



STRENGTHENING YOUR ESTATE PLANNING PRACTICE

Rainier Square Conference Center, 1301 Fifth Avenue, Third Floor Atrium, Seattle

April 7, 2010

5.50 General and 1.00 Ethics CLE Credits Approved

A program designed to answer practical questions about whether the advice and documents you provide to your estate planning clients are up-to-date given recent changes in the estate tax and the economic climate. Both intermediate and entry level practitioners will benefit from this comprehensive program.

AGENDA

- | | |
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| 8:00-8:30am | Registration & Coffee Service |
| 8:30-8:35am | Introduction and Overview
Program Chair: Mary Anne Vance
The Law Office of Mary Anne Vance PS, Seattle |
| 8:35-9:20am | Wills
Jennifer L. King
Somers Tambllyn King PLLC, Mercer Island <ul style="list-style-type: none">• Drafting, Construction and Interpretation of Wills• Tips to Qualify Your Wills for “Hall of Fame,” Not “Hall of Shame” Status |
| 9:20-10:00am | Planning Dilemmas in 2010
Kristi Mathisen
Managing Director of Tax and Financial Planning
Laird Norton Tyee, Seattle <ul style="list-style-type: none">• Planning Dilemmas in 2010: The Space Odyssey Revisited• Current Estate Tax and Capital Gains Tax Issues in Uncertain and Ambiguous Times |
| 10:00-10:30am | The 2009 Slayer Statute
Associate Professor Karen E. Boxx
University of Washington School of Law, Seattle <ul style="list-style-type: none">• Financial Exploitation as Grounds for Disinheritance• The Slayer/Abuser Statute, RCW 11.84.020 |
| 10:30-10:45am | Break |

- 10:45-12:00pm Interviewing Estate Planning Clients
Barbara C. Sherland
Stoel Rives LLP, Seattle
- Bruce R. Moen**
Moen Law Offices PS, Seattle
- Carolann O. Storli**
Storli Law PLLC, Seattle
- Improve Your Intake and Interviewing Skills with Estate Planning Clients
 - Mock Interview Followed by Q&A Session
- 12:00-1:30pm Lunch, on your own
- 1:30-2:15pm Analysis of Cases and Statutes
Mark W. Roberts
K & L Gates, Seattle
- Common Sense Analysis of the Latest Cases and Statutes Affecting Estate Planning in Washington
- 2:15-3:15pm Ethics, Ethics, Ethics
Randy V. Beitel
Senior Disciplinary Counsel
Washington State Bar Association, Seattle
- Seeking a Guardianship of Your Own Client
 - The New RPCs on Retainers and Flat Fees
 - Estate Practice Disciplinary Highlights
- 3:15-3:30 Break
- 3:30-5:00pm Estate Planning Panel
- Jesse Valdez**
Valdez Lehman, PLLC, Bellevue
and
Laura Zeman
Zeman Law Group, PLLC, Bellevue
- Powers of Attorney
 - Ways to Improve Your Current Forms
 - Judicial Enforcement
- Marijean E. Moschetto**
Moschetto & Koplinc Inc. PS, Bellevue
- Married but Mad...What to Tell Your Unhappily Married Clients
 - A Family Law Attorney Explains It All

Jihan L. Caskey
Associate Trust and Fiduciary Specialist
Wells Fargo Bank, Seattle

- Drafting Trusts
- One Bank's View on How to Improve Your Drafting Techniques

Terri R. Luken
Law Office of Mary Anne Vance PS, Seattle

- Dead Bodies, Family Feuds, and Other Selected Topics in Estate Administration Conflicts

Douglas L. Phillips
Douglas L. Phillips PLLC, Bellevue

- Billing Clients and Managing an Estate Planning Practice
- The Practical vs. the Ideal
- Engagement and Disengagement Forms

5:00 p.m. Evaluations and Adjournment

KCBA REGISTRATION FORM

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5 WAYS TO REGISTER!

WEB www.kcba.org/CLE (secured site)

CALL CLE Department: 206.267.7004

EMAIL Complete and email to CLE@kcba.org

MAIL KCBA CLE, 1200 Fifth Ave., Suite 600, Seattle, WA 98101

FAX 206.267.7099

Electronic Course Materials

KCBA is going green! We will be distributing course materials to registrants in an electronic format – searchable PDF files that you can download to your computer. Before the program, you will receive an email with instructions on how to download the materials.

Walk in registrations will receive the electronic course materials via email after the program.

