

**CURRICULUM VITAE OF  
ROBERT E. TEMMERMAN, JR.**

- Exhibit 1      Bar/Court Admissions and Certifications
- Exhibit 2      Practice in the Specialty
- Exhibit 3      Programs
- Exhibit 4      Publications
- Exhibit 5      Professional Association Activities, Honors and Awards
- Exhibit 6      Community Activities

**EXHIBIT 1**  
**BAR/COURT ADMISSIONS AND CERTIFICATIONS**

<u>Jurisdiction</u>	<u>Date</u>
Supreme Court of the State of California	December 16, 1980
United States Federal Court, Northern District of California	December 16, 1980
United States Court of Appeal for the Ninth Circuit	April 14, 1989
United States Supreme Court	January 6, 1997
United States Tax Court	March 31, 1983
Certificate of Specialization The California Board of Legal Specialization of the State Bar of California the field of Probate, Estate Planning and Trust Law	February 22, 1991
Elected as a Fellow of the American College of Trust and Estate Counsel	November 2, 1992

**EXHIBIT 2**  
**PRACTICE IN THE SPECIALTY**

I am the managing partner in the law firm of Temmerman, Cilley & Kohlmann, LLP, concentrating my practice exclusively in the areas of Estate Planning, Probate and Trust Law.

I have planned both large and small estates in the estate planning portion of my practice. Although I have planned numerous estates of less than \$5 million, my practice primarily involves planning estates of clients with estates in excess of \$5 million.

The estate administration portion of my practice involves handling probate and conservatorship matters, nonprobate trust administrations, and estate and trust litigation.

I routinely prepare the Federal Estate Tax return (Form 706) for any estate that I handle. I estimate that I have prepared in excess of 500 Federal Estate Tax returns. When appropriate I also prepare Federal Gift Tax returns (Form 709).

Of published cases, I represented the Executrix in the case of *Ablamis v. Roper* (1991) 937 F2d 1450 in which the 9th Circuit ruled that federal law preempts state community property principles and held that the non participant spouse cannot dispose of her community property interest in a qualified plan by her will. The court further ruled that a qualified domestic relation order cannot be extended to probate situations.

I was counsel of record for the Estate Planning, Trust and Probate Law Section of the State Bar of California in its *Amicus* Brief filed with the United States Supreme Court in *Boggs v. Boggs* 117 S. Ct. 1757 (1997). In *Boggs*, the U.S. Supreme Court reversed the 5th Circuit and held that ERISA preempts a state's community property law in a testamentary context with respect to qualified retirement plan benefits.

I have written extensively for CEB and have spoken at more than 100 professional continuing education programs.

I am frequently appointed by our local Probate Court as Referee/Mediator in difficult and complex litigation matters. On occasion I am also appointed as a Referee to settle various accounting disputes. I am on a panel of attorneys that the Court can select from when appointing counsel for Conservatees who object to the establishment of a conservatorship or who otherwise require court appointed counsel.

I have been engaged as both an expert witness and an expert consultant on approximately 20-30 different occasions in a variety of malpractice cases involving trust and estate attorneys or in cases involving fiduciary liability.

**EXHIBIT 3  
PROGRAMS  
(Lecturer, Moderator, Panelist)**

<b>DATE</b>	<b>FIRM OR ORGANIZATION SPONSORING THE PROGRAM</b>	<b>PROGRAM TITLE</b>	<b>HOURS TAUGHT</b>	<b>PLACE</b>
2/?/87	The Rutter Group	Handling Spousal Set Asides and Summary Administration under the New Probate Code	Panelist of 3 hour program	San Jose, CA
7/15/87	Santa Clara County Bar Association	Planning and Administration under the new trust law	Panelist of 3.5 hour program	Cupertino, CA
?/?/88	Continuing Education of the Bar	Drafting Wills	Panelist of 3 hour program	Santa Clara, CA
4/17/89	Santa Clara County Estate Planning Counsel	Postmortem Tax Planning	Moderator Panelist of 1.5 hour program	San Jose, CA
1/11/90	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 5th Annual Program	Moderator and Panelist of 3 hour program	San Jose, CA
1/27/90	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 5th Annual Program	Moderator and Panelist of 3 hour program	Monterey, CA
1/23/91	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 6th Annual Program	Moderator and Panelist of 3 hour program	San Jose, CA
2/2/91	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 6th Annual Program	Moderator and Panelist of 3 hour program	Monterey, CA

