



THROUGH THE LOOKING GLASS SYMPOSIUM
AN ONGOING REFLECTION OF THE CURRENT ESTATE AND GIFT PLANNING ISSUES
Wednesday, January 17, 2024

- 7:30 a.m. Arrival, Breakfast hosted by Ventura Coast Law
- 8 a.m. Welcoming Remarks
- 8:15 – 9:15 a.m. *The Current State of the Probate Court*
The Honorable Roger L. Lund
Presiding Probate Judge, Ventura County Superior Court
- 9:15 – 10:30 a.m. *Elder Abuse and Financial Victimization*
Melissa McMurdo
Deputy District Attorney, Ventura County District Attorney's Office
Kellie Tyndall
Senior Victim Advocate, Ventura County District Attorney's Office
**this session is eligible for MCLE in elimination of bias*
- 10:30 – 11 a.m. Break
- 11 a.m. – 12:15 p.m. *Ethical Wills: Protecting Legacies in Estate Planning*
Arthur Gross-Schaefer, J.D., C.P.A., Rabbi
Professor of Business Law and Ethics, Loyola Marymount University
Rabbi for the Community Shul of Montecito and Santa Barbara
**this session is eligible for MCLE in legal ethics*
- 12:15 – 1 p.m. Lunch hosted by Wells Fargo
- 1 – 2:15 p.m. *Directed Trusts in California: Better Late Than Never?*
Michael Rosen-Prinz
Partner, Loeb & Loeb, LLP
Phillip Hayes
Regional Wealth Advisor, Northern Trust
- 2:15 – 3:30 p.m. *Recent Developments Affecting Estate Planning*
Edward J. McCaffery, Esq.
Seyfarth Shaw LLP, Los Angeles
- 4 p.m. Closing Remarks, Evaluations & Adjourn

Continuing Education Credits (360 minutes):

State Bar of California – 6 Hours (1.25 in legal ethics and 1.25 in elimination of bias)

CFP Board – 7 Hours

California Board of Accountancy – 7.2 Hours