THROUGH THE LOOKING GLASS XVI:

An Ongoing Reflection of Current Estate and Gift Planning Issues

Thursday, January 23, 2020

Breakfast & Networking - 7:30 a.m. • Program - 8 a.m. to 4:30 p.m

Dear Colleagues,

We are excited to announce Through the Looking Glass XVI! This sixteenth year of the Symposium will explore the latest trends in estate planning and charitable giving. As in the past, the event will offer the quality continuing education, networking time with your colleagues and dynamic speakers that you have come to expect.

This year's committee has done its best to listen to your past feedback and put together a schedule of prominent professionals to present areas of expertise including hot topics in tax and residency, the future of financial planning, working with the Latinx community, electronic wills, charitable strategies for business owners, and recent developments affecting estate planning. We have brought together a phenomenal faculty of speakers to address timely and interesting challenges that we all face in the year ahead.

Join us at California State University, Channel Islands.

The 2020 Through the Looking Glass symposium is being presented once again under the auspices of the Conejo Valley Estate Planning Council, a member of the National Association of Estate Planners & Councils, in collaboration with the Center for Nonprofit Leadership at California Lutheran University and California State University Channel Islands, who will host the symposium at their respective campuses in alternating years.

Please plan to join us on Thursday, January 23, 2020 at California State University, Channel Islands, Grand Salon.

The cost is $175 before 1/10/20. $225 after and $275 at the door. A limited number of spaces are reserved for students at the reduced rate of $50. The registration fee is included as a benefit for active members of the Conejo Valley Estate Planning Council. For your convenience, you can register on-line at www.callutheran.edu/LG or return the attached registration form.

Reserve your spot today!

CENTER FOR NONPROFIT LEADERSHIP | California Lutheran University

Channel Islands
CALIFORNIA STATE UNIVERSITY
www.csuci.edu

For Attorneys, CPAs, Financial Planners and Insurance Agents

Reserve your space now!
Thursday, January 23, 2020

California State University,
Channel Islands - Grand Salon

For a map and directions, please visit http://maps.csuci.edu/?id=502&mrkIid=189833

Center for Nonprofit Leadership | California Lutheran University

Channel Islands
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A special thanks to the Symposium Planning Committee:

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Continuing Education Credits:
CFP Board –6.5 Hours
State Bar of California – 6.5 Hours
California Board of Accountancy – 7.5 Hours

THROUGH THE LOOKING GLASS XVI

January 23, 2020

An Ongoing Reflection of Current Estate and Gift Planning Issues

Presented By

Conejo Valley
Estate Planning Council

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Please complete and return this card with registration payment to:

California Lutheran University Center for Nonprofit Leadership • 60 W. Olsen Road #2700 • Thousand Oaks, CA 91360

Early bird registration deadline (1/10/20) • For more information, please call 805-493-3677

Name ______________________ Company ______________________

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Work Phone ______________ Cell Phone ______________ E-mail ______________

To pay with credit card, please register on-line at: www.callutheran.edu/cnl/lg

Please make check payable to California Lutheran University Center for Nonprofit Leadership

Early bird registration ☐ $175 (Before 1/10/20) Registration ☐ $225 At Door Registration ☐ $275 Students ☐ $50 (Limited Availability)

Fees include Continental Breakfast, Lunch, Materials and Continuing Education Credits

For more information, please call 805-493-3677

7:30 a.m. **Sign-In, Registration & Continental Breakfast**
Sponsored by Mechanics Bank Wealth Management

8:15 a.m. **Welcoming Remarks**

8:30 a.m. ***Chia-Li Chien, PhD, CFP, PMP***
California Lutheran University

The Future of Advising in Light of Automation

Description: Robots are being more and more accepted in the home for utility and entertainment. They help us by freeing up time for other enjoyable things. Automating advising in some areas is on the rise. Can you create more human advice opportunities by leveraging big data and automation?

Biography: Chia-Li Chien, Ph.D., CFP®, PMP®, is Assistant Professor and Director of the Financial Planning Program of California Lutheran University and a Succession Program Director at Value Growth Institute. She authored two award-winning books, “Show Me the Money” (2010) and “Work Toward Rewards” (2012). Palgrave MacMillan (Springer Nature) will release Dr. Chien's latest peer-reviewed research book “Practical Strategies to Enhance Retirement Success Rates in The United States” in Spring 2020. She frequently speaks at local and national conferences and serves on the boards of various national financial service associations.

9:30 a.m. ***Edvin Givargis, CPA***
Holthouse, Carlin, Van Trigt, LLP

California Residency: Proving Intent

Description: This discussion covers various topics relating to California residency. Some of the topics covered include a discussion of California residency law, planning a change in domicile, practical considerations, pitfalls, and discussion of some relevant cases.

Biography: Edvin Givargis is a Senior Manager in HCVT’s State and Local Tax group. He has extensive multistate tax compliance experience spanning income, franchise, gross receipts, and sales tax.

In addition to compliance matters, Edvin has done a considerable amount of work in the area of multistate consulting – a few key areas include state residency planning and audit defense, nexus analysis, taxability decision analysis, unitary studies, voluntary disclosure agreements, buy and sell-side due diligence, and restructuring. He has also done a considerable amount of work in the area of state tax controversy and has engaged in audit defense, settlement, and appeals spanning various tax matters in numerous states. Edvin has also taught Federal Tax Research and Multistate Taxation courses in California State University, Fullerton's MST program as an adjunct professor. He is certified as a Public Accountant by the California Board of Accountancy.

