



## CONFERENCE SCHEDULE

May 31 – June 3, 2023

Hyatt Regency San Francisco, Embarcadero

Total Conference Credit Hours: 15 | 12.5 MCLE

Total Exclusive Exhibit Hours:

### Wednesday, May 31

#### Pre-Conference Intensives

TIME	CEU   MCLE	ACTIVITY	LOCATION
8:00AM to 6:00PM		Conference Registration Desk Open	
9:00AM to 3:00PM		PFAC State Board Meeting	
12:30PM to 3:30PM	<b>3.0</b>	<b>Pre-Conference Intensive A</b> <b>An Accounting Preparation Primer AND the Court's View of the Perfect Accounting</b> Hon. Judge Roger Lund, Superior Court of California, County of Ventura; Kelly Berlinger Esq., Ventura County Superior Court; Scott MacDonald, Merrill Lynch Special Needs Team <b>ESTATE/TRUST</b>	<i>Garden Room</i>  <b>VIDEO ROOM</b>
9:00AM to Noon; 1:00PM to 3:00PM	<b>5.0</b>	<b>Pre-Conference Intensive B</b> <b>Special Needs Trust Administration: Reviewing the Fundamentals and Avoiding Common Pitfalls</b> Kevin Urbatsch, Urbatsch Law; Herb Thomas, Kairos Fiduciary Services; Ann Koerner, National Care Advisors; Lisa Soloway, Soloway Fiduciaries; Frank Acuna, Acuna Regli LLP <b>TRUST</b>	<i>Bayview B</i>  <b>VIDEO ROOM</b>
9:00AM to 1:00PM	<b>4.0</b>	<b>Pre-Conference Intensive C</b> <b>California Exam Review Course</b> Russ Marshall, NMG, CLPF, Marshall Fiduciary Services	<i>Bayview A</i>
4:30PM to 5:30PM		<b>Sponsor and Exhibitor Appreciation Reception</b>	
6:00PM to 8:00PM		<b>Opening Welcome Reception - Exhibit Hall</b>	

## Thursday, June 1

### Full Conference Day 1

Credit Hours: 7.5

MCLE Hours: 5.0

TIME	CEU   MCLE	ACTIVITY	LOCATION
6:30AM to 4:30PM		Conference Registration Desk Open	
7:00AM to 4:30PM		<i>PFAC Connect</i> Open (Exhibit Hall)	
7:00AM to 8:15AM		Breakfast	
7:15AM to 8:15AM <b>Early Bird Track</b>	<b>1.0 Person CEU/MCLE</b>	<b>EB1 Hiring and Working with Caregivers: Risks, Liabilities and Solutions</b> Robert Nuddleman, Esq., Nuddleman Law Firm	<i>Garden Room</i>  <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Estate CEU</b>	<b>EB 2 Safe Liquidation Of Used Vehicles From An Estate</b> Natalie Armenta, Aaero Sweet Corp.	<i>Bayview A</i>
	<b>1.0 Ethics CEU/MCLE</b>	<b>EB 3 Working with Asian American Clients</b> Joseph Lee, Esq., Chang and Lee Law	<i>Bayview B</i>  <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
8:30AM to 10:15AM	<b>1.5</b>	<b>Opening General Session</b> <b>Housekeeping and Opening Remarks</b> <b>Your Leadership Legacy: Becoming the Leader You Were Meant To Be</b> Lt. Colonel Oakland McCulloch	<i>Concourse</i>  <b>VIDEO ROOM</b>
10:30AM to Noon <b>Track A</b>	<b>1.5 Trust CEU/MCLE</b>	<b>A1 Digital Assets Killed The Paper Trail: A Primer On Administering Digital Assets</b> Jaime Herren, Esq. and Robert Barton, Esq., Holland & Knight LLP	<i>Garden Room</i>  <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.5 Person CEU/MCLE</b>	<b>A2 Supportive Decision Making, Beyond The Buzzword Into A Construct For Its Application In Probate Conservatorships</b> Lauriann Wright, Esq., Wright Kim Douglass ALC; Mary Winners, About Senior Solutions; Dr. Sarah Mourra, UCLA David Geffen School of Medicine	<i>Seacliff A/B</i>
	<b>1.5 Practice Management CEU/MCLE</b>	<b>A3 Your Day In Court! Being Prepared For Litigation And Testifying</b> Debby Doitch, Esq., KJM Law; Hon. Judge Mary Thornton House (Ret.), ARC; Jill Judson, CLPF, CSC Fiduciaries Inc.	<i>Regency</i>

