



WEDNESDAY, JANUARY 8, 2020

Registration: 12:00 p.m. • Program: 12:30 p.m. – 1:30 p.m.

Michael V. Vollmer, Esq.

Murtaugh Treglia Stern & Deily LLP

Practical Planning for 2020 and What May Change After the Federal Elections

(plus, a review of 2019 Federal & California trust and estate legislation and cases)

This program will discuss practical planning for 2020, with an emphasis on retirement plans, special needs trusts, and health care directives; a summary of federal and California trust and estate legislation and cases in 2019; Inflation adjustments for 2020 federal estate tax, gift tax, and income tax schedules, and California income tax schedules for 2020.

–Approved for 1.0 General CLE Credit–

Offers 1.0 Specialization Credit for all Estate Planning, Trust and Probate Law Certified Specialists

Grand Catered Events
 300 S Flower Street, Orange, CA 92868
(Complimentary Parking)

Seating is limited, and lunch may not be available for purchase on the day of the meeting. Registration is not confirmed until payment is received. The OCBA is not responsible for lost, misdirected or delayed mail. Registration may not be transferrable; Certain conditions apply. Cancellations must be received in writing via fax or e-mail three (3) business days prior to the meeting date to receive a refund. OCBA reserves the right to substitute speakers. This activity has been approved for MCLE credit by the State Bar of California in the amount of 1.0 hour(s), as appropriate to the content of the activity. OCBA is a State Bar of California approved MCLE provider and certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing MCLE. Non-Attorney guests may attend with a registered attorney at equal rate. *Persons with Disabilities:* If special arrangements are required for attendance, please contact the OCBA at least 10 days prior to the event.

Register by fax, mail or online at www.ocbar.org

OCBA Trusts & Estates, Conservatorship, and Elder Law & Special Needs Joint Section Meeting – January 8, 2020

Meeting Price – After 1/3/20, Add \$10	Includes Lunch	No Lunch
OCBA T&E, CGPP, & ELD Section Members	<input type="checkbox"/> \$35	<input type="checkbox"/> -0-
OCBA Attorney (Non-Section Member)	<input type="checkbox"/> \$60	<input type="checkbox"/> \$25
Non-OCBA Member Attorney	<input type="checkbox"/> \$70	<input type="checkbox"/> \$35

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