

PLACER COUNTY BAR ASSOCIATION'S 31st ANNUAL 2022 MCLE CONFERENCE TIMBERCREEK BALLROOM ROSEVILLE, CALIFORNIA SEPTEMBER 9-10, 2022

Friday, September 9

- 7:30am—8:45am: Registration and Buffet Breakfast
- 8:45am—9:00am: Opening Welcome
- 9:00am—10:30am: Breakout Session 1: Keeping it Civil During Opening Statements - *Hon. Michael Jones*
- Breakout Session 2: Navigating the DCSS - *Jonathan Rotondo, Esq.*
- Medi-Cal Planning Update - *Randy Rosa, Esq.*
- 10:30am—10:45am: Break with refreshments
- 10:45am—11:45pm: Breakout Session 1: Jury Selection: Essential Strategies and Tactics - *Stephen Duffy*
- Breakout Session 2: Income Available for Support/New Case re: Reliability of Self-Employed Tax Returns - *Tom Collins, CPA*
- Breakout Session 3: Important Updates to Conservatorship Laws - *Alexandria Goff, Esq.*
- 11:45am—12:30pm: Hosted Lunch: Social Networking Time with Colleagues
- 12:30 pm—12:45pm: Placer County Judicial Mentor Program - *Hon. Alan Pineschi and Hon. Suzanne Gazzaniga*
- 12:45pm—1:45pm: Ethics Lessons Learned from Fictional Attorneys - *Carl Chamberlin, Esq. and Joanna Storey, Esq.*
- 1:45pm—2:00pm: Break
- 2:00pm—3:00pm: Breakout Session 1: Cross-Examination of an Expert Witness - *Frank Noey*
- Breakout Session 2: Criminal & Civil DV: Crossover Issues - *Hon. Suzanne Gazzaniga and Jessica Hopper Esq.*
- Breakout Session 3: Assessing and Avoiding Estate Planner Liability - *Tyson Hubbard, Esq. and Sean McKissick*
- 2:45 pm—3:00 pm: Break with refreshments

Sponsorships available. Please contact placerbar.org@gmail.com for more information

Friday, September 9 continued

- 3:15pm-4:45pm: Did Adolph Weber Receive a Fair Trial? Lessons Learned from Placer's Most Infamous Trial - *Hon. Garen Horst*

Saturday, September 10

- 7:45am—8:30am: Registration and Buffet Breakfast
- 8:30am—9:30am: Implicit Bias - *Alana Mathews, Esq.*
- 9:30am—9:45am: Break with refreshments
- 9:45am—11:15am: Breakout Session 1: Civil Law - Negotiating Medical Liens - *Daniel Wilcoxon, Esq.*
- Breakout Session 2: Family Law Update - *Comm. John Paulsen, Ret.*
- Breakout Session 3: Estate Planning Tax Strategies for the IRA-TCRUT, a Tool Every EP Attorney Should Be Considering - *Edward Cotney*
- 11:30am—1:00pm: Hosted Lunch: Investigative Genetic Genealogy and Solving Violent Crime - *Anne Marie Schubert*
- 1:00pm—1:15pm: Break
- 1:15pm—2:45pm: Breakout Session 1: E-Discovery 101 - Introduction to the Electronic Discovery Reference Model - *Jennifer Resnicke*
- Breakout Session 2: Crypto Currency and NFTs in the World of Family Law - *Dorothy Haraminac*
- Breakout Session 3: Litigation 2022 Sentencing Laws: What Every Lawyer Need to Know - *Hon Richard Couzens, Ret.*
- Breakout Session 4: Trust Income Taxation - *Rebecca Van Loon, Esq.*

MCLE Credits: 11.25 Hours that includes 2.5 in Ethics Credit, 1.0 in Implicit Bias

**MCLE: This activity has been approved for MANDATORY CONTINUING LEGAL EDUCATION credit by the State Bar of California. PCBA 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 Mandatory Continuing Legal Education. *Probate/Estate Planning specialty credits offered.*

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Speaker Information

Hon. Michael Jones - Judge Jones is a Judicial Master with the Anthony M. Kennedy Inn of Court. He has taught and written materials for the CDAA, private civil law organizations and other educational providers on Trial Advocacy, Evidence, Ethics and Cross Examination. Sacramento Valley Chapter of ABOTA named him its 2020 Judge of the Year. Judge Jones has been a Judge with Placer County since December 2012.

Jonathan Rotondo - While Mr. Rotondo's undergraduate degree is in financing from California State University-Sacramento, he has worked in family law since his admission in 2016 and currently works for the Department of Child Support Services for Placer County.

Randall Rosa - Mr. Rosa earned his J.D. from Georgetown University Law Center in 1982. He is a member of the National Academy of Elder Law, the California Advocates for Nursing Home Reform, UD Davis Center for Aging and Health. He specializes in Medi-Cal and aging issues.

Stephen Duffy - Mr. Duffy is a Senior Consultant with Trial Behavior Consulting that includes jury selection, pretrial research, witness preparation, etc., in cases involving civil litigation, toxic torts, medical malpractice and white collar criminal cases. Mr. Duffy holds a B.A. and a M.A. in Political Science.

