



Roadmap to the Collaborative Probate and Elder Law Highway

March 21, 2012

Rainier Square Conference Center, 1301 Fifth Avenue, 3rd Floor Atrium, Seattle

3.50 General and .50 Ethics CLE Credits

AGENDA

11:30-12:00 Registration and Coffee Service

Attendees are welcome to bring a brown-bag lunch

12:00-12:15pm Welcome and Overview

Jamie Clausen, Phinney Estate Law, Chair

12:15-12:45pm Making the Collaborative Law Choice

Jeffrey P. Bean, Beyond the Courthouse Mediation

- What is Collaborative Law?
- Collaborative Lawyers' Roles: From Advocating Positions to Representing Interests
- Making the Process Choice: How to Choose Your Path to Resolution

12:45-1:30pm Participation Agreements for Probate and Elder Law

David A. Strickland, Attorney at Law

Alexandra Moore-Wulsin, Strata Law Group

- What is a Participation Agreement?
- Review of Model Participation Agreements
- Considerations in Presenting Participation Agreements to Clients and Opposing Parties

1:30-1:45pm Break

1:45-2:30pm Collaborative Approaches to Classic Probate Conflicts

The Honorable Eric Watness, Jams,

King County Superior Court Commissioner (Ret.)

Jamie Clausen, Phinney Estate Law

- Will Contests
- Inventory Disputes
- PR Creditor Claims
- Distribution Disputes
- Real Estate Distributions

Agenda Cont'd

2:30-3:00pm Demonstration of Facilitation/Mediation in an Elder Law and Probate Case

Kathleen Wareham, WAMS Mediation & Arbitration Panel Member
Alexandra Moore-Wulsin, Strata Law Group

- Using the Collaborative Model and Working with the Mediator/Facilitator
- Discussing the Process and Identifying Participants
- Developing the Agenda and Identifying Legal and Underlying, Broader Issues

3:00-3:15pm Break

3:15-3:45pm Ethics in Collaborative Probate and Elder Law

Joanna Roth, Attorney at Law

- Zealous Advocacy Issues RPC 1.1
- Minors and Disabled Beneficiaries RPC 1.14 and RPC 3.4
- Privilege and Fiduciary Obligations RPC 1.6
- Safety for Vulnerable Participants RPC 3.3

3:45-4:30pm Question & Answer Panel

All Speakers

4:30pm Evaluations and Adjournment

REGISTRATION FORM

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5 WAYS TO REGISTER!

EMAIL Complete the following information and send to cle@kcba.org

WEB www.kcba.org/CLE (secured website)

MAIL KCBA CLE, 1200 Fifth Avenue, Suite 600, Seattle, WA 98101

CALL CLE Department: 206.267.7057

FAX 206.267.7099

Electronic Course Materials: The course materials will be distributed in an electronic format – searchable PDF files that you can download to your computer. Before the program, you will receive instructions via email on how to download your materials and save them to your computer.

Registration Fees

ATTORNEYS

___ \$115 KCBA Members

___ \$165 Non-KCBA Members

NOT AN ATTORNEY

___ \$105 Non-Attorney Employees of KCBA Members

___ \$125 Not an Attorney/General Public

State Bar No: _____

Mr./Ms. First Name Last Name

Firm/Organization

Address City State Zip Code

Telephone Number and Email address (confirmation sent via email)

Method of Payment for 3.21.12

___ Check Enclosed (check # _____ payable to: KCBA)

VISA or MasterCard or American Express Exp. Date: _____

Card No. _____

Name as it appears on card _____

Signature _____

IMPORTANT NOTICES

*Please advise KCBA in advance of any condition that may impact your participation at the seminar so we may ensure appropriate and comfortable accommodation. **If you must cancel, tuition will be refunded less \$20, if cancellation is received in writing (cle@kcba.org or fax, 206-267-7099) by March 19, 2012. After this date, no refunds will be permitted, however, substitute attendees are welcome. ***Walk-in registrations are welcome as space permits.