# THE 2026 REAL PROPERTY, PROBATE AND TRUST SECTION

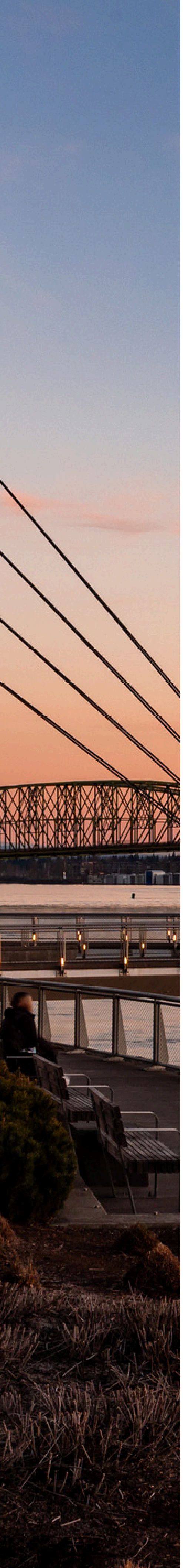
# MIDYEAR MEETING & CONFERENCE

**FRIDAY, JUNE 5, 2026 – SUNDAY, JUNE 7, 2026**

**At the Hilton Vancouver**

**IN-PERSON ONLY**

WSBA | CLE *Invested in your success.*™



# THE 2026 REAL PROPERTY, PROBATE AND TRUST SECTION

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## FRIDAY, JUNE 5, 2026 – SUNDAY, JUNE 7, 2026


Start your summer strong! Join us along the banks of the beautiful Columbia River for the RPPT Midyear in Vancouver, WA. This year, we'll gather at the Hilton Vancouver, June 5 – 7, 2026. Practitioners, and other professionals from around the state will assemble to present on critical updates, success stories and challenges. Leave inspired with valuable information and tips on a variety of topics to improve your practice. ***We look forward to being together in person and hope you can be a part of it.***

**ON THE COVER:** The Waterfront Park is a popular location to visit in Vancouver, Washington, and the pier overlooks the Columbia River. *Photo © Getty Images/timnewman*

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# THE 2026 REAL PROPERTY, PROBATE AND TRUST SECTION

# MIDYEAR MEETING & CONFERENCE

## FRIDAY, JUNE 5, 2026 – SUNDAY, JUNE 7, 2026

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

## IN-PERSON ONLY

### REGISTER ONLINE:

**#26704VAN: In-Person**

### APPROVED FOR 10.0 CLE CREDITS:

| Law and Legal Procedure | Ethics | Other |
|---|---|---|
| 8.0 | 1.0 | 1.0 |

### TUITION:

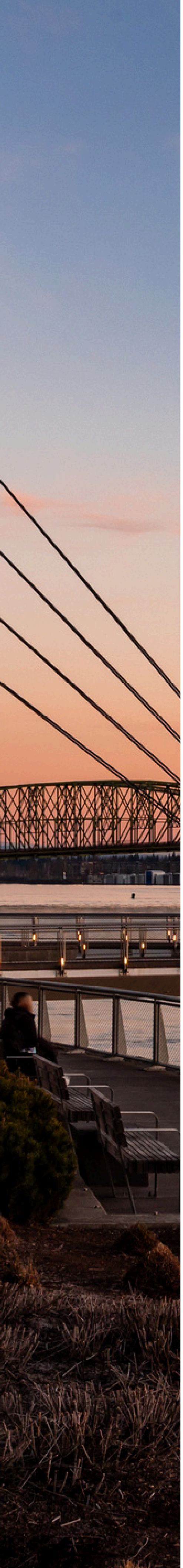
| | In-Person Pricing |
|---|---|
| RPPT Section Members/New Members | $404 |
| Standard/Non-Section Members | $429 |
| Join the Section ($25) and register at the Section member rate | $429 |

