



YEARS  
of **PFAC**  
EXCELLENCE



## CONFERENCE SCHEDULE

**Wednesday, August 5<sup>th</sup>**

### Pre-Conference Intensives

Exclusive Exhibit Hours: 2.0

TIME	CEU   MCLE	ACTIVITY
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   3.0</b>	<b>Pre-Conference Intensive A</b> Should I Stay Or Should I Go? Evaluating Whether (Or Not) To Take A Case And What To Do If You Accept The Case <i>Frank Acuña, Esq. &amp; Tracy Regli, Esq., Acuña Regli LLP; Wendy Hatch, CLPF, Hatch &amp; Associates; Andrew de Vries, Berkshire Hathaway Home Services-Franciscan Properties; Ted Ong &amp; Jeremy Lau, Prudent Investors Network</i> <b>PRACTICE MGMT</b>
9:00AM to Noon; 1:00PM to 3:00PM	<b>5.0   5.0</b>	<b>Pre-Conference Intensive B</b> <b>Special Needs Trust Administration: Creating the Spending Plan, Making Appropriate Distributions, and Working with Difficult Beneficiaries</b> <i>Kevin Urbatsch, Esq., Urbatsch Law Firm, P.C.; Ann Koerner, National Health Care Advisors; Herb Thomas, CLPF, Kairos Fiduciary Services; Daniel Cutter, CRPC, Merrill Lynch Special Needs Team</i> <b>TRUST</b>
9:00AM to 1:00PM	<b>4.0</b>	<b>Pre-Conference Intensive C</b> <b>California Exam Review Course</b> <i>Russ Marshall, NMG, CLPF, Marshall Fiduciary Services</i> <b>PRE-LICENSE</b>
3:45PM to 4:45PM		<b>Speed Lead Sessions</b>
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, August 6<sup>th</sup>**  
**Full Conference Day 1**

Credit Hours: 6.5 • Exclusive Exhibit Hours: 3.25

MCLE Hours: 5.0

TIME	CEU   MCLE	ACTIVITY
6:30AM to 4:30PM		Conference Registration Desk Open
7:00AM to 4:30PM		PFAC Connect Open (Exhibit Hall)
7:00AM to 8:15AM		Continental Breakfast / PFAC Café
7:15AM to 8:15AM <b>Early Bird Track</b>	<b>1.0   1.0</b>	<b>EB 1</b> Don't Get Burned: What You Need To Know Before Delegating Your Authority to Investment Professionals <i>Paul Hynes, Hearthstone Private Wealth Management; Apollo Lupescu, Dimensional Fund Advisors; Kristan Shepard, Esq., Goodwin Brown Gross &amp; Lovelace LLP</i> <b>TRUST</b>
	<b>1.0   1.0</b>	<b>EB 2</b> Defending Yourself: Professional Fiduciary Jiu Jitsu <i>Victor Segovia, Esq., Segovia, A Law Office; Nathan Pastor, Esq. Law Offices of Nathan D. Pastor; Loren Emmanuel, CLPF, The Ace Fiduciary Group</i> <b>PRACTICE MGMT</b>
	<b>1.0   1.0</b>	<b>EB 3</b> Timing & Tax Issues for Finalizing Estates & Trusts <i>John Grimes, CPA, Grimes and Company</i> <b>TRUST</b>
8:30AM to 10:30AM	<b>1.5   0.0</b>	<b>Opening General Session</b> <b>Housekeeping and Opening Remarks</b> <i>Julie Sugita, President</i> <b>Opening Remarks</b> <i>Rebecca May, PFB Bureau Chief</i> <b>Economy of Kindness: How Kindness Transforms Your Bottom Line</b> <i>Linda Cohen</i> <b>PERSON</b>
10:30AM to Noon <b>Track A</b>	<b>1.5   1.5</b>	<b>A1</b> Till My Conservatorship Do Us Part <i>Hon. Judge Glen Reiser (Ret.); Yevgeny Belous, Esq., Rodnunsky &amp; Associates; Lauriann Wright, Esq., Wright Kim Douglas ALC; Norine Boehmer, CLPF, BGM Associates</i> <b>ESTATE</b>
	<b>1.5   0.0</b>	<b>A2</b> Fiduciary Accountings – I Hate Accounting, Remind Me Why And How I Have To Do This <i>Martin Harris, Harris Fiduciary Accountings</i> <b>PRACTICE MGMT</b>
	<b>1.5   0.0</b>	<b>A3</b> Ethical Billing Practices <i>Russ Marshall, NMG, CLPF, Marshall Fiduciary Services</i> <b>PRACTICE MGMT</b>
	<b>1.5   1.5</b>	<b>A4</b> Insurance Coverage - Dropping the Ball <i>Nancy Valentine, Deasy Penner Podley; Kristi Dean, Esq., Stone Dean LLP</i> <b>TRUST</b>
	<b>1.5   1.5</b>	<b>A5</b> Distributions, Distributable Net Income and Taxes: A Road Map for the Fiduciary <i>Evan Sandler, CPA, MST, Onisko &amp; Scholz, LLP</i> <b>TRUST</b>
	<b>1.5   0.0</b>	<b>A6</b> Physical and Cognitive Functional Assessments <i>Vincent Amazona, Care Indeed; Dr. Mehrdad Ayati, Stanford University School of Medicine; Chio Choi, San Jose State University</i> <b>PERSON</b>
Noon to 1:00PM		PFAC Connect (Exhibit Hall)

