The Seattle Estate Planning Council and the UW School of Law are pleased to present the

**61st ANNUAL ESTATE PLANNING SEMINAR**

WE HAVE A WONDERFUL PROGRAM PLANNED FOR THIS YEAR,
with presentations by regionally and nationally recognized experts encompassing all areas of estate planning designed to keep you current on legislation, court rulings, and trends. We look forward to seeing you at the Seminar!
New This Year: Expanded Exhibit Hall and Box Lunches

We have moved and expanded the Exhibit Hall to allow for greater networking opportunities with sponsors, exhibitors, and other attendees. We will be serving box lunches with additional seating areas so attendees have more flexibility during the lunch break.

Continuing Education Credits

Approved for 14.50 CLE credits (13.50 Law & Legal Procedure; 2.00 Ethics; 1.00 Office Management)* for Washington attorneys. Application has been made for other states and additional professions. Accreditation information will be updated on our website (www.seattleestateplanningseminar.com) as it becomes available.

* TOTAL AMOUNT OF CLE CREDITS AVAILABLE TO EARN IS ONLY 14.50, NOT 16.50, AS THE TYPE OF CREDITS EARNED ARE DEPENDENT ON WHICH SESSIONS INDIVIDUALS ATTEND.
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:45 a.m.</td>
<td>Registration Opens</td>
</tr>
<tr>
<td>8:00 a.m.</td>
<td><strong>Welcome and Introductions by Conference Chair</strong></td>
</tr>
</tbody>
</table>

*Jolene Cox*, Deloitte Tax LLP, Seattle, WA

| 8:05 a.m. | **You Can Take It With You – Assuring Compliance with Decedents' Wishes in an Era of Litigation and Flexibility** |

*David Baker*, McDermott, Will & Emery LLP, Chicago, IL | *Kristen E. Caverly*, Henderson, Caverly, Pum, & Charney | San Diego, CA

This panel discussion will focus on the many ways estate plan objectives can be modified and frustrated post-death, and strategies to avoid those changes. Topics will include the current state of In Terrorem clause enforcement; the role of arbitration clauses in wills and trusts; judicial intervention through construction of ambiguities and reformations; the growing use of Non-Judicial Settlement Agreements through Virtual Representation statutes; Total Return and Directed Trust Conversions; Decanting; and Disclaimers. The panelists will discuss policy issues arising in locking in planning objectives opposed by beneficiaries and the courts, as well as trends in the use of preventive measures to defeat statutory modification remedies, like Decanting.
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:35 a.m.</td>
<td><strong>A New World Order for Estate Planners or Why Is It So Difficult to Open a Bank Account?</strong></td>
<td><em>M. Read Moore</em>, McDermott Will &amp; Emery LLP, Menlo Park, CA</td>
<td>As American estate planners we rely on the widespread use and acceptance of trusts, simplicity in organizing companies, and expediency in financial transactions. Governments and regulators around the world, however, are often skeptical of these features, suspecting them of facilitating money laundering and tax evasion. Combined with the worldwide trend towards tax transparency and government sharing of information, this skepticism has the potential to result in legislation and regulation that could significantly change the American estate planning business. This presentation will address these important developments, and their impact on our clients and the advice we give them.</td>
</tr>
<tr>
<td>10:35 a.m.</td>
<td><strong>Break in Exhibition Hall</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:55 a.m.</td>
<td><strong>Federal Tax Update</strong></td>
<td><em>Samuel A. Donaldson</em>, Georgia State University, College of Law</td>
<td>Atlanta, GA Stay current with this recap of the major cases, rulings, legislation, and regulations from the past year. This session will focus on federal income, estate, and gift tax developments relevant to individuals and small businesses.</td>
</tr>
<tr>
<td>12:25 p.m.</td>
<td><strong>Box Lunches Provided</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>Event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>----------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 1:20 p.m.  | **Life Insurance in the Age of Fiduciary Duties: What Every Estate Planner Needs to Know**  
Focused on the non-insurance advisor, this presentation addresses how our understandable attitudes around “least cost” for life insurance - and the general failure of insurance products to live up to their sales illustrations - stand in the way of facilitating smart decisions around lifetime life insurance. This presentation demonstrates a technology for creating a portfolio of policies that is truly “efficient” in its ability to optimize the client’s uses for lifetime life insurance - in the context of the client’s broader investment portfolio. |
| 2:50 p.m.  | **Afternoon Break in Exhibition Hall**                                   |
| 3:15 p.m.  | **The Prerogatives of Privileges: The Ethics of Protecting our Planning Clients (Even from Themselves!)** (ETHICS CREDIT AVAILABLE)  
Stephanie Loomis-Price, Winstead PC, Houston, TX  
This session will provide practical tips with some discussion on recent developments in audits and case law related to privileges applicable to estate planning, with a particular focus on planning with closely-held entities. |
| 4:15 p.m.  | **Preferred Equity Interests: Special Valuation Rules Under Section 2701**  
Louis A. Mezzullo, Withers Bergman LLP, Rancho Santa Fe, CA  
The presentation will cover when the special valuation rules under Section 2701 of the Internal Revenue Code apply to a transaction, the effects of its application, and methods to avoid its application. |
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:15 a.m.</td>
<td>Late Check-In</td>
</tr>
<tr>
<td>8:00 a.m.</td>
<td>Opening Remarks</td>
</tr>
<tr>
<td></td>
<td><strong>Joe Cervantes</strong>, Coldstream, Bellevue, WA</td>
</tr>
<tr>
<td>8:05 a.m.</td>
<td>Washington State Update</td>
</tr>
<tr>
<td></td>
<td><strong>Mark Roberts</strong>, K&amp;L Gates LLP, Seattle, WA</td>
</tr>
<tr>
<td></td>
<td>This in-depth review of the past year’s significant cases and legislation will identify trends you must be aware of and share practice tips you won't want to miss.</td>
</tr>
<tr>
<td>9:05 a.m.</td>
<td>Estate Planning and Administration Considerations Related to Digital Assets</td>
</tr>
<tr>
<td></td>
<td>As we move more of our lives online, a new question arises: What privacy protections can we expect when we die? Different stakeholders have different views. Some believe that privacy choices made in life should continue; others want unfettered access to all their loved one’s communications; and trust and estate attorneys want to execute a will without additional burdens. With dozens of states around the country introducing bills and passing laws on this issue, this panel gives an update on the legal landscape and prepares you to discuss these new situations with clients. This discussion explores recent efforts by states to control the deceased’s privacy, analyzes conflicts created by federal privacy laws and new systems giving users more control, and provides suggestions on the best way to meet the privacy interests of the deceased and the needs of the bereaved.</td>
</tr>
<tr>
<td>Time</td>
<td>Event</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------</td>
</tr>
<tr>
<td>10:05 a.m.</td>
<td>Break in Exhibition Hall</td>
</tr>
<tr>
<td>10:25 a.m.</td>
<td><strong>What We Can Learn From Famous People’s Wills</strong></td>
</tr>
<tr>
<td>11:25 a.m.</td>
<td><strong>The Intersection of Business Transactions &amp; Estate Planning</strong></td>
</tr>
<tr>
<td>12:25 p.m.</td>
<td><strong>Box Lunches Provided; Dessert Served in Exhibit Hall</strong></td>
</tr>
</tbody>
</table>
BREAKOUT SESSIONS