<b>DATE</b>	<b>FIRM OR ORGANIZATION SPONSORING THE PROGRAM</b>	<b>PROGRAM TITLE</b>	<b>HOURS TAUGHT</b>	<b>PLACE</b>
8/28/91	Santa Clara County Bar Association	Ablamis Special	Lecturer of 1 hour program	San Jose, CA
9/15/91	State Bar of California, Section on Estate Planning, Probate and Trust Law	Selected Current Case Developments	Panelist of 3.5 hour program	Anaheim, CA
10/12/91	State Bar of California, Section on estate Planning, Probate and Trust Law	Selected Current Case Developments	Panelist of 3.5 hour program	Los Angeles, CA
10/19/91	State Bar of California, Section on Estate Planning, Probate and Trust Law	Selected Current Case Developments; 15th Annual Fall Program	Panelist of 3.5 hour program	San Francisco, CA
1/22/92	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 7th Annual Program	Moderator and Panelist of 3 hour program	Santa Clara, CA
1/25/92	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 7th Annual Program	Moderator and Panelist of 3 hour program	Carmel, CA
1/10/93	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 8th Annual Program	Moderator and Panelist of 3 hour program	Santa Clara, CA
1/23/93	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 8th Annual Program	Moderator and Panelist of 3 hour program	Carmel, CA
3/19/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	San Diego, CA

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3/20/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	Los Angeles, CA
3/26/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	Sacramento, CA
3/27/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	San Francisco, CA
1/12/94	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 9th Annual Program	Moderator and Panelist of 3 hour program	Santa Clara, CA
1/29/94	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 9th Annual Program	Moderator and Panelist of 3 hour program	Monterey, CA
10/28/94	State Bar of California	Post Mortem Checklist; 18th Annual Fall Program	Moderator and Speaker at 2 hour program	San Francisco, CA
10/29/94	State Bar of California	Post Mortem Checklist; 18th Annual Fall Program	Moderator and Speaker at 2 hour program	Los Angeles, CA
11/05/94	State Bar of California	A Checklist for Administration of Living Trusts Following the Death of a Trustor; Fall Section Education Institute	Moderator and Speaker at 2 hour program	San Diego, CA
11/10/94	Stanislaus County Estate Planning Council	Post Mortem Trust Administration	Speaker at 1 hour program	Modesto, CA
11/20/94	California Certified Public Accountants, Education Foundation: 45th Annual Tax Accounting Conference	Post Mortem Planning	Speaker at 1 hour program	Los Angeles, CA

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11/21/94	California Certified Public Accountants, Education Foundation: 45th Annual Tax Accounting Conference	Post Mortem Planning	Speaker at 1 hour program	San Francisco CA
01/09/95	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 10th Annual Program	Moderator and Panelist of 3 hour program	Santa Clara, CA
01/28/95	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 10th Annual Program	Moderator and Panelist of 3 hour program	Monterey, CA
03/24/95	Continuing Education of the Bar	Funding and Administering Trusts after the Death of the Trustor	Moderator and Panelist of 3 hour program	San Francisco, CA
03/25/95	Continuing Education of the Bar	Funding and Administering Trusts after the Death of the Trustor	Moderator and Panelist of 3 hour program	Sacramento, CA
08/___/95	American College of Trust and Estate Counsel (Western Regional Meeting)	Legislative Proposal for Informal Administration in California	Panelist of 1 hour program	San Francisco, CA
10/11/95	Peninsula Estate Planning Council	The Marketing of Living Trust by Non Attorneys	Speaker at 1 hour program	Belmont, CA
11/17/95	San Mateo County Bar Association	Informal Administration in California - A Legislative Proposal	Speaker at 1 hour program	San Mateo, CA

