



San Francisco Estate Planning Council & Golden Gate University Symposium 2019

# Trust and Estate Conflict Resolution

May 31 | San Francisco, CA | Golden Gate University

## Agenda

Time	Topic & Speakers	Speaker(s)
8:00 am	Check in and Breakfast	
8:30 am	Welcome and Introduction	Harry Maring, GGU and Phil Hayes, SFEPCC
8:35 am	1st Session: Alternative Dispute Resolution	Bruce Ross, Seyfarth Shaw
9:35 am	2nd Session: Trials & Tribulations: Defending Transfer Tax Returns in Audit	Stephanie Loomis-Price, Winstead PC
10:35 am	Break/snack and coffee	
10:50 am	3rd Session: California Taxation of Trusts: Is change in the air?	Edwin Antolin, Antolin Agarwal LLP William Hilson, Franchise Tax Board Chris Parker, Moss Adams LLP
11:50 am	Break/ Lunch service starts	
12:10 pm	Lunch & 4th Session: You be the Judge! Ethical Dilemmas Posed by Current Cases and Ethics Opinions	Karen Boxx, Keller Rohrback LLP Linda J. Retz, Law Offices of Linda J. Retz
1:10 pm	5th Session: Dispute Resolution: Case Studies in Communication, Mediation and Litigation	Moderator: Phil Hayes, Bessemer Trust Steven Braccini, Sheppard, Mullin, Richter & Hampton LLP John Hartog, Hartog, Baer & Hand APC Katherine Porter Ragusa, Wells Fargo Bank, N.A.
2:10 pm	Break/ dessert	
2:30 pm	6th Session: Elder Abuse: Red Flags and How to Protect Your Clients	Stacie Polashuk Nelson, Holland & Knight LLP Kirsten Voyles, Legal Assistance for Seniors
3:30 pm	Adjourn	