Track One – Charitable Overlays for Advanced Estate Planning Strategies

Jeanne McMains, National Christian Foundation, Colorado Springs, CO

This session examines ways to enhance traditional advanced family wealth transfer planning techniques, such as Irrevocable Life Insurance Trusts, Family Limited Partnerships, and Installment Sales to Intentionally Defective Grantor Trusts, by integrating charitable planning strategies to complement clients’ family wealth transfer goals while also fueling their philanthropic legacies with leveraged tax efficiency.

Track Two – Marketing – What EVERY Professional MUST Know!

Stephan Leimberg, Leimberg Information Services, Inc. (LISI), Amelia Island, FL

Absorb and practice the concepts Steve Leimberg will share and within just one hour, you will be able to...
1. Build your name - and your firm's name - into a recognized brand - and bring more - and higher net worth quality clients into your office - and keep them there in a continuous lifelong stream.
2. Work smarter and earn much more by using dozens of creative, innovative, mind-stretching and easily implemented practical ideas.
3. Move your professional life to a higher “next level.”

Track Three – Special Needs Trusts: Developments

Sean R. Bleck, Somers Tamblyn King/Isenhour Bleck, Seattle, WA.

This presentation will include an overview of new Washington Medicaid Special Needs Trusts (SNT) Regulations; determining whether a SNT is a self-settled trust or a third party trust; the standards for third party SNTs, including testamentary SNTs; and creating and implementing self-settled SNTs.
BREAKOUT SESSIONS

Track One – 25 Drafting Tips from a Recovering Lawyer
Christopher P. Cline, Riverview Asset Management & Trust Company, Vancouver, WA

The dramatic changes over the past 20 years in federal and state estate planning and administration law have affected all aspects of our professional lives. Yet in many ways, the way trusts are drafted hasn’t changed at all. This presentation, which is applicable to all estate planning professionals who work with trusts, looks at the ways in which we draft and administer revocable and irrevocable trusts. It argues for a drafting approach that takes into account the challenges of administration and beneficiary needs, not just taxes.

Track Two – Estate Planning for the Creative Person
John E. Poffenbarger, Karr Tuttle Campell, Seattle, WA | Katherine Spelman, Lane Powell PC, Seattle, WA

Estate planning for the creative client frequently presents unique issues, including the handling of intellectual property rights, heightened scrutiny from taxing authorities, and often difficult family situations. This presentation will examine these issues and provide an overview of some of the specialized laws that should be considered in such planning.

Track Three – Insurance Suitability and Ethics
Jeff Baughman, Washington State Office of the Insurance Commissioner, Olympia, WA
Cheryl Penn, Washington State Office of the Insurance Commissioner, Olympia, WA

Course development in progress.
### Break in Exhibition Hall

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:30 p.m.</td>
<td>Break in Exhibition Hall</td>
</tr>
</tbody>
</table>

### BREAKOUT SESSIONS

**Track One – Can One Client With a Wardrobe of Hats Create a Conflict of Interest for the Lawyer? And other Questions Raised by the Fifth Edition of the ACTEC Commentaries.** *(ETHICS CREDIT AVAILABLE)*

Karen Boxx, UW School of Law, Seattle, WA  | Philip N. Jones, Duffy Kekel LLP, Portland, OR

The Fifth Edition of the ACTEC Commentaries, issued in March 2016, refined the guidance on several common conflict scenarios, such as where a client is both a fiduciary and a beneficiary, where a lawyer is asked to prepare estate plans for multiple generations of one family, and where a client’s capacity is diminishing. This presentation will explore these gray areas and present different views on when ethical lines are crossed.

**Track Two – GRATs: Operational Risks for Successful GRATs – other than BREXIT and U.S. Presidential elections**

Debra Estrem, Deloitte Tax LLP, San Francisco, CA  | Gary Kirk, Lane Powell PC, Seattle, WA

This presentation will explore administration and operational practices for grantor retained annuity trusts (GRATs). The commentators will review strategies to address issues that may arise at three points: 1) the funding of the GRAT; 2) the making of required annuity payments; and 3) the termination of the GRAT. Finally, the commentators will share real-life experiences with IRS examinations of GRATs.
JOLENE COX is a Managing Director for Deloitte Tax in their Private Wealth practice. Jolene currently serves a variety of privately-held businesses, owners and their related entities; private foundations and other charitable trusts; and high-wealth individuals, including resident aliens with international tax considerations. She is a trusted advisor to her clients and brings a diversity of experiences to work with her clients to manage not only their tax matters, but also many aspects of their financial affairs. A graduate of University of Washington, Jolene is a Certified Public Accountant and a member of the AICPA and the Washington State Society of CPAs. She is also a member of Washington Women in Tax and Seattle Estate Planning Council. She has served as a member of various planned giving boards, including University of Washington, Swedish Hospital Foundation and Lakeside School.

JOE CERVANTES, CFP®, CLU, is a Relationship Manager at Coldstream Wealth Management representing a five person team on one of five service teams at Coldstream. He specializes in providing comprehensive wealth management services including estate and financial planning, and risk analysis utilizing insurance planning concepts for affluent individuals and families. Joe has been a licensed insurance agent since 1990. In the mid 1990’s he attained several securities licenses to broaden his overall offering and understanding of the wealth management industry. In January of 2011, Joe joined Coldstream along with a team of credentialed professionals and formed a new service team focused on servicing the wealth management and comprehensive financial needs of successful families. Joe currently maintains insurance licenses in all lines including life, health, property, and casualty insurance. Joe is licensed as an independent agent and offers all lines of coverage through a Coldstream affiliate known as CHI LI, Inc., a wholly owned subsidiary of Coldstream.
FACULTY

DAVID A. BAKER

DAVID A. BAKER is a partner in the law firm of McDermott Will & Emery LLP based in the Firm’s Chicago office. He heads the Estate, Trust and Guardianship Controversy Practice Group. David has extensive experience in the areas of estate, trust and guardianship litigation; probate, estate, trust and guardianship administration; and charitable, foundation and exempt organization administration and litigation. He also practices estate planning. David is a fellow of the American College of Estate and Trust Counsel (ACTEC). David is the editor of the 2005 Edition of the Illinois Institute of Continuing Legal Education (IICLE) handbook on Estate, Trust and Guardianship Litigation (formerly Contested Estates), and the author of much of the book. He has authored articles and outlines for the Probate and Property Journal of the American Bar Association, the Illinois Institute for Continuing Legal Education and the Chicago Bar Association, and he speaks frequently before these organizations.

