Agenda

Understanding the Grantor's Goals and Potential Risks *R. Secord*
- Long-term and short-term financial goals
- Identifying beneficiaries
- Identifying assets and potential risks
- Objectives for asset management and control
- Creation, duration, and termination of trust

Creating Revocable "Living" Trusts *R. Secord*
- Purposes of the revocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Creating Irrevocable "Living" Trusts *V. Terzian*
- Purposes of the irrevocable trust
- Benefits and drawbacks
- Funding the trust
- Administrative issues

Overview of Income, Estate and Gift Tax Consequences of Trusts Incapacity Planning *A. Klenk*

Asset Protection Planning for Seniors and the Disabled *J. Nickerson*
- Overview of government benefit programs
- Trust options
- Planning for spouses, supplemental needs trusts

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Learning Objectives

You'll be able to:

Identify your clients' short-term and long-term financial goals.

Discuss clients' objectives for asset management and control.

Understand the benefits and drawbacks of revocable and irrevocable living trusts.

Learn about the creation, duration and termination of trusts.

Use trusts and other estate planning techniques for asset protection planning for seniors and clients with disabilities.

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All About Trusts in California

Live, Interactive Webinar - Monday, September 9, 2024

Understand the grantor's short-term and long-term financial goals

Identify objectives for management and control of assets

Create revocable and irrevocable "living" trusts

Explore tax consequences of trusts

Use trusts and other estate planning techniques for asset protection planning

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Faculty

Rebecca Secord is a real estate and estate planning attorney based in San Diego, and is the owner of Your Home Legal, APC. With licensure spanning Virginia, Washington, D.C., and California, Ms. Secord brings a wealth of knowledge and experience to her practice. Her career began with the ownership of a title company in Virginia and expanded as she managed an escrow company equivalent at a prestigious law firm in Alexandria, Virginia. Her East Coast practice also included real estate and estate litigation in state court and complex business litigation in federal court. Ms. Secord relocated to San Diego in 2017 and works with clients throughout the state of California and beyond. She earned her J.D. degree from the New England School of Law. Her unique skill set in residential transactional real estate and estate planning has made her a sought-after resource in her field. She combines legal acumen with a genuine commitment to helping her clients navigate complex legal landscapes with confidence and clarity. As an active member of the professional community, Ms. Secord is actively involved in ProVisors as the GLA of her home group and serves on the executive committee of the LGBTQ+ Affinity Group. She also serves as the vice president of the Board of Directors for Townspeople, a San Diego-based non-profit dedicated to providing permanent housing solutions to the unhoused. Her leadership and advocacy in this role underscore her dedication to community service and social impact. Beyond her professional endeavors, Ms. Secord is an avid watercolor painter, an enthusiastic softball coach and player in the America's Finest City Softball League and enjoys paddle boarding. She's also the mom to a sweet kiddo and two crazy ginger cats.

Vanessa M. Terzian is an adjunct professor of Wills and Trusts at Southwestern Law School, recently named a top attorney in *Pasadena Magazine*, and a Rising Star™ selected by Super Lawyers®, Ms. Terzian began her legal career as a trust officer for Wells Fargo, N.A. Her experience at Wells Fargo – working closely with clients, portfolio managers, beneficiaries, and other attorneys – shed light on how a poor estate plan can ruin a family's fortune and more importantly, their relationships. After witnessing firsthand, the importance of proper planning, Ms. Terzian pursued her own practice, helping countless families through her expertise in estate and tax planning, probate, and trust administration. What sets Ms. Terzian apart is her understanding of the needs of growing families, her ability to relate to working parents who desire a better life for themselves and their families, and her know-how in implementing strategic estate-planning tools in the most cost-efficient and seamless manner. Ms. Terzian also draws on her real estate and business background in crafting comprehensive plans for her clients. She is a skilled public speaker, having conducted countless seminars throughout her legal career on various estate-planning topics, including kids' protection planning, special needs planning, Medi-Cal planning, advanced tax planning, and asset protection for individuals and small businesses. Ms. Terzian is a faculty member at the Institute for Preparing Heirs®. She is an active member of the La Cañada Flintridge community, where she resides with her husband, Edward, and two sons, Alec and Jack. She is a board director of the La Cañada Education Foundation and participates in a number of charitable organizations. Ms. Terzian has successfully raised thousands of dollars for a variety of charitable causes through fundraising campaigns, which include frequent community-based public speaking events, charitable dinners, and personal contributions. In May 2018, Ms. Terzian merged her practice with a Pasadena-based estate-planning firm, Primuth and Driskell, LLP, now known as Primuth, Driskell, and Terzian, LLP, which later merged with Lagerlof, LLP. As a family woman, Ms. Terzian understands the importance of protecting assets, planning for the future, and building your own legacy. She takes pride in providing her clients with the sense of comfort and security that comes along with having an effective and comprehensive estate plan in place.

Angela Bellanca Klenk, Esq. is the founding attorney of Beach Cities Estate Law. She is a Certified Specialist in estate planning, trust and probate law by the State Bar of California, Board of Legal Specialization. She began her legal career almost 30 years ago at the downtown Los Angeles office of the esteemed firm of O'Melveny and Myers, LLP, where she was mentored in estate planning and administration by the best of the best and represented some of LA's most renowned movers, shakers, and CEOs. Ms. Bellanca Klenk established Beach Cities Estate Law in 2017, with a goal of bringing the big firm quality and expertise closer to home in her native South Bay area of Los Angeles. She and her team serve clients in estate planning, as well as trust and estate administration matters. She has a special knack for tackling complex estate, gift, and property tax issues in both planning and administration. She's a graduate of the University of Notre Dame (*magna cum laude*) and UCLA Law School (Order of the Coif Honor Society). She currently serves as president of the South Bay Estate Planning Council, a non-profit association affiliated with the National Association of Estate Planners & Councils dedicated to enhancing the proficiency of advisors who are active in the field of trusts and estates. When she's not at work, Ms. Bellanca Klenk volunteers, travels, and sharpens her client interview and negotiation skills by attempting to communicate with her college-aged children.

Jeffrey Nickerson was raised in Southern California, obtaining a B.S. degree in Finance and an MBA degree from Cal State University Long Beach. After several years preparing contracts for a major aerospace company, he returned to law school where he served on the law review and obtained a J.D. degree from Thomas Jefferson School of Law in San Diego. Mr. Nickerson utilized these skills in aerospace in managing a large contracts organization where responsibilities included contracts, export licensing, software licensing and patent applications. In 2010, he left aerospace and launched his law practice in Murrieta. The practice is focused solely on estate planning and administration and special needs trusts. Mr. Nickerson and his wife are founders of Exceptional Sports, a non-profit organization dedicated to providing recreational sports opportunities to those with special needs. His passion is providing special needs advice and counsel to special needs families. He is an active member of the Riverside County Bar – Estate Planning Section, Southwest Riverside County Bar Association, Temecula Estate Planning Group, Wealth Counsel and Academy of Special Needs Planners. He is also an avid supporter of Special Olympics, Yellowstone Park Foundation and Yosemite Conservancy. Mr. Nickerson loves spending time outdoors and with family and friends.

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