



Probate and Trust - Fall 2025

WEDNESDAY, DECEMBER 10, 2025

Approved for 5.5 CLE credits (5.0 Law and Legal Procedure + 0.5 Ethics).

\$174 - RPPT Section Members (discount applied at checkout)

\$199 - Standard/Non-Section Members

\$199 - Join the Section (\$25) and register at the Section rate (\$174)

Washington State Bar Association

1325 Fourth Ave., Suite 600 | Seattle, WA 98101

WEBCAST
ONLY

DESCRIPTION

*Presented in partnership
with the WSBA Real
Property, Probate and Trust
Section*

Join Probate and Trust colleagues online and end the year strong. In this CLE, you'll gain practical and real-life solutions and strategies from fellow practitioners that you can incorporate into your practice immediately. Hear tips and best practices for the unexpected as well as typical complications in estate planning, probate, and trust administration.

CO-CHAIRS

Shreya Ley - Layroots, LLC, Seattle

Chadwick Proctor - BNY Mellon
Wealth Management, Seattle

SCHEDULE

8:40 a.m. > Webcast Log-In Opens

8:55 a.m. > Welcome and Introductions by Program Co-Chairs

- **Shreya Ley** - Layroots, LLC, Seattle
- **Chadwick Proctor** - BNY Mellon Wealth Management, Seattle

9:00 a.m. > Washington Estate and Capital Gains Tax Update

60 minutes, 1.0 credits L&LP

The session will cover estate and capital gains tax updates including review of the new tax rates, new exemption amounts and some thoughts on planning under the law changes.

- **Rachel Roberson** - Sweeney Conrad, P.S., Kirkland
- **Melanie Abigania** - Sweeney Conrad, P.S., Kirkland

10:00 a.m. > Ethical Issues Regarding AI

30 minutes, 0.5 credits Ethics

Explore the ethical issues which arise when lawyers use AI.

- **Sandra Schilling** - Washington State Bar Association, Seattle

10:30 a.m. > BREAK

**10:45 a.m. > In re CES 2007 Trust: What Delaware's
DAPT Ruling Means (and doesn't) for Washingtonians**

60 minutes, 1.0 credits L&LP

A recent Delaware decision, *In re CES 2007 Trust*, upheld a domestic, self-settled asset protection trust. In this one-hour program, we will discuss the facts and holdings and then put them through a Washington lens: Does a Delaware DAPT actually work for a Washington resident? If not (or even if it does), what are the Washington-centric alternatives when a DAPT isn't your best move?

- **Colin Ley** - Lay Roots Law LLC, Seattle

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WSBA CLE #26497 WEB

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CO-CHAIRS

Shreya Ley – *Layroots, LLC, Seattle*

Chadwick Proctor – *BNY Mellon Wealth Management, Seattle*

SCHEDULE

11:45 a.m. > LUNCH on Your Own

12:45 p.m. > Charitable Gifts of Complex Assets

60 minutes, 1.0 credits L&LP

This program discusses the structure and income, estate and gift tax consequences of charitable gifts of securities, closely held business interests (C corporations, S corporations, partnerships), retirement plans, artwork, bitcoin, stock options, deferred compensation, life insurance, real estate, intellectual property, and cars, boats and planes. In addition, compliance issues and substantiation rules are reviewed from an estate planning perspective.

- **Jere Doyle** – *BNY Mellon Wealth Management, Boston, MA*

1:45 p.m. > BREAK

2:00 p.m. > Estate Planning for Queer Families

60 minutes, 1.0 credits L&LP

Understand the unique and universal considerations when working with queer families in estate planning. Hear best practices and advice to ensure that clients' goals are accomplished and prepare to think through potential issues regarding powers of attorney, estate administration, planning for unmarried couples and nontraditional families, and other issues.

- **Paul Firuz** – *Firuz and Jeffries, Seattle*

3:00 p.m. > Financial Elder Abuse

60 minutes, 1.0 credits L&LP

A client comes to you worried that a loved one is being financially exploited—what now? This session discusses at least eight practical and legally grounded strategies you can use to help your clients detect, prevent, and stop the abuse of their elderly loved ones.

- **Alison Warden** – *Stokes Lawrence, P.S., Seattle*

4:00 p.m. > Adjourn • Complete Online Evaluations

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REGISTRATION

To register online, please go to the [registration page](#). Click to add to cart and complete your purchase. You may pay by credit card, or via ACH. Alternatively, you may print and mail an invoice seven business days prior to the program along with your check payable to WSBA. Credit card payments by mail or fax are no longer accepted. Note, our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.

Effective Oct. 1, 2025, applicable sales tax will be applied to all live seminar registrations (in-person or virtual). For more information, refer to changes to [Washington sales tax law](#).

If special accommodations are needed, please email cle@wsba.org or call toll-free at 1-800-945-9722.

☐ Please omit my name from the networking list made available to exhibitors and/or attendees.

PRICING INFORMATION

☐ **#26497 WEB, attend via webcast, 12/10/25**

- ☐ \$174 - RPPT Section Members (discount applied at checkout)
- ☐ \$199 - Standard/Non-Section Members
- ☐ \$199 - Join the Section [add the Related Items RPPT Section membership (\$25) to your cart during checkout and register at the Section member rate (\$174)]

Seminar Registration Transfers, Refunds and Cancellations

In most circumstances, if you cannot attend the live event, we can transfer your registration to the on-demand product, once available (8-10 weeks from the program delivery date). Generally, for webcast/webinar registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed up to the start of the event. For in-person registrations, tuition fees may be refunded, less \$25 for processing, for written cancellations postmarked, emailed, or faxed by 5 p.m. up to three business days before the event. No refunds will be provided after the dates specified. You may also send a substitute in lieu of canceling. *When applicable, specific exceptions to these policies will be noted on individual event registration pages.* Please email cle@wsba.org with any requests or questions.

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PHONE > Call **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand. Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions.