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PATRICK A. KOHLMANN

PRACTICE	Estate Planning, Probate and Trust Administration, Trust and Estate Litigation, Conservatorship and Guardianship 2502 Stevens Creek Blvd. San Jose, CA 95128 Telephone (408) 998-9500 Fax (408) 998-9700 Email pkohlmann@tcklawfirm.com
LEGAL EDUCATION, HONORS:	Juris Doctor, Santa Clara University, 2000; Recipient of CALI Excellence Award for Achievement in the study of Community Property; Honored by Certification and Recognition to Who's Who Among American Law Students;
PRIOR:	Certified Public Accountant, Illinois 1994; Bachelor of Science, Accounting, 1993.
ADMISSION:	Northern District Court of Appeals, Ninth Circuit, 2001.
MEMBER:	Fellow of the American College of Trust and Estate Counsel (ACTEC); Member/Advisor/Former Officer of State Bar of California Executive Committee, Trust and Estates Section (2008-2017); Member of the Judicial Council's Probate and Mental Health Advisory Committee; Member of State Bar of California, Estate Planning, Trust and Probate Section; Member of Silicon Valley Bar Association; Member of California Society of CPAs.

EXPERIENCE:

2000-Present: Attorney and Partner (since 2006) at the law firm of Temmerman, Cilley & Kohlmann, LLP. Mr. Kohlmann is certified by the State Bar of California Board of Legal Specialization as a specialist in the field of Estate Planning, Probate and Trust Law. He has been practicing law in the field of estate planning, probate, trust administration and estate and trust litigation since 2000. Mr. Kohlmann has been either a member, advisor, or former officer of the State Bar of California Executive Committee, Trust and Estates Section (TEXCOM) since 2008, and was the Chair of the Section from 2015-2016. In the past, he has been either a chair or a member of the following TEXCOM subcommittees: Trust and Estates Administration (Chair); Ethics (Chair); Estate Planning (Member); Education (Member); Nominating (Chair); and Long Range Planning (Chair). Mr. Kohlmann is a frequent speaker for the State Bar of California, Continuing Education of the Bar (CEB), CalCPA, and many other professional organizations. Mr. Kohlmann is also a member of the Silicon Valley Bar Association and is a former Co-Chair of the Young Tax Lawyers, State Bar of California, San Jose Chapter. Mr. Kohlmann is a licensed CPA and a member of the California State Board of Accountancy.

Prior to his legal career, Mr. Kohlmann practiced public accounting as a CPA, including several years at the public accounting firm of Corbett, Lueckhoff CPAs in Chicago, Illinois.

PRACTICE:

Estate planning, business planning, trust and decedent's estate administration, probate and elder law planning, conservatorships, and related litigation.

LECTURES:

• Speaker and Panelist, "The Exam and You - Estate Planning Through Administration and Litigation," State Bar of California, Los Angeles, California (6/8/17)
• Speaker, "Recent California Case Law and Legislative Developments Affecting Trusts, Estates, and Conservatorships," Estate Planning Council, Santa Clara, California (5/15/17)
• Speaker, "Selected Recent Developments," Silicon Valley Chapter of the Society of Financial

Service Professionals, San Jose, California (4/20/17)

• Speaker and Panelist, “Trustees v. Remainder Beneficiaries, and the Struggle to Deal with an Aging Population,” East Bay Trust and Estates Lawyers, Oakland, California (4/19/17)

• Speaker and Panelist, “2704 & Other End-Of-Life Options,” East Bay Trust and Estates Lawyers, Oakland, California (2/15/17)

• Speaker and Panelist, “2704 & Other End-Of-Life Options,” East Bay Trust and Estates Lawyers, Oakland, California (2/8/17)

• Speaker and Panelist, “2704 & Other End-Of-Life Options,” Monterey Estate Planning Study Group, Monterey, California (2/7/17)

• Speaker and Panelist, “Is There a Silver Lining in Every Dark Cloud?,” Bar Association of San Francisco, San Francisco, California (2/1/17)

• Speaker and Panelist, “Estate Planing and Administration: 2016 Year in Review,” Continuing Education of the Bar (CEB), San Francisco, California (1/27/17)