MONDAY // NOVEMBER 7 @ 8:05 A.M.

JEFF BAUGHMAN

JEFF BAUGHMAN is the Program Manager for the Office of the Insurance Commissioner’s Producer Licensing & Oversight Program, and has held this position for 8 years. His program regulates individual and agency insurance licensing, compliance, education, and financial examinations for approximately 160,000 Washington State insurance licensees. Jeff has 17 years of experience as a licensed insurance producer, and 10 years of experience as a regional licensing manager for GEICO prior to beginning his career with the OIC. Jeff is currently the vice-chair of the National Association of Insurance Commissioners’ (NAIC) Producer Licensing Working Group, chairs several Producer Licensing Working Group sub-committees, and holds the Associate Professional in Insurance Regulation (AIPR) designation.

TUESDAY // NOVEMBER 8 @ 2:30 P.M.

SEAN R. BLECK

SEAN R. BLECK is a co-owner of the firm Somers Tamblyn King/isenhour Bleck, P.L.L.C. His practice focuses on estate planning issues faced by elderly and disabled persons. He is a frequent author and lecturer on Medicaid eligibility and coverage. He is a past Chair of the Elder Law Section of the Washington State Bar Association and a past President of the Washington Academy of Elder Law Attorneys. He is a Fellow of the American College of Trust and Estate Counsel. He received his J.D. from Georgetown University and an LL.M. (tax) from New York University.

TUESDAY // NOVEMBER 8 @ 1:20 P.M.
**KAREN BOXX**

**KAREN BOXX** is a Professor at the University of Washington School of Law, where she teaches in the areas of trusts and estates, estate planning, community property, conflicts of laws, cannabis law and professional responsibility. She is also of counsel at Keller Rohrback LLP, Seattle, Washington. She is co-reporter for the upcoming Fifth Edition of the American College of Trust and Estate Counsel Commentaries on the Model Rules of Professional Conduct. She is past Chair of the Washington State Bar Association Real Property, Probate and Trust Section and is currently acting co-Chair of the Elder Law, Disability Planning and Bioethics Group of the ABA Real Property, Trust and Estate Section. She has been active in legislative reform, including chairing a WSBA Task Force that drafted major revisions to Washington trust law enacted in 2011. She is a Fellow of the American College of Trust and Estate Counsel and a member of its Professional Responsibility, Elder Law, and Legal Education Committees. She has run 16 marathons (so far).

**EINAT SANDMAN CLARKE**

**EINAT SANDMAN CLARKE** is Senior Counsel at Google Inc. She specializes in the Electronic Communications Privacy Act and counsels the teams which respond to user data requests, including requests for information pertaining to deceased users. Prior to joining Google, she was an Associate at Cooley LLP. Ms. Clarke received her law degree from Santa Clara University School of Law in 2004, and is admitted to practice in California.

**KRISTEN E. CAVERLY**

**KRISTEN E. CAVERLY** is a founding partner of Henderson, Caverly, Pum & Charney LLP, and she is the Chair of the Litigation Group at the firm. Ms. Caverly provides advice, counsel and representation to clients in estate and trust controversies, probate matters, contested guardianships and conservatorships, civil and commercial litigation, and business disputes. Ms. Caverly also handles appeals. She is a ACTEC Fellow and is certified as a Specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization. Ms. Caverly was selected in 2015 as a Fellow of the Litigation Counsel of America. Ms. Caverly was named as Best Lawyers in America® for 2016 in the area of Commercial Litigation. Ms. Caverly also has been recognized repeatedly as a California “Super Lawyer” by Super Lawyers® magazine in the area of estate and trust litigation. Ms. Caverly obtained her law degree from the University of San Diego School of Law, where she graduated second in her class and was elected to the Order of the Coif. Ms. Caverly was Executive Editor of the San Diego Law Review from 1993 to 1994.

**TUESDAY // NOVEMBER 8 @ 9:05 A.M.**

**MONDAY // NOVEMBER 8 @ 8:05 A.M.**

**TUESDAY // NOVEMBER 8 @ 3:55 P.M.**
CHRISTOPHER P. CLINE

CHRISTOPHER P. CLINE is the President and COO of Riverview Trust Company, a boutique asset management and trust company headquartered in Vancouver, Washington. Chris has spent eight years in the trust and asset management field, and the previous 17 years as an estate planning attorney, helping ultra-high net worth families and private businesses meet their estate planning and succession needs. He is the author of The Law of Trustee Investments, published by the American Bar Association, along with six other volumes on various estate planning topics. He is a Fellow of the American College of Trust and Estate Counsel, and is a nationally recognized speaker. He received his J.D. from Hastings College of the Law.

SAMUEL A. DONALDSON

SAMUEL A. DONALDSON is currently on the faculty of the Georgia State University College of Law in Atlanta. He was Associate Dean and a Professor at the University of Washington School of Law in Seattle. The former Director of the law school’s Graduate Program in Taxation, Professor Donaldson teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law, and professional responsibility. He is currently Senior Counsel with the Seattle office of Perkins Coie LLP and is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC). He is the author of the Thomson-West casebook, Federal Income Taxation of Individuals, a co-author of the Price on Contemporary Estate Planning treatise published by CCH, and a co-author of Federal Wealth Transfer Taxes, a reference published by Thomson-West. Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law.

DEBRA ESTREM

DEBRA ESTREM is the National Private Wealth Tax Controversy leader for Deloitte Tax and advises on IRS controversy matters throughout the country. After law school, she spent 15 years at IRS Chief Counsel where she litigated a wide variety of individual, estate, corporate, and partnership tax matters. As a Special Trial Attorney for the IRS, Debra litigated and resolved many of the biggest-dollar and highest-profile cases at the Service. Since coming to Deloitte, Debra has handled IRS-related work for estates, individuals, tax-exempt entities, and corporations. She specializes in high-wealth individual and estate/gift tax IRS disputes. She has been closely involved with many of the largest of these disputes in the country. She is particularly experienced with valuation, hobby loss, claims, employment tax, and penalties. In addition, she is an expert in obtaining voluntary disclosure agreements, technical advice and pre-filing agreements, defending IRS examinations, and conducting regular and Fast Track IRS Appeals, as well as Post-Appeals Mediation.