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01/09/96	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 11th Annual Program	Moderator and Panelist of 3 hour program	Sunnyvale, CA
01/17/96	Santa Clara County Bar Association	Informal Administration: Is the Time Right for Legislative Change?	Speaker at 1 hour program	San Jose, CA
01/27/96	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 11th Annual Program	Moderator and Panelist of 3 hour program	Monterey, CA
05/22/96	Santa Clara County Bar Association	How the Uniform Prudent Investor Act (UPIA) Affects Our Estate Planning Practices	Speaker at 1 hour program	San Jose, CA
10/31/96	State Bar of California, Estate Planning, Trust and Probate Law Section: 20th Annual Fall Program	The New California Uniform Prudent Investor Act: A Practical Approach	Speaker at 1 hour program	Redwood City, CA
11/02/96	State Bar of California, Estate Planning, Trust and Probate Law Section: 20th Annual Fall Program	The New California Uniform Prudent Investor Act: A Practical Approach	Speaker at 1 hour program	Los Angeles, CA
11/08/96	State Bar of California: Fall 1996 Section Education Institute	California Uniform Prudent Investor Act: A Practical Approach	Speaker at 1 hour program	Rancho Mirage, CA

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12/07/96	Continuing Education of the Bar	Funding and Administering Revocable Trusts After a Grantor's Death	Moderator and speaker at 3 hour program	Santa Clara, CA
12/12/96	Continuing Education of the Bar	Funding and Administering Revocable Trusts After a Grantor's Death	Moderator and speaker at 3 hour program	Sacramento, CA
01/11/97	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 12th Annual Program	Moderator and speaker at 3 hour program	Monterey, CA
01/16/97	Continuing Education of the Bar	Funding and Administering Revocable Trusts After a Grantor's Death	Moderator and speaker at 3 hour program	San Francisco, CA
01/29/97	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 12th Annual Program	Moderator and speaker at 3 hour program	Santa Clara, CA
04/23/97	Santa Clara County Bar Association	The Impact of the U.S. Supreme Court Decision in <i>Boggs</i> on Estate Planning Practitioners	Speaker at 1 hour program	San Jose, CA
05/19/97	Santa Clara County Estate Planning Council	Turf Wars on Working Together: An Update on Trust Mills and the Unauthorized Practice of Law	Speaker at 1 hour program	San Jose, CA
08/26/97	Santa Clara County Bar Association	The Path Out of <i>Boggs</i> : ERISA and Community Property	Speaker at 3 hour program	San Jose, CA

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09/17/97	Santa Cruz County Bar Association	Estate Planning After <i>Boggs</i>	Speaker at 1 hour program	Santa Cruz, CA
11/21/97	San Mateo County Bar Association	New Probate Code Provisions on Notification of Trustee	Speaker at 1 hour program	San Mateo, CA
11/24/97	California CPA Education Foundation	The Surviving Spouse, Community Property and ERISA: The Path Out of Boggs and New Probate Code Provisions on Notification By Trustee	Speaker at 16 hour program	Universal City, CA
11/25/97	California CPA Education Foundation	The Surviving Spouse, Community Property and ERISA: The Path Out of Boggs and New Probate Code Provisions on Notification By Trustee	Speaker at 16 hour program	San Francisco, CA
01/21/97	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 13th Annual Program	Moderator and speaker at 3 hour program	Sunnyvale, CA
01/24/97	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 13th Annual Program	Moderator and speaker at 3 hour program	Monterey, CA

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02/19/97	California Center for Judicial Education & Research	The 1998 California Probate & Mental Health Institute: Probate 201: An In Depth Analysis of Substituted Judgment, Heggsted Petitions and Post Mortem Trust Funding, Modification of Irrevocable Trusts, Will and Trust Contest and Declaratory Relief Actions	Speaker at 2 hour program	San Luis Obispo, CA
03/04/98	Continuing Education of the Bar (CEB)	Antidotes for Estate Planning, Scams, Botched Trusts, and Other Disasters	Moderator and Speaker at 3 hour program	San Francisco, CA
03/13/98	Continuing Education of the Bar (CEB)	Antidotes for Estate Planning, Scams, Botched Trusts, and Other Disasters	Moderator and Speaker at 3 hour program	Sunnyvale, CA
03/21/98	Continuing Education of the Bar (CEB)	Antidotes for Estate Planning, Scams, Botched Trusts, and Other Disasters	Moderator and Speaker at 3 hour program	San Francisco, CA
05/27/98	Santa Clara County Bar Association	Modifying Irrevocable Trusts	Speaker at 1 hour program	San Jose, CA
08/21/98	International Association of Financial Planners	Estate Planning Scams	Speaker at 1 hour program	Sunnyvale, CA
08/10/98	Southern Alameda County EP Council	Trust Mills and Modifying the Botched Irrevocable Trusts	Speaker at 1 hour program	Fremont, CA