Tom Collins - Mr. Collins earned his MBA degree in Finance from the CSU-Sacramento in 1998. His business valuation designations include Accredited in Business Valuation, Chartered Financial Analyst and completed the American Society of Appraisers Business Valuation Courts I-V. He specializes in divorce matters involving Available Income Calculations, Separate Property Tracings and Business Valuations.

Alexandria Goff - Ms. Goff earned her J.D. from UC Davis School of Law. She is Placer raised and returned to Placer County to open her Probate and Estate Planning office. She is a frequent speaker for the Professional Fiduciary Association of California and the PCBA.

Carl Chamberlin - A Hastings School of Law graduate in 1985, he has been teaching Trial Advocacy (and authored a book on the subject) at Hastings since 1997. He is also a lead appellate attorney for the First Appellate District.

Joanna Storey - Ms. Storey earned her J.D. from Santa Clara University School of Law and is a frequent author and speaker on ethics, education and data privacy in helping attorneys navigate the intersection of ethics, risk management and cybersecurity considerations.

Frank Noey - A graduate of McGeorge School of Law, Mr. Noey is a Deputy District Attorney for Placer County since 2012 and Deputy Regional Defense Counsel for the Pacific Region in the California National Guard. He gained his litigation experience while working for Downey Brand.

Hon. Suzanne Gazzaniga - Placer County Superior Court Judge January 2013-present; Supervising Family Law Judge 2018-present; Placer County Superior Court Appellate Panel 2016 – present; Grand Jury Supervising Judge 2018-2023; Placer County Judicial Mentor Program Committee 2022-present; Judicial Council Family and Juvenile Law Advisory Committee 2014-2024; CJER Family Law Curriculum Committee; Participant in Judicial Council Jury Video Project 2022; CJER Criminal Law Primary Assignment Orientation Workgroup; CJER DV Online Course Contributor; CJER Faculty for Qualifying Ethics 7 and 8; CJER Faculty for Family Law Primary Assignment. Prior to becoming a Judge, Judge Gazzaniga handled both criminal and civil matters in private and public practice.

Jessica Hopper - Ms. Hopper is the Family Law Facilitator and Self-Help Managing Attorney for the Placer County Superior Court. Prior to this position Ms. Hopper worked as a private family law attorney in Placer County.

Tyson Hubbard - Mr. Hubbard is a partner at Downey Brand. He received his J.D. *magna cum laude* from the Syracuse University College of Law in 2008. His practice focuses on trust and estate litigation.

Sean McKissick - Mr. McKissick received his J.D. from UCLA School of Law and practices at Downey Brand. He specializes in Probate and Trusts. He has been recognized by Univision for his pro bono work on immigration issues.

Hon. Garen Horst - Prior to becoming a Judge for the Placer County Superior Court, he was a prosecuting attorney with the Placer County District Attorney's Office and is actively involved with Inns of Court.

Alana Mathews - Ms. Mathews has been a Sacramento County ADA. She is a graduate of McGeorge SOL and co-teaches the Implicit Bias program at McGeorge. She currently works for the Prosecutors Alliance of California and founded the Community Justice Collaborative.

Daniel Wilcoxon - Mr. Wilcoxon received his J.D. *cum laude* from McGeorge School of Law in 1972. He is the founding and senior partner of Wilcoxon and Callahan since 1979 representing plaintiffs. He has been an ABOTA member since 1993 and is known for his ability negotiating medical liens.

Hon. John Paulson, Commissioner, Ret. - After practicing nearly 36 years in family law in Placer County, Comm. Paulsen was appointed as a commissioner for Placer County on April 1, 2016 following the retirement of Comm. Amara. He retired June 2022.

Ed Cotney - Mr. Cotney has been a family wealth counselor since 2000. He is the founder of Olympus Tax Business & Insurance Services. He is a frequent author of articles relating to tax and wealth planning issues.

Anne Marie Schubert - Ms. Schubert is the District Attorney for Sacramento County. Investigative Genetic Genealogy (IGG) has revolutionized law enforcement's ability to solve violent crime. Over 70 cold cases across the country have been solved using this new technique. This talk will discuss an overview of how IGG was used in these cases and its potential use in others. Additionally, the talk will cover the legal and privacy concerns raised with this new technique along with promoting a best practice model in balancing privacy and public safety.

Jennifer Resnicke - Jennifer became a certified eDiscovery Specialist in 2016 and received her B.A. degree from CSU-Chico. She works on complex and document intensive cases for Herrig & Vogt.

Dorothy Haraminac - Ms. Haraminac Dorothy is a Certified Fraud Examiner, a Master Analyst in Financial Forensics, a Licensed Private Investigator, and a Licensed CE Instructor (TX PSB). Her unique background enabled her to pioneer investigations in frauds perpetrated with the use of cryptocurrency such as bitcoin, ether, or others ("crypto fraud") and is considered an expert in this field.

Hon. Richard Couzens, Ret. - Judge Couzens retired from the Bench after serving 28 years in Placer County. He is considered among some of his peers to be an expert of California's three-strikes laws and co-authored a book for the Rutter Group on the subject that is used as a tool of guidance for criminal sentencing. He has also authored several articles that can be found on the Criminal Justice Realignment Resource Center webpage, as well as a report on SB1427 Accomplice Liability.

Rebecca Van Loon - Ms. Loon obtained her LL.M in taxation *magna cum laude* from the University of San Diego. Her practice includes international estate planning and is a certified specialist in Probate and Estate Planning with the State Bar of California.

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