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	<b>1.5 Practice Management CEU</b>	<b>A4 Cyber Security – A Changing World</b> Chris Lee, Briane Grey, Paul Keener, City National Bank; Michael Sohn, Federal Bureau of Investigation	<i>Bayview B</i>  <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.5 Practice Management CEU/MCLE</b>	<b>A5 How To Best Manage Client And Court Needs And Expectations In The Changing California Fiduciary Real Estate Market</b> Andrew de Vries, CLPF, MBA; Minna Fernan, Esq., Minna Fernan Law; Brianna Mannion, Esq., City and County of San Francisco Legal Division-Office of the Public Administrator/Public Guardian	<i>Bayview A</i>
	<b>1.5 Estate CEU</b>	<b>A6 Back to the Future: When Cash Became King Again</b> Jeremy Lau, Prudent Investors	<i>Seacliff C/D</i>
Noon to 1:00PM		<i>PFAC Connect (Exhibit Hall)</i>	
1:00PM to 2:15PM	<b>1.0 CEU/MCLE</b>	<b>Lunch Time General Session</b> <b>PPFs in Court – The Judges Perspective</b> Hon. Judge Glen Reiser (Ret.), JAMS; Hon. Judge Sandra Bean, Alameda County Superior Court; Hon. Judge Ana Maria Luna, Los Angeles County Superior Court	<i>Concourse</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
2:15PM to 2:45PM		<i>PFAC Connect (Exhibit Hall)</i>	
2:45PM to 4:15PM <b>Track B</b>	<b>1.5 Trust CEU/MCLE</b>	<b>B1 Timing And Tax Issues For Finalizing Estates And Trusts</b> John Grimes, Grimes And Company CPAs	<i>Seacliff A/B</i>
	<b>1.5 Person CEU/MCLE</b>	<b>B2 Are You Afraid Of Conservatorships Of The Person? Risks, Exposures And Solutions</b> Brenda Shorkend, Shorkend Care Management; Hon. Judge Ana Maria Luna, Los Angeles Superior Court; David Kim, Esq., Wright Kim Douglas, ALC; Sam Gopinathan, New Wave Home Care	<i>Garden</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.5 Trust CEU/MCLE</b>	<b>B3 Dulling The Razor’s Edge: Understanding, Identifying, And Navigating The Duty Of Impartiality</b> Bryan Phipps and Jarom B. Phipps, Buchalter (Ethics)	<i>Bayview B</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.5 Estate CEU/MCLE</b>	<b>B4 Money, Marriage, Debt &amp; Death</b> Lynda Chung, Esq., Valensi Rose PLC	<i>Seacliff C/D</i>
	<b>1.5 Person CEU/MCLE</b>	<b>B5 Care Facility Disputes: The Issues And Possible Solutions</b> Frank Acuna, Esq. and Tracy S. Regli, Esq., Acuna Regli LLP; Juliet Hahklotubbe, LMFT; Lisa Soloway, CLPF, Soloway Fiduciaries Inc.	<i>Regency</i>
	<b>1.5 Practice Management CEU</b>	<b>B6 Hooked! When The Best In Us Leads To The Worst For Us: How Scammers Use Personal Values To Trap The Good-Hearted</b> Todd Finnemore, PsyD; Donata Mikulik, Senior Advocacy Services	<i>Bayview A</i>

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4:15PM to 6:00P M		<b>Meet the Exhibitors and “Taste of PFAC” Wine Tasting</b> <i>PFAC Connect</i> (Exhibit Hall)	
5:00PM to 5:45PM		<b>New Member Meeting</b>	<i>Regency Room</i>
5:00PM to 6:00P M		Past Presidents Meeting	
7:30PM to 9:00PM	<b>1.0</b> CEU	PFAC Movie Night <b>The Alzheimer’s Project: Caregivers</b>	
6:30PM to 7:30PM		PFAC Thursday Night Bay Cruise – BUS PICKUP	<i>Market Foyer Curb</i>
7:30PM to 9:00PM		PFAC Thursday Night Bay Cruise	

