



CONFERENCE SCHEDULE

Total Conference Credit Hours: 15

Total Exclusive Exhibit Hours: 8.75

Wednesday, May 1st

Pre Conference Intensives

Exclusive Exhibit Hours: 2.0

TIME	CEU	ACTIVITY	LOCATION
8:00AM to 6:00PM		Conference Registration Desk Open	Disneyland Grand Ballroom Registration
9:00AM to 3:00PM		PFAC State Board Meeting	Adventure Room
12:30PM to 3:30PM	3.0	Pre Conference Intensive Insurance from A-Z <i>Frank Acuña & Tracy Regli, Acuña & Regli</i>	MR F-G PRACTICE MGMT
10:30PM to 3:30PM	5.0	Pre Conference Intensive * Lunch will be included Special Needs Trusts from Beginning to End – A Review of What Precipitates an SNT to the Successful Administration <i>Ted Ong & Jeremy Lau, Prudent Investors Network Tony Beck, Williams, Beck & Forbes Doreen Casuto, Rehabilitation Care Coordination Mary Waltari, Battaglia & Waltari Mike Zea, Ringler Associates</i>	MR I-J TRUST
4:30PM to 5:30PM		Sponsor and Exhibitor Appreciation Reception	Rose Court Garden
6:00PM to 8:00PM		Opening Welcome Reception - Exhibit Hall	Disneyland Exhibit Hall

Thursday, May 2nd

Full Conference Day 1

Credit Hours: 7.5 • Exclusive Exhibit Hours: 3.25

TIME	CEU	ACTIVITY	LOCATION
6:30AM to 4:30PM		Conference Registration Desk Open	Disneyland Grand Ballroom Registration
7:00AM to 4:30PM		<i>PFAC Connect</i> Open (Exhibit Hall)	Disneyland Exhibit Hall
7:00AM to 8:15AM		Continental Breakfast / PFAC Café	Disneyland Exhibit Hall
7:15AM to 8:15AM Early Bird Track	1.0	EB 1 The Diet Coke Mystery or Let Her Eat Cake: How Collaborating with a Geriatric Psychiatrist and an Aging Life Care Manager Makes Sense for a Fiduciary Practice <i>Brenda Shorkend, Shorkend Care Management Sarah Mourra, UCLA David Geffen School of Medicine Jodi Pais Montgomery, Pais Montgomery Fiduciary</i>	Magic Kingdom Ballroom 1 PERSON *VIDEO*
		EB 2 The Magic of the Match <i>Melissa Billingsley & Joanna Mueller, Canine Companions for Independence</i>	Magic Kingdom Ballroom 2 PERSON *VIDEO*
		EB 3 Working with Caregivers: Solutions to Common Problems <i>Robert Nuddleman, Nuddleman Law Firm, P.C.</i>	Magic Kingdom Ballroom 3 PRACTICE MGMT *VIDEO*
8:30AM to 10:30AM	1.5	Opening General Session Keynote Presentation: Liar, Liar, Pants on Fire <i>Traci Brown, Body Language Expert</i>	Disneyland Grand Ballroom PERSON
10:30AM to Noon Track A	1.5	A1 How to Work with Attorneys in Contested Matters - Part 1 <i>Yevgeny Belous, Neilsen & Rogers LLP Lauriann Wright, Wright Kim Douglas, ALC Norine Boehmer, CLPF, Private Professional Fiduciary Hon. Judge James Steele (Ret)., Signature Resolution, LLC</i>	Magic Kingdom Ballroom 1 TRUST *VIDEO*
		A2 Administering the Tax-Motivated Trust <i>Peter Myers, Fox Rothschild LLP</i>	MR I-J TRUST
		A3 Aging in Place - Electronically! <i>Frank Acuña & Tracy Regli, Acuña & Regli</i>	Magic Kingdom Ballroom 4 PERSON
		A4 Here Today, Gone Tomorrow: A Fiduciary's Guide to the Attorney-Client Privilege <i>Mary K. deLeo, Edward J. Corey, Kelly E. Dankbar & Gary D. Rothstein Weintraub Tobin Chediak Coleman Grodin</i>	Magic Kingdom Ballroom 3 PERSON *VIDEO*
		A5 Case Studies of Fiduciary Horror Stories <i>Scott MacDonald, Merrill Lynch Special Needs Team Janie Mulrain, Ethos Fiduciary Services David Sherak, Esq., Vogt, Resnick & Sherak, LLP</i>	MR F-G PRACTICE MGMT
		A6 Get the Most out of Personal Property Without It Taking the Most Out of You <i>Johan Graham & Jeff Patterson, Bid Fast and Last Auctions</i>	Magic Kingdom Ballroom 2 ESTATE *VIDEO*

