

THROUGH THE LOOKING GLASS XVIII:

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

Tuesday, January 18, 2022 | 10:30 a.m. - 3:45 p.m.
Via Zoom



Dear Colleagues,

We are excited to announce Through the Looking Glass XVIII! This eighteenth 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 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 reform, probate law, and recent developments affecting estate planning. We have brought together a phenomenal faculty of speakers to address timely and interesting challenges that we all may face in the year ahead.

While we had hoped to host the event in-person, due to continued convening restrictions, this year's event will be hosted virtually via Zoom.

The 2022 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.

Please plan to join us on Tuesday, January 18, 2022.

The cost is \$75 before 1/14/22; \$100 after. 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 online at www.callutheran.edu/LG

Reserve your spot today!

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For Attorneys, CPAs, Financial Planners and Insurance Agents

Tuesday, January 18, 2022

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FARGO

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CONTINUING EDUCATION CREDITS:
State Bar of California – 3.0 Hours
CFP Board – 4.0 Hours
California Board of Accountancy – 4.8 Hours

10:30 a.m.

Log in to Zoom Meeting, Get Settled

10:45 a.m.

Welcoming Remarks

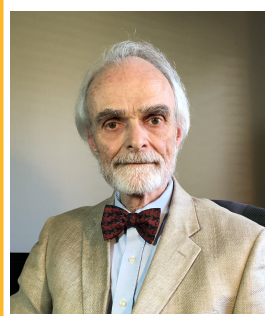
11:00 a.m.

Kevin D. Mohr, JD

Western State College of Law

The 2018 Revision of the California Rules of Professional Conduct: Background, Developments and the Missing Rule 1.14

DESCRIPTION: Professor Kevin Mohr, the former Reporter for the State Bar's Special Commission for the Revision of the California Rules of Professional Conduct, will discuss the development of the current California Rules of Professional Conduct, their similarities to and significant differences from the ABA Model Rules, and the Supreme Court's rejection of proposed rule 1.14, which was intended to provide guidance to California lawyers representing clients with diminished capacity. He will also outline possible steps that could lead to the adoption of a rule analogous to ABA Model Rule 1.14.



BIOGRAPHY

Kevin E. Mohr has been a professor at Western State College of Law since 1991, where he currently teaches Contracts, Law Practice Management & Technology, Professional Responsibility and Remedies. Professor Mohr is a former Chair of and Special Advisor to the State Bar's Committee on Professional Responsibility and Conduct, and served as the Reporter/Consultant to, and as a member of, the State Bar of California's Special Commission for the Revision of the California

Rules of Professional Conduct. He has been appointed to the State Bar's Closing the Justice Gap Working Group after serving as a member on the State Bar's Task Force on Access Through Innovation of Legal Services. In 2004, he chaired the Supreme Court AB 1101 Task Force that drafted former CRPC 3-100 (currently CRPC 1.6). He is a founding member of the California Lawyers Association Ethics Committee, and a member and past Chair of the Los Angeles County Bar Association Professional Responsibility and Ethics Committee.

Professor Mohr frequently lectures and writes about ethical and conflict of interest issues in the practice of law and is a standing contributor to the State Bar of California, California Lawyers Association, and various local bar associations. He received his B.A. from Harpur College (Binghamton University), his M.S. from the University of Wisconsin, and his J.D. from Yale Law School. Professor Mohr's private practice focuses on risk management and professional responsibility issues, including conflicts of interest and fee matters.

12:00 p.m.

Break

12:15 p.m.

Marc A. Doss, CFA®, CFP®

Wells Fargo Wealth & Investment Management

Global Economy and Capital Markets in 2022 and Beyond

DESCRIPTION: This session will outline current global economic performance and future expectations. Marc Doss will present relevant information regarding economic trends and forecasts for 2022 and shine a light on key factors affecting the global economy. He will also provide insight on investment themes and anticipated risks and rewards.



