



PERSONAL ESTATE PLANNING FOR THE 99%

April 12, 2017

Washington State Convention Center, 7th & Pike, Seattle
6.50 CLE Credits: 5.75 Law & Legal and .75 Ethics

AGENDA

- 8:00-8:25am Registration & Coffee Service
- 8:25-8:30am Welcome and Overview, 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**
Dawn S. Spratley, Lane Powell PC
- 9:45-10:15am Planning Considerations for Nonprobate Assets**
Chad Horner, Curran Law Firm, P.S.
- 10:15-10:30am Break
- 10:30-11:15am Retirement Accounts**
Jenna Ichikawa, Stokes Lawrence P.S.
 - Marital Issues
 - ERISA/Community Property
 - Beneficiary Designations
- 11:15-12:00pm Planning for Blended Family Issues**
Anna M. Cashman, Kutscher Hereford Bertram Burkart PLLC
- 12:00-1:00pm Lunch on your own
- 1:00-1:15pm Digital Assets**
Anton B. Cauthorn, Reed Longyear Malnati & Ahrens PLLC
- 1:15-1:45pm Durable Powers-of-Attorney for Finances & Property**
Anton B. Cauthorn, Reed Longyear Malnati & Ahrens PLLC

Agenda (cont'd)

- 1:45-2:15pm** **Health Care Planning**
Steven Schindler, Perkins Coie LLP
- 2:15-2:45pm** **Estate Income Tax Issues and Washington State Estate Tax**
Tony Ramsey, Karr Tuttle Campbell
- 2:45-3:00pm Break
- 3:00-4:30pm** **Interactive Session:**
Drafting Wills for Families: Including Guardianships &
Trusts for Minors and Special Needs
- Sandy Cairns, Hanson Baker Ludlow & Drumheller P S
Anton B. Cauthorn, Reed Longyear Malnati & Ahrens PLLC
Chad Horner, Curran Law Firm, P.S.
Stephen R. King, Somers Tamblyn King Isenhour Bleck PLLC
Anthony J. McCormick, Perkins Coie LLP
Tony Ramsey, Karr Tuttle Campbell
Dawn S. Spratley, Lane Powell PC
Alison J. Warden, Lasher Holzapfel Sperry & Ebberson, PLLC

Document Drafting Workshop

Work in small groups to review drafting standards and formats for wills and trusts
The faculty will provide examples of terms and issues to address.

- 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, Personal Estate Planning		
Electronic Course Materials: Course materials will be distributed to registrants in an electronic format – searchable PDF files that you can download to your computer.	Registration Fee	
ATTORNEY		
<input type="checkbox"/> KCBA RPPT/Guardianship & Elder Law Section Member	\$185	
<input type="checkbox"/> KCBA Members	\$195	
<input type="checkbox"/> NON-KCBA Members	\$239	
<input type="checkbox"/> New Attorney, KCBA Member, Admitted 2016	\$99	
<input type="checkbox"/> New Attorney, Non-KCBA Member, Admitted 2016	\$125	
<input type="checkbox"/> Retired Attorney, KCBA Member	\$25	
<input type="checkbox"/> Retired Attorney, Non-KCBA Member	\$50	
NOT AN ATTORNEY		
<input type="checkbox"/> Non-Lawyer Employees of KCBA Member	\$175	
<input type="checkbox"/> General Public/Not an Attorney	\$199	

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METHOD OF PAYMENT FOR PERSONAL ESTATE PLANNING FOR THE 99%

Check # _____ enclosed, payable to: KCBA;

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Please Note: 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 7, 2017. 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.

