

**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 with many in excess of \$100 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)**

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
01/30/15	CEB	Estate Planning and Administration: Year in Review	Speaker and moderator at a 3 hours	Santa Clara, CA
01/15/15	San Mateo County Bar Association	The Giants Win Again and other Excitement in the T&E World, Annual Estate Planning Update	Co-presenter at 1.5 hours	San Mateo, CA
12/17/14	Santa Cruz County Estate Planning Council	The Giants Win Again and other Excitement in the T&E World, Annual Estate Planning Update	Co-presenter at 1.5 hours	Santa Cruz, CA
12/03/14	Silicon Valley Bar Association	The Giants Win Again and other Excitement in the T&E World, Annual Estate Planning Update	Co-presenter at 1.5 hours	Santa Clara, CA
11/05/14	Loring Ward Advanced Symposium	Advanced Planning Panel	Co-presenter at 1 hour program	Washington, D.C.
10/24/14	Santa Clara University 10 th Annual Jerry A. Kasner Estate Planning Symposium	Current California Developments in Estate Planning	Speaker at 2 hour program	Santa Clara, CA
05/19/14	SCCEPC	Recent California Case Law and Legislative Developments Affecting Trusts, Estates, and Conservatorships	Speaker at 1.5 hours	Santa Clara, CA
03/20/14	Monterey Estate Planning Study Group	Vetoes, Taxes, and Marriage for All	Speaker and moderator at a 1.5 hours	Monterey, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
01/31/14	CEB	Estate Planning & Administration: 28th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara
01/16/14	San Mateo County Estate Planning Council	Vetoes, Taxes and Marriage for All	Speaker and moderator at a 1.5 hours	San Mateo, CA
12/18/13	Santa Cruz County Estate Planning Council	Vetoes, Taxes, and Marriage for All	Speaker and moderator at a 1.5 hours	Santa Cruz, CA
12/11/13	Silicon Valley Bar Association	Vetoes, Taxes, and Marriage for All	Speaker and moderator at a 1.5 hours	Santa Clara, CA
09/27/13	Santa Clara University 9 th Annual Jerry A. Kasner Estate Planning Symposium	Recent California Developments in Estate Planning and Administration	Speaker at a 2 hours	Santa Clara, CA
09/01/13	ACTEC Western Regional Meeting	Recent California Developments in Estate Planning and Administration	Speaker at a 3 hours	Half Moon Bay, CA
05/20/13	SCCEPC	Recent California Case Law and Legislative Developments Affecting Trusts, Estates and Conservatorships	Speaker at 1 hour	Santa Clara, CA
01/18/13	CEB	Estate Planning & Administration: 27th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara, CA
01/17/13	San Mateo County Estate Planning Council	The Giants Won the World Series Again! How Much Uncertainty Can We Tolerate? Planning from the Precipice	Speaker and moderator at a 1.5 hour	San Mateo

