



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

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**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