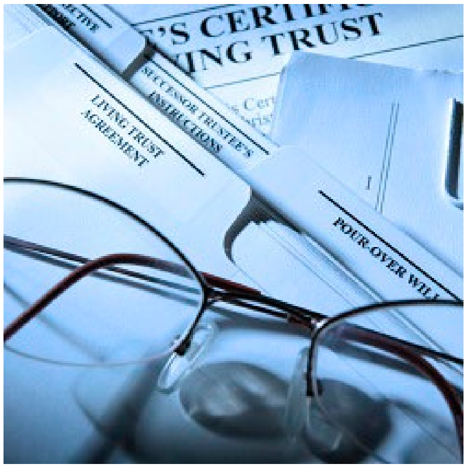
WSBA Practice Primer: Estate Planning
Track 2 - Trusts, Gifting & Asset Transfers, and Ethics



ORIGINAL PROGRAM DATES
Session 1: November 2, 2022
Session 2: November 9, 2022
Session 3: November 16, 2022

AVAILABLE MEDIA TYPES
Video & Audio MP3

REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a series of live webcasts on November 2, 9 & 16, 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 Trusts 101
This presentation will focus on different types of trust arrangements, including revocable trusts, marital trusts, and credit shelter trusts.
David Kazemba – Overcast Law Offices-NCW, PLLC – Wenatchee, WA
Mark Vohr – Ohana Fiduciary Corp, Seattle, WA

2 Gifting & Asset Transfers plus Issue Spotting
Presenters will provide an overview of gifting and asset transfers, including Medicaid gifting to avoid probate, estate taxes, and when to advise clients to pump the brakes. At the end of the session, we will cover some scenarios in which a practitioner should refer a client to an expert such as a CPA (RPC 1.1).
Megan Farr, Farr Law Group, PLLC, Enumclaw, WA
Stella Edens Pederson, Gravis Law, PLLC, Richland, WA

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(agenda continued from previous page)

3 Ethics: Conflicts of Interest in Estate Planning

This session will cover conflicts of interest in estate planning, focusing on RPCs 1.7 and 1.8, using hypothetical situations that may arise in practice as illustrations.

Jeanne Marie Clavere, Washington State Bar Association, Seattle, WA

4 Trust Administration: Pitfalls and Practice Tips

This presentation will provide a practical perspective on effective trust administration including pitfalls and practice tips, including issue spotting on forms and discussion points to have with clients.

David Kazemba – Overcast Law Offices-NCW, PLLC – Wenatchee, WA
Mark Vohr – Ohana Fiduciary Corp, Seattle, WA