• Speaker and Panelist, “2704 & Other End-Of-Life Options,” San Mateo County Bar Association, San Mateo, California (1/19/17)

• Speaker and Panelist, “Is There a Silver Lining in Every Dark Cloud?,” Santa Cruz County Estate Planning Council, Santa Cruz, California (12/14/16)

• Speaker and Panelist, “2704 & Other End-Of-Life Options,” Silicon Valley Bar Association, Santa Clara, California (12/8/16)

• Speaker, “Trustees v. Remainder Beneficiaries, and the Struggle to Deal with an Aging Population,” Santa Cruz County Bar Association, Santa Cruz, California (10/19/16)

• Speaker and Panelist, “Trustees v. Remainder Beneficiaries, and the Struggle to Deal with an Aging Population,” State Bar of California 89th Annual Meeting, San Diego, California (9/30/16)

• Speaker and Panelist, “The Only Constant is Change: Giraldin, Drake v. Pinkham and an Aging Population,” State Bar of California Webinar (5/11/16)

• Moderator and Speaker, “To Tweet or Not to Tweet ‘Ethics in Social Media’,” State Bar of California Trust & Estates Webinar (4/13/16)

• Speaker and Panelist, "The Only Constant is Change: Giraldin, Drake v. Pinkham and an Aging Population," San Mateo, California (2/18/16)
• Speaker and Panelist, "Recent Developments," East Bay Trusts and Estates Lawyers, Oakland, California (2/17/16)
• Speaker and Panelist, "Recent Developments," East Bay Trusts and Estates Lawyers, Oakland, California (2/10/16)
• Speaker and Panelist, "Estate Planning Year in Review," Continuing Education of the Bar (CEB), San Francisco, California (2/3/16)
• Speaker and Panelist, "Estate Planning Year in Review," Continuing Education of the Bar (CEB), San Francisco, California (1/29/16)
• Moderator and Panelist, "Ethics in Social Media," Bar Association of San Francisco (1/7/16)
• Speaker and Panelist, "The Guide to the Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel," State Bar of California 39th Annual Fall Program, San Francisco, California (11/20/15)
• Speaker and Panelist, "The Only Constant is Change: Giraldin, Drake v. Pinkham and an Aging Population," Monterey Estate Planning Study Group, Monterey, California (10/20/15)
• Speaker and Panelist, "Guide to the Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel," State Bar of California 88th Annual Meeting, Anaheim, California (10/9/15)
• Panelist, "The Exam and You - Estate Planning Through Administration and Litigation," State Bar of California, Millbrae, California (6/26/15)
• Lecturer, "*What the Kwok!* I Killed My Client's Title Insurance," State Bar of California Trust & Estates Law Section 2015 Spring Symposium, Costa Mesa, California (5/15/15)
• Lecturer, "Did You Know Revocable Trusts Are Post-Mortem Asset Protection Plans?," PFAC 20th Annual Educational Conference, Burlingame, California (4/23/15)
• Lecturer, "*What the Kwok!* I Killed My Client's Title Insurance," San Mateo County Bar Association, San Mateo, California (4/16/15)
• Lecturer, "Selected Recent Developments Applicable to CPAs," California Society of Certified Public Accounts (CalCPA), Trust and Estate Committee, Campbell, California (3/19/15)

