

2023 Annual Fall Probate and Trust Seminar

**WSBA CLE
24497 WEB**



Tuesday, December 12, 2023

Tuition:

- \$250.00 – RPPT Section Members
- \$275.00 – Standard/Non-Section Members
- \$275.00 – Join the Section (\$25) and register at the Section member rate (\$250).

6.0 CLE credits

- 5.0 – L&LP
- 1.0 – Ethics

Washington State Bar Association

1325 Fourth Avenue, Suite 600
Seattle, WA 98101

Webcast

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

DESCRIPTION:

Join us online for an immersive and comprehensive program designed to equip estate planning, probate and trust practitioners with the latest insights and strategies in the field. Delve into the intricacies relevant for practical and efficient representation for estate planning, probate and trust matters. Learn what you need to do now for clients impacted by the new Corporate Transparency Act, how to address clients with assets in both the US and Canada, how to live and work in the changing world of artificial intelligence, and more. Also earn ethics credits with a popular update on the top five ethical considerations for estate and trust matters.

CO-CHAIRS:

- Sarah B. Bowman – K&L Gates LLP, Seattle, WA
- Jessica Aurelia Carr – North Sound Law Group, Bellingham, WA
- Hans P. Juhl – Ryan, Swanson & Cleveland, PLLC, Seattle, WA

Schedule

8:40 a.m. Webcast Sign-In Opens

8:55 a.m. Welcome and Introductions by Program Co-Chairs

- Sarah B. Bowman – K&L Gates LLP, Seattle, WA
- Jessica Aurelia Carr – North Sound Law Group, Bellingham, WA
- Hans P. Juhl – Ryan, Swanson & Cleveland, PLLC, Seattle, WA

9:00 a.m. Critical Deadlines and Impact of Corporate Transparency Act on Estate Plans

Effective January 1, 2024, the Corporate Transparency Act (“CTA”) will require many businesses operating in the U.S. to report beneficial ownership information to the U.S. Dept. of Treasury Financial Crimes Enforcement Network (“FinCEN”) upon entity formation and certain beneficial ownership changes, or face stiff penalties. Understand the reporting obligations under the CTA, with a particular focus on how these new rules may impact your estate planning clients and your own practice. We will talk about what we know and what we don’t yet know about how the CTA will apply, and what you can do now to prepare your practice and your clients.

- Amber K. Quintal – Ogden Murphy Wallace P.L.L.C., Seattle, WA
- M. John Way – Schwabe Williamson Wyatt, P.C., Seattle, WA

10:00 a.m. Necessary Actions for Cross-border Estate Planning with Canadian Assets

Straddling the Border: select considerations when a Canadian person or asset appears in a U.S. plan or when a Canadian holds U.S. assets. What tax, inheritance, and other issues should a U.S. planner be thinking about in these circumstances?

- Cheyenne Reese – Legacy Tax + Trust Lawyers, Vancouver, BC

11:00 a.m. BREAK

11:15 a.m. Committed Intimate Relationships: What Every Probate Attorney Needs to Know

Equity relationships create an inventory issue for an Estate, not an inheritance issue. The panelists will discuss how an equity relationship affects a PR’s duties, and methods for resolving potential claims with or without litigation.

- Paul Firuz – Firuz & Jeffrey PLLC, Seattle, WA
- Eric C. Nelsen – Sayre Law Offices, PLLC, Seattle, WA
- Leslie J. Olson – Olson & Olson, PLLC, Seattle, WA

12:15 p.m. LUNCH on your own

1:00 p.m. How Artificial Intelligence is Changing Estate Planning, Or Is It?

Learn about available “Generative AI” and potential benefits and risks of using Generative AI in a legal and Estate Planning practice. See a demonstration of the use of Generative AI to draft Estate Planning documents in order to highlight just how complicated and risky that may be.

- Noah Williams – Foster Garvey PC, Seattle, WA
- Anton B. Cauthorn – Reed Longyear PLLC, Seattle, WA

2:00 p.m. Security and Control: Asset Protection Trusts for Clients Who Can’t Let Go

Many clients fear they must relinquish control to protect their hard-earned assets. But fear not, fellow counselors! Learn about hybrid jurisdiction asset protection trusts, which allow your client to retain control of their assets but also provide them with protection.

- Shreya B. Ley – LayRoots, Seattle, WA
- Colin Ley – LayRoots, Seattle, WA

3:00 p.m. BREAK

(schedule continued next page)

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3:15 p.m. Top Five Ethical Considerations of Probate and Trust Administration

This session will cover the most frequently-encountered dilemmas when representing fiduciaries

Stephanie R. Taylor – Randall Danskin, Spokane, WA

4:15 p.m. Complete online evaluations • Adjourn

REGISTRATION

ONLINE ▶ Go to www.wsba.org and enter **24497** in the search box. Payment by credit card.

BY PHONE ▶ Call **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand. Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.

BY MAIL ▶ Please fill out this registration form and mail to WSBA seven business days prior to the program along with your check payable to WSBA. Credit card payments by mail or fax are no longer accepted.

Name WSBA #

Address

City State Zip

Phone Email

- Please omit my name from the networking list made available to exhibitors and/or attendees.
- Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site.
- If special accommodations are needed, please email cle@wsba.org or call toll-free at **1-800-945-9722**.

PRICING AND PAYMENT

- #24497 WEB, attend online, 12/12/23**
 - \$250.00 – RPPT Section Members
 - \$275.00 – Standard/Non-Section Members
 - \$275.00 – Join the Section (\$25) and register at the Section member rate (\$250).

Check enclosed, payable to “WSBA” for the amount of _____
MAIL TO: Washington State Bar Association, 1325 Fourth Ave, Suite 600, Seattle, WA 98101-2539

<p>PAYMENT POLICIES</p> <p>Payment: Individual registrants must use a separate form, however, payment may be made with a single check for multiple parties.</p>	<p>Refunds: Registration fees may be refunded, less \$25 for handling, for written cancellations postmarked or emailed 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.</p> <p>Note: Please keep a copy of this flier for your records.</p>
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OFFICE USE ONLY Date Check # Total