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
12/19/12	Santa Cruz County Estate Planning Council	The Giants Won the World Series Again! How Much Uncertainty Can We Tolerate? Planning from the Precipice	Speaker and moderator at a 1.5 hour	Santa Cruz, CA
12/12/12	SVBA	The Giants Won the World Series Again! How Much Uncertainty Can We Tolerate? Planning from the Precipice	Speaker and moderator at a 1.5 hour	Santa Clara
05/21/12	SCCEPC	Recent California Case Law and Legislative Developments Affecting Trusts, Estates and Conservatorships	Speaker at 1 hour	Santa Clara, CA
01/20/12	CEB	Estate Planning & Administration: 27th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara, CA
01/19/12	San Mateo County Estate Planning Council	Congress is Run by Lawyers. A Lawyer is Trained for Two Things, and Two Things Only: To Clarify and to Confuse." Welcome to Tax Planning 2012	Speaker and moderator at a 2 hours	Santa Cruz, CA
12/14/11	Santa Cruz County Estate Planning Council	Congress is Run by Lawyers. A Lawyer is Trained for Two Things, and Two Things Only: To Clarify and to Confuse." Welcome to Tax Planning 2012	Speaker and moderator at a 2 hours	Santa Cruz, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
12/08/11	SVBA	Congress is Run by Lawyers. A Lawyer is Trained for Two Things, and Two Things Only: To Clarify and to Confuse." Welcome to Tax Planning 2012	Speaker and moderator at a 2 hours	Santa Clara, CA
09/22/11	Santa Clara University 7 th Annual Jerry A. Kasner Estate Planning Symposium	Current California Developments in Estate Planning and Administration	Speaker at a 2 hours	San Jose, CA
05/16/11	Santa Clara County Estate Planning Council	Recent California Case Law and Legislative Developments Affecting Trusts, Estates and Conservatorships	Speaker at a 2 hours	San Jose, CA
05/10/11	Stanford University	Ethical Considerations When Dealing with Elderly Clients and Donors	Speaker at a 2 hours	Stanford, CA
05/07/11	Professional Fiduciary Association of California	The Ethical Conundrum: Damned If You Do...damned If You Don't	Speaker at a 2 hours	Monterey, CA
4/14/11	SVBA	Preventing Malpractice in the Estate Planning and Administration Arena – Tips to Sleep Soundly At Night	Speaker at 1 hour	San Jose, CA
03/16/11	SVBA	The 2011 Tax Law: Guess Work and Other Challenges	Speaker and moderator at a 2 hours	Santa Clara, CA
02/08/11	Monterey Estate Planning Study Group and CPE Forum	The Giants Won the World Series And How Much Quack Did We Get from a Lame Duck?	Speaker and moderator at a 1 hour	Monterey, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
01/21/11	CEB	Estate Planning & Administration: 26th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara, CA
01/19/11	San Mateo County Estate Planning Council	The Giants Won the World Series And How Much Quack Can You Get from a Lame Duck?	Speaker and moderator at 1 hour	San Mateo
12/16/10	Silicon Valley Bar Association	The Giants Won the World Series And How Much Quack Can You Get from a Lame Duck?	Speaker and moderator at 1 hour	San Jose, CA
12/15/10	Santa Cruz County Estate Planning Council	The Giants Won the World Series And How Much Quack Can You Get from a Lame Duck?	Speaker and moderator at 1 hour	Santa Cruz
09/29/10	Santa Clara University 6 th Annual Jerry A. Kasner Estate Planning Symposium	Current California Developments in Estate Planning and Administration	Speaker at a 2 hours	San Jose, CA
05/17/10	Santa Clara County Estate Planning Council	Recent California Case Law and Legislative Developments Affecting Trusts, Estates and Conservatorships	Speaker at a 2 hours	San Jose, 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	Speaker and moderator at a 2 hours	Salinas, CA
01/22/10	CEB	Estate Planning & Administration: 25th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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	Speaker and moderator at a 2 hours	San Mateo, 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	Speaker and moderator at a 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	Speaker and moderator at a 2 hours	Santa Cruz, CA
09/30/09	Santa Clara University	5 th Annual Jerry A. Kasner Estate Planning Symposium	Speaker at a 2 hours	San Jose, CA
05/20/09	Santa Cruz County Estate Planning Council	Avoiding Potholes in the Road of Love	Speaker at 1 hour	Santa Cruz, CA
05/18/09	Santa Clara County Estate Planning Council	Annual Update	Speaker at 1 hour	San Jose, CA
02/26/09	First National Bank Trust Department and Monterey Estate Planning Group	Estate Planning in the Brave (and Poorer) New World	Speaker and moderator at a 2 hours	Monterey, CA
01/09/09	CEB	Estate Planning & Administration: 24th Annual Recent Developments	Speaker and moderator at a 3 hours	Santa Clara, CA
01/08/09	San Mateo County Estate Planning Council	Estate Planning in the Brave (and Poorer) New World	Speaker and moderator at a 2 hours	San Mateo, CA
12/17/08	Santa Cruz County Estate Planning Council	Estate Planning in the Brave (and Poorer) New World	Speaker and moderator at a 2 hours	Santa Clara, CA

