



CONFERENCE SCHEDULE

May 7-10, 2025

Disneyland Hotel, Anaheim

Total Conference Credit Hours: 15

Total Conference MCLE Hours: 14

Total Exclusive Exhibit Hours: 7

Wednesday, May 7

Pre-Conference Intensives

DEDICATED EXHIBIT HOURS

TIME	CEU MCLE	ACTIVITY	LOCATION
8:00AM to 6:00PM		Conference Registration Desk Open	
9:00AM to 3:00PM		PFAC State Board Meeting	
9:00AM to 3:00PM	5.0	Pre-Conference Intensive A <i>Starting A Professional Fiduciary Practice</i>	Magic Kingdom Ballroom 2
9:00AM to 3:00PM	5.0	Pre-Conference Intensive B <i>Growing A Professional Fiduciary Practice</i>	Magic Kingdom Ballroom 3
9:00AM to 3:00PM	3.0	Pre-Conference Intensive C <i>Firearm Safety Training with Certificate to Transport</i> Kim McGhee, Esq., Law Offices of Black & McGhee; Paul Hynes, Aspiriant; American Shooters	Magic Kingdom Ballroom 1
9:00AM to Noon	3.0	Pre-Conference Intensive D <i>California Exam Review Course</i> Russ Marshall, CLPF	Magic Kingdom Ballroom 4
4:30PM to 5:30PM		Sponsor and Exhibitor Appreciation Reception	
6:00PM to 8:00PM		Opening Welcome Reception - Exhibit Hall	

Thursday, May 8

Full Conference Day 1

Credit Hours: 7.5

MCLE Hours: 6.5

TIME	CEU MCLE	ACTIVITY	LOCATION
6:30AM to 4:30PM		Conference Registration Desk Open	Magic Kingdom Ballroom Foyer
7:00AM to 4:30PM		<i>PFAC Connect</i> Open (Exhibit Hall)	Magic Kingdom Exhibit Hall
7:00AM to 8:15AM		Breakfast	Magic Kingdom Exhibit Hall
7:15AM to 8:15AM Early Bird Track	1.0 1.0	EB1 <i>The Role of the Fiduciary in Trust Mediation - 2025</i> Hon. Judge Glen Reiser (Ret.), JAMS	Magic Kingdom Ballroom 3 This session will be recorded
	1.0 1.0	EB 2 <i>Intellectual And Developmental Disabilities: Sharpening Our Cultural Competency</i> Joseph H. Lee, Chang & Lee Law Firm; Brenda Sorkend, Shorkend Care Management; Jeanne Vosloo, Pais Montgomery Fiduciary CULTURAL COMPETENCY	Magic Kingdom Ballroom 2 This session will be recorded
	1.0 1.0	EB 3 <i>Gifts With Purpose: Decoding The Types Of Testamentary Gifts And Their Consequences</i> Marc Stern and Julia R. Haye, Greenberg & Glusker LLP	Magic Kingdom Ballroom 1
8:30AM to 10:15AM	1..5 1.5	Opening General Session Housekeeping and Opening Remarks Turn Conflict Into Harmony – Megan Hunter, High Conflict Institute ETHICS	Magic Kingdom Grand Ballroom This session will be recorded
10:30AM to Noon Track A	1.5 1.5	A1 <i>Love & Marriage, Conservatorships & Dissolutions</i> Hon. Judge Ana Maria Luna, Superior Court of California, Los Angeles County, Hon Judge Mitchell L. Beckloff (Ret.), Signature Resolutions; Sarah Broomer, Ruttenberg Cutler Broomer LLP; Susannah (Shani) Braffman Amen, Elkins Kalt Weintraub Reuben Gartside, LLP	Magic Kingdom Ballroom 2 This session will be recorded
	1.5 1.5	A2 <i>Private Practice – Navigating Business Interests As A Fiduciary</i> Kelly Dankbar, Lily M. Harris, Josiah M. Prendergast, Weintraub Tobin	Magic Kingdom Ballroom 3 This session will be recorded
	1.5 1.5	A3 <i>Unraveling Consent: Issues of Capacity and Undue Influence in Contested Trusts & Estates</i> Dr. Dana Chidekel, Neuropsychologist; Scott Rahn, RMO LLP	Magic Kingdom Ballroom 1