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08/29/98	IRS Collection Division	Estate Planning Scams	Speaker at 1 hour program	Oakland, CA
10/03/98	State Bar of California	Recent Probate and Trust Law Changes: Trustee Notification	Moderator and Speaker at 2 hour program	Monterey, CA
10/13/98	Santa Clara County Bar Association	Law Office Management in an Active Trust and Estate Planning Practice	Speaker at 2 ½ hour program	Santa Clara, CA
01/17/98	Paralegal Association of Santa Clara County (PASSCO)	Recent Developments (AB 2069 and AB 2801), Notification by Trustee: A Statutory Analysis, Why and How to Seek Court Approval of Selected Trust Issues Under PC § 17200, and Modifying Your Irrevocable Trust: How To Do It	2 hour program	Cupertino, CA
10/20/98	Northern California Trust Companies Association - Seventh Annual Education Program	The Unauthorized Practice of Law: A Statutory Analysis of Trustee Notification Statute	Moderator and Speaker in a 4 hour program	San Francisco, CA
11/06/98	CEB	Antidotes for Estate Planning Scams, Botched Trusts and Other Disasters	Moderator and Speaker in a 4 hour program	Sunnyvale, CA
01/09/99	CEB	Estate Planning and Administration: 14 <sup>th</sup> Recent Developments	Moderator and Speaker in a 4 hour program	Monterey, CA

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03/11/99	Estate Planning Council of Stanislaus County	The Dynasty Trust: Background, State Statutes, Transfer Taxes, Creditor Protection and a Case History	Speaker at 1 hour program	Modesto, CA
03/31/99	Santa Clara County Bar Association	Notification by Trustee Provision - Changes on the Horizon	Speaker at 1 hour program	San Jose, CA
04/09/99	Estate Planning, Trust and Probate Law Section and the Taxation Section of the State Bar of California	Institute of Community Property	Speaker at 1 hour program	Los Angeles, CA
04/10/99	Estate Planning, Trust and Probate Law Section and the Taxation Section of the State Bar of California	Institute of Community Property	Speaker at 1 hour program	San Francisco, CA
04/30/99	West Valley Bar Association	Trust Scams	Speaker at 1 hour	Campbell, CA
05/19/99	Santa Cruz County Bar Association	Trust Scams	Speaker at 1 hour	Santa Cruz, CA
06/11/99	University of Missouri - 11 <sup>th</sup> Annual William F. Fratcher Trust and Estates Symposium	Antidotes for Estate Planning, Scams, Botched Trusts and Other Disasters	Speaker at 2 hour program	Columbia, Missouri
06/22/99	Comerica Bank - California	Notification by Trustee: Statutory Analysis and Proposed Legislative Changes	Speaker at 2 hour program	Palo Alto, CA

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06/24/99	Northern Trust Company: The Mid Peninsula Trust Forum	Notification by Trustee: Statutory Analysis and Proposed Legislative Changes	Speaker at 5 hour program	Palo Alto, CA
09/17/99	Professional Fiduciaries Association of California	Notification by Trustee: Statutory Analysis and Proposed Legislative Changes	Speaker at 2 hour program	San Jose, CA
09/25/99	Morgan Stanley Dean Witter		Speaker at 2 hour program	Santa Cruz, CA
09/27/99	Santa Clara County Estate Planning Council	Living and Dying with QTIPs: Suggestions to the New Millennium	Speaker at 2 hour program	San Jose, CA
01/07/00	CEB	Estate Planning and Administration: 14 <sup>th</sup> Recent Developments	Moderator and Speaker of 3 hour program	Sunnyvale, CA
01/05/01	CEB	Estate Planning and Administration: 15 <sup>th</sup> Recent Developments	Moderator and Speaker of 3 hour program	Sunnyvale, CA
01/17/01	Santa Clara County Bar Association	The Future of the Estate Planning: When Should we Retire?	Speaker	San Jose, CA
02/07/01	Paralegal Association of Santa Clara County	Recent Development in California Legislation	Speaker	San Jose, CA
02/13/01	Japanese American National Museum	Managing Your Assets and Planning Your Estate to Save Taxes and Achieve Your Goals	Speaker	San Jose, CA

