



A STATEWIDE PERSPECTIVE ON TRUST AND ESTATE LITIGATION: THE BENCH AND THE EXPERTS WEIGH IN

Friday, April 21, 2017
 WSBA Conference Center
 1325 Fourth Ave, Suite 600
 Seattle, WA 98101
 (live webcast option)



Approved for 6.5 CLE credits (5.5 Law & Legal Procedure + 1 Ethics)



\$275 - Standard Tuition
 \$250 - RPPT Section Member Tuition
 \$199 - New Lawyer Tuition*



SCHEDULE

Co-Chairs:

Janet H. Somers – Somers Tamblyn King Isenhour Bleck PLLC, Mercer Island

Ann T. Wilson – Law Offices of Ann T. Wilson, Seattle

8:00 a.m. Check-in, Registration, Coffee and Pastry Service

8:25 a.m. Welcome and Introductions

Janet H. Somers – Somers Tamblyn King Isenhour Bleck PLLC, Mercer Island

8:30 a.m. Case Law and Legislative Update

This session will focus on case law and statutory changes and updates from April 2016 through April 2017. The session will include a discussion of recent published and unpublished trust and estate litigation opinions and legislation that may affect trust and estate practitioners.

Tiffany Gorton – Kutscher Hereford Bertram Burkart PLLC, Seattle

9:30 a.m. Technology Developments and Ethics in Trust and Estate Litigation

This session will focus on ethical issues facing Trust and Estate attorneys due to developments in technology. Concrete hypotheticals will be used to frame these issues and identify relevant Rules of Professional Conduct, bar opinions, and other legal sources.

Prof. Brooks Holland – Gonzaga University School of Law, Spokane

Erin R. Jajtner – JD Candidate, Gonzaga University School of Law, Spokane

10:30 a.m. Break

10:45 a.m. Practical Considerations for TEDRA Arbitration

A brief review of the history of TEDRA arbitration; the enforceability and advisability of compelling arbitration via a provision in the estate plan; exchange of perspectives as to the pros and cons of voluntary TEDRA arbitrations; and use of a mediator as an arbitrator for the purposes of enforcing settlement.

Teresa R. Byers – Garvey & Schubert Barer, Seattle

Judge Thomas McPhee – JAMS, Seattle

11:45 a.m. Lunch

Please join us for lunch hosted by the RPPT Section.

12:45 p.m. Hot Topics: Interesting Facts Make Interesting Law

This session will cover the facts and law of *Anderson V. Dussault*, *Langeland v. Drown* and *In Re Lane*.

Stephanie R. Taylor – Randall Danskin PS, Spokane

Commissioner Henry H. Judson III – King County Superior Court, Seattle

1:45 p.m. TEDRA in Washington — Multi-County Review of Procedures

This session will review procedural nuances of TEDRA across 7 Washington counties. Procedural similarities and differences among local jurisdictions will be summarized for TEDRA practitioners.

Sean A. Russel – Stokes Lawrence PS, Yakima

2:15 p.m. Break

2:30 p.m. Best Practice for TEDRA Litigation

Judge Ken Schubert – King County Superior Court

Commissioner Carlos Velategui – King County Superior Court, Seattle

3:30 p.m. Experts in TEDRA Litigation — Handwriting Examination/Capacity/Forensic Accounting

This session will include an overview of (1) forensic document examination, including analyzing handwriting and signatures, inks and paper, authenticating documents, and examining for indented writing and alterations; (2) issues surrounding capacity, including factual scenarios that may appropriate for expert analysis; and (3) forensic accounting, including the distinction between forensic accounting and forensic review, and the purposes of each. The experts will explain how they can assist with your case.

Bill Jaback – PIC Trust Company, Seattle

Brett Bishop – Bishop Document Examination Services LLC, Cheney

Dr. Kristoffer Rhoads – Memory and Brain Wellness Center at Harborview, Seattle

MODERATOR: Adrienne McEntee – Terrell Marshall Law Group PLLC, Seattle

4:30 p.m. Adjourn

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FRIDAY, APRIL 21, 2017

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