



# ORANGE COUNTY BAR ASSOCIATION

Trust & Estates, Elder Law & Special Needs,  
and Conservatorship Sections Present

**3.0 CLE Credits**

including Legal Specialization Credit for  
Estate, Trusts & Probate Law Specialists

# Trust Protectors: Planning, Administration, and Litigation Considerations

**Wednesday, October 26, 2022**

Registration: 4:30 PM | Dinner/Program: 5:00 PM – 8:15 PM

**The Promenade & Gardens by Turnip Rose** | 1570 Scenic Avenue, Costa Mesa, CA 92626 (Free Parking)

## SPEAKERS:



**Matt Brown, Esq.**  
Partner, Brown & Streza LLP



**Beth Vasquez, Esq.**  
Senior Vice President, Chief Fiduciary Officer,  
Legal Counsel, *First American Trust, FSB*



**Robert C. Eroen, Esq.**  
Partner, *Hill, Farrer & Burrill LLP*

**PROGRAM CHAIR and MODERATOR**  
**Katherine F. Biadasz Khamis, Esq.**  
*Roehl & Glowacki, P.C.*

## Topics:

- Trust protectors and alternatives in estate planning
- Advantages and pitfalls of administering trusts with and other third-party powerholders
- Trust protector issues arising in litigation

Register online at **ocbar.org**

Advance registration required. For assistance,  
please contact the OCBA at [info@ocbar.org](mailto:info@ocbar.org).

**Price Includes Dinner** After 10/20, add \$25

OCBA Trust & Estates, Elder Law, CGP Section Members	<b>\$90</b>
OCBA Members	<b>\$100</b>
OCBA Law Student Member/Sitting Judge	<b>\$50</b>
Non-OCBA Members	<b>\$150</b>

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Payments received after October 21, 2022, add \$25. OCBA is not responsible for lost, misdirected or delayed mail. Cancellations must be received in writing by October 21, 2022 (no refunds after this date). OCBA reserves the right to substitute speakers. This activity has been approved for Minimum Continuing Legal Education Credit by the State Bar of California in the amount of 3.0 hour(s), as appropriate to the content of the activity. OCBA is a State Bar 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.

**COVID-19 Health & Safety Requirements** This is an in-person event. By entering the venue, you are assuming the risk of contracting the COVID-19 virus and release the OCBA of all liability. All attendees will be required to follow all California and CDC COVID-19 guidelines then in place.

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