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1.0 Law & Legal CLE Credit – A/V Approval #1070914

Recording Date – October 4, 2017

Recording Availability – May 22, 2018

Meeting Location	Date	Time	Topic
King County Bar Association 1200 Fifth Avenue - Suite 700 Seattle, WA	Wednesday, October 4, 2017	12:00 PM to 1:15 PM	Washington’s New Trust Decanting Act: A Better Way To Update Irrevocable Trusts?

AGENDA

12:00 PM Introduction

12:10 PM Presentation: “Washington’s New Trust Decanting Act: A Better Way To Update Irrevocable Trusts?”, by Michael D. Carrico, Fox Rothschild

- Washington’s new statutory procedures for modifying or reforming an irrevocable trust, including a review of Chapter 11.107 RCW
- Specific uses for trust decanting, including updating of old trust documents and reforming trusts to qualify as special needs trusts
- Whether existing Washington procedures to modify irrevocable trusts are better, and when they probably are not

1:15 PM Adjourn

SPEAKER BIOGRAPHY:

Michael D. Carrico, Fox Rothschild – Michael Carrico received his B.A. in 1973 from Tulane University and his J.D. in 1976 from Yale Law School. He was admitted to the bar in California in 1976 and in Washington in 1984, and is an equity partner of Fox Rothschild LLP (effective May 15, 2017) and a member of its Taxation and Wealth Planning practice group. Mr. Carrico is a Fellow of the American College of Trust and Estate Counsel. He has served as Chair of the Washington State Bar Association Real Property, Probate and Trust Section and an emeritus member of its Executive Committee; has served as Chair of the WSBA Tax Section’s Estate and Gift Tax Committee; and has served as president of the Estate Planning Council of Seattle. Mr. Carrico serves as a member of planned giving advisory committees of The Seattle Foundation and the Seattle Humane Society. From 1980 to 1984 he served as Assistant Professor of Law

at Indiana University School of Law, Bloomington, and has served as a Lecturer in Law, in estate planning, at the University of Washington School of Law.