- Lecturer, “Has Your Estate Plan Killed Your Client’s Title Insurance?,” Continuing Professional Education Forum of the Central Cost, Salinas, California (3/17/15)
- Speaker and Panelist, “Ethics: To Tweet or Not? Ethics in Social Media,” State Bar of California 23rd Annual Estate & Gift Tax Conference, San Francisco, California (2/27/15)
- Speaker and Panelist, “Recent Developments,” East Bay Trusts and Estates Lawyers, Oakland, California (2/18/15)
- Panelist, “Recent Developments,” East Bay Trusts and Estates Lawyers, Oakland, California (2/11/15)
- Speaker and Panelist, “Recent Developments in Estate Planning, Probate and Trust Law,” The Bar Association of San Francisco, San Francisco, California (2/4/15)
- Speaker and Panelist, “Estate Planning Year in Review,” Continuing Education of the Bar (CEB), San Francisco, California (1/23/15)
- Lecturer, “Has Your Estate Plan Killed Your Clients’ Title Insurance?,” Santa Cruz County Bar Association, Santa Cruz, California (1/21/15)
- Speaker and Panelist, “Ethical Issues for Trust and Estate Attorneys: Liability to Non-Clients, to Successor Fiduciaries Occupying the Office of the ‘Client,’ to Incapacitated Clients, and to Family Members,” State Bar of California (1/21/15)
- Speaker and Panelist, “Ethical Issues in the Life Cycle of an Engagement,” The Bar Association of San Francisco (BASF), San Francisco, California (12/2/14)
- Speaker and Panelist, “Recent California Case Law and Legislative Developments,” American College of Trust and Estate Counsel (ACTEC), Pasadena, California (11/14/14)
- Lecturer, “Has Your Estate Plan Killed Your Client’s Title Insurance?,” Silicon Valley Bar Association, San Jose, California (7/16/14)
- Moderator and Panelist, “Fundamentals of Trusts and Estates Practice I: Wills,” State Bar of California (7/15/14)
- Lecturer, “Who Wants Title Insurance Anyway?,” East Bay Trusts and Estates Lawyers 5th Annual Spring Symposium, Oakland, California (6/3/14)
- Lecturer, “Fiduciary Records - Liability and Breach of Fiduciary Duty,” PFAC 19th Annual

Educational Conference, San Diego, California (4/24/14)
• Speaker and Panelist, “Recent Developments,” East Bay Trusts and Estates Lawyers, Oakland, California (2/19/14)
• Speaker and Panelist, “Recent Developments,” East Bay Trusts and Estates Lawyers, Oakland, California (2/12/14)
• Speaker and Panelist, “Estate Planning and Administration: Year in Review,” Continuing Education of the Bar (CEB), San Francisco, California (1/24/14)
• Lecturer, “Did You Know Revocable Trusts are Post-Mortem Asset Protection Plans?,” State Bar of California 37th Annual Fall Program, Marina del Rey, California (11/15/13)
• Speaker and Panelist, “American Taxpayer Relief Act: Estate Planning Under the New Law,” State Bar of California 86th Annual Meeting, San Jose, California (10/11/13)
• Lecturer, “Did You Know Revocable Trusts are Post-Mortem Asset Protection Plans?,” State Bar of California 86th Annual Meeting, San Jose, California (10/10/13)
• Speaker and Panelist, “Estate Planning Under the New Law,” California Society of Certified Public Accounts (CalCPA), Taxation & Estates and Trusts Committee, San Jose, California (8/1/13)
• Speaker and Panelist, “Legal Specialist Exam: Estate Planning, Trust and Probate Law,” State Bar of California, San Francisco, California (6/14/13)
• Moderator and Panelist, “Resolving Problems in Probate and How to Avoid Them in the First Place,” Continuing Education of the Bar of California (CEB), San Francisco, California (4/26/13)
• Lecturer, “Trust Me and My Records,” The Professional Fiduciary Association of California (PFAC) 18th Annual Education Conference, Monterey, California (4/25/13)
• Speaker and Panelist, “Creditor’s Claims,” Silicon Valley Bar Association, Santa Clara, California (2/20/13)
• Lecturer, “The Income Taxation of Trusts & Estates,” California Society of Certified Public Accounts (CalCPA), Trust & Estate Committee Meeting, Palo Alto, California (11/8/12)