## Friday, June 2

### Full Conference Day 2

Credit Hours: 4.5

MCLE: 4.5

TIME	CEU   MCLE	ACTIVITY	LOCATION
6:30AM to 4:30PM		Conference Registration Desk Open	
7:00AM to 4:00PM		<i>PFAC Connect</i> Open (Exhibit Hall)	
7:00AM to 8:30AM		Continental Breakfast / PFAC Café	
7:30AM to 8:30AM <b>Early Bird Track</b>	<b>1.0 Trust</b> CE/MCLE	<b>EB 4 Guardians Of The (Trust) Galaxy: Trust Protectors Defined, Explained And Explored</b> Matthew Owens, Esq. and Jenny Hill Bratt, Esq., Withers Bergman LLP	<i>Bayview B</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Ethics</b> CEU	<b>EB 5 When It Hits The Fan: Consequences For Breaching Fiduciary Duties, And How To Avoid Doing It</b> Paul Epstein, Esq., Acuna Regli LLP; Brian Sakarata, Soloway Fiduciaries Inc.	<i>Garden</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Person</b> CEU	<b>EB 6 Is It Care?</b> Leandra Sims, The Kensington Sierra Madre	<i>Regency</i>
8:30AM to 9:30AM		<i>PFAC Connect</i> (Exhibit Hall)	
9:30AM to 11:00AM <b>Track C</b>	<b>1.5 Person</b> CEU/MCLE	<b>C1 Litigation Involving Real Estate In Probate, Trust &amp; Conservatorships – What To Do When It Happens, How To Minimize Risk, How To Resolve It</b> Todd Wohl, Braun International Real Estate; Frank Cialone, Esq., Shartsis Friese LLP; Troy Martin, Esq., Lurie Zepeda Schmalz and Hogan; Michael Kasolas, Michael G. Kasolas Inc.	<i>Bayview A</i>
	<b>1.5 Person</b> CEU	<b>C2 Beyond Task-Based Care: Person-Centered Care for Clients</b> Dr. Shadi Gholizadeh, The Key	<i>Regency</i>
	<b>1.5 Person</b> CEU/MCLE	<b>C3 Contested Conservatorship &amp; Handling Conservatee's Care, Visitation &amp; Home</b> Monica Goel, Esq., TLD Law; Mary Makler, CLPF; Jennifer Bennett, The Key; Ruben Martinez, Fiduciary Real Estate Services	<i>Seacliff A/B</i>
	<b>1.5 Trust</b> CEU/MCLE	<b>C4 Evaluating And Defending Challenging Special Needs Trust Disbursement Requests</b> Kevin Urbatsch, Esq., Urbatsch Law	<i>Garden</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>

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	<b>1.5 Trust</b> CEU/MCLE	<b>C5 Best Practices In A Fiduciary Led Real Estate Transaction</b> Maya Bovshow and Paul Hargraves, Trust Properties USA; Alexandra Goff, Esq., Goff Legal PC; Jorge Gutierrez, USA National Title	<i>Seacliff C/D</i>
	<b>1.5 Practice Management</b> CEUMCLE	<b>C6 What Probate Judges Need, Want &amp; Love</b> Philip Barbaro, Esq.; Hon. Judge Mary Thornton House (Ret.), ARC	<i>Bayview B</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
11:00AM to 12:30PM		<i>PFAC Connect (Exhibit Hall)</i>	
12:30PM to 1:45PM	<b>1.0 Practice Management</b> CEU/MCLE	<b>Lunchtime General Session Fiduciary And Attorney Fee Declarations</b> Hon. Roger L. Lund, Ventura County Superior Court; Hon. David Belz, Orange County Superior Court; Kelly Berlinger, Esq., Ventura County Superior Court; Lauriann Wright, Esq., Wright Kim Douglas ALC	<i>Concourse</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
1:45PM to 3:15PM		<i>PFAC Connect (Exhibit Hall)</i>	
3:15PM to 4:15PM <b>Track D</b>	<b>1.0 Trust</b> CEU/MCLE	<b>D1 Successor Trustee Issues: Taking Over A Disaster</b> Peter Wall, TrueLink Financial; Herb Thomas, CLPF, Kairos Fiduciary; Lisa Soloway, CLPF, Soloway Fiduciaries, Inc.	<i>Garden</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Trust</b> CEU/MCLE	<b>D2 Understanding Community Services For Persons With Developmental Disabilities In California</b> Stephen Dale, JD, LL.M, Golden State Pooled Trust; Teresa Anderson, JD, The Arc and United Cerebral Palsy California Collaboration	<i>Bayview B</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Estate</b> CEU	<b>D3 Current And Upcoming Laws Affecting Real Estate Assets</b> Vinny Jain, Ingenious Asset Group; J. Andrew Douglas, Esq., Wright Kim Douglas ALC	<i>Seacliff A/B</i>
	<b>1.0 Practice Management</b> CEU	<b>D4 Confessions Of Succession - How A Sole Proprietor And A Partnership Made It Happen</b> Bonnie Burdett, CLPF, Prime Fiduciary Services; Franza Giffen, CLPF, Giffen Fiduciary Services	<i>Regency</i>
	<b>1.0 Person</b> CEU/MCLE	<b>D5 From "Where Did I Put My Keys?" to "What Keys?" Signs that Your Clients May Be Losing Capacity</b> Dana Chidekel, Board Certified Neuropsychologist	<i>Bayview A</i>
	<b>1.0 Ethics</b> CEU	<b>D6 Let's Explore End-of-Life Doulas</b> Sue Wetzel; Linda Suhr, Autumn Of Life Planning; Sarah Hill, East Bay Doula For The Dying	<i>Seacliff C/D</i>

