

Milestones on the Collaborative Trusts and Estates Road

- February 2012:** Collaborative Practice Silicon Valley (CPSV) forms a Trusts and Estates committee (now called Collaborative Estates and Trusts Committee or CPET). Monthly meetings established.
- March 2012:** Committee markets to local Trusts and Estates Professionals to attend a “brown bag” lunch to begin discussion of Collaborative concepts: debates, role plays, discussion elicits interest. Participants increase with each monthly meeting.
- June 2012:** From CPET training, marketing and protocol committees are formed.
- June—September 2012:** Training Committee creates the training / links with protocols while marketing the training itself.
- September 7&8, 2012:** First Collaborative Trusts and Estates team training focused specifically on Trusts and Estates alone.
- September 2012 — Present:** CPET gained new members from training, created T&E blog site at www.collabortiveestates.org; CPSV begins Integrating new members and modifies website to include Trusts and Estates.
- A presentation structure is created for talks to local groups and professional organizations. (Retirement communities, Senior centers, Bar Associations, Financial Planners, Psychotherapists etc.)
- Professionals involved in eldercare issues invited to monthly meetings.
- October 2013:** Trusts and Estates presentation at San Antonio, Texas International Academy of Collaborative Professionals, (IACP) Forum providing both an instructional roadmap on building a viable T&E Collaborative Presence and materials including protocols, training information, and marketing.
- April 2014:** CP CAL first Trusts and Estates workshop presented.
- May 2014:** Teleconference with Heritage Institute CEO Rod Zeeb, John Warnick of Purposeful Planning Institute, Peter Johnson and Nancy Ross with 40 attendees: Learning about each other’s purpose and structure: linking with allied organizations.
- June: 2014:** Collaborative Practice California (CP CAL) creates a Trusts and Estates committee. Sub-committees formed: *Training, Protocols, Public Education*.
- August 2014:** “*Inside Information*” a leading financial publication, reports on Collaborative Trusts and Estates: interview by Bob Veres.
- November 7 & 8, 2014:** Second California Collaborative Interdisciplinary Team Trusts and Estates Training in San Mateo California.