CHRISTOPHER P. CLINE
TUESDAY // NOVEMBER 8 @ 2:30 P.M.

SAMUEL A. DONALDSON
MONDAY // NOVEMBER 7 @ 10:55 A.M.

DEBRA ESTREM
TUESDAY // NOVEMBER 8 @ 3:55 P.M.
ROCHELLE L. HALLER, an owner of Garvey Schubert Barer, started her practice in New York City at Davidson, Dawson & Clark, a well-established boutique estate planning law firm. After several years on the east coast, Rochelle returned to her native Washington State and joined Graham & Dunn (now Miller Nash Graham & Dunn), where she continued her estate planning practice. Rochelle’s practice focuses on estate planning, tax planning, high net worth planning, probate and trust administration, prenuptial and postnuptial planning, family owned business succession planning and planning for athletes and entertainers. In the last few years, Rochelle has been a frequent speaker and has written several articles on estate planning for digital assets. She also serves on the Washington State Bar Association Legislative Committee for the Real Property, Probate and Trust section and has been involved with several other association committees. She received her J.D., cum laude, from New York Law School.

BENETTA PARK JENSON is a Managing Director and Midwest Wealth Advisor at J.P. Morgan Private Bank. She assists clients with the development of comprehensive, generational wealth transfer planning strategies. She previously was a partner in the Private Client Department of the law firm of McDermott Will & Emery. Benetta is a Fellow of the American College of Trust and Estate Counsel (ACTEC) and was invited to join the College as part of its inaugural class of Fellows in the new category of Fiduciary Counsel. Benetta frequently speaks and writes nationally on trust and estate planning topics. She is part of leadership of several professional organizations, including the Society of Trust and Estate Practitioners (founding officer and former Chair of the Chicago branch and former officer of STEP USA), Real Property, Trust & Estate Law Section of the American Bar Association, Trust Law Committee (former Chair) of the Chicago Bar Association, and the Chicago Estate Planning Council (Board Member).

PHILIP N. JONES is admitted to practice in Oregon and Washington. Since 1976, he has been with the firm of Duffy Kekel LLP, with offices in Portland and Vancouver. Mr. Jones practices primarily in the areas of estate planning, estate and trust administration and taxation, and estate and trust litigation. He is a member of the American College of Trust and Estate Counsel and the Estate Planning Council of Portland. For twenty years he served as an Adjunct Professor of Law at Lewis & Clark Law School, where he taught Estate & Gift Taxation and Federal Tax Procedure. He is also the author of numerous articles in the Journal of Taxation and other publications.
GARY M. KIRK is a Shareholder at Lane Powell and a member of its Trusts and Estates Practice Group. His practice focuses exclusively on estate and tax planning for high net worth individuals with an emphasis on income tax planning for closely-held businesses and business succession planning. Gary works on all types of business entities and owners in connection with operating agreements, reorganizations and income tax issues. He is rated AV Preeminent® in Martindale-Hubbell’s Peer Review Ratings™. Gary received his J.D. from the University of Oregon and his LL.M. in Taxation from New York University.

STEPHAN R. LEIMBERG is Publisher of Leimberg Information Services, Inc. (LISI) an e-mail and database service providing information, analysis, and commentary on tax cases, rulings, and legislation for financial services professionals, and CEO of Leimberg and LeClair, Inc., the firm that created NumberCruncher software for estate and financial planning professionals. Leimberg was the 1998 Edward N. Polisher Lecturer of Dickinson School of Law and 2004 recipient of the National Association of Estate Planners and Councils Distinguished Accredited Estate Planner award. He was Editor of Keeping Current (Society of Financial Service Professionals), former Lecturer-in-Law in the Masters of Taxation Program of both Villanova and Temple University Schools of Law, and served on the Editorial Board of Estate Planning Magazine. He is editor, author or co-author of many books on estate, financial, and employee benefit and retirement planning and a nationally known speaker.

STEPHANIE LOOMIS-PRICE is a shareholder in Winstead’s Wealth Preservation Practice Group. Stephanie handles federal gift and estate tax litigation against the Internal Revenue Service across the country, as well as state fiduciary and probate controversy work in Texas courts. She also counsels clients regarding complex estate administration. Board Certified in Estate Planning and Probate Law, Stephanie is a Fellow of the American College of Trust and Estate Counsel (ACTEC), where she serves as a Regent, as well as a member of the Business Planning Committee and the Long-Range Planning Committee. In addition, Stephanie serves as Finance Officer for the Real Property, Trust and Estate Law Section of the American Bar Association, as well as Chair of the Income and Transfer Tax Planning Group of the same organization. On tax matters, Stephanie has represented clients before the United States Tax Court, the United States Court of Federal Claims, and United States Court of Appeals for the Fifth, Eighth, and Eleventh Circuits.
M. READ MOORE is a partner at McDermott Will & Emery LLP and provides legal counsel on all aspects of estate planning, estate and trust administration, tax controversy, and privately owned business governance and succession planning. Read works with clients across the United States and around the world on innovative planning and tax and nontax controversies for private companies, domestic and foreign trusts, and wealthy family groups. He has considerable experience in the international aspects of the private client practice, including inbound investment and wealth transfers to the United States, the U.S. tax and legal aspects of non-U.S. private company and wealth management structures, and U.S. tax compliance for clients with global investments and assets. Read is an ACTEC Fellow and an Academician of the International Academy of Estate and Trust Law. Read is also a member of the editorial board of Estate Planning magazine and served as Editor of the ACTEC Journal. Read received his J.D. from the University of Virginia School of Law, where he was a member of the Editorial Board of the Virginia Law Review.

LOUIS A. MEZZULLO is a consulting partner in Withers Bergman LLP. His areas of practice are taxation, estate and business planning, and employee benefit planning. He was an Adjunct Professor at the University of Richmond Law School from 1978 to 2006, was on the faculty of the University of Miami School of Law Graduate Program in Estate Planning from 2004 until 2007, and was on the faculty of the University of San Diego School of Law in 2009. He has been published extensively and frequently speaks at tax and estate planning conferences. Mezzullo received his J.D. from the University of Richmond Law School, and a B.A. and M.A. from the University of Maryland. He is a past Chair of the American College of Tax Counsel; a Fellow of the American Bar Foundation; a Fellow of the Virginia Law Foundation; a Past President of ACTEC, as well as former Chair of its Business Planning, Employee Benefits in Estate Planning, and Elder Law Committees; a Charter Fellow of the American College of Employee Benefits Counsel; and an Academician and a former Vice President of the International Academy of Trust and Estate Law.