Noon to 1:00PM		<i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall
1:00PM to 2:15PM	1.0	Lunch Time General Session Cybersecurity in an Evolving Digital Age Ryan White, Chief, Cyber & Intellectual Property Crimes Section National Security Division	Disneyland Grand Ballroom PRACTICE MGMT
2:15PM to 2:45PM		<i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall
2:45PM to 4:15PM Track B	1.5	B1 How to Work with Attorneys in Contested Matters - Part 2 <i>Yevgeny Belous, Neilsen & Rogers LLP Lauriann Wright, Wright Kim Douglas, ALC Norine Boehmer, CLPF, Private Professional Fiduciary Hon. Judge James Steele (Ret)., Signature Resolution, LLC</i>	Magic Kingdom Ballroom 1 TRUST *VIDEO*
		B2 Recognizing, Preventing and Addressing Financial Elder Abuse <i>Kimberly Swierenga, Swierenga Law & Mediation Merriane Dean, The Dean Law Group, APLC</i>	MR F-G PERSON
		B3 Mental Disorder Diagnostic Criteria and Coping Strategies <i>Donna Bogdanovich, Bogdanovich Murray Professional Fiduciaries</i>	Magic Kingdom Ballroom 3 PERSON *VIDEO*
		B4 Unique Issues for Special Needs Trusts in California and CalABLE Act <i>Stephen Dale, The Dale Law Firm, P.C. Dante Allen, CalABLE</i>	Magic Kingdom Ballroom 4 TRUST
		B5 Just Move Out, Please: how to Regain Possession of Real Property <i>Charles Scott & Lori Bolander, Law Offices of Kimball, Tirey & St. John LLP Ron Greenwald & Patti Gerke, Greenwald & Gerke</i>	Magic Kingdom Ballroom 2 ESTATE *VIDEO*
		B6 Should I keep or Sell the Real Estate? A Practical Template to Make the Decision <i>Kim Onisko, Onisko & Scholz, LLP, CPA</i>	MR I-J ESTATE
4:15PM to 6:00PM		Meet the Exhibitors and "Taste of PFAC" Wine Tasting <i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall
6:00PM to 7:00PM		Past Presidents Meeting	Frontier Board Room
6:15PM to 7:00PM		New Member Meeting & Orientation	MR F-G
7:30PM to 9:00PM	1.0	Evening Session <i>Movie Night - The World's Fastest Indian</i>	Grand Ballroom PERSON

Friday, May 3rd

Full Conference Day 2

Credit Hours: 4.5 • Exclusive Exhibit Hours: 3.5

TIME	CEU	ACTIVITY	LOCATION
6:30AM to 4:30PM		Conference Registration Desk Open	Disneyland Grand Ballroom Registration
7:00AM to 4:00PM		<i>PFAC Connect</i> Open (Exhibit Hall)	Disneyland Exhibit Hall
7:00AM to 8:30AM		Continental Breakfast / PFAC Café	Disneyland Exhibit Hall
7:30AM to 8:30AM Early Bird Track	1.0	EB 4 Death Before Divorce <i>Daniel Gold, TLD Law</i>	Magic Kingdom Ballroom 1 ESTATE *VIDEO*
		EB 5 Navigating the Regional Center System <i>Jim Huyck, Huyck Consulting</i>	Magic Kingdom Ballroom 2 PERSON *VIDEO*
		EB 6 Are You Covered? Risk Management and Insurance for Professional Fiduciaries <i>Andrew Jones & Ashley Glazewski, Furman Kornfeld & Brennan LLP Larry Hilton, Dominion Insurance Services Kim Schwarcz, Kim Schwarcz Fiduciary</i>	Magic Kingdom Ballroom 3 PRACTICE MGMT *VIDEO*
8:30AM to 9:30AM		<i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall
9:30AM to 11:00AM Track C	1.5	C1 Cannabis and the Fiduciary: What You Weed to Know <i>Lee-Anne Godfrey, RN Health Management</i>	MR I-J PERSON
		C2 Everything You Wanted to Know about Court Accountings but Were Afraid to Ask <i>Francine Lee, Ernst & Young</i>	Magic Kingdom Ballroom 2 PRACTICE MGMT *VIDEO*
		C3 What Attorneys and Fiduciaries Should Know About Representing Clients in a Real Estate Transaction <i>Jean Shrem, Shrem Law</i>	Magic Kingdom Ballroom 4 ESTATE
		C4 SNT Trust Administration for the Mentally Ill Beneficiary <i>Meredith Taylor, IMT Associates</i>	Magic Kingdom Ballroom 3 TRUST *VIDEO*
		C5 Alternative Court Proceedings to a Conservatorship <i>Carlos Arcos, Carlos A. Arcos, A Law Corporation</i>	MR F-G PERSON
		C6 Instagram Influencers, YouTube Celebrities, Bitcoin Miners, and Me: A Look at the Fiduciary Duties with Digital Assets <i>Megan Moghtaderi & Jennifer Lumsdaine, TLD Law</i>	Magic Kingdom Ballroom 1 ESTATE *VIDEO*
11:00AM to 12:30PM		<i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall

