

THE 2015 REAL PROPERTY, PROBATE AND TRUST SECTION MIDYEAR MEETING AND CONFERENCE:  
STAYING AHEAD OF THE CURVE - NEW LEGISLATION, TECHNOLOGY, AND BEST PRACTICES



In partnership with the WSBA Real Property, Probate and Trust Section

**Plenary sessions include:**

- Highlights of new Washington state legislation affecting estate planning and real property practice
- Ethics and technology
- Best practices for dealing with high-conflict personalities

**Highlights of concurrent tracks include:**

**Real Property**

- Updates on marijuana and real property issues
- Land use permits for development deals
- Independent duty doctrine/allocation of risk

**Probate and Trust**

- Lessons learned from trustee front lines
- New legislation affecting trustees
- End-of-life palliative care and decision-making

Enjoy opportunities to connect with colleagues during the weekend:

- Friday at 5:15 p.m.: hosted wine-tasting welcome reception with hors d'oeuvres underwritten by Washington Trust Bank
- Saturday at 7 a.m.: Third Annual Scott A. W. Johnson Memorial Fun, Fun, Fun Walk/Run\* underwritten by Stokes Lawrence PS.
- Saturday at 5:30 p.m.: no-host networking reception

*\*For more information please contact Karen Boxx at [kboxx@uw.edu](mailto:kboxx@uw.edu) or Lora Brown at [lora@lrbrownlaw.com](mailto:lora@lrbrownlaw.com). Fun Run registration available online (visit [www.WSBARPPT.com](http://www.WSBARPPT.com)). When registering, you'll make an online donation of \$50 or more to one (or more) of the following organizations: Washington Ceasefire, ACLU of Washington, Washington Coalition for Open Government, or Legal Voice.*

The annual RPPT Section meeting will be held at 5:00 p.m. Friday prior to the hosted wine tasting and reception.

See full 2.5-day program agenda and faculty inside →



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Continuing Legal Education  
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Seattle, WA 98101-2539

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FRIDAY - SUNDAY, JUNE 12-14, 2015

THE HISTORIC DAVENPORT HOTEL, SPOKANE, WA



11.75 CLE credits

REGISTER NOW AT [WSBACLE.ORG](http://WSBACLE.ORG)

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# REGISTER ONLINE NOW!

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FRIDAY - SUNDAY, JUNE 12-14, 2015



11.75 CLE credits, including 1.75 ethics credits



\$399 RPPT Section member

\$424 Join the RPPT Section (\$25) and attend for the member rate (\$399)

\$425 Standard



Go to [wsbacle.org](http://wsbacle.org) and enter 15704 in the search field.

## LODGING INFORMATION AT THE HISTORIC DAVENPORT HOTEL

*"Washington's grandest hotel. Whether it's the soaring architecture, award-winning amenities, rich history, or simply its proximity to nearby Spokane attractions, The Historic Davenport Hotel has welcomed film stars, explorers, writers, politicians and other luminaries for more than 100 years."*

A block of rooms is reserved at special rates of \$150 - \$170 for single/double occupancy until May 11, 2015. Ask for "the Washington State Bar Association RPPT Midyear Meeting."

Reserve your room in the Davenport Tower (across the street from the conference site) with rates starting at \$150 by calling 1-800-918-9342. Reserve your room in the Historic Davenport Hotel (the conference site) with rates starting at \$170 by calling 1-800-899-1482.

**REGISTER SOON** - the block fills up quickly! Cut-off date is May 11, 2015, but book now to be sure to get the type of room you want.

**The Historic Davenport Hotel**  
10 S. Post St.,  
Spokane, WA 99201

## FRIDAY, JUNE 12

11:30 a.m. Check-in • Walk-in Registration • Coffee and Snack Service • Exhibits open

### PLENARY

12:55 p.m. Welcome and Introduction by Program Chair and Co-Chairs

Heidi L.G. Orr (Chair) - Lane Powell PC, Seattle

Anna M. Cashman (Co-Chair, Probate and Trust) - Kutscher, Hereford, Bertram, Burkart PLLC, Seattle

Nathan G. Smith (Co-Chair, Real Property) - Witherspoon Kelley, Spokane

1 p.m. Real Property Update

Scott B. Osborne - Foster Pepper PLLC, Seattle

2 p.m. Probate and Trust Update

RoseMary Reed - Stokes Lawrence PS, Seattle

3 p.m. Break

3:15 p.m. Understanding and Managing High-Conflict Personalities

Joseph Shaub - Joseph Shaub, M.A., J.D., Bellevue

4:15 p.m. Sneaky Ethical Challenges: Probate, Real Property, and Estate Planning

Stacey L. Romberg - Attorney at Law, Seattle

Jeanne Marie Clavere - Washington State Bar Association, Professional Responsibility Counsel, Seattle

Brady M. Peterson - Lukins & Annis PS, Spokane

5 p.m. Real Property, Probate and Trust Section Annual Business Meeting

5:10 p.m. Adjourn Day One.

5:15 p.m. Hosted wine-tasting welcome reception with hors d'oeuvres

We recognize and thank Washington Trust Bank for underwriting the wine-tasting welcome reception.