JEANNE LEE MCMAINS has been a practicing attorney in the areas of estate planning, business succession and charitable giving since 1995. After owning her own law firm and practicing with a large national law firm, Ms. McMains currently serves as Vice President of Gift Planning Services with The National Christian Foundation where she assists families and professionals nationwide with their philanthropic and family legacy planning needs. Ms. McMains has served as a featured presenter for several financial institutions including A.G. Edwards & Sons, Alliance Bernstein, Fidelity Investments, Merrill Lynch, Morgan Stanley, New York Life, Northwestern Mutual, Principal Financial Group and Ronald Blue & Company. She is also a featured speaker for numerous charitable organizations including Alliance Defense Fund, Christian Legal Society, Compassion International, Focus on the Family, Kingdom Advisors, Medical Teams International, Pepperdine University and the Young Life Foundation. Ms. McMains obtained her law degree from Indiana University.

M. READ MOORE

LOUIS A. MEZZULLO

JEANNE LEE MCMAINS
**FACULTY**

**CHERYL PENN** has 39 years of experience in the insurance industry: 10 years as an Assigned Risk Manager for Farmers Insurance Group and 29 years as an employee of the Washington State Office of the Insurance Commissioner in various capacities, including 18 years as an Investigator – reviewing complaints against insurance producers, and five years as a Compliance Analyst/Supervisor overseeing the market practices and regulatory compliance of Washington State licensees. She holds the Certified Investigator certification from the Council on Licensure, Enforcement and Regulation (CLEAR); the Health Insurance Associate designation from the Health Insurance Association of America (HIAA); and the Associate Compliance Professional designation from the Association of Insurance Compliance Professionals (AICP).

**JOHN E. POFFENBARGER** is a shareholder at Karr Tuttle Campbell and the chair of the firm’s Trusts and Estates Practice Group. He is experienced in a wide range of areas including wills and trusts, planning and formation of limited liability entities, estate and trust administration, generation skipping trusts and other advanced estate planning strategies, as well as shareholder and buy-sell agreements and business succession planning. John also frequently handles estate and gift tax matters with the Internal Revenue Service. In addition, he has handled estate matters for some of the Seattle area’s most prominent musicians. John received his undergraduate degree from the University of Oregon in 1984 and his J.D. from the University of Washington School of Law in 1987. He is a frequent speaker and writer on estate and closely held business planning topics.

**MARK W. ROBERTS** is a partner in the Seattle office of K&L Gates LLP. He is a member of the firm’s Private Clients, Trusts and Estates practice group, and his practice emphasizes all areas of estate planning and the administration of trusts and estates. He graduated from Bucknell University and received his law degree with honors from the University of North Carolina School of Law. He is a past chairperson of the Real Property, Probate and Trust Section of the Washington State Bar Association and previously served as co-chair of the Washington State Bar Association Probate Law Task Force. He is also a fellow of the American College of Trust and Estate Counsel. He has served as a member of the executive committee of the Estate Planning Council of Seattle. He is a frequent lecturer at professional continuing education programs on topics relating to estate planning and probate and trust law.

**CHERYL PENN**

**MARK W. ROBERTS**

**JOHN E. POFFENBARGER**

**TUESDAY // NOVEMBER 8 @ 2:30 P.M.**

**TUESDAY // NOVEMBER 8 @ 8:05 A.M.**
KATHERINE C. SPELMAN is a shareholder at Lane Powell and has extensive experience in copyright issues, from the production and development phases to potential sale or defense work. Kate frequently advises estate planners on how to best assist their clients in developing strategies to maximize the value of copyrights both during life and after death, including what is necessary to preserve and transfer those intellectual property assets while minimizing the risk of fiduciary litigation. Kate received her undergraduate degree from the University of Michigan and her J.D. from the University of Wisconsin School of Law. She is a frequent speaker and author on various topics involving intellectual property, including an article published in the American Bar Association’s Landslide magazine titled “Estate Planning and Copyright.”

BRUCE D. STEINER is an attorney with Kleinberg, Kaplan, Wolff & Cohen, P.C., in New York City, and is a member of the New York, New Jersey and Florida Bars. He has 40 years of experience in the areas of taxation, estate planning, business succession planning and estate and trust administration. He is a frequent lecturer at continuing education programs for bar associations, CPAs and other professionals. is a commentator for Leimberg Information Services, Inc., is a technical advisor for Ed Slott’s IRA Advisor, is a member of the editorial advisory board of Trusts & Estates, and has written numerous articles for Estate Planning, BNA Tax Management’s Estates, Gifts & Trusts Journal, Trusts & Estates, the Journal of Taxation, Probate & Property, TAXES, the CPA Journal, the CLU Journal and other professional journals. He has been quoted in various publications including Forbes and the New York Times, and has been named a New York Super Lawyer. Mr. Steiner received an A.B. from Cornell University, a J.D. from the State University of New York at Buffalo, and an LL.M. in taxation from New York University, where he was a Gerald L. Wallace scholar.

CARL SZABO, as Senior Policy Counsel for NetChoice, analyzes tech-related legislative and regulatory initiatives relevant to online companies. He monitors and analyzes Federal and state legislation including online taxation and privacy issues. Carl is also an Adjunct Professor of privacy law at the George Mason School of Law. Carl works at the NTIA Privacy Multi-Stakeholder process, speaks on panels about burdens to e-commerce, and testifies before state legislatures on proposed legislation. Recently, Carl met with FTC Commissioners on new COPPA regulations, presented on mobile-app privacy at the IAPP Annual Conference, and worked with the Maryland Child Privacy Taskforce. Carl was an intellectual property attorney at the law firm of Wildman, Harrold, Allen & Dixon where he advised clients on privacy, Internet, e-commerce, and contractual matters. Carl also worked on copyright, trademark, and anti-piracy both for Motion Picture Association of America (MPAA) and the Entertainment Software Association (ESA). He obtained his J.D. and Communications Law Certificate from the Catholic University of America, magna cum laude.
RICHARD M. WEBER

RICHARD M. WEBER, MBA, CLU®, AEP®
(Distinguished) was the 2012-2013 President of the Society of Financial Service Professionals (FSP). A 49-year veteran of the life insurance industry, he has been a successful agent, an insurance company executive, and now a consultant to insurers and their agents on the topic of effective and ethical selling. Author of more than 300 articles encompassing products, sales practices, and the due diligence necessary to buy and sell insurance and annuities, his research paper, Life Insurance as an Asset Class - co-authored with Christopher Hause - received the 2008 Academy of Financial Services “Best Paper” award. The 2008 recipient of FSP’s Kenneth Black, Jr. Leadership Award, he was also elected to the National Association of Estate Planning Councils’ Hall of Fame in 2009 for “significant and outstanding lifetime achievements and contributions to the practice and profession of estate planning.” Dick has served his clients as a “fee-only” Insurance Fiduciary℠ since 2002.

