

The Crossroads of Estate Planning and Dissolution Law: Lessons for Lawyers in Both Fields

Highlights include:

- ◆ HB 3338—a legislative response to *Olesberg*
- ◆ Reproductive tissue rights
- ◆ Using trust assets for child and spousal support
- ◆ Avoiding and resolving personal property disputes

Click here to
register online!

*Cosponsored by the Estate Planning and
Administration Section*

Friday, June 19, 2009
9 a.m.–4:15 p.m.

Oregon Convention Center
Portland, Oregon

6.25 General CLE credits



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Video Replays

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Friday, June 19, 2009

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Oregon Convention Center
777 N.E. Martin Luther King Jr. Blvd.
Portland, Oregon

BREAKING UP IS HARD TO DO . . . AND A RANGE OF CRUCIAL LEGAL issues face both estate planning and family law attorneys when it happens. This seminar will examine a number of issues that you and your clients should consider to protect inheritance in case of future dissolution—marital or domestic—life insurance and beneficiary designations, reproductive tissue rights, using trust assets to pay child and spousal support, family business planning, strategies for parents and grandparents when making gifts, avoiding and resolving disputes over pets and personal property, and pre- and post-nuptial agreements.

This is a great opportunity to learn from estate planning and family law experts on the best way to help your clients make decisions, resolve questions, and reduce the potential for future conflicts.

Estate Planning and Administration Section Members receive \$20 off registration rates!

Register by using this form or calling the OSB CLE Service Center at (503) 431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For a full listing of OSB CLE seminars, please visit www.osbarcle.org.

This seminar will be videotaped and shown in its entirety at the following locations if three or more registrations are received at least a week prior to the replay date. To find out if a replay will be shown, please click on the Seminars Calendar at www.osbarcle.org and select the date of the scheduled video replay.

- ◆ **Astoria**
Friday, July 24
Di Bartolomeo Law Office
1139 Exchange St.
- ◆ **Bend**
Friday, July 17
Miller Nash LLP
1567 S.W. Chandler Ave.
Suite 204
- ◆ **Coos Bay**
Friday, July 17
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene**
Friday, July 24
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass**
Thursday, July 16
Josephine County Courthouse
Room 222
N.W. 6th and “C” Streets
- ◆ **Hood River**
Friday, July 17
Wyers Haskell Davies PC
216 Columbia
- ◆ **Klamath Falls**
Friday, July 17
Boivin Uerlings & Dilaconi PC
803 Main St., Suite 201
- ◆ **LaGrande**
Friday, July 17
Mautz Baum & O’Hanlon LLP
1902 Fourth St.
- ◆ **Medford**
Friday, July 24
Frohnmayr Deatherage
2592 E. Barnett Rd.
- ◆ **Newport**
Friday, July 24
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton**
Friday, July 24
Mautz Baum & O’Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond**
Friday, July 24
Bryant Emerson & Fitch
888 W. Evergreen
- ◆ **Roseburg**
Thursday, July 16
Douglas County Counsel’s Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem**
Friday, July 17
The Vandermay Law Firm
Capitol Center Building
388 State St., Suite 340
- ◆ **Tigard**
Wednesday, July 15
Oregon State Bar Center
16037 S.W. Upper Boones Ferry Rd.
- ◆ **Vale**
Friday, July 17
Butler & Looney PC
292 Main St. S.

The Crossroads of Estate Planning and Dissolution Law: Lessons for Lawyers in Both Fields—Friday, June 19, 2009

8:00 Registration

9:00 **The Differing Perspectives of Family Lawyers and Estate Planners**

Conrad G. Hutterli, *Attorney at Law, Portland*

9:30 **Issues at the Crossroads of Estate Planning and Dissolution Law**

- ◆ HB 3338 and *Olesberg*
- ◆ Availability of trust assets for child and spousal support
- ◆ Family business planning
- ◆ Gifting strategies for parents and grandparents

Moderator: Christopher P. Cline, *Wells Fargo Bank, Portland*
Zachary Fruchtagarten, *Gevurtz Menashe Larson & Howe PC, Portland*

Stephen E. Kantor, *Samuels Yoelin Kantor Seymour & Spinrad LLP, Portland*

Jonathan A. Levy, *Cavanaugh Levy Bilyeu LLP, Portland*

Russell Lipetzky, *Attorney at Law, Salem*

10:30 Break

10:45 **Issues at the Crossroads of Estate Planning and Dissolution Law (Continued)**

11:45 **New Risks Presented by Medical Technology: Frozen Embryos and More**

William J. Howe, III, *Gevurtz Menashe Larson & Howe PC, Portland*

Section Planners:

- ◆ **John H. Draneas**, *Draneas & Huglin PC, Lake Oswego*
- ◆ **Lucinda R. Giorgetti**, *Law Office of Lucinda Giorgetti, Lake Oswego*
- ◆ **Conrad G. Hutterli**, *Attorney at Law, Portland*
- ◆ **Jonathan A. Levy**, *Cavanaugh Levy Bilyeu LLP, Portland*
- ◆ **Helen Rives Pruitt**, *Meyer & Wyse LLP, Portland*

OSB CLE Seminars Attorney:

- ◆ **Karen D. Lee**, *klee@osbar.org, (503) 431-6382*

12:15 Lunch (On your own, or a plated lunch at the Convention Center may be ordered using the registration form)

1:15 **Life Insurance and Beneficiary Designations Following Dissolution**

- ◆ Using life insurance to secure support obligations
- ◆ Enforcing the obligation
- ◆ Avoiding “excess” security
- ◆ Ownership of the policy and resulting income tax effects
- ◆ Using life insurance trusts
- ◆ Enforceability of “informal” beneficiary designations
- ◆ Overriding effect of employer plan provisions and federal law

Paul J. DeBast, *DeBast McFarland & Richardson, Portland*

John H. Draneas, *Draneas & Huglin PC, Lake Oswego*

2:15 **Avoiding and Resolving Disputes about Pets, Paintings, and Other Personal Property in Dissolution and Estate Planning**

- ◆ Pet trusts: the simple and the sublime
- ◆ Tangible personal property: pitfalls in passing on your princely possessions
- ◆ What really happens before the divorce court

Amy E. Bilyeu, *Cavanaugh Levy Bilyeu LLP, Portland*

Lauren Saucy, *Saucy & Saucy PC, Salem*

3:00 Break

3:15 **Prenuptial and Postnuptial Agreements**

- ◆ Prenupts: a primer on enforceability
- ◆ Divorce vs. death
- ◆ Postnuptial agreements after *Grossman*

Michael A. Yates, *Yates Matthews & Eaton PC, Portland*

4:15 Adjourn

SEMINAR REGISTRATION

PORTLAND

- \$175 OSB Member—Early registration (received before noon, Monday, 6/15/09)..... \$ _____
 - \$195 OSB Member—Regular registration (received after noon, Monday, 6/15/09) \$ _____
 - \$205 Non-OSB Member \$ _____
Estate Planning and Administration Section member discount—subtract \$20: — _____
 - \$0 **2008–2009 Season Ticket** (Please register by noon, Monday, 6/15/09, to guarantee a seat and course materials. Season Ticket registrations received after this time are welcome and will be accommodated on a space-available basis.)..... \$ _____
 - \$0 50-year OSB members may attend free of charge \$ _____
 - \$0 Oregon judges and their lawyer staff (see below) \$ _____
 - Registrant is a judge
 - Registrant is a lawyer staff member for the following judge
- _____
 Judge (please print)
- _____
 Signature of Judge (required)
- \$25 Lunch Vegetarian \$ _____
- TOTAL REGISTRATION FEES (AEP09) (772) \$ _____
WB

VIDEO REPLAY

(Please see video replay schedule on previous page.)

- Location: _____
- \$175 Registration \$ _____
 - \$155 Estate Planning and Administration Section member \$ _____
 - \$0 2008–2009 Season Ticket \$ _____
 - \$0 50-year OSB members may attend free of charge \$ _____
 - \$0 Oregon judges and their lawyer staff (see below) \$ _____
 - Registrant is a judge
 - Registrant is a lawyer staff member for the following judge
- _____
 Judge (please print)
- _____
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Seminar products will be available approximately two weeks after the live program.

- \$195 Audio CDs and course materials (AEP09.KCD) \$ _____
 - \$325 DVDs and course materials (AEP09.KDV) ... \$ _____
 Subtotal:..... \$ _____
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 - \$65 Course materials (AEP09.HB) \$ _____
 2008–2009 Season Ticket No. _____
 course materials discount—subtract 20%: —
 Subtotal:..... \$ _____
- Shipping and handling fee:..... \$ 7.00
 TOTAL ORDER:..... \$ _____
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For audiocassette and VHS formats, please call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413.

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CANCELLATIONS: Cancellation requests must be received at least 48 hours prior to the start of the seminar to qualify for a refund. Requests are accepted via phone, fax, or mail; please see “Four Ways to Register” for contact information. All cancellations are subject to a \$20 cancellation fee.

TUITION ASSISTANCE: Tuition assistance is available on the basis of financial need. Fax a request stating your financial situation to 503-968-4456 no later than one week before the seminar.

DIETARY RESTRICTIONS OR SPECIAL ACCOMMODATIONS: Call 503-431-6351, or toll-free in Oregon, 1-800-452-8260, ext. 351.

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Name on Credit Card (please print)	
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2. **PHONE:** 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413
3. **FAX with VISA or MasterCard number:** 503-968-4456
4. **MAIL with check:** Oregon State Bar, CLE Registration, P.O. Box 231935, Tigard, OR 97281-1935