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09/06/01	The State Bar of California	Community Property, Community Property with Right of Survivorship and Joint Tenancy; What Form of Title is Right for Your Client?	Speaker	Anaheim, CA
09/11/01	SCCBA	Update on Conservatorships: Probate, Dementia, Elder Abuse, LPS and Limited Conservatorships	Speaker	Santa Clara, CA
09/22/01	CEB	Conservatorships: The Basics	Speaker	Palo Alto, CA
09/29/01	CEB	Conservatorships: The Basics	Speaker	San Francisco, CA
11/14/01	Silicon Valley Bar Association	The New Minimum Distribution Rules: How They Work and How to Incorporate	Moderator	Santa Clara, CA
01/18/02	State Bar of California, Winter Section Educational Institute	Joint Tenancy; What Form of Title is Right for Your Client?	Speaker	San Diego, CA
01/25/02	CEB	Estate Planning and Administration: 16 <sup>th</sup> Recent Developments	Moderator and Speaker of 3 hour program	Palo Alto, CA
02/08/02	Johnson, Gaver & Leach, LLP	Recent Legislative and Case Law Developments: Tips and Tricks	Speaker at 3 hour program	Monterey, CA

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05/01/02	Professional Fiduciary Association of California	Uniform Prudent Investor Act and Discretionary Powers	Speaker at 2 hour program	San Mateo, CA
05/07/02	Northern Trust of California	54 <sup>th</sup> Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	West Los Angeles and Pasadena, CA
05/08/02	Northern Trust of California	54 <sup>th</sup> Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	San Diego, CA
05/09/02	Northern Trust of California	54 <sup>th</sup> Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	Newport Beach, CA
05/15/02	Silicon Valley Bar Association	Uses and Abuses of Durable Power of Attorneys: Building Flexibility into the Estate Plan	Speaker at 1 hour program	Santa Clara, CA
10/09/02	Ronald McDonald House	Looking Through the Keyhole: Inside Scenes from Your Attorney's Office	Dramatization of Critical Estate Planning Issues	San Jose, CA
10/16/02	Santa Cruz County Estate Planning Council	Uses and Abuses of Durable Power of Attorney	Speaker at 1 hour program	Santa Cruz, CA
10/23/02	American Cancer Society	3 <sup>rd</sup> Annual Estate Planning Seminar: Using the 2002 Gift and Estate Tax Changes to Your Clients' Advantage	Speaker at 2 hour program	Sacramento, CA

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12/18/02	Santa Cruz County Estate Planning Council	Update in Down Times: When the Bills Arrive	Speaker at 1 hour program	Santa Cruz, CA
12/18/02	Silicon Valley Bar Association	Update in Down Times: When the Bills Arrive	Speaker at 1 hour program	Santa Clara, CA
01/30/03	CEB	Estate Planning and Administration: 17 <sup>th</sup> Recent Developments	Speaker and Moderator at 3 hour program	Sunnyvale, CA
02/18/03	San Mateo County Bar Association	Update in Down Times: When the Bills Arrive	Speaker at 1 hour program	San Mateo, CA
05/20/03	Northern Trust	55 <sup>th</sup> Annual Trust & Tax Forum: Is There a New Trust Code in California's Future? A Comparison of the UTC with Current California Trust Laws	Speaker at 4 hour program	San Diego, CA
05/21/03	Northern Trust	55 <sup>th</sup> Annual Trust & Tax Forum: Is There a New Trust Code in California's Future? A Comparison of the UTC with Current California Trust Laws	Speaker at 4 hour program	Newport Beach, CA
05/22/03	Northern Trust	55 <sup>th</sup> Annual Trust & Tax Forum: Is There a New Trust Code in California's Future? A Comparison of the UTC with Current California Trust Laws	Speaker at 4 hour program	Los Angeles, Westwood, CA

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05/22/03	Northern Trust	55 <sup>th</sup> Annual Trust & Tax Forum: Is There a New Trust Code in California's Future? A Comparison of the UTC with Current California Trust Laws	Speaker at 4 hour program	Pasadena, CA
06/25/03	Ronald McDonald House	Looking Through the Keyhole: Inside Scenes from your attorney's office	Dramatization of Critical Estate Planning Issues	Los Altos, CA
09/04/03	State Bar of California	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 <sup>st</sup> Century	Speaker	Anaheim, CA
09/15/03	Santa Clara County Estate Planning Council	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 <sup>st</sup> Century	Speaker	San Jose, CA
10/24/03	State Bar of California	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 <sup>st</sup> Century	Speaker	San Francisco, CA
12/17/03	Santa Cruz County Estate Planning Council	The Million Dollar Filing Fee "The Mike, Jim & Bob Report"	Speaker at 2 hour program	Santa Cruz, CA
12/17/03	Silicon Valley Bar Association	The Good, the Bad and the Ugly	Speaker at 2 hour program	Santa Clara, CA

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01/23/04	CEB	Estate Planning and Administration: 19 <sup>th</sup> Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, CA
12/15/04	Santa Cruz County Bar Association	The Continuing Search for WDM (Ways to Manage Death, Disability and Dissolution)	Speaker and moderator at a 3 hour program	Santa Cruz, CA
12/15/04	Silicon Valley Bar Association	The Continuing Search for WDM (Ways to Manage Death, Disability and Dissolution)	Speaker and moderator at a 3 hour program	Santa Clara, CA
01/21/05	CEB	Estate Planning and Administration: 20 <sup>th</sup> Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, CA
05/03/05	Professional Fiduciary Association of California	Reporting Duties of Trustees to Beneficiaries and Exercise of Trustee's Discretionary Powers	Speaker at a 2 hour program	Burlingame, CA
05/16/05	Santa Clara County Estate Planning Council	Significant Developments in 2005 of Interest to Estate Planners	Speaker at a 2 hour program	San Jose, CA
12/13/05	Silicon Valley Bar Association	Taxes, Trusts and Planning in Disastrous Times	Speaker at 2 hour program	San Jose, CA
12/21/05	Santa Cruz County Estate Planning Council	Taxes, Trusts and Planning in Disastrous Times	Speaker at 2 hour program	Santa Cruz, CA
01/26/06	CEB	Estate Planning and Administration: 21 <sup>st</sup> Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, CA

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05/15/06	Santa Clara County Estate Planning Council	California Recent Developments	1 hour	San Jose, CA
05/19/06	CEB	28 <sup>th</sup> Annual UCLA/CEB Estate Planning Institute - Highlights of Current Developments	1.5 hours	Los Angeles, CA
10/08/06	State Bar of California	Preventing Malpractice in the Estate Planning and Administration Arena – Tips to Sleep Soundly At Night	3 hours	Monterey, CA
10/10/06	Santa Clara University, School of Law	Recent California Case Law Developments	1 hour	Santa Clara, CA
12/20/06	Santa Cruz County Estate Planning Council	Changing Our Plans in 2007 : New Laws, New Interpretations and How to Handle the Transition	2 hours	Santa Cruz, CA
12/20/06	Silicon Valley Bar Association	Changing Our Plans in 2007 : New Laws, New Interpretations and How to Handle the Transition	2 hours	San Jose, CA
01/11/07	Santa Cruz County Estate Planning Council	Changing Our Plans in 2007 : New Laws, New Interpretations and How to Handle the Transition	2 hours	Monterey, CA
01/17/07	Mount Diablo Estate Planning Council	Recent Developments in Federal and California Law	2 hours	Lafayette, CA

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01/23/07	San Mateo County Bar Association	Annual Update of Estate Related cases and Laws	2 hours	San Mateo, CA
02/06/07	Silicon Valley Bar Association	Preventing Malpractice in the Estate Planning and Administration Arena	3 hours	Santa Clara, CA
05/18/07	CEB	29 <sup>th</sup> Annual UCLA/CEB Estate Planning Institute - Highlights of Current Developments	2 hours	Los Angeles, CA
05/21/07	Santa Clara County Estate Planning Council	California Recent Developments	1 hour	San Jose, CA
10/04/07	Orange County Bar Association	Preventing Malpractice in the Estate Planning and Administration Arena – Tips to Sleep Soundly At Night	1 hour	Costa Mesa, CA
10/12/07	33 <sup>rd</sup> Annual Probate and Trust Conference	Quick Tips: Post Death Administration Checklist	1 hour	Los Angeles, CA
11/06/07	The 12 <sup>th</sup> Annual Advanced Estate Planning Symposium	Updates and Additions to Your Post Mortem Trust Administration Checklist	1 hour	Alamo, CA
12/19/07	Santa Cruz County Estate Planning Council	Changing Our Plans in 2008 New Laws, New Interpretations and How to Handle the Transition	2 hours	Santa Cruz, CA

