Day One Probate Institute: Probate Administration
Program Chair: Michael J. Longyear, Reed Longyear Malnati Ahrens & West PLLC
CoSponsored by KCBA Real Property & Probate Section
6.75 General CLE Credits APPROVED
Attend Both Programs:
December 8, Probate Institute: Probate Administration AND December 9, Probate Litigation & Ethics
at a discounted price! Combined credits = 1.50 Ethics and 11.75 General CLE Credits Approved
$295 for KCBA Members and $350 for Non-KCBA Members

8:00am – 8:30am Registration Opens; Coffee Service
8:30am – 8:35am Welcome
  Michael J. Longyear, Reed Longyear
  Malnati Ahrens & West

8:35am – 9:05am Probate Basics: Filing the Petition & Appointing the Personal Representative
  Diane L. Wies, Mullavey Prout
  Grenley & Foe LLP

9:05am – 9:35am Marshalling Assets: Identify the Type of Property; Community vs. Separate; Probate vs Non-Probate
  Robert P. Morrison, Law Offices of Robert Morrison

9:35am – 10:00am Securing the Property: Everything from Changing the Locks to Inventory
  Leesa M. Camerota, Guardianship Services of Seattle

10:00am – 10:15am Break
10:15am – 10:45am Appraisal Process:
  Amy Jeanne (“AJ”) Goertz, Goertz & Lambrecht PLLC

10:45am – 11:15am Valuation of Family/Closely Held Businesses
  Lorraine L. Barrick, CPA ASA

11:15am – 11:45am Creditor Claim Process
  Mike J. Longyear, Reed Longyear
  Malnati Ahrens & West

11:45am – 12:00pm Questions & Answers (morning presenters)

12:00pm – 1:00pm Lunch on your own

1:00pm – 1:30pm Taxes: Tax Elections, Income & Estate Taxes:
  TBD

1:30pm – 2:00pm GALS & Special Representatives:
  Appointments & Duties
  Ken M. Kilbreath, Inslée Best
  Doezie & Ryder P.S.

2:00pm – 2:30pm TEDRA and Non-Judicial Agreements
  Scott A.W. Johnson,
  Stokes Lawrence PS

2:30pm – 3:00pm Funding Testamentary Trusts: Formulas, Facts & Property Characteristics
  Ann T. Wilson, Attorney at Law

3:00pm – 3:15pm Break
3:15pm – 3:45pm Fees & Costs of Administration: Factors to Consider & Practice Tips
  Bruce R. Moen, Attorney at Law

3:45pm – 4:15pm Closing the Probate: Declaration of Completion vs. Decree of Distribution
  Carolann O’Brien Storli,
  Johnson Law Group

4:15pm – 4:30pm Resources
  Honorable Richard D. Eadie, Presiding Judge, King County Superior Court

4:30pm – 4:45pm Questions & Answers (afternoon presenters)

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<td>Securities Claims in the Probate &amp; Estate Setting, Carl J. Carlson, Carlson &amp; Dennett, P.S.</td>
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<td>Family Support Awards and Representing the Surviving Spouse, Sandra Bates Gay, Sandra Bates Gay, P.S.</td>
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**Day Two: 8th Annual: Probate Litigation & Ethics**

**Program Chair:** Sheila C. Ridgway, Law Office of Mary Anne Vance and Sheila C. Ridgway, P.S.

5.00 General & 1.50 Ethics CLE Credits APPROVED

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