12:30PM to 1:45PM	1.0	Lunch Time General Session The Assessment of Civil Capacities: A Practice Method of Screening for Incapacity <i>Dr. Teo Ernst, Teo Ernst, Psy.D. ABPP</i>	Disneyland Grand Ballroom PRACTICE MGMT
1:45PM to 3:15PM		<i>PFAC Connect</i> (Exhibit Hall)	Disneyland Exhibit Hall
3:15PM to 4:15PM Track D	1.0	D1 Examining the Role of A Professional Fiduciary in Challenges to Mom or Dad's Wishes Before They Die <i>Robert Barton & Vivian Thoreen, Holland & Knight LLP Hon. Judge David Cowan, Los Angeles Superior Court</i>	Magic Kingdom Ballroom 1 TRUST *VIDEO*
		D2 The Law, Ethics, and Practicalities of the Private Professional Fiduciary as Petitioner <i>Jeffrey Marvan, MarvanLaw, A.P.C. Yevgeny Belous, Nielsen & Rogers LLP</i>	Magic Kingdom Ballroom 4 ETHICS
		D3 Asset Administration – Identifying, Managing and Selling Assets <i>Andrew de Vries, Berkshire Hathaway Home Services</i>	Magic Kingdom Ballroom 3 ESTATE *VIDEO*
		D4 Managing Interactions with Personality Disordered Clients or Families <i>Donna Bogdanovich, Bogdanovich Murray Professional Fiduciaries Sylvia Thompson, LivHOME</i>	Magic Kingdom Ballroom 2 PERSON *VIDEO*
		D5 Thinking of Buying a Fiduciary Practice? A Case Study. <i>Robyn Farber, Robyn Farber & Associates Inc., Professional Fiduciary Marin Bradshaw, Murtaugh, Treglia, Stern & Deily LLP Josef Cowan, Cowan Law Group</i>	MR F-G PRACTICE MGMT
		D6 The Ballad of Jannie Brown: How a Career Criminal Uses the Law to Take Property From the Unwitting and What You Can Do to Put Things Right <i>Tamila Jensen, Law Office of Tamila C. Jensen P.C.</i>	MR I-J ESTATE
3:15PM to 4:45PM		Exhibitor Move Out	Disneyland Exhibit Hall
4:30PM to 5:15PM		PFAC Member Annual Meeting	TBD
5:30PM to 8:00PM		Dinner Celebration Disneyland Resort Hotel	Magic Kingdom Lawn
7:00PM to 11:00PM		PFAC Park Experience 7-8PM - Guests escorted into Park 9PM - PFAC Private Party 10:15PM - VIP viewing of World of Color show	Paradise Gardens (Disney's California Adventure Park)

Saturday, May 4th

Full Conference Day 3

Credit Hours: 3.0

TIME	CEU	ACTIVITY	LOCATION
7:15AM to 2:00PM		Conference Registration Desk Open	Disneyland Grand Ballroom Registration
7:30AM to 8:45AM		Continental Breakfast / PFAC Café	Grand Ballroom Center Lounge
8:45AM to 10:45AM	2.0	Closing General Session Cultural Diversity and Ethics <i>Viki Kind, Kind Ethics</i>	Disneyland Grand Ballroom ETHICS *VIDEO*
10:45AM to 11:00AM		PFAC Café/Break	Grand Ballroom Center Lounge
11:00AM to Noon Track E	1.0	E1 The Interplay Between Business Entities and Fiduciary Trustees <i>David Kim, Wright Kim Douglas, ALC Hon. Judge Brenda Penny, Los Angeles County Superior Court</i>	Magic Kingdom Ballroom 1 ESTATE *VIDEO*
		E2 Overview of Transfer Taxes and Income Taxation of Trusts and Estates for Fiduciaries <i>Rebecca Van Loon, Seltzer Caplan McMahon Vitek, A Law Corporation</i>	Magic Kingdom Ballroom 2 ESTATE *VIDEO*
		E3 Recent (and Scary) Developments in Litigation Land <i>Mary Cataldo, Procopio, Cory, Hargreaves & Savitch, LLP</i>	MR F-G PRACTICE MGMT
		E4 Maximizing a Settlement Award Involving Government Benefits <i>William Lindahl, CPT Institute</i>	Magic Kingdom Ballroom 4 PERSON
		E5 Taxability of Trust Distributions: What is Distributable Net Income (DNI)? <i>Evan Sandler, Onisko & Scholz, LLP, CPA</i>	Magic Kingdom Ballroom 3 TRUST *VIDEO*
		E6 Going Forward with Reverse. A High-Level Look at Today's Reverse Mortgage Loan Options. <i>Brad Dela Cruz, American Advisors Group</i>	MR I-J ESTATE
Noon		Conference End	

Schedule is subject to change without notice