<b>DATE</b>	<b>FIRM OR ORGANIZATION SPONSORING THE PROGRAM</b>	<b>PROGRAM TITLE</b>	<b>HOURS TAUGHT</b>	<b>PLACE</b>
12/19/07	Silicon Bar Valley Association	Changing Our Plans in 2008 New Laws, New Interpretations and How to Handle the Transition	2 hours	San Jose, CA
01/10/08	San Mateo County Bar Association	Changing Our Plans in 2008 New Laws, New Interpretations and How to Handle the Transition	2 hours	San Jose, CA
01/18/08	CEB	Estate Planning and Administration: 23rd Recent Developments	Speaker and moderator at 3 hour program	Santa Clara, CA
01/30/08	First National Bank Trust Department and Monterey Estate Planning Group	Changing our Plans in 2008 New Laws, New Interpretations and How to Handle the Transition	2 hours	Monterey, CA
05/09/08	CEB	30 <sup>th</sup> Annual UCLA/CEB Estate Planning Institute - Highlights of Current Developments	2 hours	Los Angeles, CA
09/19/08	Santa Clara University	4 <sup>th</sup> Annual Jerry A. Kasner Estate Planning Symposium	2 hours	San Jose, CA
11/06/08	Silicon Valley Bar Association	Avoiding Potholes in the Road of Love	1 hour	Santa Clara, CA
12/17/08	Silicon Valley Bar Association	Estate Planning in the Brave (and Poorer) New World	2 hours	Santa Clara, CA
12/17/08	Santa Cruz County Estate Planning Council	Estate Planning in the Brave (and Poorer) New World	2 hours	Santa Clara, CA

<b>DATE</b>	<b>FIRM OR ORGANIZATION SPONSORING THE PROGRAM</b>	<b>PROGRAM TITLE</b>	<b>HOURS TAUGHT</b>	<b>PLACE</b>
01/08/09	San Mateo County Estate Planning Council	Estate Planning in the Brave (and Poorer) New World	2 hours	San Mateo, CA
01/09/09	CEB	Estate Planning & Administration: 24th Annual Recent Developments	3 hours	Santa Clara, CA
02/26/09	First National Bank Trust Department and Monterey Estate Planning Group	Estate Planning in the Brave (and Poorer) New World	2 hours	Monterey, CA
05/18/09	Santa Clara County Estate Planning Council	Annual Update	1 hour	San Jose, CA
05/20/09	Santa Cruz County Estate Planning Council	Avoiding Potholes in the Road of Love	1 hour	Santa Cruz, CA
09/30/09	Santa Clara University	6 <sup>th</sup> Annual Jerry A. Kasner Estate Planning Symposium	2 hours	San Jose, CA
12/16/09	Santa Cruz County Estate Planning Council	Pigs Fly, Cubs Win World Series, Hell Freezes Over and Three Blind Men Will Guide Your T&E Practice in 2010	2 hours	Santa Cruz, CA
12/17/09	Silicon Valley Bar Association	Pigs Fly, Cubs Win World Series, Hell Freezes Over and Three Blind Men Will Guide Your T&E Practice in 2010	2 hours	San Jose, CA

<b>DATE</b>	<b>FIRM OR ORGANIZATION SPONSORING THE PROGRAM</b>	<b>PROGRAM TITLE</b>	<b>HOURS TAUGHT</b>	<b>PLACE</b>
01/21/10	San Mateo County Bar Association	Pigs Fly, Cubs Win World Series, Hell Freezes Over and Three Blind Men Will Guide Your T&E Practice in 2010	2 hours	San Mateo, CA
01/22/10	CEB	Estate Planning & Administration: 25th Annual Recent Developments	3 hours	Santa Clara, CA
03/23/10	Monterey Estate Planning Study Group	Pigs Fly, Cubs Win World Series, Hell Freezes Over and Three Blind Men Will Guide Your T&E Practice in 2010	2 hours	Salinas, CA
05/17/10	Santa Clara County Estate Planning Council	Recent California Case Law and Legislative Developments Affecting Trusts, Estates and Conservatorships	2 hours	San Jose, CA

## **EXHIBIT 4 PUBLICATIONS**

"PROBATE Checklist" published in the Estate Planning, Trust and Probate News of the State Bar of California in the Fall of 1988.

"Litigation Alert: Ablamis v. Roper" published in Estate Planning, Trust and Probate News, Vol 11, No. 3, Fall 1991.