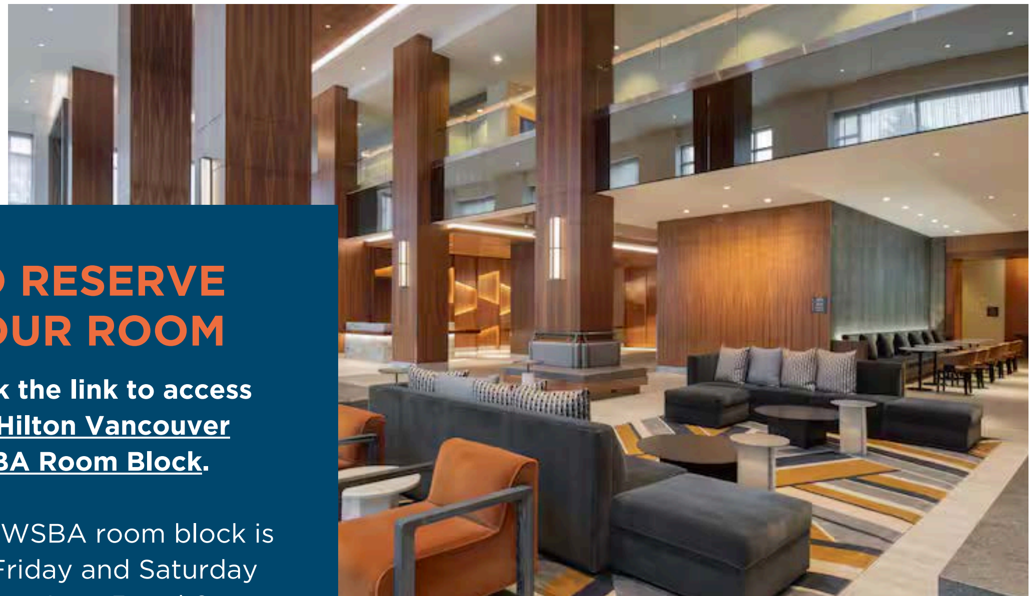
### CO-CHAIRS:

- **Keaton Hille** - *Hanson Baker Ludlow Drumheller P.S., Bellevue*
- **Michelle Mendoza** - *Agwest Farm Credit, Spokane*
- **Liberty B. Upton** - *Bertram & Cashman PLLC, Seattle*

### SCHOLARSHIPS

The section will be offering scholarships. Please watch this space for more information and we will provide updates as they materialize.





## TO RESERVE YOUR ROOM

**Click the link to access the Hilton Vancouver WSBA Room Block.**

The WSBA room block is for Friday and Saturday nights, June 5 and 6, at the rate of $219 per night plus taxes and fees.

*To help manage our event room block, we may share limited reservation details (such as first and last name) with the hosting hotel and, in some cases, receive related booking information in return. This exchange may be used to support event planning. Any personal data is handled in accordance with applicable privacy laws and the hotel's privacy policies. By making a reservation, you acknowledge and consent to this limited data sharing for event-related purposes.*

SCAN TO BOOK A ROOM

# Lodging Information

There is a *limited block* of discounted rooms at the Hilton Vancouver held for attendees until May 4, 2026, based entirely on space availability. Once they are filled, room prices may increase. Room reservations made under the WSBA room block are intended for attendees of the Midyear Conference only. If a non-attendee would like to stay in the area, please find accommodations outside of the WSBA room block.

### Hilton Vancouver Washington

*301 W. 6th Street, Vancouver, Washington, 98660*

**Reservations:** 360.993.4500
**Email:** PDXVA_FOT@hilton.com
**Online:** www.hilton.com/en/hotels/pdxvahh-hilton-vancouver-washington/

# DAY 1 | FRIDAY, JUNE 5, 2026

## 12:00 p.m. > Check-in • Walk-in Registration • Refreshments

## 12:55 p.m. > Welcome and Introductions by Program Committee

- **Keaton Hille** – *Hanson Baker Ludlow Drumheller P.S., Bellevue*
- **Michelle Mendoza** – *Agwest Farm Credit, Spokane*
- **Liberty B. Upton** – *Bertram & Cashman PLLC, Seattle*

## 1:00 p.m. > Real Property Updates

***60 minutes, 1.0 credit L&LP***

A review of recent case law, legislation and regulatory actions affecting real estate transactions in Washington.

- **Scott B. Osborne** – *Foster Garvey PC, Seattle*

## 2:00 p.m. > Probate and Trust Updates

***60 minutes, 1.0 credit L&LP***

This session will focus on the last year of important cases and legislation in the areas of estate planning, probate, and trusts.

- **Liberty B. Upton** – *Bertram & Cashman PLLC, Seattle*

## 3:00 p.m. > Break

## 3:15 p.m. > Staying Out of Trouble: Real Estate Issues for Fiduciaries

***60 minutes, 1.0 credits L&LP***

This session provides an overview of fiduciary duties in estate/probate and real estate contexts, with a focus on identifying common pitfalls that can expose personal representatives, trustees, and agents to liability. It will cover core obligations such as loyalty, prudence, disclosure, and proper accounting, alongside real-world examples of missteps in property management, transactions, and estate administration. The focus of the presentation is on risk mitigation, best practices, and strategies to navigate complex situations while minimizing exposure to legal claims.

