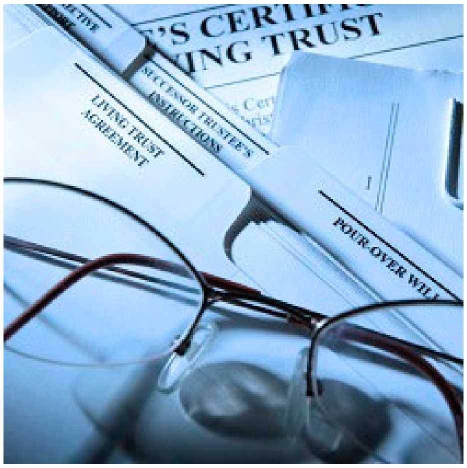
WSBA Practice Primer: Estate Planning
Track 3 - Probate and TEDRA



ORIGINAL PROGRAM DATES
Session 1: November 30, 2022
Session 2: December 7, 2022
Session 3: December 14, 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 30, December 7 & 14, 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 **Initial Meeting and Opening Probate**
In this session we will begin with the basic structure of the initial meeting with the executor and how to open probate. Topics will include: information to give out in the meeting including timelines and what to gather, the respective roles of the personal representative and attorney, different types of estate administration, and the process for opening probate and the initial court hearing. The final 30 minutes of the session will cover the ethical obligations of personal representatives and ethical issues for attorneys.
Gregory Sklar – Farr Law Group, Enumclaw, WA
Saphronia R. Young – Regeimbal, McDonald & Young, PLLC, Des Moines, WA

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(agenda continued from previous page)

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2 Administering and Closing a Probate

We will cover a variety of issues that arise in the probate process, including: creditor's claims, marshalling assets, disclaimers, income tax returns, delays in administration, distributions, and closing the estate. We will end with an overview of TEDRA to prepare for the next session.
Saphronia R. Young, Regeimbal, McDonald & Young, PLLC, Des Moines, WA

3 TEDRA

In session three we will cover TEDRA. Beginning with an overview of jurisdiction and different types of actions that can be brought under TEDRA, as well as a differentiation of civil actions compared to TEDRA actions. We will also cover how to file a TEDRA action, types of relief that are available, litigation support resources. The end of the session will cover attorney's fees and related ethics.
Saphronia R. Young, Regeimbal, McDonald & Young, PLLC, Des Moines, WA
Shannon Walker – View Ridge Law, Seattle, WA (moderator)