



Wednesday, October 9, 2019

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

Speaker:

Mark C. Doyle, Esq.

Partner, *Tredway Lumsdaine & Doyle LLP (TLD Law)*

Planning and Administration of the Bypass Trust "to B or Not to B"

This program will provide an informative discussion on the following topics:

- Drafting Marital Split Trusts
- The pros and cons of a Bypass Trust design
- Tax consideration in use of drafting Bypass Trust
- Funding the Bypass Trust
- Postmortem administration and taxation of the Bypass Trust

–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 Section Meeting – October 9, 2019

Meeting Price – After 10/4/19, Add \$10	Includes Lunch	No Lunch
OCBA Trusts & Estates Section Member	<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

Name (*print*): _____ Email: _____
By providing your email address, you agree to allow the OCBA to email you regarding relevant OCBA information.

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\$ _____ enclosed/to be charged (Make checks payable to the OCBA)