- **Jenica Cassidy** – *Helsell Fetterman LLP, Seattle*
- **Kaylee Cox** – *Helsell Fetterman LLP, Seattle*
- **Makenzie Spinks** – *Helsell Fetterman LLP, Seattle*

## 4:15 p.m. > Adjourn • Complete Evaluations

**4:30 P.M. RECEPTION**

# DAY 2 | SATURDAY, JUNE 6, 2026

## 8:00 a.m. > Check-in • Walk-in Registration • Morning Refreshments

## 8:25 a.m. > Welcome Remarks

## 8:30 a.m. > Ethical Thickets in Alternative Dispute Resolution

***60 minutes, 1.0 credits Ethics***

This session discusses the legal and ethical rules involved in ADR, focusing on their application and impact on lawyers participating in mediations. Also included are ethical considerations and concepts facing neutrals in mediation with an emphasis on how those concepts can impact a mediation.

- **Commissioner Bradford Moore (Ret.)** – *JAMS, Seattle*

## 9:30 a.m. > Gifts, Death & Dirt – An Update on Real Property in Trust and Estate Planning

***60 minutes, 1.0 credits L&LP***

This presentation will focus on several real estate issues that arise in administering a trust or estate. We will discuss fiduciary duties regarding sales of real estate, the appropriate means of conveyance, seller disclosures, and tax considerations.

- **Anna M. Cashman** – *Bertram & Cashman PLLC, Seattle*
- **Nathan Smith** – *Kutak Rock LLP, Spokane*

## 10:30 a.m. > Break

(DAY 2 CONTINUED NEXT PAGE)

# DAY 2 | SATURDAY, JUNE 6, 2026

## PROBATE & TRUST TRACK

**11:00 a.m. >**

### Ending Probate for Profit Schemes: An Overhaul of Intestate Probates

***60 minutes, 1.0 credit L&LP***

This session will provide a detailed explanation of the changes that were enacted by the Washington State legislature to close a loophole in the intestacy statute that saw harm occur to numerous families totaling hundreds of millions of dollars. The revisions to the statute will change the way probate (primarily intestate estates) will be administered from the Petition through the Closing.

- **Brent Williams-Ruth** – *Law Offices of Brent Williams-Ruth, Federal Way*

**12:00 p.m. >**

### Ins and Outs of SLATs

***60 minutes, 1.0 credit L&LP***

The presentation will provide a background and the basics of SLATs, tax aspects, and special considerations.

- **Alex Hurt** – *Perkins Coie LLP, Seattle*

## REAL PROPERTY TRACK

**11:00 a.m. >**

### Development Agreements: The Power of Collaboration

***60 minutes, 1.0 credit L&LP***

This session begins with the history of development agreements. We then continue with the mechanics of development agreements and the practical use of them the when, why, where and how.

- **James Howsley** – *Jordan Ramis, PC, Portland, OR*

**12:00 p.m. >**

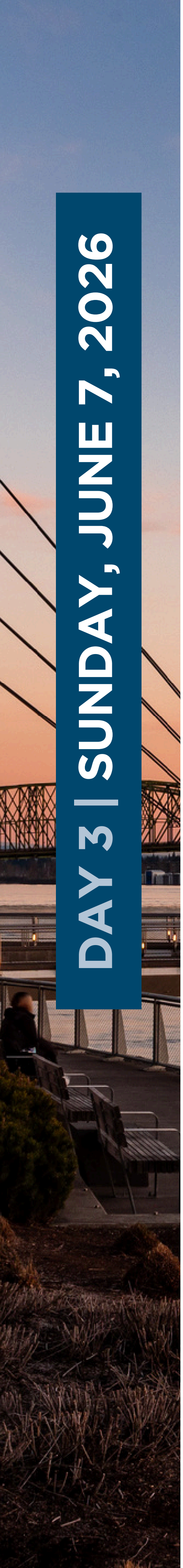
### Recent Changes to WUCIOA

***60 minutes, 1.0 credit L&LP***

This session will review the material changes made to WUCIOA in the 2024, 2025 and 2026 legislative sessions, including the termination of the Horizontal Property Regimes Act, the Washington Condominium Act, and the Washington Homeowners' Association Act, the creation of an express warranty alternative to the implied warranties of quality, and the expansion of the small communities exemption, and the ability to waive receipt of a resale certificate.

- **Joseph P. McCarthy** – *Stoel Rives LLP, Seattle*

**1:00 p.m. > Adjourn • Complete Evaluations**



# DAY 3 | SUNDAY, JUNE 7, 2026

## 8:30 a.m. > Check-in • Walk-in Registration • Morning Refreshments

## PROBATE & TRUST TRACK

### 9:00 a.m. >

### Income Today, Impact Tomorrow: Charitable Remainder Trusts & Charitable Gift Annuities

***60 minutes, 1.0 credit L&LP***

This presentation provides an overview of two popular planned giving strategies—Charitable Remainder Trusts and Charitable Gift Annuities—that help donors support the causes they care about while also achieving personal financial goals. Explore how each option works, the differences between them, and the advantages they offer in terms of lifetime income, tax planning, and long-term charitable impact.