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3:15PM to 4:45PM		Exhibitor Move Out	
<b>4:15PM to 7:00PM</b>		<b>Open Time</b>	
6:30PM to 7:30PM		Dinner Reception	<i>Mezzanine</i>
7:30PM to 10:00PM		Dinner Celebration	<i>Grand Ballroom</i>

## Saturday, June 3

### Full Conference Day 3

Credit Hours: 3.0

MCLE Hours: 3.0

TIME	CEU   MCLE	ACTIVITY	LOCATION
7:15AM to 2:00PM		Conference Registration Desk Open	
7:30AM to 8:45AM		Continental Breakfast / PFAC Café	
8:45AM to 10:45AM	<b>2.0 ETHICS</b> CE/MCLE	<b>Closing General Session</b> <b>Rules Of Engagement: When You're The Only Ethical Adult In The Room</b> Liza de Vries, Esq., de Vries Law Firm; Robyn Brook Christo, Esq. Epstein Holtzapple Christo LLP	<i>Grand Ballroom</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
10:45AM to 11:00AM		PFAC Café/Break	
11:00AM to Noon <b>Track E</b>	<b>1.0 Estate</b> CEU/MCLE	<b>E1 Case and Statutory Updates In Estate, Trust And Probate Law</b> Catherine Swafford, Esq., Michael S. Brophy, Esq., Craig S. Weinstein, Esq., Withers Berman LLP	<i>Regency</i>
	<b>1.0 Practice Management</b> CEU	<b>E2 Court Accountings Are Easy!</b> Martin Harris, Harris Fiduciary Accounting	<i>Bayview B</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Estate</b> CEU/MCLE	<b>E3 Top 10 Real Estate Issues Fiduciaries Miss</b> Teresa Gorman, Esq., Ruben Martinez, Logan Martinez, Fiduciary Real Estate Services	<i>Bayview A</i>
	<b>1.0 Estate</b> CEU/MCLE	<b>E4 Jumpstart Your First Trust Administration: Stuff No One Explains, Explained!</b> Lisa Soloway, CLPF, Soloway Fiduciary Services; Tracy Regli, Esq., Acuna Regli LLP	<i>Seacliff A/B</i>
	<b>1.0 Person</b> CEU	<b>E5 Lifetime Planning For Your Special Needs Loved One</b> Kerrie Lloyd, ChSNCA, Prudent Investors	<i>Garden</i> <b>VIDEO ROOM</b> <i>This session will be videotaped and part of the Registration PLUS Video Package</i>
	<b>1.0 Trust</b> CEU/MCLE	<b>E6 Making HEMS Human</b> Peter Wall, Truelink Financial; Herb Thomas, CLPF, Kairos Fiduciary Services	<i>Seacliff A/D</i>
Noon		Conference End	

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