

The 2026 Real Property, Probate and Trust Section Midyear Conference: Probate and Trust Track

ORIGINAL PROGRAM DATE
June 5 – 7, 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 June 5 – 7, 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

Practitioners, and other professionals from around the state will assemble to present on critical updates, success stories and challenges. Leave inspired with valuable information and tips on a variety of topics to improve your practice.

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.
Liberty B. Upton – Bertram & Cashman PLLC, Seattle, WA

3 Staying Out of Trouble: Real Estate Issues for Fiduciaries
This session provides an overview of fiduciary duties in estate/probate and real estate contexts, with a focus on identifying common pitfalls that can expose personal representatives, trustees, and agents to liability. It will cover core obligations such as loyalty, prudence, disclosure, and proper accounting, alongside real-world examples of missteps in property management, transactions, and estate administration. The focus of the presentation is on risk mitigation, best practices, and strategies to navigate complex situations while minimizing exposure to legal claims.
Jenica Cassidy – Helsell Fetterman LLP, Seattle, WA
Makenzie Spinks – Helsell Fetterman LLP, Seattle, WA

Agenda continues on the next page.

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4 Ethical Thickets in Alternative Dispute Resolution
This session discusses the legal and ethical rules involved in ADR, focusing on their application and impact on lawyers participating in mediations. Also included are ethical considerations and concepts facing neutrals in mediation with an emphasis on how those concepts can impact a mediation.
Commissioner Bradford Moore (Ret.) – JAMS, Seattle, WA

5 Gifts, Death & Dirt – An Update on Real Property in Trust and Estate Planning
This presentation will focus on several real estate issues that arise in administering a trust or estate. We will discuss fiduciary duties regarding sales of real estate, the appropriate means of conveyance, seller disclosures, and tax considerations.
Anna M. Cashman – Bertram & Cashman PLLC, Seattle, WA
Nathan Smith – Kutak Rock LLP, Spokane, WA

6 Ending Probate for Profit Schemes: An Overhaul of Intestate Probates
This session will provide a detailed explanation of the changes that were enacted by the Washington State legislature to close a loophole in the intestacy statute that saw harm occur to numerous families totaling hundreds of millions of dollars. The revisions to the statute will change the way probate (primarily intestate estates) will be administered from the Petition through the Closing.
Brent Williams-Ruth – Law Offices of Brent Williams-Ruth, Federal Way, WA

7 Ins and Outs of SLATs
The presentation will provide a background and the basics of SLATs, tax aspects, and special considerations.
Alex Hurt – Perkins Coie LLP, Seattle, WA

8 Income Today, Impact Tomorrow: Charitable Remainder Trusts & Charitable Gift Annuities
This presentation provides an overview of two popular planned giving strategies—Charitable Remainder Trusts and Charitable Gift Annuities—that help donors support the causes they care about while also achieving personal financial goals. Explore how each option works, the differences between them, and the advantages they offer in terms of lifetime income, tax planning, and long-term charitable impact.
Alexandra Gerson – University of Washington, Seattle, WA

9 Planning with Cryptocurrencies: Through Boom and Bust
Cryptocurrency presents unique challenges in planning due to the privacy, volatility and risk of liability inherent in these assets. These characteristics are contrary to the usual goals of estate planning and administration, such as asset protection, certainty in disposition, and public or private disclosure through court proceedings, tax filings, and reports by personal representatives and trustees. This presentation will address planning considerations of owners, their lawyers, and fiduciaries.
David Bentsen – Speidel Bentsen LLP, Wenatchee, WA

10 The Modern Talent Market: Is Your Firm Built to Last or Ready to Evolve?
Law firms across Washington continue to ask the same question: "Why is it so hard to find and keep great people?" The answer is more complex than it seems. Today's talent market has shifted—experienced candidates are scarce, hiring timelines are shorter, and expectations have evolved. Drawing from real-world recruiting and workforce strategy experience, this session will explore common hiring challenges, key drivers of retention, and what high-performing firms are doing differently, with practical strategies attendees can implement immediately.
Katryn Whitney – Emerald Search Partners LLC, Seattle, WA
Jason Smith – Game Set Match Consulting, Seattle, WA