

16th Annual Probate Administration

Morning Session

October 23, 2020

AGENDA

- 0:00:05-0:38:04** **Opening a Probate**
Chad Horner | Curran Law Firm, P.S.
- 0:38:04-0:48:49** **Alternatives to Probate**
Chad Horner | Curran Law Firm, P.S.
- 0:48:49-1:23:07** **Identifying and Administering Separate and
Community Property Assets**
Saul Tilden | Stokes Lawrence Velikanje Moore & Shore
- 1:23:07-1:52:07** **Identifying and Administering Non-Probate Assets**
Chad Horner | Curran Law Firm, P.S.
- 1:52:07-2:23:32** **Marshalling Assets and Preparing the Inventory**
Mary Anne Vance | Reed Longyear Malnati & Ahrens, PLLC
- 2:23:32-3:05:47** **Creditor Claim Process and Procedure**
Jason W. Burnett | Reed Longyear Malnati & Ahrens PLLC

FACULTY CHAIRS

MICHAEL J. LONGYEAR

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MICHAEL J. LONGYEAR has over 26 years of experience helping clients make important decisions regarding their personal and estate planning, guardianship proceedings, probate and trust administration, as well as elder law issues. He also devotes part of his legal practice to related real estate and business organization management matters. Michael was recognized as a 2019 Super Lawyer by Washington Law & Politics Magazine, as has been named as a Super Lawyer since 2014 and from 2001 to 2010. He was also named Seattle Best Lawyer in 2001 and 2003 by Seattle magazine. He has received the Highest Possible Peer Review Rating in Trusts & Estates from Martindale-Hubbell for being rated AV Preeminent by his peers. Michael is past chair of the Real Property, Probate & Trust section of the King County Bar Association (KCBA) and is a member of the Estate Planning Council of Seattle and Northwest Family Business Advisors. He has served on the executive committee of the Real Property, Probate and Trust Section of the Washington State Bar Association (WSBA). He has been recognized for his experience in the area of guardianship and served on the Washington Supreme Court Certified Professional Guardian Board from 2001 to 2008. He is a Certified Professional Guardian and serves as guardian of the estate, trustee, and estate administrator in routine and contested matters. He is a Past-Chair of the King County Bar Association Guardianship and Elder Law Section, and is a Past Co-Chair of the Title 11.88 Mandatory Guardian ad Litem Training Program. He is a past Co-Chair of the King County Settlement Guardian ad Litem (SPR 98.16W) Training Program. Michael is a Past-Chair of the Elder Law Section of the Washington State Bar Association and served on the Executive Committee from 1999 to 2008 and 2015 to present.

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KEN KILBREATH is Senior Vice President at Key Private Bank. Ken advises high net worth families, business owners and corporate executives on all aspects of their wealth and estate planning. Ken leads teams of specialists who provide investment, trust, private banking and wealth planning services to their clients throughout the region. He was a shareholder at the law firm of Inslee, Best, Doezie & Ryder where his practice included estate and trust planning, tax planning and business succession planning. Ken is a fellow of the American College of Trust and Estate Counsel (ACTEC) and Past President of the East King County Estate Planning Council. Ken received his J.D. from Seattle University School of Law and his LL.M. in taxation from the University of Washington School of Law. Ken has also attended the University of Chicago-Booth school of Business for executive training and has obtained the Certified Private Wealth Advisor® designation for high net-worth wealth management. Ken is involved in a variety of community activities including serving on the board of directors for Bellevue LifeSpring and Lawyers Helping Hungry Children.

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MIRIAM J. AYOUB is an Associate Attorney at the Law Office of Michelle L. Graunke. Miriam graduated from Seattle University School of Law in 2011, and has been practicing in the Seattle area with a focus on Elder Law since that time. Miriam also serves as Guardian ad Litem in guardianship and probate matters. Miriam is a member and past Chair of the Guardianship and Elder Law Section of the King County Bar Association. She is also a member and Chair-Elect of the Elder Law Section of the Washington State Bar Association. Miriam also is a former adjunct professor at Seattle University School of Law.

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JASON W. BURNETT primarily focuses his practice on litigation matters with an emphasis on real estate, probate, trust and will litigation. Jason also has significant experience in business law matters and dedicates part of his practice to representing businesses in transactions as well as litigation.

An accomplished and practical litigator, Jason works to resolve clients' legal problems from beginning to end. He applies creative problem-solving and real world analysis to identify and maximize cost-effective and favorable resolutions. Litigation for Jason includes advising clients on how to avoid litigation, and he counsels clients on pre-litigation strategies and dispute resolution, and helps them identify issues and analyze the risk of alternative courses of action.

Jason graduated from the University of Washington in 1995 and earned his Juris Doctor from Seattle University in 2000. He clerked for the Honorable Elaine Houghton on the Division II Court of Appeals and the Honorable Charles W. Johnson on the Washington Supreme Court. Employing his writing skills, Jason is an editor of the Washington State Bar Association's Real Property, Probate and Trust newsletter and is also a member of the editorial board for the Washington State Real Property Desk Book Series.

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CHAD HORNER is a partner with the Curran Law Firm where he assists individuals and families with their estate planning and probate needs. An important part of Chad's practice has been volunteering with neighborhood organizations that help individuals who can't afford the cost of legal help, as well as organizations working to improve access to healthcare for people in need. For families facing questions after the death of a loved one, Chad created kingcountyprobates.com as a resource for pleadings and tips in navigating the probate system. Chad also serves as a pro tem commissioner with the King County Superior Court Ex Parte and Probate Department. He grew up in Wenatchee before moving to Seattle to attend the University of Washington for his undergraduate degree. In 1997, he graduated from Drake Law School with honors where he was editor-in-chief of the law review.

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SAUL TILDEN'S practice focuses on estate planning, probate and trust administration for individuals, families and family-owned businesses. He works with clients to tailor estate and business-succession plans to meet their unique needs. In addition, Saul has a litigation practice, where he represents clients in trust and estates disputes.

MARY ANNE VANCE
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MARY ANNE VANCE focuses her practice on estate planning, trusts, and probate law at Reed Longyear Malnati and Ahrens. She enjoys helping people find comfortable solutions to their estate planning and probate concerns.

Mary Anne has represented a wide variety of clients, helping them organize their estates and care for their family members. Estate Planning for blended families can be especially challenging for families wanting to be "fair" to children from a prior marriage. Mary Anne offers surprisingly direct solutions to help parents care for both their earlier born children and their new spouse.

Mary Anne is grateful that her clients give her the opportunity to help them at difficult times. The passing of a loved one is one of life's most difficult challenges. Mary Anne helps family members navigate probate laws, so that they can focus on what is most important to them.

Mary Anne is the co-author of the Probate and Estate Planning chapters of Butterworth's *Washington Civil Practice Deskbook*. She has chaired and spoken at many legal seminars sponsored by the Washington State and King County Bar Associations. She was voted "Super Lawyer" by the readers of *Washington Law and Politics Magazine*, voted one of Seattle's "Top Attorneys" by *Seattle Magazine* and voted a Top Lawyer and Super Lawyer in 2019 by *Seattle Met Magazine*. Ms. Vance graduated from Northwestern University School of Law in Chicago, Illinois.