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# 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 4:00PM	<b>6.0</b>	<b>Pre-Conference Intensive A</b> <b><i>Starting A Professional Fiduciary Practice</i></b>	Magic Kingdom Ballroom 2
9:00AM to 4:00PM	<b>6.0</b>	<b>Pre-Conference Intensive B</b> <b><i>Growing A Professional Fiduciary Practice</i></b>	Magic Kingdom Ballroom 3
9:00AM to Noon	<b>3.0</b>	<b>Pre-Conference Intensive C</b> <b><i>Firearm Safety Training with Certificate to Transport</i></b> Kim McGhee, Esq., Law Offices of Black & McGhee; Paul Hynes, Aspiriant; California Gun Services	Magic Kingdom Ballroom 1
Noon to 4:00PM	<b>3.0</b>	<b>Pre-Conference Intensive D</b> <b><i>California Exam Review Course</i></b> Russ Marshall, CLPF	Magic Kingdom Ballroom 4
4:30PM to 5:30PM		<b>Sponsor and Exhibitor Appreciation Reception</b>	Rose Garden
6:00PM to 8:00PM		<b>Opening Welcome Reception</b>	Magic Kingdom Exhibit Hall

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**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 <b>Early Bird Track</b>	1.0   1.0	<b>EB1 <i>The Role of the Fiduciary in Trust Mediation - 2025</i></b> Hon. Judge Glen Reiser (Ret.), JAMS	Magic Kingdom Ballroom 3  <b>This session will be recorded</b>
	1.0   1.0	<b>EB 2 <i>Intellectual And Developmental Disabilities: Sharpening Our Cultural Competency</i></b> Joseph H. Lee, Chang & Lee Law Firm; Brenda Sorkend, Shorkend Care Management; Jeanne Vosloo, Pais Montgomery Fiduciary <b>CULTURAL COMPETENCY</b>	Magic Kingdom Ballroom 2  <b>This session will be recorded</b>
	1.0   1.0	<b>EB 3 <i>Gifts With Purpose: Decoding The Types Of Testamentary Gifts And Their Consequences</i></b> Marc Stern and Julia R. Haye, Greenberg & Glusker LLP	Magic Kingdom Ballroom 1
8:30AM to 10:15AM	1.5   1.5	<b>Opening General Session Housekeeping and Opening Remarks</b> Turn Conflict Into Harmony – Megan Hunter, High Conflict Institute <b>ETHICS</b>	Grand Ballroom <b>This session will be recorded</b>
10:30AM to Noon <b>Track A</b>	1.5   1.5	<b>A1 <i>To Serve Or Not To Serve</i></b> Hon. Judge Ana Maria Luna, Superior Court of California, Los Angeles County; Sarah Broomer, Rutenberg Cutler Broomer LLP; Adam L. Streltzer, Adam L. Streltzer, Attorney At Law	Magic Kingdom Ballroom 2  <b>This session will be recorded</b>
	1.5   1.5	<b>A2 <i>Private Practice – Navigating Business Interests As A Fiduciary</i></b> Kelly Dankbar, Lily M. Harris, Josiah M. Prendergast, Weintraub Tobin	Magic Kingdom Ballroom 3  <b>This session will be recorded</b>
	1.5   1.5	<b>A3 <i>Unraveling Consent: Issues of Capacity and Undue Influence in Contested Trusts &amp; Estates</i></b> Dr. Dana Chidekel, Neuropsychologist; Scott Rahn, RMO LLP	Magic Kingdom Ballroom 1

