



The Estate Planning, Probate and Trust Litigation Subsection presents

Probate Litigation Bootcamp



7:30 - 8:00 a.m. | MCLE Registration

7:55 - 8:00 a.m. | Welcome and Opening Remarks

8:00 - 9:00 a.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel I: On Your Marks: Petitions and their Responses

Speakers

Honorable Glen M. Reiser, Ret., JAMS
Alicia Gamez, Gámez Law

Topics

- What are the Elements of a Probate Petition?
- Action versus Special Proceeding
- Probate and Civil Procedure
- Responses to Petition - Options and Risks

9:05 - 10:05 a.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel II: Attacking the Pleadings: Demurrer, Anti-SLAP and MSJ

Speakers

Honorable Ana Maria Luna, Ret., Signature Resolution
Ciarán O'Sullivan, Law Offices of Ciarán O'Sullivan Fred C. Crombie
Fred C. Crombie, Coblenz, Patch, Duffy & Bass

Topics

- Challenging the Judge
- Motions to Disqualify Opposing Counsel
- Demurrers
- Anti-SLAPP
- Motions for Judgment on the Pleadings
- Motion for Summary Judgment/Adjudication
- Five Year Rule

10:15 - 11:15 a.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel III: Discovery after Death: Planning and Executing Discovery that Actually Helps

Speakers

Honorable Mary E. Wiss, San Francisco Superior Court
Frank Busch, Coblenz, Patch, Duffy & Bass

Topics

- Discovery options
- Probate-specific strategies
- Practical tips to create value

11:20 a.m. - 12:20 p.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel IV: Tools for Protecting the Vulnerable: Probate Elder Abuse Restraining Orders, Financial Elders Abuse Actions and Attachments

Speakers

Honorable Ana Maria Luna, Ret., Signature Resolution
Frank Busch, Coblenz, Patch, Duffy & Bass

Topics

- What qualifies as elder/dependent adult abuse
- Who can seek an EARO (standing issues)
- Steps to obtain/defend against an EARO
- Enforcement of EARO, including fees
- Elder abuse attachments

Section Chairs

Alicia Gámez, Law Office of Alicia M. Gámez and Frank Busch, Coblenz, Patch, Duffy & Bass

Register at www.sfbar.org/calendar

Date

Friday, August 22, 2025

Schedule

MCLE Registration: 7:30 - 8:00 a.m.
In-Person Program: 8:00 a.m. - 5:05 p.m.
Lunch: 12:20 - 1:20 p.m.
Reception Immediately to Follow

MCLE

7.5 Hours of Estate Planning, Trust & Probate Law Specialization Credit and .5 Hour of Civility

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

Cost

BASF Section Members and Paralegals	\$100
BASF Members	\$150
Nonmembers	\$450

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

Location

BASF Offices
50 Fremont Street, Suite 1700
San Francisco, CA

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All are welcome, varying rates apply based on membership status.

Event Code: G250510



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12:40 - 1:10 p.m. | MCLE: .5 Hour of Civility

Panel V: Civility in the Legal Profession

Keynote Speaker

Honorable Stephen M. Murphy, San Francisco Superior Court

Topics

- Best practices in and outside of court
- Trial and judicial civility
- The role of sanctions

1:20 – 2:50 p.m. | MCLE: 1.5 Hours of Estate Planning, Trust & Probate Law Specialization Credit

Panel VI: Attacking and Defending the Fiduciary: Fiduciary Duties; Suspension and Removal; Accountings; Clawbacks, Surcharge, and Attorney’s Fees

Speakers

Honorable Sandra K. Bean, Alameda County Superior Court
Honorable Roger L. Lund, Ventura Superior Court

Topics

- Fiduciary Duties
- Accountings
- Suspension and Removal
- Attorney’s Fees
- Surcharge
- Claw backs

3:00 – 4:00 p.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel VII: Tee’ing Up the Case for Mediation

Speakers

Honorable Glen M. Reiser, Ret., JAMS
Honorable Roger L. Lund, Ventura Superior Court
Honorable Ana Maria Luna, Ret., Signature Resolution
Honorable Sandra K. Bean, Alameda County Superior Court

Topics

- What preparation is appropriate?
- Information: Discovery or Accountings?
- Role of the Fiduciary
- Role of the Mediator
- Mediator's proposal
- Court Approval

4:05 – 5:05 p.m. | MCLE: 1 Hour of Estate Planning, Trust & Probate Law Specialization Credit

Panel VIII: Crossing the Finish Line: Evidence, Trial, Motions in Limine, Experts, Damages, and Remedies

Speakers

John S. Rueppel, JKZ
Stacie Polashuk Nelson, Holland & Knight

Topics

- Insights into preparing for trial including a pretrial checklist 100 days out to trial
- Importance of the trial brief and educating the judge
- The ins and outs of working with and presenting experts
- Post trial work including briefing, motions and statements of decision

5:05 - 5:10 p.m. | Closing Remarks

5:10 - 6:30 p.m. | Networking Reception

Section Chairs

Alicia Gámez, Law Office of Alicia M. Gámez and Frank Busch, Coblenz, Patch, Duffy & Bass

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