



## **“A Review of the 2013 Updates to the Washington Trust Act”**

King County Bar Association, 1200 Fifth Avenue, Suite 600, Seattle

April 2, 2014

0.75 General **AV** CLE Credit Approved: approval #370166

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### **SPEAKER BIO:**

**Katie S. Groblewski** - Katie assists individuals and families in Washington and Oregon with estate planning, and trust and estate administration. Katie also works with business owners and their families on business succession planning. She understands that each client has specific goals and drafts primary estate planning documents tailored for the client’s individual needs. She also works closely with high income clients, assisting with drafting, funding and implementing complex wealth transfer and income tax mitigation plans, modifying existing irrevocable trusts judicially and non-judicially, and assisting family closely held companies with succession planning.

Katie also assists individual and corporate fiduciaries with a wide range of issues, including valuation, distribution and management of assets, fiduciary income taxes, and beneficiary disputes. She also helps clients with administration matters, including preparing estate and gift tax returns and dispute resolution agreements, assisting with succession or sale of family business interests from estates, and defending high-net worth estates through IRS audit.

## HOW DO I EARN CREDIT FOR SELF-STUDY OR AUDIO/VISUAL (A/V) COURSES?

Lawyers are allowed a maximum of 22.5 audio-visual credits out of the 45 credits required for reporting period compliance.

Only 22.5 credits must be live.

For pre-recorded A/V (self-study) programs, although the sponsor should apply for accreditation, **lawyers need to report the credits earned for taking the course.** If the program has been approved, you can simply add it to your roster and

(a) indicate the date(s) you took the course, and

(b) the number of credits you earned.

- To add an approved course to your roster, follow the procedures below:
- Go to the "mywsba" website at [www.mywsba.org/](http://www.mywsba.org/).
- Log in.
- Click on the "Access MCLE" link in the "MCLE Info" box on your home profile page.
- Click on "Add Activity." Search to find the approved course in our system. (See search suggestions on the screen.)
  - \*\* If you already know the Activity ID number for the course, you need only enter that information on the search screen.
  - \*\* If you do not know the Activity ID number, you will need to do a search to see if a Form 1 has been approved for the course.
  - \*\* "Add Approved Activities" lists can be sorted, by clicking on the column headings, to make finding a course easier.
- Locate the approved course (activity) on the list and click on the Activity ID link to add it to your roster.
  - For live courses, correct the number of credits earned, if needed.
  - For A/V courses, (1) indicate the date(s) you took the course, and (2) the number of credits you earned.
- Click the "Add Activity" Button.

If you were not able to find the Form 1 for the course, click the Live or A/V Form 1 button on the search results screen, fill out the form, and submit the course for accreditation review. Form 1 applications must include a detailed agenda of the activity, including the start and end times for each session and break. Without a detailed agenda, no credit can be granted.

One (1) MCLE credit may be claimed for each 60 minutes of participation in an accredited activity. Time spent on course registration, introductions, breaks, and business meetings are not included in activity accreditation and may not be counted. Bar members are responsible for making appropriate adjustments to their records when the actual time spent in an accredited activity is less than the maximum approved credit-hours. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

- You can Edit or Delete any activity on your Current Reporting Period roster by clicking on the hyperlink to the right of an activity.
- Your online CLE credit roster is provided only for your convenience and is not an official record. At the end of your reporting period you must certify your credits with the online or paper CLE Certification (C2) form to meet Supreme Court MCLE compliance requirements.
- A "Certificate of Attendance" or other sponsor-provided certification is not sufficient to receive course credit.

For further assistance, contact the State Bar Service Center at 206-443- (9722) or 800-945-9722, or [questions@wsba.org](mailto:questions@wsba.org).