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To Decant or Not to Decant

With California's enactment of the Uniform Trust Decanting Act, practitioners have a new means to address issues concerning irrevocable trusts. Is decanting the panacea for changing the terms of an irrevocable trust or is it merely an additional tool that requires comparison and analysis? This presentation will review California's new decanting statute and contrast it with petitions for modification, petitions for reformation, and petitions for instructions.

Jenny Hill Bratt is a partner at Withers Bergman LLP. She focuses her practice on US and international estate and income tax planning, trusts and estates administration, family and closely held business planning, charitable planning, and exempt organizations. Jenny is an ACTEC fellow, a member of the Executive Committee of the Trusts and Estates Section of the California Lawyers Association, and a specialist in estate planning, trust, and probate law by the State Bar of California Board of Legal Specialization. She is a former Co-Editor-in-Chief of the California Trusts and Estates Quarterly. She received her B.A. from the University of California San Diego and her J.D. and LL.M in Taxation from University of San Diego. She is admitted to practice in California, New York, and Connecticut.

Rodney Lee is a Partner at Loeb & Loeb LLP and a seasoned trial attorney focusing on private wealth and general business disputes for clients ranging from high net worth individuals, including professional athletes and entertainers, to entrepreneurs and startup companies. With more than 15 years of experience in general business and trust and estate matters, he navigates his clients through complex business and interpersonal issues obtaining favorable results in state, federal, and alternative dispute resolution forums. Rodney concentrates on estate, trust and fiduciary litigation, including disputes involving issues of undue influence, lack of capacity, breach of fiduciary duty, and elder abuse. He also has extensive experience advising clients on the removal of personal representatives and trustees.

Join us on **Wednesday, January 22, 2020** 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 January 20, 2020

Send a check with names to: SFEPFC – 767 Brannan Place – Concord, CA 94518

Or pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

If you or your guest requires a vegetarian meal, please send an email to: sfepc@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:

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