1:00PM to 2:15PM	<b>1.0   1.0</b>	<b>Lunch Time General Session</b> Where's the FUN in DysFUNctional Families: Interactive Case Studies <i>Hon. Judge Mary Thornton House (Ret.), ARC; Lauriann Wright, Esq., Wright Kim Douglas ALC; Brenda Shorkend, Shorkend Care Management; Robert A. Earnest, Esq., Earnest Trust Management</i> <b>PERSON</b>
2:15PM to 2:45PM		PFAC Connect (Exhibit Hall)
2:45PM to 4:15PM <b>Track B</b>	<b>1.5   1.5</b>	<b>B1</b> To Sell or Not To Sell – That Is the Question <i>Hon. Judge Brenda Penny, Los Angeles Superior Court Probate Division; LeAnne Maillian, Esq., Los Angeles County Bar; Nancy Sanborn, The Sanborn Team</i> <b>ESTATE</b>
	<b>1.5   1.5</b>	<b>B2</b> Normal Aging or Elder Abuse? How Insufficient Staffing Can Lead to Avoidable Injuries in Assisted Living Facilities <i>Kathryn Stebner, Esq. &amp; Deena Zacharin, Esq., Stebner &amp; Associates</i> <b>PERSON</b>
	<b>1.5   1.5</b>	<b>B3</b> Avoiding the Legal Pitfalls for Fiduciaries Involved in Home Care <i>Elizabeth Murphy, Esq. &amp; Michaelle Baumert, Esq., Jackson Lewis, PC</i> <b>PERSON</b>
	<b>1.5   1.5</b>	<b>B4</b> Trust Distributions and Drafting: Perspective From Our Gigs <i>Stephen Dale, Esq., The Dale Law Firm P.C.; Peter Wall, True Link Financial</i> <b>TRUST</b>
	<b>1.5   1.5</b>	<b>B5</b> Probate Administration – Soup to Nuts <i>Merrienne Dean, Esq., The Dean Law Group, APLC</i> <b>ESTATE</b>
	<b>1.5   1.5</b>	<b>B6</b> Contested Nonprobate Transfers <i>Matthew Owens, Esq., Withers Bergman LLP</i> <b>ESTATE</b>
4:15PM to 6:00PM		<b>Meet the Exhibitors and “Taste of PFAC” Wine Tasting</b> PFAC Connect (Exhibit Hall)
6:00PM to 7:00PM		Past Presidents Meeting
6:15PM to 7:00PM		New Member Meeting & Orientation
7:00PM to 9:00PM		PFAC Bay Cruise

