



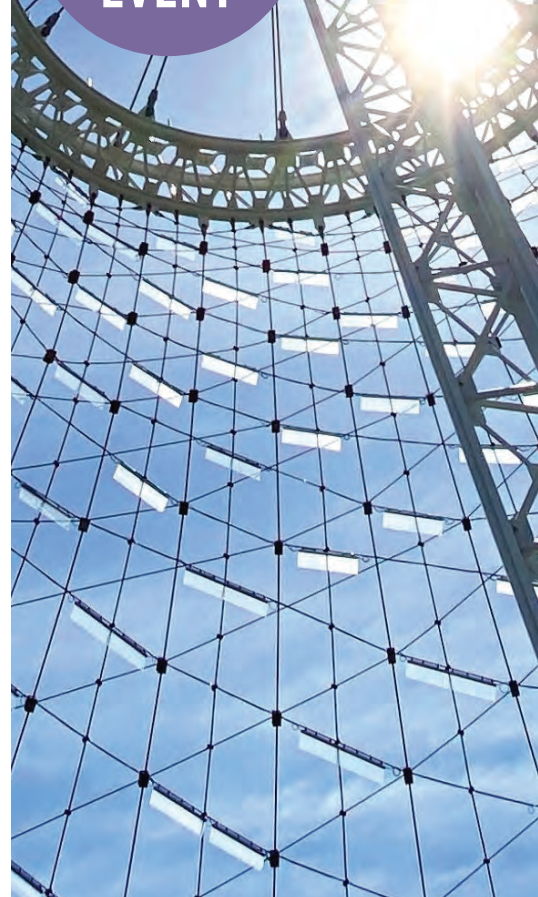
*The 2024 Real Property, Probate and Trust Section*

## **MIDYEAR MEETING AND CONFERENCE**

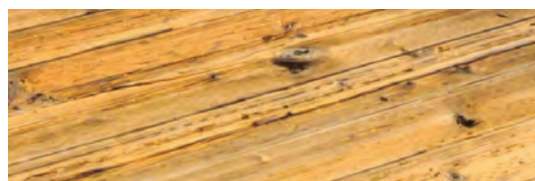
Friday, June 7 - Sunday, June 9, 2024

The Historic Davenport Hotel, Spokane, WA

**IN-  
PERSON  
EVENT**



**WSBA | CLE** *Invested in your success.™*





The 2024 Real Property, Probate and Trust Section

# MIDYEAR MEETING AND CONFERENCE



# SPOKANE

*Join us in Spokane at the gorgeous Historic Davenport hotel for the 2024 RPPT Midyear.*

This in-person program caters to both new attorneys and veteran practitioners seeking a refresher. Either way, practitioners of probate and trust as well as real property will be up-to-date with practice essentials, foundational knowledge, updates, and practical tools.

We look forward to being together in person and hope you can be a part of it. As always, if you are unable to join us, the 2024 Midyear will be recorded and available for purchase from the WSBA CLE store at a later date. If you have health and safety concerns related to attending the RPPT Midyear in person, please email us at [cle@wsba.org](mailto:cle@wsba.org).

## WSBA CLE – 24704 SPO

### DATES

Friday, June 7 through Sunday, June 9, 2024

### IN-PERSON

### 10.0 CLE CREDITS

- 7.0 – L&LP
- 1.0 – Ethics
- 2.0 – Other

### TUITION

- \$404 – Section Members
- \$429 – Standard/Non-Section Members
- \$429 – Join the Real Property, Probate, and Trust Section (\$25) and register at the discounted price (\$404)

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

### COMMITTEE

Allison Foreman – *Foreman Hotchkiss Bauscher & Zimmerman PLLC, Wenatchee, WA*

Emily Kelly – *Stoel Rives LLP, Seattle, WA*

Nathan Smith – *Kutak Rock LLP, Spokane, WA*

### VENUE

The Historic Davenport Hotel  
10 South Post Street, Spokane, WA, 99201  
1-800-899-1482

### REGISTRATION

Online at [The 2024 Real Property, Probate and Trust Section Midyear Meeting and Conference](#) (mywsba.org).