	1.5   1.5	<b>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?</b> 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	<b>A5 The Layering Of Rights – Conservatorship, Supported Decision-Making And Preparing For What's To Come</b> 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	<b>A6 Understanding Dementia: Enhancing Care And Quality Of Life</b> 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	<b>Lunch Time General Session A View From The Bench – Planning &amp; Investment Management</b> 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	Grand Ballroom <b>This session will be recorded</b>
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	<b>B1 Keeping Up With Changes To Public Benefits</b> Sheri Sudweeks and Leslie Yarnes Sugai, Sugai & Sudweeks LLP	Magic Kingdom Ballroom 2 <b>This session will be recorded</b>
	1.5   1.5	<b>B2 Tee-ing Up For Mediation: Pre and Post Mediation Considerations</b> 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 <b>This session will be recorded</b>
	1.5   1.5	<b>B3 Effective Case Vetting – To Take The Case Or Pass</b> Douglas Housman, Law Offices of Cain, Cain & Housman; Meredith Taylor, IMT Associates	Magic Kingdom Ballroom 1
	1.5   1.5	<b>B4 We Are CalABLE</b> Anne Osborne, Deputy Executive Director CalABLE; Miguel Casillas, CalABLE Ambassador	Magic Kingdom Ballroom 4
	1.5   1.5	<b>B5 Our Fiduciary Duty: Protecting Elders From Financial Exploitation</b> Jeremy Lau and Jared Ong, Prudent Investors	Meeting Room F/G
	1.5   0.0	<b>B6 Understanding The Fiduciary Advantage: Why Suitability Isn't Enough For Effective Beneficiary Investment Management</b> Jon Henderson, Echo45 Advisors	Meeting Room H/I

4:15PM to 6:00PM		<b>Meet the Exhibitors and “Taste of PFAC” Wine Tasting</b> <i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
5:00PM to 5:45PM		<b>New Member Meeting</b>	Meeting Room F/G
5:00PM to 6:00PM		Past Presidents Meeting	Adventure Room
5:00PM to 6:00PM		PFAC Leadership Reception	Magic Kingdom Ballroom 1
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 <b><i>Still Alice</i></b>	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 / PFAC Café	Magic Kingdom Exhibit Hall
7:30AM to 8:30AM <b>Early Bird Track</b>	1.0	<b>EB 4 <i>Employment Policies &amp; Procedures Every Fiduciary (and their Clients) Should Have</i></b> Robert Nuddleman, Nuddleman Law Firm P.C.	Magic Kingdom Ballroom 2 <b>This session will be recorded</b>
	1.0   1.0	<b>EB 5 <i>Emotional Issues Of The Conserved</i></b> Dr. Jon Bathori, Licensed Clinical Psychologist	Magic Kingdom Ballroom 3 <b>This session will be recorded</b>
	1.0   1.0	<b>EB 6 <i>Case Study Exploring The Limitations Of The Exempt Seller In The Sale Of Real Property</i></b> 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 <b>Track C</b>	1.5   1.5	<b>C1 <i>Fiduciary Planning to Prevent Litigation: 30 Strategies In Honor of PFAC's 30<sup>th</sup> Anniversary</i></b> 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 <b>This session will be recorded</b>
	1.5   1.5	<b>C2 <i>Ethical Considerations for Private Fiduciaries: Safeguarding Client Interests And Navigating Professional Boundaries</i></b> Monica Goel, TLD Law; Kristin Yokomoto, Baker & Hostetler LLP <b>ETHICS</b>	Magic Kingdom Ballroom 3 <b>This session will be recorded</b>
	1.5   1.5	<b>C3 <i>Pitfalls To Avoid When Preparing Fiduciary Accountings Under The New Uniform Fiduciary Income And Principal Act And Understanding DNI</i></b> Francine Lee and Damien Martin, Ernst & Young	Magic Kingdom Ballroom 1
	1.5   1.5	<b>C4 <i>Case Studies On Fiduciary Breaches</i></b> Jeremiah Raxter, RAXTER LAW	Magic Kingdom Ballroom 4
	1.5   1.5	<b>C5 <i>Love &amp; Marriage, Conservatorships &amp; Dissolutions</i></b> 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	Meeting Room F/G

