



23rd Annual Trust and Estate Litigation Seminar

ORIGINAL PROGRAM DATE

April 23, 2026

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

REPORTING YOUR CREDIT

This on-demand program was a live seminar presented on April 23, 2026. 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

Join us on-demand this year's Trust and Estate Litigation program. Hear from practitioner colleagues presenting a case law update, ethics, case prep tips and serving as fiduciary.

AGENDA

1 2025-2026 Year in Review: An Update for the Trust and Estate Litigator

This presentation will explore new cases and other updates relating to trusts and estates, and trust and estate litigation in 2025-2026.

Aleksander "Sascha" Schilbach - Ballard Spahr LLP, Seattle, WA

2 Tips and Best Practices for TEDRA Trials

This presentation will cover both practical and legal tips for preparing for TEDRA trials, including navigating pre-trial motions and evidentiary issues, managing clients and witnesses (and the judge), and tips for effective use of technology at trial.

Elizabeth Jennings - Stokes Lawrence, P.S., Seattle, WA

Ann Wilson - Stokes Lawrence, P.S., Seattle, WA

3 Managing and Litigating the Simultaneous Holding of Multiple Fiduciary Duties

When a closely held company is held in Trust and the same individual is operating as Trustee and Manager of the Company, they owe the company itself, the shareholders, and beneficiaries all important, but different, fiduciary duties. This presentation explores how to both manage those different (and sometimes at odds) duties prospectively to decrease the likelihood of litigation, how to confront these different duties in litigation, and finally how the attorney client privilege operates based off of which role the individual is operating within at any given time.

Julie Pendleton - Lasher Holzapfel Sperry & Ebberson PLLC, Seattle, WA

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4 **Whose Secret Is It? Attorney-Client Privilege in Trust and Estate Litigation**

This presentation explores the complexities of attorney-client privilege in estate and trust litigation. It examines who holds the privilege, when it applies, and the circumstances under which it may be waived or pierced. The discussion will address how courts balance the competing interests of fiduciaries, beneficiaries, clients, and counsel. Practical guidance will be offered for navigating these issues in estate and trust disputes.

Kristen Fisher - Stokes Lawrence, P.S., Seattle, WA

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