



Please join us for the
San Francisco Estate Planning Council & Golden Gate University Symposium 2019

Trust and Estate Conflict Resolution

May 31 | San Francisco, CA

[Please RSVP by May 28](#)

Friday, May 31, 2019
8:00 am – 3:30 pm
Golden Gate University, Rooms 2101 & 2102
536 Mission Street, San Francisco, CA

Pre-Registration is Required
\$175 members | \$200 non-members
At the door: \$200 members | \$225 non-members
Six hours of MCLE credit offered

Contact us at SFEPC@astound.net with questions, to request a vegetarian meal, or to pay by check.

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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	