MONDAY // NOVEMBER 7 @ 1:20 P.M.

FACULTY / ADVISORY BOARD MEMBERS

RICHARD M. WEBER

ADVISORY BOARD MEMBERS

CHRISTOPHER P. CLINE
Riverview Trust Company, Vancouver, WA

SAMUEL A. DONALDSON
Georgia State University, College of Law, Atlanta, GA

WENDY GOFFE
Stoel Rives LLP, Seattle, WA

STEPHAN R. LEIMBERG
Leimberg Information Services, Inc. (LISI), Amelia Island, FL

TAMMY MILLER
Wells Fargo Private Bank, Seattle, WA

MALCOLM A. MOORE
Davis Wright Tremaine LLP, Seattle, WA

M. READ MOORE
McDermott Will & Emery LLP, Menlo Park, CA

JOHN R. PRICE
UW School of Law (Professor Emeritus), Seattle, WA

STEVEN J. SCHINDLER
Perkins Coie LLP, Seattle, WA

61ST ANNUAL ESTATE PLANNING SEMINAR
THANK YOU TO OUR SPONSORS

BECU Trust Services provides full-service trust administration, from revocable living trusts to the more complex special needs trusts, estate administration, wealth management, and independent investment advisory services. Our experienced, credentialed staff is ready to meet with you and your clients.

When quality, responsiveness and a personal touch is required, Fedelta is your partner. At Fedelta Care Solutions, we take care of our clients like we would our own family members, no exceptions. Our team of over 350 employees is able to offer complete care solutions for any stage of life. Whether the solution is home care, care management, or senior housing placement, living well is possible and Fedelta can help you get there. We proudly serve King, Pierce, Snohomish, and Kitsap Counties.

Award-winning, locally-owned and managed, Andelcare is known for “caring for the ones you love” with grace and compassion. Our professional caregivers are selected for their ability to communicate, offer honest empathy and to deliver what we call “natural kindness”. We provide a full range of care and resources that enrich the lives of aging, ill and disabled adults by enabling them to live happy, healthy and independent lives in the comfort and security of their own homes. We assist families by helping them make well informed long-term care decisions. Since 2003 we have cared for thousands of clients and their families with the utmost integrity and trust.
At Lasher our collaborative and highly experienced attorneys serve as trusted legal counsel for family, individual and business clients in the areas of estate, gift and tax planning, business succession strategies, and probate and trust administration.

National Christian Foundation offers innovative tools and solutions to individuals, families and business owners to help them simplify their giving and multiply the impact of their gifts through asset based-giving and tax-efficient solutions for wealth transfer.

For over 160 years Northwestern Mutual has been helping clients successfully achieve financial security by offering quality products and services, including life insurance, disability income insurance, education-funding alternatives, retirement solutions, wealth management, and estate and business planning analysis. Our advisors work locally, but have all the resources of the entire Network behind them to help their clients achieve their goal of financial security.
More than 100 years of Trust and Estate administrative experience: As a Corporate Trustee, we manage and oversee client assets with integrity and the highest ethical standards. In collaboration with the legal and tax advisors, we can help consider and manage the goals of wealth including growth, preservation and distribution.

Washington Trust Bank is the oldest and largest privately owned bank headquartered in the Northwest and has offered trust, estate and investment services for over 110 years.

At The Private Bank, our dedicated team of highly specialized wealth-management professionals works with you to craft a customized plan to build, manage, preserve, and transfer your wealth.
**ALASKA TRUST COMPANY** Alaska Trust Company is the premier provider of trust, investment management, and other fiduciary services. Alaska Trust Company provides clients and their advisors with direct access to the best estate and domestic asset protection planning laws in the country.

**AMERICAN CANCER SOCIETY** The American Cancer Society saves lives by helping people stay well, by helping people get well, by finding cures, and by fighting back. Planned Giving Director Tom Andrewjeski looks forward to providing you with custom language so that you can help your clients accomplish their wishes.

**BERNTSON PORTER & COMPANY, PLLC** Berntson Porter & Company, PLLC is a premier Certified Public Accounting and planning firm that helps clients identify, clarify and achieve their goals. In addition to providing tax, accounting, and a wide range of consulting services, we help clients manage their wealth and insurance needs through our affiliated firms.

**BONHAMS** Bonhams is a privately owned British auction house. Founded in 1793, it is one of the world’s oldest and largest auctioneers of fine art and antiques. Now, the Bonhams name is recognized internationally throughout all sectors of fine art, jewelry, motorcars and collectors’ markets. Our Seattle office works closely with fiduciaries, trust attorneys and other professional advisors in the valuation of collections.

**CAPSTONE TRUST** Capstone Trust is a non-bank, unbundled trust company capable of serving as trustee, attorney-in-fact, guardian of the estate & executor.

**CHCSERVICES** CHCServices is a licensed home care and home health care company. We specialize in expert care management, skilled services (including PT, OT, Speech, Nursing) and home care. Our services help individuals remain in their homes with dignity and grace.

**D.A. DAVISON** At D.A. Davidson Trust Company, we offer straightforward advice, personalized solutions, and industry expertise. We are dedicated to helping clients achieve their financial goals—both in realizing aspirations of today and in shaping their legacy for the future.

**EDELWEISS CONSULTING** We are a trusted partner of individuals and families providing valuation services and unique value-related solutions based on a thorough understanding of each client’s situation and goals. We take an objective and proactive approach to bear on every aspect of a valuation engagement. We have earned our clients’ trust and continued business by focusing on the quality of the overall experience.

**FRED HUTCHINSON CANCER RESEARCH CENTER** At Fred Hutchinson Cancer Research Center, home to three Nobel laureates, interdisciplinary teams of world-renowned scientists seek new and innovative ways to prevent, diagnose and treat cancer, HIV/AIDS and other life-threatening diseases.

