Monthly Meetings
2023/2024

SACRAMENTO
ESTATE
PLANNING
COUNCIL

Sacramento Estate Planning Council

Celebrating 50 Years with

University of the Pacific McGeorge School of Law

For more information and sponsorship opportunities for the 2024 Estate Planning Forum,
contact Raquel Altavilla at 916-715-5939 or admin@sacepc.org.

Save the Date!

Live and Virtual Forum

Thursday, May 30, 2024

8:00 am – 4:30 pm

The Sacramento Estate Planning Council's Estate Planning 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 Estate Planning Forum – which will be a *live* and *virtual forum* – continues the tradition of bringing a diversity of topics to cover something for every practitioner. Please join us and 150+ of your peers for the 2024 Estate Planning Forum.

This year, the Estate Planning Forum will offer up to 6 hours of credit for general California Bar MCLE purposes and specializations in Taxation Law and Estate Planning, Trust and Probate Law. In addition to credit for MCLE, there will be up to 6 hours of CE available for CFPs, CPAs, CLPFs, and CTFAs.

Sacramento Estate Planning Council

Monthly Meetings

are held at the

Sutter Club - Sacramento Room

1220 Ninth Street
Sacramento, CA 95814

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

Monthly Meetings

Lorem ips

September 27, 2023

Kit Mac Nee, CFP®, CRPC®, AEP® - Morgan Stanley
Los Angeles, CA

Behavioral Finance with NAEPC

Behavorial Finance is the study of how we make decisions about money. We'll look at the work of Amos Tversky and Daniel Kahneman. Many biases guide our choices. Understanding them and how our clients use them to make their choices can help us as professionals communicate clearly to help our clients better accomplish their goals. It is also important for each of us to understand what our biases are to be better able inform ourselves with as much unbiased information as possible. The presentation ends with best practices for professionals in estate planning. Behavorial Finance is the study of how we make decisions about money. We'll look at the work of Amos Tversky and Daniel Kahneman. Many biases guide our choices. Understanding them and how our clients use them to make their choices can help us as professionals communicate clearly to help our clients better accomplish their goals. It is also important for each of us to understand what our biases are to be better able inform ourselves with as much unbiased information as possible. The presentation ends with best practices for professionals in estate planning.

October 25, 2023

Ryan Szczepanik, Senior Wealth Strategies - BNY Mellon Wealth Management
San Francisco, CA

Navigating an Estate Planner's Minefield: Tips to Safeguard Intent and Steer Clear of Trust Disputes

Ryan Szczepanik is a Senior Wealth Strategist at BNY Mellon Wealth Management. He previously practiced trust litigation for several years. Ryan will provide tips and pitfalls to avoid when constructing a client's estate plan, with an eye toward minimizing the likelihood that interested persons will challenge or the court will depart from the client's intentions.

November 15, 2023

Jay D. Adkisson, Managing Partner - Adkission Pitet LLP
Las Vegas, NV

Asset Protection in CA and Creditor Rights Issues with Regards to Trusts

Jay's presentation will focus on asset protection strategies that are viable for California residents and creditor rights issues with regard to spendthrift trusts in California.

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 Meetings

January 24, 2024

Jacob Stein, Managing Partner – Aliant LLP
Encino, CA
Advanced Considerations in Asset Protection

February 28, 2024

TBD

March 27, 2024

Krista Conover, Trust Officer - Silicon Valley Bank
San Mateo, CA

April 24, 2024

John Prokey, Partner - Ramsbacher Prokey Leonard LLP
San Jose, CA