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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
10/12/07	33 rd Annual Probate and Trust Conference	Quick Tips: Post Death Administration Checklist	Speaker at 1 hour	Los Angeles, CA
10/04/07	Orange County Bar Association	Preventing Malpractice in the Estate Planning and Administration Arena – Tips to Sleep Soundly At Night	Speaker at 1 hour	Costa Mesa, CA
05/21/07	Santa Clara County Estate Planning Council	California Recent Developments	Speaker at 1 hour	San Jose, CA
05/18/07	CEB	29 th Annual UCLA/CEB Estate Planning Institute - Highlights of Current Developments	Speaker at a 2 hours	Los Angeles, CA
02/06/07	Silicon Valley Bar Association	Preventing Malpractice in the Estate Planning and Administration Arena	Speaker at a 3 hours	Santa Clara, CA
01/23/07	San Mateo County Bar Association	Annual Update of Estate Related cases and Laws	Speaker and moderator at a 2 hours	San Mateo, CA
01/17/07	Mount Diablo Estate Planning Council	Recent Developments in Federal and California Law	Speaker and moderator at a 2 hours	Lafayette, 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	Speaker and moderator at a 2 hours	Monterey, CA
12/20/06	Silicon Valley Bar Association	Changing Our Plans in 2007 : New Laws, New Interpretations and How to Handle the Transition	Speaker and moderator at a 2 hours	San Jose, 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	Speaker at a 2 hours	Santa Cruz, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
10/10/06	Santa Clara University, School of Law	Recent California Case Law Developments	Speaker at a 1 hour	Santa Clara, CA
10/08/06	State Bar of California	Preventing Malpractice in the Estate Planning and Administration Arena – Tips to Sleep Soundly At Night	Speaker at a 3 hours	Monterey, CA
05/19/06	CEB	28 th Annual UCLA/CEB Estate Planning Institute - Highlights of Current Developments	Speaker at a 1.5 hours	Los Angeles, CA
05/15/06	Santa Clara County Estate Planning Council	California Recent Developments	Speaker at a 1 hour	San Jose, CA
01/26/06	CEB	Estate Planning and Administration: 21 st Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, 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
12/13/05	Silicon Valley Bar Association	Taxes, Trusts and Planning in Disastrous Times	Speaker at 2 hour program	San Jose, 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
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
01/21/05	CEB	Estate Planning and Administration: 20 th Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
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
01/23/04	CEB	Estate Planning and Administration: 19 th Recent Developments	Speaker and moderator at a 3 hour program	Santa Clara, CA
12/17/03	Silicon Valley Bar Association	The Good, the Bad and the Ugly	Speaker at 2 hour program	Santa Clara, 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
10/24/03	State Bar of California	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 st Century	Speaker	San Francisco, CA
09/15/03	Santa Clara County Estate Planning Council	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 st Century	Speaker	San Jose, CA
09/04/03	State Bar of California	Elder Abuse: The Domestic Violence and Financial Embezzlement Problem of the 21 st Century	Speaker	Anaheim, 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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
05/22/03	Northern Trust	55 th 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
05/22/03	Northern Trust	55 th 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
05/21/03	Northern Trust	55 th 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
05/20/03	Northern Trust	55 th 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
02/18/03	San Mateo County Bar Association	Update in Down Times: When the Bills Arrive	Speaker at 1 hour program	San Mateo, CA
01/30/03	CEB	Estate Planning and Administration: 17 th Recent Developments	Speaker and Moderator at 3 hour program	Sunnyvale, CA
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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
10/23/02	American Cancer Society	3 rd Annual Estate Planning Seminar: Using the 2002 Gift and Estate Tax Changes to Your Clients' Advantage	Speaker at 2 hour program	Sacramento, 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
10/09/02	Ronald McDonald House	Looking Through the Keyhole: Inside Scenes from Your Attorney's Office	Dramatization of Critical Estate Planning Issues	San Jose, CA
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
05/09/02	Northern Trust of California	54 th Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	Newport Beach, CA
05/08/02	Northern Trust of California	54 th Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	San Diego, CA
05/07/02	Northern Trust of California	54 th Annual Trust and Tax Forum: Uses and Abuses of Durable Power of Attorneys	Speaker at 1 hour program	West Los Angeles and Pasadena, CA
05/01/02	Professional Fiduciary Association of California	Uniform Prudent Investor Act and Discretionary Powers	Speaker at 2 hour program	San Mateo, CA
02/08/02	Johnson, Gaver & Leach, LLP	Recent Legislative and Case Law Developments: Tips and Tricks	Speaker at 3 hour program	Monterey, CA
01/25/02	CEB	Estate Planning and Administration: 16 th Recent Developments	Moderator and Speaker of 3 hour program	Palo Alto, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
11/14/01	Silicon Valley Bar Association	The New Minimum Distribution Rules: How They Work and How to Incorporate	Moderator	Santa Clara, CA
09/29/01	CEB	Conservatorships: The Basics	Speaker	San Francisco, CA
09/22/01	CEB	Conservatorships: The Basics	Speaker	Palo Alto, CA
09/11/01	SCCBA	Update on Conservatorships: Probate, Dementia, Elder Abuse, LPS and Limited Conservatorships	Speaker	Santa Clara, CA
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
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
02/07/01	Paralegal Association of Santa Clara County	Recent Development in California Legislation	Speaker	San Jose, CA
01/17/01	Santa Clara County Bar Association	The Future of the Estate Planning: When Should we Retire?	Speaker	San Jose, CA
01/05/01	CEB	Estate Planning and Administration: 15 th Recent Developments	Moderator and Speaker of 3 hour program	Sunnyvale, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
01/07/00	CEB	Estate Planning and Administration: 14 th Recent Developments	Moderator and Speaker of 3 hour program	Sunnyvale, 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
09/25/99	Morgan Stanley Dean Witter		Speaker at 2 hour program	Santa Cruz, 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
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
06/22/99	Comerica Bank - California	Notification by Trustee: Statutory Analysis and Proposed Legislative Changes	Speaker at 2 hour program	Palo Alto, CA
06/11/99	University of Missouri - 11 th 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
05/19/99	Santa Cruz County Bar Association	Trust Scams	Speaker at 1 hour	Santa Cruz, CA
04/30/99	West Valley Bar Association	Trust Scams	Speaker at 1 hour	Campbell, 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
04/09/99	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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
03/31/99	Santa Clara County Bar Association	Notification by Trustee Provision - Changes on the Horizon	Speaker at 1 hour program	San Jose, CA
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
01/09/99	CEB	Estate Planning and Administration: 14 th Recent Developments	Moderator and Speaker in a 4 hour program	Monterey, 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
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
10/17/98	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
10/13/98	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
10/03/98	State Bar of California	Recent Probate and Trust Law Changes: Trustee Notification	Moderator and Speaker at 2 hour program	Monterey, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
08/29/98	IRS Collection Division	Estate Planning Scams	Speaker at 1 hour program	Oakland, CA
08/10/98	Southern Alameda County EP Council	Trust Mills and Modifying the Botched Irrevocable Trusts	Speaker at 1 hour program	Fremont, CA
08/21/98	International Association of Financial Planners	Estate Planning Scams	Speaker at 1 hour program	Sunnyvale, CA
05/27/98	Santa Clara County Bar Association	Modifying Irrevocable Trusts	Speaker at 1 hour program	San Jose, 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
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
03/04/98	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
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
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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
11/21/97	San Mateo County Bar Association	New Probate Code Provisions on Notification of Trustee	Speaker at 1 hour program	San Mateo, CA
09/17/97	Santa Cruz County Bar Association	Estate Planning After <i>Boggs</i>	Speaker at 1 hour program	Santa Cruz, 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
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
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
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
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
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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
01/16/97	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
01/11/97	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 12th Annual Program	Moderator and speaker at 3 hour program	Monterey, CA
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
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
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
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
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
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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
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
01/09/96	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 11th Annual Program	Moderator and Panelist of 3 hour program	Sunnyvale, CA
11/17/95	San Mateo County Bar Association	Informal Administration in California - A Legislative Proposal	Speaker at 1 hour program	San Mateo, CA
10/11/95	Peninsula Estate Planning Council	The Marketing of Living Trust by Non Attorneys	Speaker at 1 hour program	Belmont, 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
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
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
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
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

