



**Estate Planning 101 for California Attorneys
Agenda**

March 26, 2026; 1:00 to 2:30 p.m.

I. Introduction and Framing

II. Foundational California Estate Planning Principles

III. Core Estate Planning Documents

IV. Cultural Competency and Client Discovery

V. Common Planning Scenarios and Design Choices

VI. Pitfalls, Ethics, and Risk Management

VII. Probate, Conservatorship, and Trust Administration Overview

VIII. Q&A, Resources, and Closing