

2026 ESTATE PLANNING FORUM

Thursday, May 21, 2026

8:00 a.m. - 4:30 p.m.



UNIVERSITY OF THE
PACIFIC
McGeorge School of Law

8:00 - 8:30	Registration and Breakfast
8:30 - 8:40	Opening Remarks: Lynn Swenson - President
8:40 - 9:40	Beth Shapiro Kaufman - "Recent Tax Developments"
9:40 - 9:50	Break
9:50 - 10:50	Stacie Nelson - "Avoiding Roadblocks with Matured Bequests"
10:50 - 11:00	Break
11:00 - 12:00	Justin Miller - "Fiduciary Income Tax Overview - How Trusts and Estates are Taxed"
12:00 - 12:55	Lunch / McGeorge Scholarship Presentation
12:55 - 1:55	Kelly J. Cooksey and Anna K. Soliman - "California's New Virtual Representation Statute"
1:55 - 2:10	Raffle / Break
2:10 - 3:10	Ryan Szczepanik - "Trust and Tax Planning for Business Owners"
3:10 - 3:25	Raffle / Break
3:25 - 4:25	James P. Lamping - "The Post-Death Divorce: Litigating Spousal Fiduciary Breaches and Property Rights Postmortem"
4:25 - 4:30	Closing Remarks: Lynn Swenson - President
4:30 - 5:45	Networking/Mixer/Wine Reception