



# *11th Annual* **Probate Administration**

Washington State Convention Center, 7<sup>th</sup> & Pike, Seattle

**November 19, 2015**

**6.25 General & .50 Ethics CLE Credits; 6.75 Total CLE Credits**

This comprehensive course covers what you need to know from opening a probate to closing a probate and everything in between.

- This fast-paced agenda is a “nuts and bolts” program for new attorneys or attorneys who are new to probate administration and for attorneys who would like a refresher course.
- The focus is on a variety of probate issues with practical tips and guidelines for probate administration.

## **AGENDA**

- |               |   |
|---------------|---|
| 8:00-8:25am   | Registration and Coffee Service   |
| 8:25-8:30am   | <b>Welcome and Overview by Program Chairs</b><br>Michael J. Longyear, Reed Longyear Malnati & Ahrens, PLLC<br>Ken Kilbreath, Wells Fargo Private Bank |
| 8:30-9:00am   | <b>Appointing the Personal Representative or Administrator</b><br>Diane L. Wies, Mullavey Prout Grenley & Foe, LLP                                    |
| 9:00-9:15am   | <b>Settling Small Estates</b><br>Chad Horner, Curran Law Firm, P.S.   |
| 9:15-9:45am   | <b>Tips for Identifying Community Property Assets</b><br>Jenna Ichikawa, Stokes Lawrence, P.S.  |
| 9:45-10:15am  | <b>Identifying and Administering Nonprobate Assets</b><br>Chad Horner, Curran Law Firm, P.S.  |
| 10:15-10:30am | Break   |

- 10:30-11:00am**      **Securing Estate Assets**  
Amy J. Goertz, Elder Law Group, PLLC
- 11:00-11:15am**      **Brokerage Accounts, Transferring Stocks**  
Sarah L. Moen, Moen Law Offices, P.S.
- 11:15: 12:00pm**      **Creditor Claim Process and Procedure**  
Mark C. Vohr, Ohana Fiduciary Corporation
- 12:00-1:00pm**      **Lunch on your own**
- 1:00-1:30pm**      **Testamentary Trust Funding & Estate Tax Elections**  
Tony McCormick Perkins Coie, LLP
- 1:30-2:00pm**      **Estate Accountings**  
Rachel L. Merrill, Hanson Baker Ludlow Drumheller, P.S.
- 2:00-2:30pm**      **Estate Income Tax Issues**  
Eric Stoll, Malone Law Group
- 2:30-3:00pm**      **TEDRA**  
Jason W. Burnett, Reed Longyear Malnati & Ahrens, PLLC
- 3:00-3:15pm**      Break
- 3:15-3:45pm**      **Fees**  
Hon. Eric B. Watness, JAMS, King County Superior Court (Ret.)
- 3:45-4:00pm**      **Probate GAL**  
Eric E. Brunstrom, Tarutis and Brunstrom, P.S
- 4:00- 4:15pm**      **Closing Estates**  
Michelle Graunke, Attorney at Law
- 4:15-4:45pm**      **Question & Answer Session Panel**
- 4:45pm**      Evaluations and Adjourn

**REGISTRATION FORM: Probate Administration**

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**5 WAYS TO REGISTER!**

EMAIL Complete the following information and send to [cle@kcba.org](mailto:cle@kcba.org)  
 WEB <http://www.kcba.org/cle/>  
 CALL CLE Department 206.267.7067  
 MAIL KCBA CLE, 1200 Fifth Avenue, Suite 700, Seattle, WA 98101  
 FAX ATTN: CLE Dept. 206.267.7099

REGISTRATION FEES, Probate Administration	PRIORITY BY 5:00PM, November 17	STANDARD AFTER 5:00PM, November 17
<b>Electronic Course Materials:</b> Course materials will be distributed to registrants in an electronic format – searchable PDF files that you can download to your computer.		
<b>ATTORNEY</b>		
___ KCBA Guardianship & Elder Law Section MEMBERS	\$175	\$180
___ KCBA MEMBERS	\$195	\$200
___ NON-KCBA MEMBERS	\$239	\$249
___ New Attorney, KCBA Member, Admitted 2014/2015	\$99	\$105
___ New Attorney, Non-KCBA Member, Admitted 2014/2015	\$125	\$135
<b>NOT AN ATTORNEY</b>		
___ Non-Lawyer Employees of KCBA Member	\$175	\$180
___ General Public/Not an Attorney	\$199	\$205

State Bar No: \_\_\_\_\_  
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 Mr./Ms. First Name Last Name

\_\_\_\_\_  
 Firm/Organization

\_\_\_\_\_  
 Address City State Zip Code

\_\_\_\_\_  
 Telephone Number and Email address (confirmation sent via email)

Method of Payment for Probate Administration: \_\_\_ Check Enclosed (check # \_\_\_\_\_ payable to: KCBA)

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**IMPORTANT NOTICES:** Please advise KCBA two weeks in advance of any condition that may impact your participation at the seminar so we may ensure appropriate and comfortable accommodation. If you must cancel, tuition will be refunded less \$40, if cancellation is received in writing ([cle@kcba.org](mailto:cle@kcba.org) or fax, 206-267-7099) by 5:00pm, November 17, 2015. After this date, no refunds will be permitted; however, substitute attendees are welcome.