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## 1.0 Law & Legal CLE Credit – A/V Approval #1068081

Recording Date – March 15, 2018

Recording Availability – April 4, 2018

Meeting Location	Date	Time	Topic
King County Bar Association 1200 Fifth Avenue - Suite 700 Seattle, WA	<b>Thursday, March 15, 2018</b>	12:00 PM to 1:15 PM	Developing and Implementing Plans for the Administration of Small Trusts

### AGENDA

**12:00 PM** Introduction

**12:10 PM** Presentation: ‘Developing and Implementing Plans for the Administration of Small Trusts’, by Bill Jaback, Partners In Care and Roger S. Kohn, Law Offices of Roger S. Kohn

- Targeting benefit to the beneficiaries
- Managing professional fees
- Preparing beneficiaries for a “soft landing” once the trust is fully depleted

**1:15 PM** Adjourn

### SPEAKER BIOGRAPHY

**Bill Jaback, Partners In Care** – William Jaback is a Certified Professional Guardian and Certified Public Accountant who has been in practice as a professional fiduciary for 20 years. He is the Executive Director of Partners In Care, a Washington State chartered trust company, where he supervises the administration durable powers of attorney, guardianships, probates and trusts. He believes that any discretionary trust requires a solid understanding of the beneficiaries or grantors objectives and a well-documented administrative plan to ensure thoughtful and efficient trust administration.

**Roger S. Kohn, Law Offices of Roger S. Kohn** – Roger Kohn is in solo practice in Seattle. He focuses his practice on guardianships, trusts, estate planning, probate, and elder law issues. As a Special Assistant Attorney General with the Attorney General’s Office, he represents Harborview Medical Center and the University of Washington Medical Center in guardianship actions. Since the mid-1990s, he has served as a Guardian ad Litem in guardianships, probates, and minor settlements, and also as a litigations GAL in

actions seeking recovery for damages suffered by minor children and incapacitated individuals. He serves as a mediator for disputes involving fiduciaries. Roger received his BA from Yale University in 1979 and his JD from Columbia University in 1984. He served on the Executive Committee of the King County Bar Association's Guardianship and Elder Law Section and the Board of the Washington Chapter of National Association of Elder Law Attorneys (NAELA). For many years, Roger volunteered at the King County Superior Court's guardianship/probate review calendar and the Fremont Legal Clinic, and he has represented many clients on a pro bono basis.