

# THROUGH THE LOOKING GLASS XIV:

*An Ongoing Reflection of Current  
Estate and Gift Planning Issues*

*California State University, Channel Islands – Grand Salon  
Tuesday, January 16, 2018*



Dear Colleagues,

We are excited to announce Through the Looking Glass XIV! Once again, the fourteenth symposium will explore the latest trends in estate planning and charitable giving. As in the past, this year's symposium 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 listened to your past feedback and put together a schedule of prominent professionals to present areas of expertise including hot topics in current trust and estate planning issues, will drafting and contests, data/information governance, 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.

## **New Year! New Venue!**

The 2018 Through the Looking Glass symposium is being presented once again under the auspices of the Conejo Valley Estate Planning Council, 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 **Tuesday, January 16, 2018** at California State University, Channel Islands, Grand Salon.

The cost is \$175 before 1/5/18. \$225 after and \$275 at the door. A limited number of spaces are reserved for students at the reduced rate of \$50. For your convenience, you can register online at [www.callutheran.edu/cnl/LG](http://www.callutheran.edu/cnl/LG) or return the attached registration form.

Reserve your spot today!

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Estate Planning Council**

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7:30 a.m.

Registration/Continental Breakfast  
Breakfast Sponsor – Rabobank Wealth Management



8:00 a.m.

Welcome

8:15 a.m.

*Honorable Glen Reiser*  
Ventura County Superior Court Probate/Conservatorship

### *Observations from the Bench on Current Trust and Estate Issues*



**DESCRIPTION:** Because of the proliferation of inter vivos trusts over the last three to four decades, probate courts have increasingly become the epicenter of high stakes intra-family litigation. Judge Reiser will talk about some of the cross-disciplinary issues that arise as probate has become the new “civil.”

The Honorable Glen M. Reiser is the current probate judge, although he also has substantial experience with the civil and criminal bench. Judge Reiser spent 20 years in private practice handling a diverse body of cases from environmental law to family law before being appointed to the bench by Governor Pete Wilson in 1998.

9:15 a.m.

*Terrence M. Franklin, Esq.*  
Sacks Glazier Franklin & Lodise LLP

### *The 1846 Last Will of John Sutton – What’s Not So New in Will Drafting and Contests*

**DESCRIPTION:** Will drafting, the role of the attorney as counselor and witness, and pleading and the presentation of facts in a will contest trial, will all be addressed in the context of the last will and testament of the fourth great-grandfather of the speaker, a Florida slave owner whose will emancipated the speaker’s fourth great- grandmother, and her children and grandchildren.



Terrence M. Franklin (“Terry”), Partner at Sacks Glazier Franklin & Lodise, is a seasoned attorney with nearly a quarter century of experience handling trust and estates and probate litigation, disputes and appeals. After handling will contests and related litigation in Los Angeles for nearly two decades, Terry Franklin discovered a will contest in his own family history. His fourth great-grandfather owned his fourth great-grandmother and their children and grandchildren, but set them all free in his will. Terry uses the experience of his quest to discover the will and the contest to share enduring lessons about estate law in modern times.

10:15 a.m.

Break Sponsored by Union Bank



10:25 a.m. Patrick A. Fraioli Jr., Esq.  
Ervin Cohen & Jessup LLP

### *Information Governance for Estate Planning Professionals*

**DESCRIPTION:** Explore tips and best practices from the front lines in cyberspace with cyber expert, Patrick Fraioli. Learn about the latest social engineering scams, techniques and ransom ware vectors used by attackers and fraudsters, and what you can do to keep your and your clients' information safe.



Patrick Fraioli, Jr., Esquire is a partner and the Co-Chair of the Cybersecurity, Data Privacy & E-Commerce Workgroup at Ervin Cohen & Jessup LLP in Beverly Hills. As Co-Chair of the Cybersecurity, Data Privacy & E-Commerce Workgroup, Pat has performed Cyber Risk Assessments, responded to data breaches, acted as litigation counsel, interacted with regulators on notification issues, and worked closely with federal and state law enforcement. He has also lectured extensively, providing keynote addresses, webinars, seminars and panel discussions on encryption, password methodology, and the Internet of Things & Big Data.

As a technology lawyer, Pat represents clients in the courtroom, the boardroom and before government regulatory agencies.

11:25 a.m. Lunch Sponsor – Wells Fargo



12:00 p.m. Gary S. Wolfe, Esq.  
The Wolfe Law Group

### *The IRS, Panama Papers and High Net Worth Investors*

**DESCRIPTION:** An overview of the 2016 data leak of 11.5 million documents from the Panama Law Firm, Mossack Fonseca, that implicated some of the world's wealthiest people in money laundering and tax evasion schemes. While those involved hailed from many countries, money laundering and tax evasion are felonies for US taxpayers. The presentation will examine legal ways to minimize or eliminate tax, while providing confidentiality and asset protection.



The Wolfe Law Group is an international array of legal and tax experts providing collaborative services for Global High Net Worth Investors on a per client basis. Gary S. Wolfe has over 35 years of experience providing clients with expertise for IRS Civil and Criminal Tax Audits, Offshore Tax Evasion and International Tax Planning & Asset Protection.

As of 2017, Gary has been the recipient of 36 separate international tax awards from 11 different global expert societies in London/UK. He has written 20 e-books (available on Amazon) regarding the IRS, International Tax Planning and Asset Protection and has published or been interviewed in 150+ articles published by 16 different US and International magazines. Please see website at [gswlaw.com](http://gswlaw.com) for more info.

1:00 p.m.

Break

1:15 p.m.

*Edward J. McCaffery, Esq. and Alan T. Yoshitake, Esq.*  
Seyfarth Shaw LLP, Los Angeles

### *Recent Developments Affecting Estate Planning*

**DESCRIPTION:** Edward McCaffery and Alan Yoshitake will discuss the practical applications for current estate planning practices. They will also discuss planning opportunities and pitfalls going forward. As always, The Dynamic Duo will shed light on current developments relevant to practitioners and their clients.



Edward McCaffery and Alan Yoshitake are partners in the law firm of Seyfarth Shaw LLP, Los Angeles. Mr. McCaffery is 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.



Mr. Yoshitake is the Department Chair of Seyfarth Shaw's National Trust & Estates Practice. In conjunction with acting as Department Chair, Mr. Yoshitake is a practicing partner in the downtown Los Angeles office of Seyfarth Shaw LLP and is a member of the Trusts and Estates Practice Group. Mr. Yoshitake's practice primarily focuses on sophisticated planning of trusts and estates, trust and probate administrations, charitable planning, family business, tax and succession planning and trusts and estates litigation.

2:30 p.m.

Closing Remarks and Evaluations





# For Attorneys, CPAs, Financial Planners and Insurance Agents

RESERVE YOUR SPACE NOW! JANUARY 16, 2018

California State University,  
Channel Islands – Grand Salon

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

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## CONTINUING EDUCATION CREDITS:

CFP Board – 5.5 Hours

State Bar of California – 5.5 Hours

California Board of Accountancy – 6.6 Hours

Please complete and return this card with registration payment to:  
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60 W. Olsen Road #2700 • Thousand Oaks, CA 91360  
[djensen@callutheran.edu](mailto:djensen@callutheran.edu)

OR

Register on-line at: [www.callutheran.edu/cnl/lg](http://www.callutheran.edu/cnl/lg)

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

EARLY BIRD REGISTRATION ☐ \$175 (Before 1/5/18) 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