Planning Outside the Box: State Specific Issues for Washington Estate Planners

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DESCRIPTION
This recorded seminar focuses on advanced Washington estate planning issues for Washington practitioners. Issues addressed include community property and cohabitation, family trusts in dissolution actions, pre-immigration estate planning, estate planning for members of American Indian Tribes, litigation checkup, and ethics.

AGENDA

1. Pre-Immigration Estate Planning – A Practical Guide to Working with Global Clients Considering Immigrating to the United States
This topic focuses on the estate planning considerations for non-U.S. clients who desire to immigrate to the United States. The presentation includes a discussion of the applicable U.S. gift, estate and generation-skipping transfer taxes to a non-U.S. client (before and after the client becomes a U.S. resident), planning considerations, and specific strategies for creating a tax-efficient estate plan.

   Walter Impert – Dorsey & Whitney LLP, Seattle

2. Ethics of Advising Fiduciaries: Looking at an Attorney’s Role as Advisor, Advocate and Mediator in Estate and Trust Administration
This hour long presentation focuses on the myriad of ethical issues that can impact attorneys in their various roles as an advisor, advocate and mediator in estate and trust administration.

   Stephanie R. Taylor – Randall Danskin PS, Spokane

Agenda continued on next page.

As the trend toward cohabitation without marriage continues, it is important to understand whether and how significant non-marital relationships can affect our clients’ estate planning needs. This presentation reviews basic community property principals that have traditionally applied only to married couples in Washington, and then explores the developing case law that has created community-like equitable interests for certain unmarried couples in committed intimate relationships. Finally, the presentation discusses committed intimate relationships in the context of estate planning and estate disputes, explaining how a committed intimate relationship can affect an individual’s estate plan, and what planning techniques can be used to prevent surprises--and disputes--upon the passing of an individual who is unmarried but who was (or may have been) in a committed intimate relationship.

Paul Firuz – Kutscher Hereford Bertram Burkart PLLC, Seattle

Estate Planning and Administration for Indian Tribal Members by the Non-Indian Law Attorney: Property Interests, Choice of Law and Venue, and How These Matter to Drafting the Estate Plan

This presentation includes significant discussion about estate administration for members of Indian tribes as well as an overview of issues affecting the administration of estates of tribal members, the federal law applicable to restricted trust and allotment lands, and the administration of these assets by the Office of Hearings and Appeals of the Bureau of Indian Affairs. It also covers issues such as characterization of property interests, choice of law and venue, and how these relate to drafting the estate plan.

David J. Bentsen – Speidel Bentsen LLP, Wenatchee

Charitable Gifting Techniques to Benefit Your Client’s Goals - A Look at the Options From Beneficiary Designations to Charitable Trusts

Presenters Jessica Breitbarth and Renee Kurdzos bring their extensive knowledge in gift planning to discuss how charitable giving can be a useful tool in an estate planner’s toolbox. Even with uncertain tax reform looming, charitable giving remains an important conversation in every estate plan. This presentation explores not only the basics of charitable giving, but also more sophisticated techniques for real estate, life insurance, and appreciated assets.

Jessica H. Breitbarth – Seattle Children’s Hospital, Seattle
Renee Kurdzos – Fred Hutchinson Cancer Research Center, Seattle

Anatomy of Trust and Estate Litigation – Disputes, Nuts and Bolts of TEDRA and ADR Plus Case Law and Statutory Updates

This session covers the anatomy of trust and estate litigation, including a potpourri of disputes, some nuts and bolts of TEDRA and alternative dispute resolution. It will also include case law and statutory updates.

Tiffany Gorton – Kutscher Hereford Bertram Burkart PLLC, Seattle
Gail Mautner – Lane Powell PC, Seattle