



BANK OF STOCKTON

Wealth Management Group

Presents ABA Trust & Estate Briefing Series

Fiduciary Litigation
Thursday, May 2, 2019
10:00 am – 12:00 pm
(9:30 Continental Breakfast)

Bank of Stockton Wealth Management Group
555 W. Benjamin Holt Drive, Bldg A, Stockton, CA 95207

Our presenters will review the challenges involved with the prudent investor rule and developments with respect to concentration. Get your questions answered in this 90-minute Briefing.

This Briefing will focus on:

The annual review of fiduciary litigation topics by a panel of attorneys will include recent case law developments in a wide range of fiduciary Areas. This webinar is an excellent business development opportunity; Invite outside counsel to attend this informative program at your location.

- Defenses and limitations
- Jurisdiction and standing
- Creation, funding, and construction
- Claims related to trust investments
- Conflicts of interest
- Trustee compensation
- Amendment, modification, and termination
- Accounting and disclosure
- Settlement and arbitration



To Register: Contact Katie DuPriest (209) 929-1422 or kdupriest@bankofstockton.com
By Monday, April 29, 2019

Bank of Stockton does not charge to attend the Trust Briefing Series. However, there is a nominal cost for your professional credits: **\$20 for SJCBA Members** and **\$30 for Non-Members**.

For information on MCLE credits, please contact the SJCBA (209) 948-0125

This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of two (2) participatory hours, of which two (2) hours credit will apply to the General MCLE Requirement. The SJCBA 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 minimum continuing legal education.

This briefing has been approved for 2.5 CTFA, 2.0 CFP, 2.0 CPE for tax