



**THROUGH THE LOOKING GLASS  
VIRTUAL SYMPOSIUM  
AN ONGOING REFLECTION OF THE CURRENT ESTATE AND GIFT PLANNING ISSUES  
AGENDA  
Tuesday, January 18, 2022**

10:30 am	Log on to Zoom Meeting
10:45 am	Welcoming Remarks
11:00 am	<i>The 2018 Revision of the California Rules of Professional Conduct: Background, Development and the Missing Rule 1.14</i> Kevin E. Mohr Western State College of Law
12:00 pm	Break
12:15 am	<i>Global Economy and Capital Markets in 2022 and Beyond</i> Marc A. Doss, CFA®, CFP® Wells Fargo Wealth & Investment Management
1:15 pm	Break
1:30 pm	<i>Recent Developments Affecting Estate Planning</i> Edward McCaffery, Esq. Seyfarth Shaw, LLP
2:30 pm	<i>Reflecting on Tax Year 2021 and Looking Forward to Tax Year 2022</i> Matthew Faas, CPA Holthouse Carlin & Van Trigt LLP
3:30 pm	Closing Remarks
3:45 pm	Adjourn

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**Continuing Education Credits:**

State Bar of California – 3.0 Hours (please note that the California State Bar has declined MCLE credit for the lunchtime speaker)

CFP Board – 4.0 Hours

California Board of Accountancy – 4.8 Hours