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1.0 Ethics CLE Credit – A/V Approval #1114299

Recording Date - April 10, 2019

Meeting Location	Date	Time	Topic
King County Bar Association 1200 Fifth Avenue - Suite 700 Seattle, WA	Wednesday, April 10, 2019	12:00 PM to 1:15 PM	The Pitfalls in Handling Client Funds

AGENDA

- 12:00 PM** Introduction
- 12:10 PM** Presentation: ‘The Pitfalls in Handling Client Funds’, by Tracy Sambrano, WSBA
An overview of the common mistakes lawyers make in handling client funds. The emphasis will be on how to establish policies and procedures to ensure compliance with the trust account rules.
- 1:15 PM** Adjourn

SPEAKER BIOGRAPHY

Tracy Sambrano, WSBA – Tracy Sambrano is an Auditor, in the Office of Disciplinary Counsel at the Washington State Bar Association. Her duties include auditing Washington lawyers’ trust accounts. She educates lawyers about the trust-account rules and assists lawyers in establishing procedures and internal controls to bring their trust-account practices into compliance with the rules. Prior to joining the WSBA auditing staff in 2015, she worked as an Accounting Manager at a mid-size law firm in Snohomish County for 18 years. She managed all of the accounting functions for the firm, including managing the firm’s trust account.