

PLACER COUNTY BAR ASSOCIATION'S 32nd ANNUAL 2023 MCLE CONFERENCE TIMBERCREEK BALLROOM ROSEVILLE, CALIFORNIA SEPTEMBER 8-9, 2023

Friday, September 8

- 7:30am - 8:45am: Registration and Buffet Breakfast
- 8:45am - 9:00am: Opening Welcome
- 9:00am - 10:30am: Breakout Session 1: Controlling the Narrative in a Successful Mediation - *Steven Block, Esq.*
- Breakout Session 2: (FL) Guideline Support Inputs for Business Owners - *Kenny Pierce*
- Breakout Session 3: (CL) Mental Health Diversion and Selected Sentencing Issues - *Hon. Richard Couzens*
- Breakout Session 4: Trust Contest 101: Practical Considerations Related to Trust Contests - *Danielle Diebert & Miranda Fernandez, Esq.*
- 10:30am - 10:45am: Break with refreshments
- 10:45am - 11:45pm: Microaggression v. Dog Whistle (Bias) - *Vida Thomas, Esq.*
- 11:45am - 12:30pm: Hosted Lunch: Social Networking Time with Colleagues
- 12:30pm - 1:30pm: Now that Your Case is on Appeal . . . - *Justice Elena Duarte and Justice Stacy Boulware Eurie*
- 1:30pm - 1:45pm: Break
- 1:45pm - 2:45pm: Breakout Session 1: Civil/Criminal - Jury Selection and Voir Dire - *Hon. Garen Horst* (.5 Bias available)
- Breakout Session 2: Family Law - DV - *Hon. Suzanne Gazzaniga and Jessica Hopper, Esq.*
- Breakout Session 3: Probate - Risky Business: Correctly Completing Certificates of Review for Gifts to Care Custodians - *Jarom Phipps*
- 2:45pm - 3:00pm: Break with refreshments
- 3:00pm - 4:30pm: The Tangled Web We Weave: Statutes & Protocols of Mental Health Court - *Hon. Garen Horst, Elizabeth Madsen and Kyle Jibson*
- 4:45pm - 6:00pm PCBA Reception - Happy Hour

Saturday, September 9

- 7:30am - 8:45am: Registration and Buffet Breakfast
- 9:00am - 10:00am: Succession Planning (Competency) - *Natalie Vance, Esq.*
- 10:00m - 10:15am: Break with refreshments
- 10:15am - 11:15am: Breakout Session 1: Civility Matters - ABOTA Panel* - *Hon. Michael Jones, Shelly Jenni, Esq., and Carolee Kilduff, Esq.*
- Breakout Session 2: Family Law Civil Discovery - *Comm. Albert Erkel*
- Breakout Session 3: Criminal Law - Prelim Fundamentals - *Hon. Suzanne Gazzaniga and Hon. Jeffrey Penney*
- Breakout Session 4: Estate Planning - Trust Administration - *David Gaw, Esq.*
- 11:30am - 1:00pm: Hosted Lunch: Ethics - Part 2: Alright, You've Been Sued for Malpractice - *Mark Ellis, Esq.*
- 1:00pm - 1:10pm: Break
- 1:10pm - 2:10pm: Breakout Session 1: Tips and Tricks for Successful Law and Motion - *Hon. Trisha Hirashima*
- Breakout Session 2: Using Reverse Mortgage in a Gray Divorce Settlement - *Mitch Cooper*
- Breakout Session 3: Criminal Law Panel Discussion - *Placer D.A. Morgan Gire and Placer P.D. Dan Koukol*
- Breakout Session 4: Estate Planning - Business Succession Planning for Prof. Clients & Lawyers *Therese Adams, Esq. (Ret.)*
- 2:10pm - 2:15pm Break with refreshment
- 2:15pm - 3:15pm Ethics - New Trust Account Rules - *Greg Fayard, Esq.*

MCLE Credits: 11.0 Hours credit which includes 2.0 hours in Ethics Credit, 1.0 hours in Bias (not implicit) and 1.0 hours in Competency; Jury selection breakout affords an additional .5 hours bias credit

*A portion may qualify for Ethics credit

*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

Steven Block - Following a long career as a civil litigator, Mr. Block has spent the last 20 years as a mediator, arbitrator, special master and referee. He previously served as a settlement conference judge for Sacramento County Superior Court and as a certified mediator for the Third District Court of Appeals.

Kenny Pierce - Mr. Pierce is a business appraiser and family law forensic accounting expert. He has been engaged on hundreds of complex, high net worth marital dissolutions, and has been qualified as an expert and testified in California Superior Court in seven counties.

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.