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	1.5 1.5	A4 To Sell Or Not To Sell: 2024 New Real Property Sale Commission Rules: When Is It Time To Sell The Conservatee's Residence And Should The Seller Pay Buyer's Commission? Hon. Judge Craig Karlan (Ret.), ADR Services; David Kim, Wright Kim Douglas; Carmen Alberio (Ret.), Los Angeles County Superior Court Supervising Probate Attorney; Brian Joy, Berkshire Hathaway Home Services California Properties	Magic Kingdom Ballroom 4
	1.5 1.5	A5 The Layering Of Rights – Conservatorship, Supported Decision-Making And Preparing For What's To Come Hon. Judge Mary Thornton House (Ret.), ARC; Hon. Judge Kim Hubbard (Ret.); Debby Doitch, KJMLAW Partners PLC	Meeting Room F/G
	1.5 0.0	A6 Understanding Dementia: Enhancing Care And Quality Of Life Kathy Nelson & Isabella Riggs, Visiting Angels	Meeting Room H/I
Noon to 1:00PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
1:00PM to 2:15PM	1.0 1.0	Lunch Time General Session A View From The Bench – Planning & Investment Management Hon. Judge Roger Lund, Superior Court of California, Ventura County; Hon. Judge Ana Maria Luna, Superior Court of California, Los Angeles County; Paul Bartschi and Donovan Filpi, Merrill Lynch Special Needs Team	Magic Kingdom Grand Ballroom This session will be recorded
2:15PM to 2:45PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
2:45PM to 4:15PM Track B	1.5 1.5	B1 Keeping Up With Changes To Public Benefits Sheri Sudweeks and Leslie Yarnes Sugai, Sugai & Sudweeks LLP	Magic Kingdom Ballroom 2 This session will be recorded
	1.5 1.5	B2 Tee-ing Up For Mediation: Pre and Post Mediation Considerations Hon. Judge Roger Lund, Superior Court of California, Ventura County; Hon. Judge Glen Reiser (Ret.), JAMS; Hon. Judge Ana Maria Luna, California Superior Court, Los Angeles County; Kelly Murphy Berlingeri, Superior Court of California, Ventura County	Magic Kingdom Ballroom 3 This session will be recorded
	1.5 1.5	B3 Effective Case Vetting – To Take The Case Or Pass Douglas Housman, Law Offices of Cain, Cain & Housman; Meredith Taylor, IMT Associates	Magic Kingdom Ballroom 1
	1.5 1.5	B4 Employment Policies & Procedures Every Fiduciary (and their Clients) Should Have Robert Nuddleman, Nuddleman Law Firm P.C.	Magic Kingdom Ballroom 4
	1.5 1.5	B5 Our Fiduciary Duty: Protecting Elders From Financial Exploitation Jeremy Lau and Jared Ong, Prudent Investors	Meeting Room F/G
	1.5 0.0	B6 Understanding The Fiduciary Advantage: Why Suitability Isn't Enough For Effective Beneficiary Investment Management Jon Henderson, Echo45 Advisors	Meeting Room H/I

4:15PM to 6:00PM		Meet the Exhibitors and “Taste of PFAC” Wine Tasting <i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
5:00PM to 5:45PM		New Member Meeting	Meeting Room F/G
5:00PM to 6:00PM		Past Presidents Meeting	Meeting Room H/I
6:00PM to 7:00PM		Fiduciary Academy Student Reception	Magic Kingdom Ballroom 2
7:30PM to 9:00PM	1.0 0.0	PFAC Movie Night <i>Still Alice</i>	Magic Kingdom Grand Ballroom