• Speaker and Panelist, "One Small Click; One Giant Ethical Violation," 2012 Annual Meeting of the California Tax Bar & California Tax Policy Conference, San Diego, California (11/2/12)
• Lecturer, "$5,120,000 Lifetime Gift Tax Exemption - Too Good To Last!," Diablo Valley Estate Planning Counsel, Lafayette, California (10/17/12)
• Lecturer, "Trust Me and My Records," State Bar of California 85th Annual Meeting, Monterey, California (10/12/12)
• Lecturer, "Trust Me and My Records," The Professional Fiduciary Association of California (PFAC) Northern California Region Education Day, San Francisco, California (9/6/12)
• Lecturer, "Trust Me and My Records," Monterey Estate Planning Study Group, Monterey, California (8/16/12)
• Lecturer, "Property Tax Planning for Business Entities," San Mateo County Bar Association, San Mateo, California (7/19/12)
• Speaker and Panelist, "$5,120,000 Lifetime Gift Tax Exemption - Too Good To Last!," California Society of Certified Public Accounts (CalCPA), Peninsula & San Jose Chapters' 11th Annual Estate Planning Symposium, San Jose, California (7/11/12)
• Lecturer, "Trust Me and My Records," Mechanics Bank Annual Symposium, Contra Costa County Bar Association, Walnut Creek California (4/26/12)
• Lecturer, "Trust Me and My Records," Santa Cruz County Bar Association, Santa Cruz, California (3/21/12)
• Moderator and Panelist, "*Andersen v. Hunt*, The 2011 Case of the Year," State Bar of California (2/22/12)
• Moderator and Panelist, "Practical Problems in Trust Administration," Continuing Education of the Bar of California (CEB), Santa Clara and San Francisco, California (1/20/12 and 1/27/12)
• Speaker and Panelist, "The Issues with 'I Love You' Trusts, and Other Community/Separate Property Problems Confronting Married Couples," State Bar of California 35th Annual Fall Program, San Francisco, California (11/18/11)
• Speaker and Panelist, "The Issues with 'I Love You' Trusts, and Other Community/Separate Property Problems Confronting Married Couples,"

State Bar of California 84th Annual Meeting, Long Beach, California (9/17/11)

• Speaker and Panelist, “The 2010 Tax Act: An Estate Planning and Administrative Update,” State Bar of California 84th Annual Meeting, Long Beach, California (9/16/11)

• Speaker and Panelist, “Planning for and Dealing with a Client's Incapacity & Elder Law Remedies for Financial Abuse,” Continuing Education of the Bar of California (CEB), San Francisco, California (7/22/11)

• Lecturer, “Trust Me and My Records,” California Society of Certified Public Accountants (CalCPA) 2011 Annual Estate and Trust Conference, Burbank and San Francisco, California (6/16/11 and 6/17/11)

• Lecturer, “Update on New Estate Laws,” California Society of Certified Public Accountants (CalCPA), San Jose, California (5/19/11)

• Lecturer, “Limiting Fiduciary Risk in Administering 2010 Estates,” The Professional Fiduciary Association of California, 16th Annual Educational Conference, Monterey, California (5/6/11)

• Lecturer, "Understanding and Limiting Fiduciary Risk Administering 2010 Estates and New Laws for 2011," The Professional Fiduciary Association of California, Santa Clara County Chapter, Campbell, California (2/25/11)

• Moderator and Panelist, "Practical Problems in Probate," Continuing Education of the Bar of California (CEB), Santa Clara and San Francisco, California (1/21/11 and 1/28/11)

• Lecturer, "Modified Carryover Basis Rules for the Estates of 2010 Decedents," California Society of Certified Public Accountants (CalCPA), San Jose, California (11/18/10)

• Speaker and Panelist, "Death, Debts, and Taxes: Creditors' Claims," Silicon Valley Bar Association, Santa Clara, California (10/28/10)

• Moderator and Panelist, "Hot Topics in Conservatorships: Three Years Post-Reform," State Bar of California 83rd Annual Meeting, Monterey, California (9/25/10)

• Moderator and Panelist, "Practical Estate Asset Management in Today's Economy," Continuing Education of the Bar of California (CEB), San Francisco, California (6/4/10)