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1.5 | 1.5

**C6 2025: Are Trusts Dead? AB 2016**  
Amanda Sinclair, Hyden Zakheim, LLP

Meeting Room H/I

11:00AM to 12:30PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
12:30PM to 1:45PM	1.0   1.0	<b>Lunch Time General Session</b> <b><i>Judicial Perspective: Exploring Opportunities To Utilize Mediation Options To Avoid Trial</i></b> 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	Grand Ballroom <b>This session will be recorded</b>
1:45PM to 3:15PM		<i>PFAC Connect</i> (Exhibit Hall)	Magic Kingdom Exhibit Hall
3:15PM to 4:15PM <b>Track D</b>	1.0   1.0	<b>D1 <i>Planning, Litigating, &amp; Judging the Professional Fiduciary's Duty of Impartiality</i></b> Hon. Judge Mary Thornton House (Ret.) ARC; Eric Hirschberg and Mark A. Lester, Lester & Hirschberg, LLP	Magic Kingdom Ballroom 2 <b>This session will be recorded</b>
	1.0   1.0	<b>D2 <i>PPF Practice Administration In Action – How Does This Thing Work?</i></b> 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 <b>This session will be recorded</b>
	1.0   0.0	<b>D3 <i>A Fiduciary Duty to Craft a Financial Plan for Individuals with Limited Resources</i></b> Jeremy Lau and Jared Ong, Prudent Investors	Magic Kingdom Ballroom 1
	1.0   1.0	<b>D4 <i>The Love Affair is Over: Professional Fiduciaries in a New Era of Accountability</i></b> Jennifer Sawday and Monicca Goel, TLD Law	Magic Kingdom Ballroom 4
	1.0   1.0	<b>D5 <i>A Conservatorship Case Study: Nosy Neighbors, A Toxic Boyfriend, No Money, Suspicious Solar Panels, and the Ethics Behind It All</i></b> 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	<b>D6 <i>What To Do With Stale Trusts</i></b> 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		<b>Open Time</b>	
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	<b>Closing General Session</b> <b><i>Ethical Minefields: Navigating the Complexities of Elder Abuse, Conservatorships, and High Conflict Families As A Fiduciary</i></b> Hon. Judge Jonathan Rosenbloom, Superior Court of California, Los Angeles County; Megan Moghtaderi, Offit Kurman P.C.; Stacy L. Reger, Ph.D, Clinical Psychologist <b>ETHICS</b>	Grand Ballroom <b>This session will be recorded</b>
10:45AM to 11:00AM		PFAC Café/Break	Magic Kingdom Ballroom Foyer
11:00AM to Noon <b>Track E</b>	1.0   1.0	<b>E1 <i>The Parable Of The Blind Man And The Elephant Or The Fiduciary And The Social Security Disability Program</i></b> Philip Barbaro, Barbaro Chinen Pitzer & Duke LLP; Joshua W. Potter, Potter Padilla & Pfau	Magic Kingdom Ballroom 2 <b>This session will be recorded</b>
	1.0   0.0	<b>E2 <i>Proposition 19 And Real Property Transfers: What's A Fiduciary To Do?</i></b> Frank Acuna and Tracy Regli, Acuna Regli LLP	Magic Kingdom Ballroom 3 <b>This session will be recorded</b>
	1.0   0.0	<b>E3 <i>New Rules, New World: Demystifying the New Real Estate Landscape (Post – NAR Settlement): What Every CLPF Needs To Know</i></b> Paige Fingerhut Charnick, Beach Equities	Magic Kingdom Ballroom 1
	1.0   1.0	<b>E4 <i>"Wow! I Just Inherited A Picasso!" Generational Wealth Transfer of Fine Art, Jewelry and Tangible Personal Property</i></b> Morgana Blackwelder, John Moran Auctioneers & Appraisers	Magic Kingdom Ballroom 4
	1.0   1.0	<b>E5 <i>Estate Planning &amp; Administration In A Digital World</i></b> Amiee Kushner, Blue Pine Fiduciary LLC; Alexandria Goff, Goff Legal P.C.	Meeting Room F/G
	1.0   1.0	<b>E6 <i>The Problems We Inherit</i></b> Valerie Uribe, Valerie Uribe, P.L.C; Stefanie Cutler, Ruttenberg Cutler Broomer, LLP	Meeting Room H/I
Noon		Conference Adjourn	

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