Friday, May 9

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	Magic Kingdom Ballroom Foyer
7:00AM to 4:00PM		<i>PFAC Connect</i> Open (Exhibit Hall)	Magic Kingdom Exhibit Hall
7:00AM to 8:30AM		Breakfast / <i>PFAC Café</i>	Magic Kingdom Exhibit Hall
7:30AM to 8:30AM Early Bird Track	1.0 1.0	EB 4 <i>Tax Issues Fiduciaries Should Know</i> Philip Wolf and Steven Walker, Walker Law	Magic Kingdom Ballroom 2 This session will be recorded
	1.0 1.0	EB 5 <i>Emotional Issues Of The Conserved</i> Dr. Jon Bathori, Licensed Clinical Psychologist	Magic Kingdom Ballroom 3 This session will be recorded
	1.0 1.0	EB 6 <i>Case Study Exploring The Limitations Of The Exempt Seller In The Sale Of Real Property</i> Teresa Gorman and Ruben Martinez, Fiduciary Real Estate Services	Magic Kingdom Ballroom 1
8:30AM to 9:30AM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
9:30AM to 11:00 Track C	1.5 1.5	C1 <i>Fiduciary Planning to Prevent Litigation: 30 Strategies In Honor of PFAC's 30th Anniversary</i> Hon. Judge Roger Lund, California Superior Court Ventura County; Kelly Berlingeri, California Superior Court Ventura County; Susan Ghormley and LeAndra McCormick, IE FIDS, Inc.	Magic Kingdom Ballroom 2 This session will be recorded
	1.5 1.5	C2 <i>Ethical Considerations for Private Fiduciaries: Safeguarding Client Interests And Navigating Professional Boundaries</i> Monica Goel, TLD Law; Kristin Yokomoto, Baker & Hostetler LLP ETHICS	Magic Kingdom Ballroom 3 This session will be recorded
	1.5 1.5	C3 <i>Proposition 19 And Real Property Transfers: What's A Fiduciary To Do?</i> Frank Acuna, Acuna Regli LLP	Magic Kingdom Ballroom 1
	1.5 1.5	C4 <i>Case Studies On Fiduciary Breaches</i> Jeremiah Raxter, RAXTER LAW	Magic Kingdom Ballroom 4
	1.5 1.5	C5 <i>To Serve Or Not To Serve</i> Hon. Judge Ana Maria Luna, Superior Court of California, Los Angeles County; Sarah Broomer, Ruttenberg Cutler Broomer LLP; Adam L. Streltzer, Adam L. Streltzer, Attorney At Law	Meeting Room F/G
	1.5 1.5	C6 <i>2025: Are Trusts Dead? AB 2016</i> Amanda Sinclair, Hyden Zakheim, LLP	Meeting Room H/I

