifts of securities, closely held business interests (C corporations, S corporations, partnerships), retirement plans, artwork, bitcoin, stock options, deferred compensation, life insurance, real estate, intellectual property, and cars, boats and planes. In addition, compliance issues and substantiation rules are reviewed from an estate planning perspective.

*Jere Doyle - BNY Mellon Wealth Management, Boston, MA*

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### 5 Estate Planning for Queer Families

Understand the unique and universal considerations when working with queer families in estate planning. Hear best practices and advice to ensure that clients' goals are accomplished and prepare to think through potential issues regarding powers of attorney, estate administration, planning for unmarried couples and nontraditional families, and other issues.

*Paul Firuz - Firuz and Jeffrey PLLC, Seattle, WA*

### 6 Financial Elder Abuse

A client comes to you worried that a loved one is being financially exploited—what now? This session discusses at least eight practical and legally grounded strategies you can use to help your clients detect, prevent, and stop the abuse of their elderly loved ones.

*Alison Warden - Stokes Lawrence, P.S., Seattle, WA*