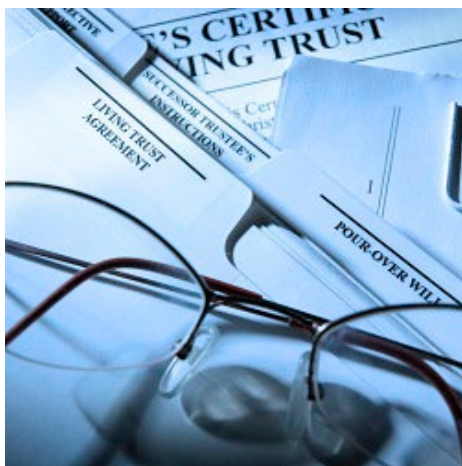


WSBA Practice Primer: Estate Planning

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

WSBA Practice Primer: Estate Planning

Track 1 - Wills, POAs, and Health Directives

(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

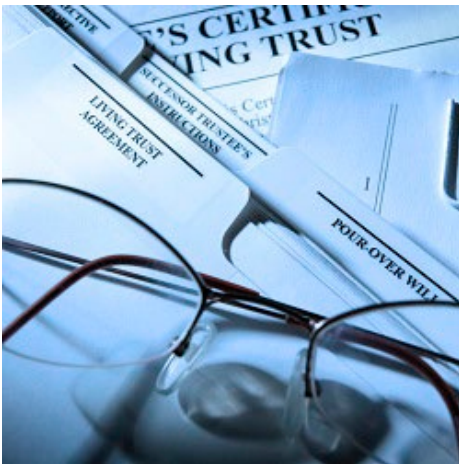
This session will dig deeper on how to plan for and direct future assistance, we will cover: surrogate decision making, powers of attorney, health care directives and death with dignity, POLST, how advanced directives work together, and putting it all together. During the final 45 minutes of the session,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

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.

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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

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

(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

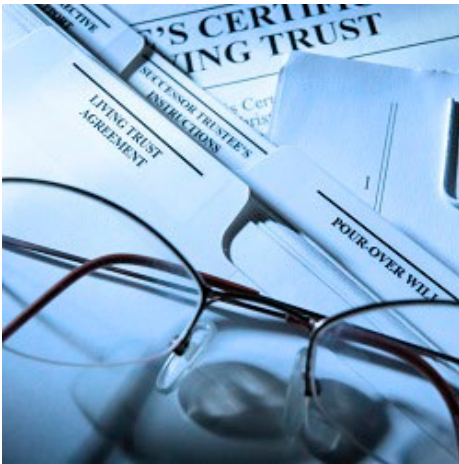
This presentation will provide a practical perspective on effective trust administration including pitfalls and practice tips, including issue spotting on forms and discussion points to have with clients.

David Kazemba - Overcast Law Offices-NCW, PLLC - Wenatchee, WA

Mark Vohr - Ohana Fiduciary Corp, Seattle, WA

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.

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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

WSBA Practice Primer: Estate Planning

Track 3 - Probate and TEDRA

(agenda continued from previous page)

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)