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
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
11/10/94	Stanislaus County Estate Planning Council	Post Mortem Trust Administration	Speaker at 1 hour program	Modesto, 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
10/29/94	State Bar of California	Post Mortem Checklist; 18th Annual Fall Program	Moderator and Speaker at 2 hour program	Los Angeles, 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
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
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
3/27/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	San Francisco, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
3/26/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	Sacramento, CA
3/20/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	Los Angeles, CA
3/19/93	Continuing Education of the Bar	Estate Planning for the Unmarried	Speaker at 3 hour program	San Diego, 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
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
1/25/92	Continuing Education of the Bar	Recent Developments in Estate Planning and Administration; 7th Annual Program	Moderator and Panelist of 3 hour program	Carmel, CA
1/22/92	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
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
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
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
8/28/91	Santa Clara County Bar Association	Ablamis Special	Lecturer of 1 hour program	San Jose, CA

DATE	FIRM OR ORGANIZATION SPONSORING THE PROGRAM	PROGRAM TITLE	HOURS TAUGHT	PLACE
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
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
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
1/11/90	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
4/17/89	Santa Clara County Estate Planning Counsel	Postmortem Tax Planning	Moderator Panelist of 1.5 hour program	San Jose, CA
?/?/88	Continuing Education of the Bar	Drafting Wills	Panelist of 3 hour program	Santa Clara, 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
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

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 "Additional Property Transfer Obstacles for Married Persons and Registered Domestic Partners" 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)

- ◆ California State Chair, 2011-2016
- ◆ 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)