"Selected Recent Case Developments" published in the 15th Annual Program of the State Bar of California's Section on Estate Planning, Probate and Trust Law (September 1991).

"§§5000-5032: Non-Probate Transfers of Community Property-The Legislature's Answer to the Supreme Court," published in Estate Planning, Trust and Probate Law News, Vol 12, No. 3, Fall 1992.

Co-author of "Post Mortem Trust Administration Checklist" published as part of the program materials in the 18th Annual Program of the State Bar of California's Section on Estate Planning, Probate and Trust Law (October, 1994) and republished by Continuing Education of the Bar with substantial proprietary exhibits as part of the program materials for CEB's "Funding and Administering Trusts After the Death of the Trustor" (March, 1995).

California Reporter for the American College of Trust and Estates Counsel Study on Family Protection/Forced Heirship (1996-1997).

Co-author of CEB's Action Guide entitled "Handling Post Mortem Trust Administration: A Checklist" (1996, revised Fall, 1997).

"The New California Uniform Prudent Investor Act: A Practical Approach" published as part of the program materials in the 20th Annual Program of the State Bar of California's Section on Estate Planning, Trust and Probate Law (November, 1996).

Co-author of "A Report on the Oral Argument Before the U.S. Supreme Court in *Boggs v. Boggs*," published in the California Trusts and Estate Quarterly, Vol 3, No. 1, Spring 1997.

Co-author of "U.S. Supreme Court Rules that ERISA Preempts Testamentary Rights Under State Community Property Laws" published in the California Trusts and Estates Quarterly, Vol 3, No. 2, Summer 1997.

Co-author of "Is There a New Trust Code in California's Future? - A Comparison of the Recently Adopted Uniform Trust Code with Current California Trust Laws" published in the California Trusts and Estate Quarterly, Vol 6, No. 4, Winter 2000

Author of Chapter entitled "Obstacles to Estate Planning for Married Clients" published in CEB's California Estate Planning, 2002, and updated annually thereafter.

**EXHIBIT 5**  
**PROFESSIONAL ASSOCIATION ACTIVITIES, HONORS AND AWARDS**

PROFESSIONAL ASSOCIATION ACTIVITIES

State Bar of California, Section on Estate Planning, Probate and Trust Law (1980-2001)

- ◆ Chair of Executive Committee (1997-1998)
- ◆ Vice Chair of Executive Committee (1996-1997)
- ◆ Executive Committee Member or Technical Advisor (1990-1996; 1998-2001)
- ◆ California Law Revision Commission Liaison (1990-1992)
- ◆ Chair of SubCommittee on "Post-Mortem Trust Administration" (1993-1995)
- ◆ Co-Chair of SubCommittee on "Informal Administration Legislative Proposal" (1994-1996)

Santa Clara County Bar Association, Section on Estate Planning, Probate and Trust Law (1980-present)

- ◆ Chairperson (1987)
- ◆ Vice Chairperson (1986)

American Bar Association, Section on Real Property and Probate (1980-present)

American College of Trust and Estate Counsel (ACTEC)

- ◆ Elected Fellow of the College in 1992
- ◆ Member of State Laws Committee (1998-2001 and 2009-present)

HONORS AND AWARDS

Certificate of Service awarded by the Superior Court of the County of Santa Clara (1989-2002)

Certificate of Specialization awarded by Senior Adults Legal Services in recognition of 10 years of Pro Bono Services.

Named as one of the top 100 Northern California Super Lawyers (2005-present)

## **EXHIBIT 6 COMMUNITY ACTIVITIES**

Past member of the Board of Directors of the Center for Living with Dying (1980-1991).

Senior Member of the National Ski Patrol Association (1980-1992).

Past member of the Board of Directors of the Santa Clara Chapter of the American Heart Association (1981-1985).

Member and Advisor to Resource Development Council of the Bay Area Lupus Foundation (1993-1995).

Member and Treasurer of Indian Princesses: Loma Costanoan Chapter (a father-daughter youth group) (1994-2002).

Member and Treasurer of Indian Guides: Loma Costanoan Chapter (a father-son youth group) (1998-2002).

Adjunct Faculty Member of Santa Clara University School of Law teaching Estate Planning and Taxation (2001-2003) and guest lecturer in 2009.

Assistant Cycle Coach for Leukemia and Lymphoma Society in Team in Training Program (2004-present)