# Friday, August 7<sup>th</sup>

## Full Conference Day 2

Credit Hours: 4.5 • Exclusive Exhibit Hours: 3.5

MCLE Hours: 4.5

TIME	CEU   MCLE	ACTIVITY
6:30AM to 4:30PM		Conference Registration Desk Open
7:00AM to 4:00PM		PFAC Connect 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   0.0</b>	<b>EB 4</b> Clients & Clutter: Resources and Strategies for Managing Clients' Personal Belongings <i>Cindy Hofen, Managing Moves and More; Marty Stevens-Heebner, Clear Home Solutions</i> <b>ESTATE</b>
	<b>1.0   1.0</b>	<b>EB 5</b> How to Avoid Environmental Liability <i>Steven Hoch, Esq., Clark Hill PLC</i> <b>PRACTICE MGMT</b>
	<b>1.0   0.0</b>	<b>EB 6</b> Future Shock: A Look at Fiduciary Practice Ten Years from Now and Beyond! <i>Frank Acuña, Esq. &amp; Tracy Regli, Esq., Acuña Regli LLP; Scott MacDonald, Merrill Lynch Special Needs Team, Elizabeth Soloway, CLPF, Soloway Fiduciaries Inc.</i> <b>PRACTICE MGMT</b>
8:30AM to 9:30AM		PFAC Connect (Exhibit Hall)
9:30AM to 11:00AM <b>Track C</b>	<b>1.5   1.5</b>	<b>C1</b> Helping Fiduciaries Understand the Court's Perspective <i>Hon. Judge Roger Lund, Ventura County Superior Court; Paul Bartschi, Merrill Lynch Special Needs Team</i> <b>PRACTICE MGMT</b>
	<b>1.5   1.5</b>	<b>C2</b> Trustee Unchained: Decanting Has Come to California <i>Patrick A. Kohlmann, Esq., Temmerman, Cilley &amp; Kohlmann LLP</i> <b>TRUST</b>
	<b>1.5   0.0.</b>	<b>C3</b> Administering the Digital Estate <i>David Little, Esq., Hartog Baer &amp; Hand, APC</i> <b>ESTATE</b>
	<b>1.5   1.5</b>	<b>C4</b> How Assets are Treated by Medi-Cal <i>Paula Kluge, CLPF, Sunrise Fiduciary</i> <b>PERSON</b>
	<b>1.5   0.0</b>	<b>C5</b> Best Practices for Fiduciaries: So You've Been Named Trustee; Now What? <i>Mary deLeo, Esq.; Edward Corey, Jr., Esq.; Gary Rothstein, Esq.; Carlena Tapella, Esq., Weintraub Tobin</i> <b>TRUST</b>
		<b>C6</b> Hoarding: The Stuff Is Just The Surface <i>Joan McCreary, JMPO</i> <b>PERSON</b>
11:00AM to 12:30PM		PFAC Connect (Exhibit Hall)
12:30PM to 1:45PM	<b>1.0   1.0</b>	<b>Lunch Time General Session</b> <b>Current Issues in Conservatorships: Assuring the Best Interests of Elders and the Vulnerable are Protected</b> <i>Hon. Judge David Cowan, Los Angeles Superior Court; Tamila Jensen, Esq., Law Offices of Tamila C. Jensen P.C.; Scott MacDonald, Merrill Lynch Special Needs Team</i> <b>ESTATE</b>
1:45PM to 3:15PM		PFAC Connect (Exhibit Hall)
3:15PM to 4:15PM <b>Track D</b>	<b>1.0   1.0</b>	<b>D1</b> Effective Use of Substituted Judgment Petitions to Protect Your Clients <i>Hon. Judge Glen Reiser (Ret.), JAMS; Scott Schomer, Esq., Schomer Law Group</i> <b>PERSON</b>
	<b>1.0   1.0</b>	<b>D2</b> The (Not So) Dumb Questions You Are Too Scared to Ask <i>Megan A. Moghtaderi, Esq., TLD Law; Natalie Keam, Onisko &amp; Scholz; Caitlin Cogan, CLPF,</i>