# The 2024 Real Property, Probate and Trust Section MIDYEAR MEETING AND CONFERENCE

### WSBA IN-PERSON MEETINGS & EVENTS:

WSBA policy encourages attendees of WSBA meetings and events to follow the CDC's COVID-19 Community Level guidance (e.g., masks are recommended in indoor public transportation settings), as well as any applicable state or local health authority requirements based on location of the event. As a friendly reminder, if you are sick, or exhibiting signs or symptoms of COVID-19, we request that you stay home. For more information on COVID-19 Prevention Actions from the CDC, see [How to Protect Yourself and Others | CDC](#).

**THANK YOU  
TO OUR SPONSORS**

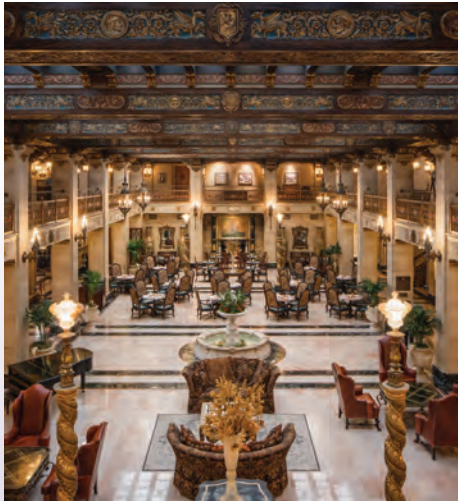


**Baker Tilly US, LLP**



## LODGING INFORMATION

There is a block of discounted rooms at **The Historic Davenport** held for attendees until May 8, 2024, based entirely on space availability. Once they are filled, room prices may increase. Room reservations made under the WSBA room block are intended for attendees of the Midyear Conference only. If a non-attendee would like to stay in the area, please find accommodations outside of the WSBA room block.



## TO RESERVE YOUR ROOM

Go online directly to [this link](#) OR call the reservations department at 509-455-8888. Identify yourself as part of the Washington Bar Association to receive the discounted rate.

The WSBA room block is for Friday and Saturday nights, June 7 and 8, at the following nightly rates (plus taxes and fees):

- \$195 - Single Room
- \$205 - Double Double Room

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## DAY 1, FRIDAY, JUNE 7

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### 12:00 p.m. Check-in • Walk-in Registration Afternoon Refreshments

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### 12:55 p.m. Welcome and Introductions by Program Committee

- Allison Foreman – Foreman Hotchkiss Bauscher & Zimmerman PLLC, Wenatchee, WA
  - Emily Kelly – Stoel Rives LLP, Seattle, WA
  - Nathan Smith – Kutak Rock LLP, Spokane, WA
- 

### 1:00 p.m. Real Property Updates

*60 minutes, 1.0 credit L&LP*

This session will review recent legislation, regulatory matters and court decisions affecting real estate transactions in Washington.

- Scott B. Osborne – Foster Garvey PC, Seattle, WA
- 

### 2:00 p.m. Probate and Trust Updates

*60 minutes, 1.0 credits L&LP*

This session will focus on the last year of important cases and legislation in the areas of estate planning, probate, and trusts.

- Anna M. Cashman – KHBB Law PLLC, Seattle, WA
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### 3:00 p.m. BREAK

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### 3:15 p.m. The Corporate Transparency Act

*60 minutes, 1.0 credits L&LP*

The Corporate Transparency Act came into effect at the beginning of 2024 and private companies now have to report, for the first time, extensive information about their beneficial owners and company applicants to the Treasury Department's Financial Crimes Enforcement Network. The scope of the Corporate Transparency Act is, by design, exceptionally broad. This program gives a general survey of the Corporate Transparency Act, and highlights certain components of the Act that are ripe for confusion and varied interpretation among practitioners. The program also provides best practice tips for practitioners as we all acclimate to the Corporate Transparency Act landscape.

