



**THROUGH THE LOOKING GLASS SYMPOSIUM 2020:  
AN ONGOING REFLECTION OF THE CURRENT ESTATE AND GIFT PLANNING ISSUES  
WORKING AGENDA  
Thursday, January 23, 2020**

7:30 am	Sign-in, Breakfast
8:00 am	Welcoming Remarks
8:30 am	The Future of Advising in Light of Automation Chia-Li Chien, PhD, CFP, PMP California Lutheran University
9:30 am	California Residency - Proving Intent Edvin Givargis Holthouse, Carlin, Van Trigt, LLP
10:30 am	Break
11:00 am	Charitable Strategies for Business Owners Stephanie Buckley, JD, LLM Wells Fargo Private Bank
12:00 pm	Lunch
12:45pm	Electronic Wills Susan Gary, JD University of Oregon, School of Law
1:45 pm	Advising the Latinx Community Renee Dehesa, JD Jones, Lester, Schuck, Becker & Dehesa, LLP
2:45 pm	Break
3:00 pm	Recent Developments Affecting Estate Planning Edward McCaffery Seyfarth Shaw, LLP
4:15 pm	Closing Remarks
4:30 pm	Adjourn