

CONTINUING LEGAL EDUCATION

THE BAR ASSOCIATION OF SAN FRANCISCO



The Probate Litigation Subcommittee of the Estate Planning, Probate and Trust Section presents

Tax Strategies and Implications When Settling a Trust or Estate Dispute

**Wednesday
September 18, 2019**

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

Program: 12:00 - 1:30 p.m.

Speakers

Ryan J. Szczepanik

Hartog, Baer & Hand, APC

Brandon L. Spivack

Hartog, Baer & Hand, APC

Topics

- The tax laws that the presenters anticipate will be implicated in a trust or estate dispute
- The factors the IRS and a federal court will apply to determine whether to respect a settlement agreement, and the principles that have emerged from the relevant case law
- The scrutiny the IRS will give to the pleadings, discovery, and settlement documents as it decides whether to respect the tax related provisions of a settlement agreement
- Strategies the lawyer may employ to impact that decision

MCLE: 1 Hour Estate Planning, Trust & Probate Law Specialization Credit

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

BASF Conference Center
301 Battery Street, 3rd Floor
San Francisco

Cost

\$35 BASF Section Members

\$45 BASF Members, Government &
Nonprofit Attorneys

\$60 Others

Free for BASF Student Members

All prices increase \$10 on the day of the program.

This is a brown bag luncheon.

Event Code: G190506

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 Co-Chairs: Alicia Gámez, Law Office of Alicia M. Gámez; James Patrick Lamping, Law Office of James P. Lamping and Howard Slavitt, Coblenz, Patch, Duffy & Bass LLP

Register online: www.sfbar.org/calendar or complete form below.

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



Live



Recorded

Available October 1