



ORANGE COUNTY BAR ASSOCIATION Trusts & Estates Section Presents

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TRUSTS & ESTATES ANNUAL SEMINAR

California Directed Trusts: A Big Step Forward for California Trust Law, But What Happens Now?

Tuesday, October 22, 2024

Registration & Networking: 5:00 – 5:30 PM | Presentation & Buffet Dinner: 5:30 PM – 7:30 PM

Dave & Busters, Irvine Spectrum | 661 Spectrum Center Drive, Irvine Spectrum, Irvine, CA 92618

For many years in other states, directed trusts have been used to assign discrete fiduciary powers and duties among different officeholders. However, attorneys have been reluctant to plan with directed trusts in California without statutory authority. Now, with the passage of the California Uniform Directed Trust Act, effective January 1, 2024, the wait is over. Join Philip Hayes, Michael Rosen-Prinz and Nicholas Van Brunt to learn about the new act, how directed trusts can benefit your clients, and where California stands in its progress in modernizing its trust laws. The speakers will also share reflections on the first year of the Act's implementation and thoughts on what the future may hold, including a discussion on how California courts will interpret a law that purports to protect directed trustees from liability - even when a beneficiary may have been harmed.

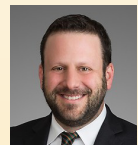
SPEAKERS:



Philip J. Hayes
Regional Wealth Advisor
Northern Trust



Michael Rosen-Prinz
Partner and Co-Chair, Family Office
Loeb & Loeb, LLP



Nicholas J. Van Brunt
Partner
Sheppard Mullin

Price Includes Dinner After 10/17, add \$25

OCBA Trusts & Estates Section Members	\$75
OCBA Members	\$100
OCBA Law Student Member/Sitting Judge	\$50
Non-OCBA Members	\$150

Register online at **ocbar.org**

Advance registration required. Limited Seating.
Contact the OCBA at education@ocbar.org.
Registration Deadline: October 17, 2024.

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Payments received after October 17, 2024, add \$25. OCBA is not responsible for lost, misdirected or delayed mail. Cancellations must be received in writing by October 17, 2024 (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 2.0 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.

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