BIOGRAPHY:

Marc A. Doss is managing director and regional chief investment officer for the Pacific North and Pacific South Divisions within Wells Fargo Wealth & Investment Management. He leads a team of investment professionals who deliver comprehensive, custom, diversified portfolio management for clients of Wells Fargo Advisors and Wells Fargo Private Bank. In his role as regional chief investment officer, Mr. Doss serves as the

investment thought leader in regions throughout his division by providing insight on the economy and financial markets at client events and through written commentary. He serves on the Wells Fargo Investment Oversight Committee, and the Asset Allocation and Portfolio Construction Working Groups.

Prior to his current role, Mr. Doss served as senior director of investments for the Southwest region and the regional investment manager for Wells Fargo Private Bank in San Diego. Prior to joining Wells Fargo, he worked as a managing director at Lehman Brothers and U.S. Trust. Mr. Doss has more than 27 years of experience in financial services and has been featured in various media outlets: *The Wall Street Journal*, Dow Jones MarketWatch, CNBC.com, *U.S. News & World Report*, and Bloomberg.

Mr. Doss earned a Juris Doctor from the University of San Diego School of Law, Bachelors of Science in Economics and Political Science from the University of Illinois, is a CFA® Charterholder, and holds the Certified Financial Planner™ (CFP®) designation. He is a former trustee for the San Diego County Retirement Association (SDCERA) and previously served as the president of the CFA Society of San Diego. He served four years of active duty in the U.S. Navy and eight years in the reserves as a U.S. naval officer. Mr. Doss is based in San Diego, California.

1:15 p.m.

Break

1:30 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, teaching public finance and law, law and economics, and law and technology (including intellectual property law).

Ed McCaffery's scholarship has been widely cited by economists, government officials, journalists and policy analysts. Among his publications are his recent books, *Behavioral Public Finance* (which McCaffery co-edited); *Fair Not Flat: How to Make the Tax System Better and Simpler*, which proposes a tax system based on taxing spending rather than income; and *Taxing Women*, which examines how working women suffer under current tax laws. Other publications include *Rethinking the Vote: The Politics and Prospects of American Election Reform*, which he co-edited. Another book, *A New Understanding of Property*, will be published later this year.

In an effort to reach a wider audience to explain basic concepts of tax and public finance, McCaffery created the People's Tax Page and a series of animated cartoons featuring Sabrina the Unicorn. McCaffery is a frequent commentator on a variety of tax issues on CNN and The Huffington Post.

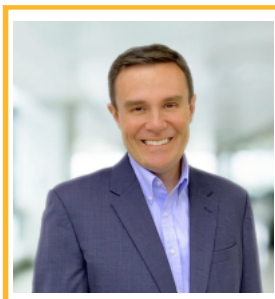
2:30 p.m.

Matthew A. Faas, CPA, Principal

Holthouse Carlin Van Trigt, LLP

Reflecting on the 2021 Tax Year and Considering the Future

DESCRIPTION: Join Matthew Faas for a review of the 2021 tax year and what income tax changes are or may be in store for the 2022 tax year and beyond. Matt will explore potential implications of the latest enacted and/or proposed legislation and how practitioners can help their clients plan in an ever-changing tax environment.



BIOGRAPHY

Matthew Faas joined Holthouse Carlin Van Trigt, LLP to expand the firm's Phoenix office. He brings over 17 years of public accounting experience serving closely held businesses and high net worth individuals and families. Taking a holistic approach to client service, Matt addresses the tax issues of businesses, families, and individuals with a 360-degree view so that tax planning is comprehensive. He has subject matter specialization in partnership taxation addressing

complex allocations, waterfall arrangements, capital analysis, and basis adjustments, among others. Matt's industry experience includes providing tax consulting and compliance services to professional sports teams and clients in the real estate, retail, and private equity industry sectors.

Prior to joining HCVT, Matt was a tax managing director at Deloitte, where he led various client service engagement teams and managed complex compliance and consulting projects for multiple large private companies and high net worth individuals in Arizona and California.

3:30 p.m.

Closing Remarks and Evaluations

3:45 p.m.

Adjourn