



PERSONAL ESTATE PLANNING FOR THE 99%

April 23, 2015, 8:25am – 4:30pm

Washington State Convention Center, 7th & Pike, Seattle

**6.50 CLE Credits: 5.75 General and .75 Ethics
Professional Guardian Credits Pending**

AGENDA

- 8:00-8:25am Registration & Coffee Service
- 8:25-8:30am **Welcome, Program Chair**
Michael J. Longyear, Reed Longyear Malnati & Ahrens PLLC
- 8:30-9:15am **Ethical Considerations for Personal and Estate Planning**
Kathleen Wareham, Mediator
Washington Arbitration and Mediation Service (WAMS)
- 9:15-9:45am **Community Property Considerations**
Jenna B. Ichikawa, Stokes Lawrence P.S.
- 9:45-10:15am **Planning Considerations for Nonprobate Assets**
Chad Horner, Curran Law Firm, P.S.
- 10:15-10:30am Break
- 10:30-11:30am **Retirement Accounts**
Judd R. Marten, LeSourd & Patten, P.S.
 - Marital Issues
 - ERISA/Community Property
 - Beneficiary Designations
- 11:30-12:15pm **Planning for Blended Family Issues**
James W. Spencer, Spectra Law PS
- 12:15-1:15pm Lunch on your own

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1:15 - 1:45pm **Durable Powers-of-Attorney for Finances & Property**
Carla Calogero, Reed Longyear Malnati & Ahrens PLLC

1:45-2:15pm **Health Care Planning**
Steven Schindler, Perkins Coie LLP

- Health Care Directives
- Powers of Attorney for Health Care
- Other Health Care Planning Options

2:15-2:45pm **Estate Income Tax Issues and Washington State Estate Tax**
Alexandra (Xan) Gerson, Helsell Fetterman LLP

2:45-3:00pm Break

3:00-4:00pm **Drafting Wills for Families: Including Guardianships & Trusts for Minors and Special Needs**
Christopher M. Henderson, Dussault Law Group

4:00-4:30pm **Question and Answer Session Panel**
Carla Calogero, Reed Longyear Malnati & Ahrens PLLC
Alexandra (Xan) Gerson, Helsell Fetterman LLP
Christopher M. Henderson, Dussault Law Group
Steven Schindler, Perkins Coie LLP

4:30pm Evaluations and Adjournment



**REGISTRATION FORM
PERSONAL ESTATE PLANNING FOR THE 99%**

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4 WAYS TO REGISTER!

WEB www.kcba.org/CLE
MAIL KCBA CLE, 1200 Fifth Avenue, Suite 700, Seattle, WA 98101
CALL CLE Department, 206.267.7008
EMAIL Complete the following and send to cle@kcba.org

REGISTRATION FEES		
Electronic Course Materials: The course materials will be distributed in an electronic format – searchable PDF files that you can download to your computer.		
ATTORNEYS	BEFORE 5:00pm, April 21	AFTER 5:00pm, April 21
___ KCBA Member	\$185	\$195
___ NON-KCBA Member	\$225	\$240
___ KCBA Member New Admittee (adm. 2014)	\$ 95	\$105
___ NON-KCBA Member New Admittee (adm. 2014)	\$125	\$135
NOT AN ATTORNEY		
___ Non-Lawyer Employees of KCBA Member	\$160	\$170
___ General Public/Not an Attorney	\$180	\$195

If you must cancel, tuition will be refunded less a \$40 administrative fee, so long as cancellation is received in writing CLE@kcba.org by 5:00pm, April 21, 2015. After this date, no refunds will be permitted. However, substitute attendees are welcome. Please advise KCBA in advance of any condition that may impact your participation at the seminar so we may arrange appropriate and comfortable accommodation in time for the program.

State Bar No: _____ Full Name _____

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METHOD OF PAYMENT FOR PERSONAL ESTATE PLANNING FOR THE 99%

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