## SATURDAY, JUNE 13

7 a.m. Third Annual Fun Run in Honor of Scott A.W. Johnson

We recognize and thank Stokes Lawrence PS for underwriting this activity.

8:15 a.m. Late Check-in • Walk-in Registration • Coffee and Pastry Service • Exhibits open

We recognize and thank Laird Norton Wealth Management (breakfast) and Stewart Title (break) for underwriting the Saturday breakfast/coffee and pastry service.

### CONCURRENT TRACKS

#### Real Property Track - Saturday

8:25 a.m. Welcome by Real Property Program Co-Chair

Nathan G. Smith (Co-Chair, Real Property) - Witherspoon Kelley, Spokane

8:30 a.m. The Development Game: Securing Land Use Permits for Real Estate Development Deals and Sales

James Howsley - Jordan Ramis PC, Vancouver

9:30 a.m. Untangling the Web of Lien Priority Issues

Dainen N. Penta - Leahy McLean Fjelstad, Seattle

Jody M. McCormick - Witherspoon Kelley, Spokane

10:30 a.m. Break

10:45 a.m. From *Berschauer* to *Donatelli*: The Independent Duty Doctrine

Justin D. Park - Romero Park PS, Bellevue

11:45 a.m. Leases: Dealing with Insurance, Indemnification, and Subrogation

Mike Garner - Stokes Lawrence PS, Seattle

#### Probate and Trust Track - Saturday

8:25 a.m. Welcome by Probate and Trust Program Co-Chair

Anna M. Cashman (Co-Chair, Probate and Trust) - Kutscher, Hereford, Bertram, Burkart PLLC, Seattle

8:30 a.m. You Draft It and We Administer It - Lessons Learned From the Trustee Front Lines

Elaine P. Adams - Weyburn Fiduciary Services Inc., Mercer Island

Anna M. Cashman - Kutscher, Hereford, Bertram, Burkart PLLC, Seattle (Moderator)

Barbara Potter - Laird Norton Wealth Management, Seattle

Christina Riffle - Wells Fargo, N.A., San Francisco

9:30 a.m. Everything You Didn't Want the Public to Know About Your Estate Planning Clients: Privacy Issues in Probate and Trust Administration

Gail E. Mautner - Lane Powell PC, Seattle

Sarah MacLeod - Lane Powell PC, Seattle

10:30 a.m. Break

10:45 a.m. Mediating Trust and Estate Disputes, and How to Avoid Them

Hon. Eric B. Watness, Ret. - Judicial Arbitration and Mediation Service, Seattle

Thomas Keller - Thomas M. Keller, PS, Seattle

11:45 a.m. Adding Flexibility in Trust Administration: New Legislation on Trustee Investments, Delegation of Authority, and Directed Trusts

Mark W. Roberts - K&L Gates LLP, Seattle

12:45 p.m. Adjourn Day Two - afternoon on your own.

5:30 p.m. No-Host Networking Reception

## SUNDAY, JUNE 14

7:30 a.m. Late Check-in • Coffee and Pastry Service • Exhibits open

### PLENARY

8:25 a.m. Welcome and Introduction by Program Co-Chairs

8:30 a.m. Practice Safe Tech: Cloud Computing, Social Media, and Ethics

Robin L. Haynes - Witherspoon Kelley, Spokane

9:30 a.m. Comparative Overview of Business and Real Property Appraisal

Dan Guderjohn - Corporate Advisory Associates, Inc., Seattle

Patrick M. Lamb - Lamb Hanson Lamb Appraisal Associates, Inc., Seattle

Tiffany Gorton - Kutscher, Hereford, Bertram, Burkart PLLC, Seattle (Moderator)

10:30 a.m. Break and move to concurrent tracks.

### CONCURRENT TRACKS

#### Real Property Track - Sunday

10:45 a.m. Marijuana and Real Property Issues and Concerns

Hilary Bricken - Harris & Moure PLLC, Seattle

11:45 a.m. An Introduction to CERCLA/MTCA in Real Estate Transactions: What You Don't Know Can Hurt You

Kelly T. Wood - Phillips Wesch Burgess PLLC, Olympia

#### Probate and Trust Track - Sunday

10:45 a.m. Hot Topics

Thomas M. Culbertson - Lukins & Annis P.S, Spokane

Stephanie R. Taylor - Randall Danskin PS, Spokane

11:45 a.m. End-of-Life/Palliative Care and Decision-Making

John A. Barnes - Sullivan Barnes PLLC, Lynnwood

J. Randall Curtis, M.D., M.P.H. - Cambia Palliative Care Center of Excellence, University of Washington, Seattle

12:45 p.m. Complete evaluation forms • Adjourn conference.

### WSBA is paperless!

Once you have registered, your coursebook will be available 48 hours prior to the conference as a PDF file in your My CLE account, where you can view it or save it on your tablet, laptop, or other device. You can also print out a copy prior to the conference if it's important to you for note taking. **No print copies of the coursebook will be available at the conference.** Questions? Email us at [cle@wsba.org](mailto:cle@wsba.org).