**GUARDIANSHIP SERVICES OF SEATTLE** Guardianship Services of Seattle is a Washington Chartered Trust Company and Certified Professional Guardian Agency. We are proud to be one of the oldest companies in the country offering our niche services: trust administration (with special focus on Special Needs Trusts), legal guardianship, powers of attorney, budgeting services, and contract case management.
**GUIDE DOGS FOR THE BLIND** Guide Dogs for the Blind is more than an industry-leading guide dog school; they are a passionate Community that serves the visually impaired. With exceptional client services and a robust network of trainers, puppy raisers, donors and volunteers, they prepare highly qualified guide dogs to serve and empower individuals who are blind or have low vision.

**HEIRSEARCH.COM** Since 1967, HeirSearch.com has specialized in providing forensic genealogy A Better Way to the legal and trust professions through a five-pillar approach that ensures reasonable, non-percentage based fees, authorized search services, a 97% success rate, documented court-ready reports and worldwide services. We Find Missing Heirs a Better Way.

**HERCO OIL AND GAS** We specialize in wide-ranging oil and gas services, including mineral appraisals, title research, lease negotiation and mineral sales.

**INTERACTIVE LEGAL** InterActive Legal is the premier Knowledge Company for lawyers specializing in Elder Law, Estate, and Special Needs Planning. We provide smart document drafting tools, discussion forums, and more.

**KEY PRIVATE BANK** Key Private Bank provides fiduciary wealth management services to high-net-worth families, private foundations and nonprofit clients, and Native American governments and businesses. As strategic planners, we deliver customized and integrated advice and solutions on investment management, banking, trust, and philanthropic planning, through an experienced and credentialed local team. Working with our clients to build a lasting relationship, we use clients’ long-term goals and objectives as the basis for our services.

**LIFETIME ADVOCACY PLUS** Lifetime Advocacy Plus is a full charge, certified fiduciary agency with 50 years of experience, highly experienced with Special Needs Trust, both D4A and D4C. Agency is dedicated to working with individuals and families. LA+ is the agency that designed the first Special Needs Trust.

**MARKET APPRAISAL, INC.** Real estate valuations for single family, multi family, green built properties, floating homes, vacant land, condominiums and moorage for attorneys, banks, mortgage companies and private individuals. Coverage areas include King, Kitsap, Island, Pierce and Snohomish Counties. Twenty-five years experience. Designated by the NAIFA, member of the Appraisal Institute and Accredited Green Appraiser for energy efficient structures.

**MOSS ADAMS ADVISORY SERVICES** The Moss Adams LLP Valuations Group is a full-service national valuation and financial consulting practice that provides supportable and timely valuation analysis and consulting services. We have rendered valuation opinions in areas of estate and gift reporting; financial feasibility; merger; acquisition and divestment services; ESOPs; financial reporting; and litigation services. Our wealth planning appraisals have included: common stock, preferred stock, options, promissory notes, undivided interests in real property, undivided interests in promissory notes, contracts, assignee interests, and various partnership interests. Moss Adams also has extensive experience providing valuation services for business succession.

**NORTHWEST KIDNEY CENTERS** Northwest Kidney Centers is a not-for-profit, locally managed provider of kidney dialysis, public health education and research.
into the causes and treatments of chronic kidney disease. Founded in Seattle in 1962, it was the world’s first dialysis organization. One of the 10th-largest dialysis provider in the country, it is an influential model because of its high quality services, deep community connections and generous donor support.

**NORTHWESTERN MUTUAL - PUGET SOUND**
Financial security planning for individuals and businesses; Risk Management Products include Life Insurance, Disability Insurance, Annuities, Long-Term Care, Fee Based Planning, Investment Management and Trust Services.

**PARTNERS IN CARE**
Partners In Care (PIC) provides a wide range of fiduciary and care management services for those in need of assistance, support or protection. We serve in a variety of capacities: Guardian of Person and/or Estate, Trust Administration, Attorney-In-Fact, Probate Administration, and contract services.

**PETE RSON SULLIVAN LLP**
At Peterson Sullivan, we apply a unique combination of business knowledge, accounting skill and tax planning expertise toward helping clients achieve their financial goals. When planning for a client’s financial future, it’s important to evaluate all assets, liabilities, commitments and goals to make sound decisions. We help clients understand their overall financial picture and give recommendations based on significant experience to minimize estate, gift and transfer taxes, implement successful estate plans, structure charitable giving strategies and deliver tax-compliance services. You can count on personal attention, diligent service and independent, ethical advice when you work with our wealth management, accounting and valuation professionals.

**SEATTLE CHILDREN’S HOSPITAL FOUNDATION**
The mission of Seattle Children’s Hospital is to prevent, treat, and eliminate pediatric diseases. The Legacy Planning Department provides a full array of services and support for professional advisors, including continuing education programs, case planning assistance, planned giving calculations, marketing brochures, weekly eGiftLaw newsletters, and networking events.

**SEATTLE HUMANE**
Seattle Humane’s mission is bringing people and pets together and keeping them together. We save thousands of pets in our community every year with no time limits. Including charitable gifts in estate plans supports Seattle Humane’s commitment to the welfare of our region’s animals.

**SOUTH DAKOTA TRUST COMPANY, LLC**
With currently more than $30 billion in assets under administration, South Dakota Trust Company LLC (SDTC) offers pure trust administration without any investment management products or services, working with whomever the client or their advisor desires regarding investments, insurance and custody. Additionally, SDTC has extensive experience administering trusts with non-financial assets, e.g., LLCs, FLPs, closely-held stock, real estate and off shores entities. As a result of South Dakota’s competitive and unique trust, asset protection, income tax, and private family trust company laws, SDTC works with families all over the globe, serving as trustee, as well as, corporate and/or trust agent for family-owned private trust companies.

**STERLING FOUNDATION MANAGEMENT**
Sterling Foundation Management provides customized management services for private foundations and other charitable entities that enable donors to maximize the impact of their philanthropy. In addition,
Sterling is the nation’s leading provider of secondary planning services for charitable remainder trusts.

**THE SALVATION ARMY** The Salvation Army Planned Giving Department offers complimentary tax guides, legacy and bequest planning tools, consultations and seminars. Bequests and other testamentary gifts have been a significant source of support for Salvation Army programs and services for 150 years.

**THE WASHINGTON STATE DEVELOPMENT DISABILITIES ENDOWMENT TRUST FUND** Washington State’s Special Needs Trust Program is for individuals with developmental disabilities. This program offers a low cost way of setting up a Special Needs Trust for an individual with developmental disabilities.

**U.S. TRUST, BANK OF AMERICA PRIVATE WEALTH MANAGEMENT** U.S. Trust offers more than 200 years of private wealth management experience. We provide our clients with professional expertise, backed by access to some of the industry's most respected talent in wealth structuring, investment management, estate planning, taxation, private business finance and the strategic use of credit.

