



KING COUNTY BAR

ASSOCIATION

CONTINUING
LEGAL EDUCATION

PERSONAL ESTATE PLANNING FOR THE 99%

May 14, 2021

5.50 CLE Credits: 4.75 Law & Legal & .75 Ethics

AGENDA

- 0:00:00-0:02:50 Welcome and Overview**
Michael J. Longyear | Reed Longyear Malnati & Ahrens PLLC
- 0:02:50-0:59:34 Ethical Considerations**
Jeffrey T. Kestle | Forsberg & Umlauf, P.S.
Mary Anne Vance | Reed Longyear Malnati & Ahrens PLLC
- 0:59:34-1:26:46 Planning Without a Will**
Chad Horner | Curran Law Firm, P.S.
- 1:26:46-2:09:31 Community Property Considerations**
Dawn S. Spratley | Lane Powell PC
- 2:09:31-2:54:04 Retirement Accounts**
Jenna B. Ichikawa | Stokes Lawrence P.S.
- 2:54:04-3:25:25 Tax Considerations**
Anthony (Tony) McCormick | Perkins Coie LLP
- 3:25:25-3:55:51 Health Care Advance Planning**
Steven J. Schindler | Perkins Coie LLP
- 3:55:51-4:25:51 Durable Powers-of-Attorney for Finances & Property**
Anna M. Cashman | KHBB Law PLLC
- 4:25:51-5:22:25 Drafting Wills and Trusts – Key Provisions**
Xan Gerson | Metis Estate Planning PLLC
- 5:22:25-5:36:54 Question and Answer Session Panel**