- **Alexandra Gerson** – *University of Washington, Seattle*

### 10:00 a.m. >

### Planning with Cryptocurrencies: Through Boom and Bust

***60 minutes, 1.0 credit L&LP***

Cryptocurrency presents unique challenges in planning due to the privacy, volatility and risk of liability inherent in these assets. These characteristics are contrary to the usual goals of estate planning and administration, such as asset protection, certainty in disposition, and public or private disclosure through court proceedings, tax filings, and reports by personal representatives and trustees. This presentation will address planning considerations of owners, their lawyers, and fiduciaries.

- **David Bentsen** – *Speidel Bentsen LLP, Wenatchee*

## REAL PROPERTY TRACK

### 9:00 a.m. >

### Contaminated Property Transactions 101

***60 minutes, 1.0 credit L&LP***

This presentation will provide an overview of Washington's contaminated sites law, the Model Toxics Control Act, and its liability provisions. The session will also discuss tools and negotiation strategies for buyers and sellers of contaminated property as they assess and allocate risk.

- **Michael Dunning** – *Perkins Coie, Seattle*

### 10:00 a.m. >

### Commercial Title Endorsements: The Coverage Behind the Checklists

***60 minutes, 1.0 credit L&LP***

This presentation provides a practical overview of commercial title insurance endorsements, including what endorsements are, why they are requested, and how they expand or limit coverage under ALTA policies. It walks through commonly requested commercial endorsements—such as zoning, access, condominium, environmental, leasehold, and financing endorsements—highlighting what each covers and when underwriting involvement is required. The session also explains general issuing standards and rate considerations, emphasizing the importance of surveys, documentation, and underwriting review in complex transactions. This is an educational guide to understanding endorsement purpose, risk allocation, and best practices in commercial title insurance.

- **Lori Bullard** – *First American Title Insurance Corporation, Seattle*
- **Michelle Taylor** – *First American Title Insurance Corporation, Seattle*

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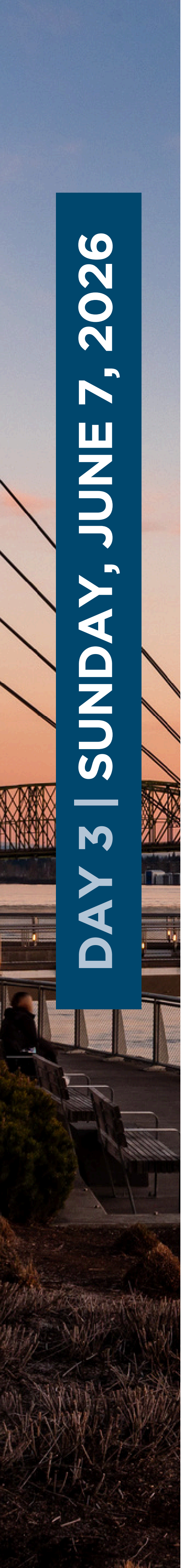




## 11:00 a.m. > BREAK

## PLENARY SESSION

### 11:30 a.m. >
### The Modern Talent Market: Is Your Firm Built to Last or Ready to Evolve?

***60 minutes, 1.0 credits Other***

Law firms across Washington continue to ask the same question: "Why is it so hard to find and keep great people?" The answer is more complex than it seems. Today's talent market has shifted—experienced candidates are scarce, hiring timelines are shorter, and expectations have evolved. Drawing from real-world recruiting and workforce strategy experience, this session will explore common hiring challenges, key drivers of retention, and what high-performing firms are doing differently, with practical strategies attendees can implement immediately.

- **Katryn Whitney** – *Emerald Search Partners LLC, Seattle*
- **Jason Smith** – *Game Set Match Consulting, Seattle*

## 12:30 p.m. > Adjourn • Complete Evaluations

# 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.*

*Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site. If special accommodations are needed, please email **cle@wsba.org** or call toll-free at **800-945-9722**.*

## PRICING INFORMATION

☐ **#26704VAN, attend in Vancouver, WA**
6/5/26 through 6/7/26

- ◯ **$404** - RPPT Section Members
- ◯ **$404** - New Members*
- ◯ **$429** - Standard/Non-Section Members
- ◯ **$429** - Join Section [add the related item Real Property, Probate, and Trust Section Membership ($25) to your cart during check-out and register at the discounted Section price ($404)]

**Active members of the WSBA will be considered New Members through the calendar end of the tenth year following admittance to practice in the state. The store will automatically discount registration, if applicable, during checkout.*

### 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.

**ONLINE >** Go to **www.wsbacle.org** and enter **26704** in the search box. Payment by credit card.

**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.