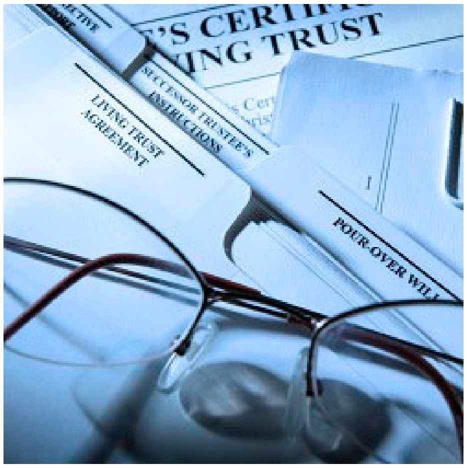
WSBA Practice Primer: Estate Planning
Track 1 - Wills, POAs, and Health Directives



ORIGINAL PROGRAM DATES
Session 1: October 12, 2022
Session 2: October 19, 2022
Session 3: October 26, 2022

AVAILABLE MEDIA TYPES
Video & Audio MP3

REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a series of live webcasts on October 12, 19 & 26, 2022, in Seattle, WA. If you attended the live webcasts 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 WSBA Practice Primer takes a substantive area of law and develops a series of learning tracks that build upon one another. Completion of all three learning tracks (usually three sessions within a track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would be beneficial to both new attorneys and experienced attorneys intending to change or expand practice areas. Our 2022 series will cover the practice area of Estate Planning. The topics covered by the three Practice Primer tracks include Wills, POAs and Health Directives, Trusts, Gifting & Asset Transfers and Ethics, and Probate and TEDRA.

The courses will be led by active practitioners offering both the experienced perspective and the new practitioner perspective, with guest faculty invited in to speak as subject matter experts.

AGENDA

1 Back to Basics: The Client Interview, Exploring Options, and Basic Wills

In this session we will begin with the basics of estate planning covering a variety of topics: interviewing, the standard for signing wills and other documents, surrogate decision making, alternatives to wills, the anatomy of a basic will, how to choose a personal representative, and the types of bequests and beneficiary designations afforded by basic wills. During the final 30 minutes of the session, we will cover basic ethics in estate planning including the continuum of capacity (RPC 1.14)

Stella Edens Pederson, Gravis Law, PLLC, Richland, WA
Gregory Sklar, Farr Law Group, PLLC, Enumclaw, WA

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(agenda continued from previous page)

2 A Deeper Look: Advanced Planning Issues and Community Property Basics

We will take a more in depth look in this session where we will cover: specific terms and their implications, community property basics, non-probate assets, burial instructions, digital assets, CIRs (Committed Intimate Relationships) and testamentary trust basics. We will wrap up this session with a discussion of ethical issues that arise in regard to co-personal representatives and beneficiaries.

Beth McDaniel, Law Offices of Beth A McDaniel, PLLC, Renton, WA
Dalynne Singleton, Gourley Law Group, Snohomish, WA

3 Healthcare Helpers: Surrogate Decision Making, Power of Attorney, and Health Care Directives

This session will dig deeper on how to plan for and direct future assistance, we will cover: surrogate decision making, powers of attorney, health care directives and death with dignity, POLST, how advanced directives work together, and putting it all together. During the final 45 minutes of the session, we will cover relevant ethics issues, including the continuum of capacity and elder abuse.

Megan Farr, Farr Law Group, PLLC, Enumclaw, WA
Stella Edens Pederson, Gravis Law, PLLC, Richland, WA