



**Ellen Cookman, J.D., LL.M.**  
*Cookman Law*

## **RECENT DEVELOPMENTS IN SPECIAL NEEDS PLANNING**

The laws regarding special needs trusts are constantly changing and keep us on our toes! Please join attorney Ellen Cookman for a lively and informative presentation on the basics of special needs trusts as well as a deeper dive into the following issues: Should I draft a stand-alone or testamentary special needs trust? How should I draft the trust so that pre-tax retirement accounts can be “rolled over” into the trust? How do I “establish” a special needs trust? What is the difference between a first-party and third-party special needs trust? What is an ABLE account and why should a disabled beneficiary have one? What is a limited conservatorship and how does it work?

Ellen Cookman is the principal of Cookman Law in Palo Alto, California. She is passionate about helping families of all shapes and sizes plan for the future and utilize available resources. Ellen is a Certified Specialist in Estate Planning, Trust & Probate Law from the California State Bar Board of Legal Specialization. She received her J.D. from UC Berkeley School of Law (Boalt Hall), and recently received her LL.M. in Estate Planning, Trust and Probate from Golden Gate University. Ellen lives in East Palo Alto with her husband (also the office manager at Cookman Law), two cute and very active little boys, and a boxer-pit bull mix named Ulysses.

Join us on **Wednesday, March 21, 2018** at 5:30 PM  
At the Omni Hotel - 500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members                      \$95 Preregistered Guests  
*At the door – Registrations still needed - \$80 members and \$100 guests*  
**Reservation needed by** March 19, 2018

Send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518  
Or pay by credit card – <http://www.123signup.com/calendar?org=sfepcc>

### **Continuing Education Credit:**

*MCLE:* This activity is approved for MCLE credit of one hour by the State Bar of California.  
*CPA & CFP®:* A sign-in sheet and an attendance certificate are provided at each meeting.

### **Excused Absence:**

Members can request an excused absence by mailing a letter, or sending an email (SFEPCC@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.