10:30 a.m. **Break**

11:00 a.m. ***Stephanie Buckley, JD, LLM***
Wells Fargo Private Bank

Charitable Strategies for Business Owners

Description: Many successful business owners engage in philanthropy, particularly upon the sale of their business. Utilizing charitable strategies at the time of sale provides the business owner with several benefits while allowing him or her to support one or more charitable causes. One of the main benefits include the mitigation and/or deferral of capital gains tax on sale and depending on the strategy selected, can also include a lifetime income stream. In this session, Ms. Buckley will discuss various charitable strategies such as private foundations, donor advised funds, and charitable remainder trusts and how utilizing these strategies can create a win-win for your clients and the charities they support. She will also discuss the pitfalls to be aware of to ensure a smooth transaction and a happy client.

Biography: Stephanie Buckley serves as Senior Vice President and Senior Regional Fiduciary Manager of Philanthropic Services within The Private Bank. Wells Fargo Philanthropic Services helps charitable individuals, families, and nonprofit organizations work toward their unique goals by providing specialized advisory services. Stephanie leads a team of experienced specialists that provides philanthropic advice to Wells Fargo clients throughout the Southwest and California Regions.

Prior to joining Wells Fargo, Ms. Buckley worked at Pepperdine University for over 10 years as an associate vice chancellor of the Center for Estate and Gift Planning. She also served an associate vice chancellor at the law school where she raised major gifts, managed the school's board of visitors and taught as an adjunct faculty member. Ms. Buckley earned a BA degree in Economics with high honors from the University of California, Santa Barbara, a JD with a specialization in business law from the University of California, Los Angeles School of Law and an LLM in taxation with honors from Loyola Law School in Los Angeles.

Noon **Lunch Sponsored by Wells Fargo**

12:45 p.m.

Susan Gary, JD

University of Oregon, School of Law

Electronic Wills: Because Paper is So 20th Century

Description: The Uniform Law Commission has developed an Electronic Wills Act, in part to address a growing wave of state adoptions of e-will statutes. This presentation will discuss how electronic wills may be executed and revoked and whether they will be given effect. The presentation will review the new uniform act and discuss the differences in statutes around the country.

Biography: Susan N. Gary is an Orlando J. and Marian H. Hollis Professor at the University of Oregon School of Law. She researches, writes, and speaks about the regulation of charities, fiduciary duties and the prudent investor standard, the definition of family for inheritance purposes, donor intent related to restricted charitable gifts, and the use of mediation to resolve disputes in probate. She served as the Reporter for the Uniform Law Commission's Electronic Wills Act and the Uniform Prudent Management of Institutional Funds Act (UPMIFA). She is a member of the American Law Institute, a Commissioner on the Oregon Law Commission, an Academic Fellow and former Regent of the American College of Trust and Estate Counsel, and a Director of the ACTEC Foundation. She served as the first faculty member trustee on the University of Oregon Board of Trustees. Before entering academia, she practiced with Mayer, Brown & Platt in Chicago and with DeBandt, van Hecke & Lagae in Brussels. She received her B.A. from Yale University and her J.D. from Columbia University.associations.

1:45 p.m.

Rennee Dehesa, JD

Jones, Lester, Schuck, Becker & Dehesa, LLP

Advising the Latinx Community

Description: Understanding cultural differences and issues presented when representing Latinx clients. Practice tips on counseling and advocating for culturally diverse clients in estate planning. Identification of unique circumstances presented in Latino family estates and familial structures.

Biography: Rennee Dehesa is a bilingual estate planning and estate administration attorney with extensive experience in a succession planning, probate, trust administration, and conservatorships and guardianships. She also has substantial experience with business transactions, formations and business succession planning. Her experience in managing estates and representing businesses gives her the unique ability to integrate the professional and operational need of business owners with their estate planning and administration needs.

Ms. Dehesa earned her undergraduate degree from University of San Diego in 2004, receiving a dual major in Political Science and Spanish with a Minor in Business Administration. In 2006, she earned her Juris Doctor degree from California Western School of Law.

2:45 p.m. **Break**

3:00 p.m. ***Edward J. McCaffery, Esq.***
Seyfarth Shaw LLP, Los Angeles

Recent Developments Affecting Estate Planning

Description: Edward McCaffery will discuss the practical applications for current estate planning practices. He will also discuss planning opportunities and pitfalls going forward. As always, Ed will shed light on current developments relevant to practitioners and their clients.

Biography: Edward McCaffery is a partner and senior counsel in the Los Angeles office of Seyfarth Shaw LLP and is a member of Seyfarth's Business Services Department. Mr. McCaffery practices in the area of trusts and estates, taxation and intellectual property. He is also the Dean and Carl Mason Franklin Chair in Law at the University of Southern California School of Law, where he teaches classes in income taxation, property, corporate tax and partnership tax. From 1995 to 2006, Mr. McCaffery was also a Visiting Professor of Law and Economics at the California Institute of Technology.

4:15 p.m. **Closing Remarks and Evaluations**

4:30 p.m. **Adjourn**