

New Location

SONOMA COUNTY BAR ASSOCIATION

Along with the SCBA Education Committee, Trusts & Estates Section and Real Property Section, presents:

Real Property and Trusts & Estates Crossover Issues

Join us for an interactive discussion about issues to consider in planning and drafting estate plans that include real property assets, as well as the opportunities and potential challenges during probate or trust administrations.

Topics will include:

- ⇒ Estate planning considerations for clients with real property assets
- ⇒ Procedural concerns in real property transactions involving trusts & estates - trust administration vs. probate
- ⇒ Entity owned real property and estate planning
- ⇒ Subtrust allocations of real property
- ⇒ Exclusions from property tax reassessment
- ⇒ Estate planning for cannabis-related businesses and real property
- ⇒ MediCal planning to protect the family home
- ⇒ Co-ownership agreements and beneficiary buyout options for inherited real property interests
- ⇒ Basic tax considerations for estate planners: estate tax, income tax and property tax
- ⇒ Life estate planning in and out of trusts



Kenneth R. Cyphers
Anderson Zeigler,
A Professional Corporation



Naomi Metz
Law Office of Naomi E. Metz

For Speaker Bios, Visit the Seminar Page at www.SonomaCountyBar.org

Date: Wednesday, December 5, 2018 **Time:** Check-In: 2:45 pm; Presentation: 3:00—5:00 pm

Place: **NEW LOCATION: The Glaser Center**, 547 Mendocino Ave, Santa Rosa, CA 95401.
PARKING FOR THIS LOCATION IS AVAILABLE DIRECTLY BEHIND THE GLASER CENTER IN THE 7TH STREET PARKING GARAGE AT 521 7TH STREET

Registration Fee: \$80--SCBA Members; \$95--Public;
\$20--Students (Students must provide proof of current enrollment with registration to receive discount)

Credit: 2 Units Participatory MCLE Credit in General Law

Water and light snacks will be provided.

Please sign me up for *Real Property/T&E Crossover on Wednesday, December 5, 2018*

Attendee(s): _____

Phone: _____ ♦ Email: _____

Check, Visa, MasterCard, or Discover Accepted ♦ Amount: \$ _____ ♦ Payor: _____

Card #: _____ ♦ Exp: _____ ♦ CVV: _____ ♦ Zip: _____

PLEASE SEND MY HANDOUT TO ME DIGITALLY (OPTIONAL). Handout material will be emailed the morning of the presentation to the email address listed above. Printed material will not be provided at the door for those who receive digital copies of their handout. Digital Handouts can also be requested by contacting Joan Guillaumin at Joan@SonomaCountyBar.org or (707) 542-1190 ext. 10.

REGISTER BY: PHONE: call 707-542-1190 x10 • FAX: 707-542-1195 • MAIL: Sonoma County Bar Association, 111 Santa Rosa Ave., Ste. 222, Santa Rosa, CA 95404.
WEB: at www.sonomacountybar.org. Online registration closes one day prior to the presentation for programs hosted at the SCBA office and 5 business days prior for programs hosted outside of the SCBA office. Once online registration closes, you may continue to register for this program by phone or fax.

REFUNDS will be given if a SCBA refund request form is received prior to the start of the program. Refund request forms are available on the SCBA website.

The Sonoma County Bar Association has been approved as a Multiple Activity Provider (Provider #130) for Minimum Continuing Legal Education credits by the State Bar of California and as a Multiple Activity Provider (Provider #130) by the State Bar of California's Board of Specialization for Legal Specialization credits in (1) Family Law, and (2) Estate Planning, Trust & Probate Law. The Sonoma County Bar Association certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing continuing legal education.