

CONTINUING LEGAL EDUCATION

THE BAR ASSOCIATION OF SAN FRANCISCO



The Estate Planning, Probate and Trust Section of the Barristers Club presents

Secrets and Lies: Family Dynamics in Estate Planning

Tuesday
January 22, 2019

MCLE Registration: 11:30 a.m. - 12:00 p.m.

Program: 12:00 - 1:15 p.m.

Speakers



Patricia de Fonte
Principal Attorney
De Fonte Law



Alice Shikina
Principal Mediator
Shikina Mediation and Arbitration

Summary

The panel will consider multiple hypotheticals which address the secrets families hold and the challenging dynamics of family relationships. At its heart, estate planning is about families, and attorneys should do more than simply address taxes and trustee powers. They must address ex-spouses, estranged children, beneficiaries with substance abuse issues, beneficiaries with financial challenges, mistrust among family members, long-standing feuds and more. The panel will consider these challenges, advise how to facilitate conversations around these issues, and identify strategies for addressing them in estate planning documents.

Topics

- Learn techniques used by mediators to facilitate emotionally difficult conversations
- Learn what provisions to include in your estate plan to address challenging family dynamics
- Learn how to bring value to your clients by being more than a document preparer

MCLE: 1 Hour

To receive MCLE credit, you must sign in during the designated MCLE registration period. This activity is approved for Minimum Continuing Legal Education credit by the State Bar of California. BASF is a certified provider.

Provider #103

Location

Bar Association of San Francisco
301 Battery Street, 3rd Floor
San Francisco, CA 94111

Cost

\$30 Section Members
\$40 BASF Members, Government & Nonprofit Attorneys
\$55 Others
FREE for BASF Student Members
All prices increase \$10 on the day of the program.

Event Code: B191255

BASF Members:

Be sure to log in to get your discounts!
Refunds will be given up to 48 hours in advance, less a \$10 handling fee.

Special Requests:

People with disabilities should contact BASF regarding reasonable accommodations.

Section Chairs: Kelsey Quaranto, Quaranto Law & Richard Shu, Barulich Dugoni Law Group, Inc

Event Code: B19255 Register online: www.sfbare.org/calendar

CLE Webcast: www.sfbare.org/online-cle



Live



Recorded

Available February 1