Monthly Meetings

2017 / 2018

Sacramento Estate Planning Council

SACRAMENTO ESTATE PLANNING COUNCIL

The Sacramento Estate Planning Council's Technical Forum is the premier Northern California educational conference for professionals in the estate planning field. The one-day conference features nationally known experts from across the country, speaking on issues and concepts that are essential for practitioners who wish to stay up to date. The Tech Forum, now in its forty-seventh year, is the ideal place to earn continuing education credit in law, accounting and financial planning.

It is also one of the few local venues offering credit for not only general California Bar MCLE purposes, but for the California Bar legal specializations in (1) Taxation, and (2) Estate Planning, Trust and Probate law. All courses will be approved for continuing education for general MCLE purposes including the specializations. There will be 6 hours of credit available.

The 2018 Tech Forum continues the tradition of bringing a diversity of topics to offer something for every practitioner. Please join us and 150+ of your peers for the SEPC 2018 Technical Forum.

Save the date!

2018 TECHNICAL FORUM

McGEORGE SCHOOL OF LAW
FRIDAY, JANUARY 12, 2018
7:30 A.M. – 4:15 P.M.
HOSTED WINE RECEPTION IMMEDIATELY FOLLOWING

PRESENTERS

SAM DONALDSON
GEORGIA STATE UNIVERSITY COLLEGE OF LAW
Recent Estate Planning Updates

KIM KAMIN
GRESHAM PARTNERS
Estate Planning for the Modern Family

MICHAEL ROSEN PRINZ
PRINZ MCDERMOTT WILL & EMERY LLP
Planning for Digital Assets in California

DR. TED ERNST
UNIVERSITY OF CALIFORNIA, SAN FRANCISCO
Client Control: Challenging Client Behavior

Sacramento Estate Planning Council

Monthly Meetings

are held at the

Sutter Club

California Room

1220 Ninth Street
Sacramento, CA 95814

Cocktails: 5:00 p.m.
Dinner: 5:45 p.m.

Save the Dates!

2017 Holiday Party
Date: December 14, 2017
Location: Suspects Dinner Theater

2018 Annual Meeting
Date: May 23, 2018
Location: Topgolf Roseville
1700 Freedom Way
Roseville, CA 95678
Come for appetizers/beverages and some topgolf fun!

Monthly Meeting

September 27, 2017

Bette Epstein - ADR Services Inc.
Oakland, CA
Mediation Strategies for Planning and Litigation

Mediation can resolve conflicts at the estate planning stage and after litigation has started. Ms. Epstein will explore the use of a neutral facilitator to address issues such as blended families, business succession planning, management of real estate, and treatment of inter vivos gifts, including how accountants, appraisers and investment advisors can facilitate the process.

October 25, 2017

Craig Ackerman, MBA, CRS - Ackerman Realty Group
San Francisco, CA
Best Practices and Innovations to Smooth Trust Administration and Speed Real Property Sales

Often, the most valuable, yet, arguably most vulnerable asset of a decedent's estate is their residential real estate holdings. Sometimes time-worn properties, often sold 'as-is', at reduced prices. Why?

A former licensed contractor and Fortune 500 marketing manager, now top Bay Area real estate broker, Craig Ackerman, specializes in a better approach to achieving excellence with Trust Administration sales. Craig's program is built around some simple but powerful concepts that consistently produce dramatically faster sales, at higher prices.

November 15, 2017

Bryan D. Kirk, Managing Director and Trust Counsel and Michael Firestone, CFA, Managing Director
Fiduciary Trust International of California
Los Angeles, CA
Investing for a Fiduciary

What does "prudence" really mean when it comes to investing? This presentation looks at the standards for a fiduciary investing under the Prudent Investor Act and the implications in the day-to-day administration of an estate or trust as well as the specific holdings of an estate or trust investment portfolio. The necessary interplay of the Prudent Investor Act and the Principal and Income Act is examined, as well as the income tax implications of investing as the law directs. The presentation will also explore issues raised by concentrated holdings and ESG (environmental, social and corporate governance) criteria or SRI (socially-responsible investing).

Sacramento
Estate
Planning
Council

The Sacramento Estate Planning Council ("SEPC") provides a forum where Trust Officers, Private Fiduciaries, Attorneys, Certified Public Accountants, Chartered Life Underwriters, Chartered Financial Consultants, Certified Financial Planners, Chartered Financial Analysts, Educators, Planned Giving Professionals, and Accredited Valuation Experts in the Sacramento Valley can meet and share information about new developments in estate planning, a constantly changing field.

Members continue their professional development at monthly dinner meetings that feature speakers on important topics related to estate planning.

The SEPC is a non-profit, professional association which serves as an educational and networking resource for over 200 regional members who practice in the area of estate planning. If you are an Estate Planning professional practicing in the Sacramento area, we encourage you to learn more about our organization and attend our events.

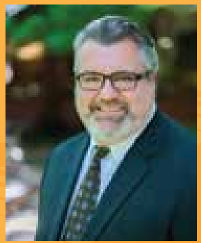
Monthly Meeting

February 28, 2018

Jonathan Canick, Ph.D. - Brown & Toland Physicians
San Francisco, CA
Aging, Cognition and Capacity

Aging is not a disease. Dr. Canick will explain how neuropsychology's use of objective measurement and normative data brings reliability and validity to the evaluation of cognitive capacity, allowing distinctions between normal aging, cognitive impairment and dementia. An assessment of cognitive functioning facilitates conclusions about a person's information processing ability that assist in evaluations of mental capacity and vulnerability to undue influence.

March 28, 2018



Kevin Urbatsch, Esq. - Urbatsch Law Firm P.C.
Pleasant Hill, CA
Recent Developments in Special Needs Planning

Special needs planning has been rapidly changing in the past several years. ABLE Accounts, new federal laws, and SSA stepped up enforcement are just a few things. Our speaker will provide updates on all of these topics and more.

April 25, 2018

Shirley Kovar, Attorney
San Diego, CA
Fixing Ambiguities/Mistakes in Wills/Trusts

Trust and estate litigation frequently arises due to ambiguities or mistakes in the estate planning documents. Shirley will identify the five sources of a transferor's "intent", which courts use to resolve the meaning of an ambiguous instrument. Shirley will also discuss the impact of a recent California Supreme Court case that explains how to remedy a "mistake" in a will.