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11:00AM to 12:30PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
12:30PM to 1:45PM	1.0 1.0	Lunch Time General Session <i>Judicial Perspective: Exploring Opportunities To Utilize Mediation Options To Avoid Trial</i> Hon. Judge David L. Belz (Ret.), Judicate West; Hon. Judge Gerald G. Johnston (Ret.), JAMS; Trevor Murphy, Professional Fiduciary Services; Teresa Gorman, Fiduciary Real Estate Services	Magic Kingdom Grand Ballroom This session will be recorded
1:45PM to 3:15PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
3:15PM to 4:15PM Track D	1.0 1.0	D1 #37 <i>Planning, Litigating, & Judging the Professional Fiduciary's Duty of Impartiality</i> Hon. Judge Mary Thornton House (Ret.) ARC; Eric Hirschberg and Mark A. Lester, Lester & Hirschberg, LLP	Magic Kingdom Ballroom 2 This session will be recorded
	1.0 1.0	D2 #76 <i>PPF Practice Administration In Action – How Does This Thing Work?</i> Hon. Judge Ana Maria Luna, Superior Court of California, Los Angeles County; Yevgeny Belous, Rodnunsky & Associates; Stacey Haft, SJH Fiduciary Services	Magic Kingdom Ballroom 3 This session will be recorded
	1.0 0.0	D3 #44 <i>A Fiduciary Duty to Craft a Financial Plan for Individuals with Limited Resources</i> Jeremy Lau and Jared Ong, Prudent Investors	Magic Kingdom Ballroom 1
	1.0 1.0	D4 #52 <i>The Love Affair is Over: Professional Fiduciaries in a New Era of Accountability</i> Jennifer Sawday and Monicca Goel, TLD Law	Magic Kingdom Ballroom 4
	1.0 1.0	D5 #34 <i>A Conservatorship Case Study: Nosy Neighbors, A Toxic Boyfriend, No Money, Suspicious Solar Panels, and the Ethics Behind It All</i> Alex Chen, Acuna Regli LLP; Sarah B. Russo, Russo Elms Roberts LLP; Nick Landaker, TheKey; Sharon Duncan, Duncan Fiduciary Services	Meeting Room F/G
	1.0 1.0	D6 #20 <i>What To Do With Stale Trusts</i> Frank Acuna and Tracy Regli, Acuna Regli LLP	Meeting Room H/I
3:15PM to 4:45PM		Exhibitor Move Out	
4:15PM to 7:00PM		Open Time	
6:30PM to 9:30		PFAC's Fun House – Dinner & Carnival	Adventure Lawn

Saturday, May 10

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	Magic Kingdom Ballroom Foyer
7:30AM to 8:45AM		Continental Breakfast / PFAC Café	Magic Kingdom Ballroom Foyer
8:45AM to 10:45AM	2.0 2.0	Closing General Session #63 Ethical Minefields: Navigating the Complexities of Elder Abuse, Conservatorships, and High Conflict Families As A Fiduciary Hon. Judge Jonathan Rosenbloom, Superior Court of California, Los Angeles County; Megan Moghtaderi, Offit Kurman P.C.; Stacy L. Reger, Ph.D, Clinical Psychologist ETHICS	Magic Kingdom Grand Ballroom This session will be recorded
10:45AM to 11:00AM		PFAC Café/Break	Magic Kingdom Ballroom Foyer
11:00AM to Noon Track E	1.0 1.0	E1 The Parable Of The Blind Man And The Elephant Or The Fiduciary And The Social Security Disability Program Philip Barbaro, Barbaro Chinen Pitzer & Duke LLP; Joshua W. Potter, Potter Padilla & Pfau	Magic Kingdom Ballroom 2 This session will be recorded
	1.0 0.0	E2 Pitfalls To Avoid When Preparing Fiduciary Accountings Under The New Uniform Fiduciary Income And Principal Act And Understanding DNI Francine Lee and Damien Martin, Ernst & Young	Magic Kingdom Ballroom 3 This session will be recorded
	1.0 0.0	E3 New Rules, New World: Demystifying the New Real Estate Landscape (Post – NAR Settlement): What Every CLPF Needs To Know Paige Fingerhut Charnick, Beach Equities	Magic Kingdom Ballroom 1
	1.0 1.0	E4 “Wow! I Just Inherited A Picasso!” Generational Wealth Transfer of Fine Art, Jewelry and Tangible Personal Property Morgana Blackwelder, John Moran Auctioneers & Appraisers	Magic Kingdom Ballroom 4
	1.0 1.0	E5 Estate Planning & Administration In A Digital World Amiee Kushner, Blue Pine Fiduciary LLC; Alexandria Goff, Goff Legal P.C.	Meeting Room F/G
	1.0 1.0	E6 The Problems We Inherit Valerie Uribe, Valerie Uribe, P.L.C; Stefanie Cutler, Ruttenberg Cutler Broomer, LLP	Meeting Room H/I
Noon		Conference Adjourn	