Presented in partnership with the Real Property, Probate and Trust Section

PLANNING OUTSIDE THE BOX:

State Specific Issues for Washington Estate Planners

Friday
December 8, 2017

WSBA Conference Center
1325 4th Avenue, Suite 600
Seattle, WA 98104
[live webcast option]

Approved for 6.0 CLE credits,
(5.0 Law and Legal Procedure and 1.0 Ethics)

$275 – Tuition
$199 – New Member tuition*

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition and complimentary Mentorship Luncheon.

Program Co-Chairs: *Jessica C. Allen – Witherspoon Brajcich McPhee PLLC, Spokane*
Anna M. Cashman – Kutscher Hereford Bertram Burkart PLLC, Seattle

This seminar will focus on advanced Washington estate planning issues for Washington practitioners. Issues to be 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.

SCHEDULE

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

8:25 a.m. Welcome and Introductions by Program Chair/Co-Chairs

8:30 a.m. Pre-Immigration Estate Planning – A Practical Guide to Working with Global Clients Considering Immigrating to the United States

This topic focusses on the estate planning considerations for non-U.S. clients who desire to immigrate to the United States. The presentation will include 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

9:30 a.m. Ethics of Advising Fiduciaries: Looking at an Attorney's Role as Advisor, Advocate and Mediator in Estate and Trust Administration

During this hour long presentation, Ms. Taylor will focus 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

10:30 a.m. BREAK

10:45 a.m. "Living in Sin"? – The Trend Toward Cohabitation Without Marriage Continues: Understand Estate Planning for Unmarried Couples in Washington State

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 will review basic community property principals that have traditionally applied only to married couples in Washington, and will then explore the developing case law that has created community-like equitable interests for certain unmarried couples in committed intimate relationships. Finally, the presentation will discuss 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

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SCHEDULE (continued)

11:45 a.m. LUNCH on your own *

12:45 p.m. 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 will include significant discussion about estate administration for members of Indian tribes and will include 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 will also cover 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

1:45 p.m. Charitable Gifting Techniques to Benefit Your Client's Goals – A Look at the Options From Beneficiary Designations to Charitable Trusts

Ms. Breitbarth and Ms. 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 will explore not only the basics of charitable giving, but will also discuss 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

2:45 p.m. BREAK

3:00 p.m. Anatomy of Trust and Estate Litigation – Disputes, Nuts and Bolts of TEDRA and ADR Plus Case Law and Statutory Updates

This session will cover 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

4:00 p.m. Adjourn

REGISTER NOW

*Special opportunity for new members: Attend a complimentary Mentorship Luncheon with experienced practitioners in the field! Ask questions, discuss challenges, and get tips on building your practice. This opportunity is included in your tuition and is exclusively for those who have been practicing for fewer than five years.

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Please fill out the registration form and mail or fax to WSBA. To register online, go to www.wsbacle.org/seminars and enter 18497 in the search box.

First Name ____________ M.I. ______ Last Name ____________

WSBA No. ____________ Firm/Company Name: ____________

Street Address ____________

City ____________ State ______ Zip ______

Phone ____________ Fax ____________

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☐ **# 18497SEA, attend in Seattle, 12/8/17**

☐ **$275 – tuition**

☐ **$199 – New Member tuition*** (includes Mentorship lunch)

☐ **# 18497WEB, attend via webcast, 12/8/17**

☐ **$275 – tuition**

☐ **$199 – New Member tuition***

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

Please note: Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions. There is no transaction fee if you mail in your check.

If special accommodations are needed, please email cle@wsba.org or call toll-free at 1-800-945-WSBA.

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Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site.

PAYMENT POLICIES

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NOTE: Please keep a copy of this flier for your records.

REFUNDS: Registration fees may be refunded, less $25 for handling, for written cancellations postmarked, emailed, or faxed by 5 p.m., up to 3 business days before the seminar. No refunds after that date, but you will receive the coursebook. Canceled registrations may not be transferred to other seminars. You may send a substitute (e.g., someone from your firm) in lieu of canceling.

Register:

Mail: WSBA, 1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539

Internet: Register online at www.wsbacle.org/seminars • Order products online at www.wsbacle.org.

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