- Austin Graves – Kutak Rock LLP, Spokane, WA
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### 4:15 p.m. Complete evaluations • Adjourn

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### 4:45 p.m. Reception

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## DAY 2, SATURDAY, JUNE 8

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### 8:00 a.m. Check-in • Walk-in Registration • Breakfast

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### 8:25 a.m. Welcome and Introductions by Program Committee

- Allison Foreman – Foreman Hotchkiss Bauscher & Zimmerman PLLC, Wenatchee, WA
  - Emily Kelly – Stoel Rives LLP, Seattle, WA
  - Nathan Smith – Kutak Rock LLP, Spokane, WA
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### 8:30 a.m. Navigating Data Privacy and Cybersecurity in Law Practice

*60 minutes, 1.0 credits Other*

If cybercrime were a country, it would rank as the world's third-largest economy. This session is a practical guide for legal professionals discussing fundamental cyber hygiene practices, insights into evolving threats, and the critical importance of data privacy in the legal field. Learn the concept of a security culture and understand how fostering such a culture within your office is essential to integrating and sustaining cybersecurity best practices and upholding the highest standards for client security.

- Alyssa Underwood – First American Financial Corporation, Long Beach, CA
  - Nathan Morales – Stoel Rives LLP, Portland, OR
- 

### 9:30 a. m. Forensic Document Examination in Real Property, Probate & Trust Cases

*60 minutes, 1.0 credit Other*

This presentation discusses various applications of forensic science that provide useful information when evaluating and authenticating documents related to real property, probate, and trust cases. Understand issues related to: forgery, altered and counterfeit documents, as well as considerations regarding the best evidence for scientific evaluation. Review and discuss examples recreated from fraudulent documents in actual cases and have hands-on exercises.

- James Tarver – Central Valley Document Examination Services LLC, Spokane, WA
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### 10:30 a.m. BREAK

*(Day 2 continued next page)*

## PROBATE AND TRUST TRACK

### 11:00 a.m. The RCW 11.54 Basic Award: Past, Present, and Future

60 minutes, 1.0 credit L&LP

Washington State law has long provided courts with the authority to award family support from an estate, notwithstanding inconsistent terms in the governing estate planning documents, and even when the estate is insolvent. This presentation analyzes the origins of Washington's support system structure, how these concepts have evolved over time, and summarizes recent changes to the applicable statutes.

- Hans Juhl – Ryan Swanson Cleveland, PLLC, Seattle, WA
- Ryan Montgomery – Montgomery Purdue Blankinship & Austin PLLC, Seattle, WA

### 12:00 p.m. When the Marriage Ends but the Trust Doesn't: Irrevocable Trust Issues Arising During Divorce

60 minutes, 1.0 credit L&LP

Divorce can create complications for a couple's shared estate plan. This session addresses some of the most common issues including issues that arise with respect to Spousal Lifetime Access Trusts (SLATs) and other irrevocable trusts, continuing grantor trust status, the impact of the IRS's recent pronouncement regarding adding discretionary tax reimbursement clauses, disputes about who can serve as trustee, pitfalls of powers of appointment, and ill-aligned beneficiary status given the breakup of the marriage. The presenters will offer potential solutions and drafting tips.

- Alison Warden – Stokes Lawrence PS, Seattle, WA
- Ann T. Wilson – Stokes Lawrence PS, Seattle, WA

## REAL PROPERTY TRACK

### 11:00 a.m. New Environmental Considerations for Real Estate Transactions

60 minutes, 1.0 credit L&LP

Get updates on emerging environmental issues, including new regulations impacting the path to regulatory closure, tips on allocating risk in transactions of contaminated properties, and recent strategies for redeveloping impacted sites.

- Alexandra Kleeman – Hillis Clark Martin & Peterson P.S., Seattle, WA

### 12:00 p.m. Building Solutions: Addressing Common Legal Issues on Construction Projects

60 minutes, 1.0 credit L&LP

Hear from two Washington construction lawyers about legal issues and disputes that can arise on construction projects and considerations to keep in mind when approaching a project. Colm Nelson and Evan Brown explain some of the significant issues they have seen in recent years and offer some ideas for those embarking on development and construction in Washington or picking up the pieces of a troubled project.