Danielle Diebert - Ms. Diebert's trust and estate practice at Buchalter includes advising individuals, corporate fiduciaries, and private professional fiduciaries in all aspects of trust, probate, and conservatorship administration, focusing on trust and estate litigation. the law.

Miranda Fernandez - Ms. Fernandez's trust and estate practice at Weintraub Tobin includes advising individuals, corporate fiduciaries, and private professional fiduciaries in all aspects of trust, probate, and conservatorship administration, focusing on trust and estate litigation. the law.

Vida Thomas - Ms. Thomas an AV rated attorney and managing partner at Oppenheimer Investigations Group, who has been practicing for 30 years advising employers on employment law and human resource management with a substantial workplace investigations practice.

Hon. Elena Duarte - Associate Justice Duarte was appointed to the Third District Court of Appeals by Gov. Schwarzenegger and confirmed on December 10, 2010. In addition to her responsibilities on the bench, she also teaches, lectures and mentors.

Hon. Stacy Boulware-Eurie - Associate Justice Boulware Eurie was appointed to the Third District Court of Appeals by Gov. Newsom and confirmed on August 4 2022. Prior to this appointment, she was a Judge for Sacramento County Superior Court and worked for the DOJ as a Senior Assistant Attorney General.

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. He is a frequent speaker for the PCBA

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.

Jarom Phipps - Mr. Phipps is a certified specialist in estate planning, trust, and probate law by the State Bar Board of Legal Specialization. Mr. Phipps lives in Loomis, California, he is the President of the South Placer Estate Planning Council, and his specialty is trust and estate litigation.

Elizabeth Madsen - Ms. Madsen works for Placer County's Public Defender and is the Mental Health Supervisor for the Public Defender's Office.

Kyle Jibson - Mr. Jibson has been with the Placer County District Attorney's office as a DDA for the last 17 years. He is currently assigned to the Mental Health Court and its treatment team and trains other DDA on matters relating to mental health.

Natalie Vance - Ms. Vance is Chief Diversity Officer and co-managing shareholder of Klinedinst. She is an experienced litigator representing professionals and is a certified legal specialist by the State Bar of California in legal malpractice.

Hon. Michael Jones - Before being appointed to the Placer County Superior Court by Gov. Brown, Judge Jones was a partner at Hansen, Kohls, et al., in Roseville. Judge Jones is a member of the Anthony M. Kennedy Inns of Court and is a member of ABOTA.

Shelly Jenni, Esq. - Ms. Jenni, an experienced trial lawyer, is an ABOTA member. She has been with Wilcoxon & Callahan since she was a student at McGeorge Law SOL.

Carolee Kilduff, Esq. - Ms. Kilduff has been defending employers in civil cases for 40 years. She is the 2022 recipient of the ABOTA James F. Gilwee award for civility.

Hon. Albert Erkel, Comm. - Comm. Erkel spent 40 years in private practice before being appointed as a commissioner in June 2022. While in private practice he served as a Pro-Tem judge and as the foreperson on the Placer County Grand Jury.

Hon. Jeffrey Penney - Prior to taking the bench in 2004, Judge Penney was a DDA for Placer County District Attorney; he has also taught administration of justice at Sierra College

David Gaw, - During his 45-year career practicing, Dave has become one of California's most recognized and trusted estate planning lawyers. He is a certified specialist and former member of the Executive Committee on Trusts and Estates Section of the State Bar.

Mark Ellis - Mr. Ellis' practice focuses on defending professionals sued for malpractice and is certified as a specialist in legal malpractice by the State Bar of California.

Hon. Trisha Hirashima - Prior to being appointed Judge for the Placer County Superior Court, Judge Hirashima was a Commissioner for the court. Prior to that, she was law and motion's research attorney.

Morgan Gire - Mr. Gire became Placer County's District Attorney in April 2020 and thereafter was elected to the office in June 2022. Fifteen of his many years in practice was as a Deputy District Attorney for Sacramento County.

Dan Koukol - Mr. Koukol has been the managing attorney for the Placer County Public Defenders office since 2016 and has over 35 years experience as a criminal defense attorney in Placer County.

Therese Adams - Following her retirement from practicing law, Ms. Adams established TAD Executive Fiduciary Services and is a licensed private fiduciary. She draws upon her many years practicing in probate and estate planning and serves as an arbitrator and Pro-Tem Judge.

Greg Fayard - Mr. Fayard was appointed in 2011 by the Placer County Board of Supervisors as a county parks commissioner and currently serves as co-chair on Placer County's property tax assessment appeals board. He is a Certified Specialist in Legal Malpractice Law by the State Bar Board of Legal Specialization.

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