



J.D. Rees, Sheppard Mullin
Adam F. Streisand, Sheppard Mullin

Crypto and Blockchain 101 for California Estate Planners, Fiduciaries, and Fiduciary Litigation Counsel

Regardless of one's views about the future value or utility of crypto and blockchain investments, trust and estate planners, litigators, and fiduciaries must have a working knowledge of these assets. This presentation will provide guidance on what crypto and blockchain technologies are, how people are investing in them, and how familiar fiduciary duties apply to fiduciaries and counsel charged with handling them. Additionally, this presentation flags common issues faced by estate planners who must counsel clients on crypto and blockchain investments, such as access, custody, taxes, and more.

J.D. Rees is a fifth-year attorney in Sheppard Mullin's Business Trials and Private Wealth and Fiduciary Litigation Practice Groups. In addition to advising clients on probate matters ranging from conservatorships and guardianships to will and trusts contests, Mr. Rees has also counseled clients on cryptocurrency and blockchain-technology matters, and has published articles about the interplay between cryptocurrencies and trusts and estates and tax laws.

Adam Streisand is a litigation partner with several practices at Sheppard Mullin. Naming him "Litigation Attorney of the Year" in 2018, and one of "The Most Influential People in Los Angeles", the Los Angeles Business Journal explained: "Streisand is widely regarded as one of the nation's top trial attorneys, particularly in high profile litigation involving private wealth disputes, fiduciary litigation, business succession and partnership disputes and litigation involving trusts, estates and conservatorships." (L.A. Bus. J. 2018). Adam is credited with "rescuing" both L.A. NBA franchises, representing Microsoft CEO Steve Ballmer at trial against Donald Sterling over the Clippers, and Jeanie Buss in litigation over control of the Lakers. The *American Lawyer* cited Mr. Streisand as a veteran of battles over celebrity estates, including Michael Jackson, Tom Petty, Hugh Hefner, Muhammad Ali, Ray Charles, Marilyn Monroe, Marlon Brando, Barry White, Dennis Hopper, Michael Crichton, Anna Nicole Smith, Rodney Dangerfield, Rock Hudson, Joey Bishop, Bing Crosby, Gore Vidal, Carroll Shelby, Douglas Tompkins, Alan Thicke, among others. Streisand is repeatedly named one of the top trial lawyers in the U.S. and in California by numerous publications.

Join us on **Wednesday, May 22, 2019** 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 May 20, 2019

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>

If you or your guest requires a vegetarian meal, please send an email to: sfepcc@astound.net

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.

767 Brannan Place, Concord, CA 94518

SAN FRANCISCO ESTATE PLANNING COUNCIL

Notice of Nomination of Directors for 2019-2022 Term

The bylaws of the San Francisco Estate Planning Council provide that a nominating committee of five members shall nominate directors to be voted upon by the membership.

We will vote on the following slate of directors at the upcoming May 22, 2019 member meeting:

Miranda Holmes (Second Term)
John Osborn (Second Term)
Genevieve Larson (First Term)
Eric Rodriguez (First Term)

We extend our thanks to the following directors whose terms are expiring:

Amy Allen
Keith McWilliams

SAVE THE DATE

2019 SFEPC ROOFTOP REVELRY SOCIAL

May 30, 2019

Sansome Rooftop Deck

6:00PM – 8:30PM

Live Entertainment, Food, Beer, Wine and Great Company!

SFEPC & GGU SYMPOSIUM

Trust and Estate Conflict Resolution

May 31, 2019

Golden Gate University

Mark your calendars!
Sponsorship Opportunities for both events.
More information to follow.