- Colm Nelson – Stoel Rives LLP, Seattle, WA
- Evan Brown – Stoel Rives LLP, Seattle, WA

1:00 p.m. Complete evaluations • Adjourn

**DAY 3, SUNDAY, JUNE 9****8:30 a.m. Check-in • Walk-in Registration • Morning Refreshments****PROBATE AND TRUST TRACK****9:00 a.m. Okay, So We're Doing This:  
Washington Capital Gains Tax***60 minutes, 1.0 credit L&LP*

A fast-paced review of the on-again and still-evolving Washington Capital Gains Tax, including history, rules, notices, planning considerations, and upcoming voter initiatives (which may—full disclosure—moot this presentation!).

• **Steven Schindler** – Perkins Coie LLP, Seattle, WA

**10:00 a.m. Guardianship Statute Updates***60 minutes, 1.0 credit L&LP*

We are nearly four years into the Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act. This session provides updates on its successes and challenges.

• **Michael Longyear** – Reed Longyear Malnati Corwin & Burnett, PLLC, Seattle, WA

• **Miriam Ayoub** – Graunke Ayoub Law, Seattle, WA

**11:00 a.m. BREAK****REAL PROPERTY TRACK****9:00 a.m. UCC Filings***60 minutes, 1.0 credit L&LP*

An overview of the requirements for creation, perfection, and foreclosure of security interests in personal property in conjunction with real estate lending transactions.

• **John Kaplan** – Stoel Rives LLP, Seattle, WA

**10:00 a.m. Updates to the Washington  
Common Interest  
Communities Act***60 minutes, 1.0 credit L&LP*

This session provides an overview of significant changes to the WUCIOA.

• **Nathan Luce** – Socius Law Group PLLC, Seattle, WA

**11:00 a.m. BREAK***(Day 3 continued next page)*



*DAY 3 continued*

## PLENARY SESSION

### 11:30 a.m. Navigating Mediation's Ethical Terrain

*60 minutes, 1.0 credit Ethics*

In this interactive ethics session, explore ethics guidelines that apply to mediation through a series of hypotheticals and audience voting for the best answers to the same. From both the mediator's and advocate's perspectives, apply theory to practice in an illustrative manner.

• Ann T. Marshall – JAMS, Seattle, WA

### 12:30 p.m. Complete evaluations • Adjourn

## END DAY 3

*Thank you for attending!*



## The 2024 Real Property, Probate and Trust Section – Midyear Meeting and Conference Friday, June 7, 2024 through Sunday, June 9, 2024 • 24704 SPO

### REGISTRATION

**ONLINE ▶** Go to [www.wsba.org](http://www.wsba.org) and enter **24704** 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](mailto:cle@wsba.org) or call toll-free at **1-800-945-9722**.

### PRICING AND PAYMENT

**#24704 SPO, attend in Spokane, 6/7/24 through 6/9/24**

- \$404.00 – RPPT Section Members  
 \$429.00 – Standard/Non-Section Members  
 \$429.00 – Join the Real Property, Probate, and Trust Section (\$25) and register at the discounted rate (\$404)

Check enclosed, payable to “WSBA” for the amount of .....

**MAIL TO:** Washington State Bar Association, 1325 Fourth Ave, Suite 600, Seattle, WA 98101-2539

#### PAYMENT POLICIES

**Payment:** Individual registrants must use a separate form, however, payment may be made with a single check for multiple parties.

**Refunds:** Registration fees may be refunded, less \$25 for handling, for written cancellations postmarked, emailed, or faxed by 5 p.m. up to three business days before the seminar. No refunds will be provided after that date, but you will receive the coursebook. You may send a substitute (e.g., someone from your firm) in lieu of canceling.

OFFICE USE ONLY    Date ..... Check # ..... Total .....