



in conjunction with

UNIVERSITY OF THE
PACIFIC
McGeorge School of Law

2012 Technical Forum

Thursday, January 26, 2012

7:30 a.m. – 6:00 p.m.

- 7:30 AM **Registration and Continental Breakfast**
- 8:00 AM **Opening Remarks**
- 8:10 AM **Steve Oshins**, *Asset Protection Other than Self-Settled Trusts*
- 10:10 AM **Break**
- 10:25 AM **Howard M. Zaritsky**, *Practical Estate Planning in 2012 and Select Tax-Saving Techniques for Real Clients*
- 12:20 PM **Lunch** – Sponsored by First Northern Bank Asset Management & Trust Department
- 1:20 PM **Howard M. Zaritsky**, *Practical Estate Planning in 2012 and Select Tax-Saving Techniques for Real Clients (continued)*
- 2:30 PM **Q & A with Howard M. Zaritsky**
- 2:45 PM **Break**
- 3:00 PM **Benjamin A. Koplan**, *Obligations of the Trusted Advisor: Addressing Risk in Today's World of Compliance, Transparency and Fiduciary Responsibility*
- 4:00 PM **Robert P. Schweih**s, *Valuation Adjustments for Estate and Gift Tax Purposes*
- 5:00 PM **Closing Remarks**
- 5:15 PM **Wine Reception** – Sponsored by Mechanics Bank Wealth Management

A portion of the Technical Forum proceeds benefit the Sacramento Estate Planning Council Endowed Scholarship Fund at University of the Pacific, McGeorge School of Law.