

Along with the SCBA Alternative Dispute Resolution Section and the SCBA Trusts & Estates Section, presents:

A Matter of Trust:

The Challenges of Mediating Inheritance Disputes

It is not just the intensity of emotions that challenges the mediator in inheritance disputes. Challenges arise also from the range of interests that need to be considered, including some that might not be represented at the mediation, trying to clarify what the real issues and sources of dispute are, meeting (or ignoring) Probate Code and tax code strictures, and ethical dilemmas posed by attorney-client and multi-party tensions. By discussing these and other challenges, the speaker will also be eliciting ideas for overcoming them, before, during, and after the mediation session.



Richard Collier
Cooper, White & Cooper
San Francisco

Mr. Collier has a litigation and ADR practice with Cooper, White & Cooper LLP. His litigation practice focuses on trust and probate disputes in which he has represented beneficiaries and trustees, both individual and corporate, in breach of fiduciary duty, surcharge, and prohibited transferee actions, and actions to interpret or modify trust instruments. He trained as a mediator in 1993 and has mediated over 400 disputes covering a wide range of subjects, number of parties, and dollar amounts, including numerous inheritance disputes. He is a Past President of the Mediation Society and, with Dana Curtis, chaired the BASF Mediation Committee for many years. He serves as an arbitrator and mediator for the American Arbitration Association and as a mediator and neutral evaluator for the Northern District of California United States District Court's ADR Program. Before practicing law, Mr. Collier taught in the English Department at UC Berkeley, where he received the University's Distinguished Teaching Award.

Date: Tuesday, February 26, 2019

Time: Check-In: 11:45 am; Presentation: 12:00 - 1:00 pm

Place: SCBA Office, 111 Santa Rosa Ave., Ste. 222, Santa Rosa, CA 95404. Parking for this seminar is ONLY available in the Public Parking Garage at 555 First Street. Do not park in the parking lot at 111 Santa Rosa Avenue.

Registration Fee: \$60--SCBA Members; \$75--Public; \$50--SCBA ADR Section and SCBA T&E Section Members
\$20--Students (Students must provide proof of current enrollment with registration to receive discount)

Credit: 1.0 Unit Participatory MCLE Credit in General Law and
1.0 Unit Participatory Specialization Credit in Estate Planning, Trust & Probate Law

T&E Specialization

Credit Included!

Water and light snacks will be provided.

Please sign me up for *Mediating Inheritance Disputes on Tuesday, February 26, 2019*

Attendee(s): _____

Phone: _____ ♦ Email: _____

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

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

(Check Here) 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 at any time before the seminar 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.