**VOYA FINANCIAL ADVISORS** With education, financial planning and a broad range of personalized asset accumulation, protection and distribution solutions, Voya Financial Advisors is focused on helping Americans advance their retirement readiness. Voya Financial is a premier retirement, investment and insurance company serving the financial needs of approximately 13 million individual and institutional customers in the United States.

**WARE, EGTVET & ASSOCIATES, LLC** Professional fiduciary services including daily money management, estate plan execution in the roles of attorney in fact, personal representative, independent trustee, or the agent of individuals in those roles. We work as a trusted advocate in the space between a person and his/her attorney and other advisors to execute that person’s business needs.

**WASHINGTON STATE UNIVERSITY COLLEGE OF VETERINARY MEDICINE** We enhance animal and public health and well-being through excellent professional veterinary medical education; undergraduate, graduate, and resident education in health sciences; basic and clinical biomedical research; and public service through clinical care, diagnostic services, continuing education, and outreach.

**WEALTHCOUNSEL, LLC** WealthCounsel: The largest community of estate planning attorneys. The leading drafting technology. The gold standard in continuing education. What you need for your practice to thrive.

**WHITTIER TRUST COMPANY** Whittier Trust is the largest multi-family office headquartered on the West Coast. Assisting high net worth families with inter-generational wealth transfer, management, family office, and philanthropy is our hallmark. Our Client Advisors work with a maximum of 20 relationships to ensure proactive service.

**WINDEMBERG REAL ESTATE/HKW INC.** The Attorney’s Real Estate Partner. Specialize in helping you and your clients sell properties involving probate, trusts and divorce.

**WOODLAND PARK ZOO** Woodland Park Zoo saves animals and their habitats through conservation leadership and engaging experiences, inspiring people to learn, care, and act.
Thank you for registering to attend the 61st Annual Estate Planning Seminar. You will need to complete a separate registration form for each individual attending. If you have any questions about registration, please contact Debra Bryant at estplan@uw.edu.

3 Ways to Register
Online: seattleestateplanningseminar.com
Mail: UW Graduate Program in Taxation, Box 353020, Seattle, WA 98195
Walk-in: On-site registration is available, space permitting

Payment Information
- Check enclosed payable to the Washington Law School Foundation
- Visa
- Mastercard

Conference Registration Costs
- $475 EARLY REGISTRATION WITH ELECTRONIC COURSEBOOK
- $499 EARLY REGISTRATION WITH PRINTED COURSEBOOK
- $524 REGISTRATION WITH ELECTRONIC COURSEBOOK
- $549 REGISTRATION WITH PRINTED COURSEBOOK

NOTE: Tuition includes lunch on both days.

Omit Name from Conference Networking List

Authorized Signature

Cancellation fee is $50
Refunds will not be given after October 25, 2016
Substitutions are possible; please contact Debra Bryant at estplan@uw.edu for information.
Please choose all that apply:

- ATTORNEY
- INSURANCE
- ACCOUNTANT
- PARALEGAL
- CERTIFIED FINANCIAL PLANNER (CFP)
- CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)
- CERTIFIED PROFESSIONAL GUARDIAN

<table>
<thead>
<tr>
<th>BAR STATE (1)</th>
<th>BAR NUMBER (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAR STATE (2)</td>
<td>BAR NUMBER (2)</td>
</tr>
<tr>
<td>BAR STATE (3)</td>
<td>BAR NUMBER (3)</td>
</tr>
<tr>
<td>BAR STATE (4)</td>
<td>BAR NUMBER (4)</td>
</tr>
<tr>
<td>ACCOUNTING STATE (1)</td>
<td>ACCOUNTING LICENSE NUMBER (1)</td>
</tr>
<tr>
<td>ACCOUNTING STATE (2)</td>
<td>ACCOUNTING LICENSE NUMBER (2)</td>
</tr>
<tr>
<td>INSURANCE STATE</td>
<td>INSURANCE NUMBER</td>
</tr>
<tr>
<td>CFP NUMBER</td>
<td>CTFA NUMBER</td>
</tr>
</tbody>
</table>
ABOUT THE HOSTS / LODGING

THE ESTATE PLANNING COUNCIL OF SEATTLE
One of the primary missions of our organization is to inform the public on estate planning matters and issues that confront us all. Our website - www.epcseattle.org - gives you access to unbiased information about estate tax-planning strategies, wills, trusts, business succession, and other topics that impact your personal estate plan. The Council is composed of local attorneys, CPAs, trust officers, insurance professionals, financial planners, and members of the planned giving community whose professional careers have all been centered around helping individuals achieve their estate planning goals.

THE UNIVERSITY OF WASHINGTON SCHOOL OF LAW
UNIVERSITY OF WASHINGTON

THE UNIVERSITY OF WASHINGTON SCHOOL OF LAW TAX PROGRAM
The program is dedicated to providing students with a solid foundation in the technical aspects of tax law. Our program is designed to teach the necessary skills for innovative tax planning in all areas — federal, state, and local taxation; international taxation; and estate, trust and gift taxation. Our mission is to offer a comprehensive curriculum that prepares students to succeed in whichever practice they choose.

SHERATON SEATTLE HOTEL
888-627-7056
Group Code: 61st Annual Estate Planning Seminar
1400 Sixth Avenue, Seattle, WA 98101
Rates begin at $149.00 + taxes per night for single/double occupancy
Conference Rate Cut-Off Date: October 5, 2016 (5 p.m. PDT)

MOTIF SEATTLE
855-515-1144
Group Code: University of Washington
1415 Fifth Avenue, Seattle, WA 98101
Rates begin at $159.00 + taxes per night for single/double occupancy
Conference Rate Cut-Off Date: October 16, 2016

THE PARAMOUNT HOTEL SEATTLE
206-292-9500
Group Code: Annual Estate Planning Seminar
724 Pine Street, Seattle, WA 98101
Rates begin at $163.00 + taxes per night for single/double occupancy
Conference Rate Cut-Off Date: October 6, 2016

Online reservation links are on our website: www.seattleestateplanningseminar.com
NOVEMBER 7-8, 2016 / SEATTLE, WA
WASHINGTON STATE CONVENTION CENTER

SEMINAR COSTS:
Early registration is on or before September 7, 2016

$475 Early registration with electronic coursebook

$499 Early registration with printed coursebook

$524 Registration with electronic coursebook

$549 Registration with printed coursebook

WEBSITE:
www.seattleestateplanningseminar.com