BANK OF STOCKTON

Wealth Management Group

Presents ABA Trust & Estate Briefing Series

Tales from the Crypt

Thursday, June 6, 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 presenter will discuss mistakes made by fiduciaries and estate planning professionals and how to avoid them will be discussed.

This Briefing will focus on:

- Issues in trust administration
- Mistakes on tax returns
- Valuation issues
- Misuse of the GST tax exemption
- Fiduciary litigation issues
- Maintaining confidentiality
- Mistakes with charitable trusts

To Register: Contact Lynn Salerno (209) 929-1521 or lsalerno@bankofstockton.com

By Monday, June 3, 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 and 2.0 CPE for Business Law