• Moderator and Panelist, "Practical Problems in Trust Administration," Continuing Education of the Bar of California (CEB), Santa Clara and San Francisco, California (1/22/10 and 1/29/10)
• Lecturer, “Property Tax Planning for Business Entities,” San Mateo County Bar Association, Estate Planning Section, San Mateo, California (11/20/09)
• Speaker and Panelist, "Death, Debts, and Taxes: Creditors' Claims Against a Decedent," Continuing Education of the Bar of California (CEB), Santa Clara, California (7/31/09 and 8/7/09)
• Speaker and Panelist, “Fundamentals of Probate and Other Nontrust Administration,” Continuing Education of the Bar of California (CEB), San Francisco, California (5/29/09 and 5/30/09)
• Lecturer, “Key Language in Trusts to Protect Trustees - 4 Key Things Fiduciaries Should Look For,” The Professional Fiduciary Association of California, Santa Clara County Chapter, Campbell, California (5/22/09)
• Speaker and Panelist, “Practical Problems in Probate,” Continuing Education of the Bar of California (CEB), Santa Clara, California (1/10/09)
• Lecturer, “Tax & Legal Issues Update,” The Santa Clara County Estate Planning Council, Santa Clara, California (5/19/08)
• Lecturer, “Petitioning for Instructions - When and Why,” Professional Fiduciary Association of California, Annual Conference, Burlingame, California (5/10/08)
• Lecturer, “Changing Our Plans in 2007: New Laws, New Interpretations, and How to Handle the Transition,” Estate Planning Council of Southern Alameda County, Fremont, California (1/11/07)
• Lecturer, “2006 Tax Update for Trusts, Estates, & Fiduciaries, and a Review of SB 754, Ch. 100 - the Unitrust Conversion,” Professional Fiduciary Association of California, Silicon Valley Chapter, Campbell, California (1/27/06)
• Lecturer, “‘The Revised Circular 230' and ‘California Property Tax Assessment’, Reassessment, and Valuation Reduction’,” Paralegal Association of Santa Clara County, Annual Educational Seminar, San Jose, California (10/15/05)
• Lecturer, “The Uniform Prudent Investor Act & the Uniform Principal and Income Act,” The

Professional Fiduciary Association of California Annual Conference, Millbrae, California (5/3/05)
• Speaker and Panelist, "The Continuing Search for WMDs (Ways to Manage Death, Disability and Dissolution)," the Monterey Estate Planning Study Group, Monterey, California (2/17/05)
• Lecturer, "Professional Fiduciary Management for Trustees," California State University, Fullerton, Extended Education, San Francisco and Oakland, California (6/26/04 and 10/9/04)
• Lecturer, "Fundamentals of Estate Planning," Sterling Madison Education Services, San Jose, California (6/5/03)
• Lecturer, "Dynasty Trusts: Demystifying Multi-Generational Estate Planning," California Society of Certified Public Accountants, Personal Financial Planning Committee, San Jose, California (3/5/03)
• Speaker, "Estate Planning for Seniors - What Every Agent Should Know," Senior Real Estate Specialists Continuing Education, California Real Estate Board, San Mateo, California (2002)

PROFESSIONAL HONORS/
PUBLISHED ARTICLES:

• Editor of Third Edition of the "Guide to the California Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel," published by State Bar of California Trust and Estates Section, March 2015
• Author of "The State of Title Insurance Five Years After *Kwok*," published in the California Trusts and Estates Quarterly, Vol. 20, Issue 4, 2014
• Author of "'Friending,' 'Tweeting,' and 'Connecting:' Ethical Issues Arising from Social Media," published in the California Trusts and Estates Quarterly, Vol. 18, Issue 3, Spring 2012
• Author of "*Kwok v. Transnation Title Insurance Company*: Another Thing for Estate Planners to Worry About," published in the California Trusts and Estates Quarterly, Vol. 18, Issue 2, Spring 2012
• Author of "The Trust Creditors Claims Procedure: To Do or Not To Do, That Is The Question," published in the California Trusts and Estates Quarterly, Vol. 17, Issue 1, Spring 2011
• Author of "Carrying on in 2010: The Modified Carryover Basis Regime and Complying With Reporting Requirements," published in the

California Trusts and Estates Quarterly, Vol. 16, Issue 1, Spring 2010
• Author of "Fractional Interest Transfers of Life Insurance Policies by Medi-Cal Applicants," published in the *Legal Network News*, CANHR, Vol. 16, No. 1 (Spring 2005)
• Peer Review Rated AV® Preeminent™ by Martindale Hubbell
• Northern California Super Lawyer, 2013-2017
• Judge Pro Tempore, Santa Clara County Superior Court (2005)
• Presidential Honors Society

PERSONAL: Mr. Kohlmann frequently competes in marathons and half and full marathons. He has qualified for the Boston Marathon multiple times, and has run Boston several times.