		<i>Cogan Fiduciary Services</i>	<b>PRACTICE MGMT</b>
	<b>1.0   1.0</b>	<b>D3</b> Financial Standard of Care – With A Focus on Ethics <i>Jeff Marvan, Esq., MarvanLaw, A.P.C.; Aaron Jacobs, CLPF, Sentry Services</i>	<b>ETHICS</b>
	<b>1.0   1.0</b>	<b>D4</b> Navigating the Tightrope of Trust Administration and Four Tricky Administration Issues <i>Vivian Rivera, Esq.; Stacie Nelson, Esq.; Robert Barton, Esq., Holland &amp; Knight LLP</i>	<b>TRUST</b>
	<b>1.0   1.0</b>	<b>D5</b> A Complex Trust Administration <i>Ron Miller, CLPF, Select Fiduciary Group</i>	<b>TRUST</b>
	<b>1.0   0.0</b>	<b>D6</b> Service Dogs WTF...TD (What's The Fiduciary....To Do!) <i>Joanne Mueller &amp; Charmaine Stainbrook, Canine Companions For Independence</i>	<b>PERSON</b>
3:15PM to 4:45PM		Exhibitor Move Out	
4:30PM to 5:30PM		<b>PFAC Member Annual Meeting</b>	
6:00PM to 7:30PM		<b>25<sup>th</sup> Anniversary Reception</b>	
7:30PM to 9:00PM		<b>25<sup>th</sup> Anniversary Dinner Celebration</b>	

**Saturday, August 8<sup>th</sup>**  
**Full Conference Day 3**

Credit Hours: 4.0

MCLE Hours: 4.0

TIME	CEU   MCLE	ACTIVITY
7:15AM to 2:00PM		Conference Registration Desk Open
7:30AM to 8:30AM	1.0   0.0	Breakfast and a Movie <b>Happy</b> ( <i>Yes, This Is A Movie About Happiness</i> )
8:45AM to 10:45AM	2.0   2.0	<b>Closing General Session</b> When Your Job Is Being The Ethical Adult In The Room <i>Liza de Vries, Esq., De Vries Law, P.C.</i> <b>ETHICS</b>
10:45AM to 11:00AM		PFAC Café/Break
11:00AM to Noon <b>Track E</b>	1.0   1.0	<b>E1</b> The Sword and Shield of Elder Financial Abuse Litigation: How to Fight for and Protect the Victims of Elder Abuse <i>Kelly Dankbar, Esq.; Danielle Diebert, Esq.; Daniel Kim, Esq.; Leslie Kolafa, Esq., Weintraub Tobin</i> <b>PERSON</b>
	1.0   0.0	<b>E2</b> Data Security: What You Need to Know and What You Need to Do <i>Kai Stinchcombe, True Link</i> <b>PRACTICE MGMT</b>
	1.0   1.0	<b>E3</b> Powers of Attorney and Health Care Directives: Duties, Liabilities and Ethical Considerations <i>Kathleen Durrans, Esq., Aaron Riechert, Carpol &amp; Riffle, ARC</i> <b>ESTATE</b>
	1.0   1.0	<b>E4</b> Reverse Mortgage for Forward Thinking Fiduciaries <i>Frank Acuña, Esq., Acuña Regli LLP; Brad Dela Cruz, American Advisors Group</i> <b>ESTATE</b>
	1.0   1.0	<b>E5</b> Protecting the SNT Trustee When Dealing with Courts, Public Benefits and Families <i>Nancy Reinhardt, Esq., Law Offices of Nancy Reinhardt; Ruth Phelps, Esq., Phelps Law Group; Ann Koerner, National Care Advisors</i> <b>TRUST</b>
	1.0   1.0	<b>E6</b> Jumpstart Your First Trust Administration: Stuff No One Explains, Explained! <i>Tracy Regli, Acuña Regli LLP; Lisa Soloway, CLPF, Soloway Fiduciaries, Inc.</i> <b>TRUST</b>
Noon		Conference End

***Schedule is subject to change without notice***