

Collaborative Interdisciplinary Team Trusts & Estates Training

Helping Families Manage Conflict and Preserve Relationships

For Attorneys, Financial Specialists, Elder Care & Licensed Mental Health Professionals

At This Unique Training, You Will Learn:

- How to work as a Collaborative Team to manage current or prevent future family conflict
- Skills to begin a Collaborative Case
- Protocols developed for Trust and Estates Cases
- Ethical considerations when working in the Collaborative Model

Build your team: Bring a Colleague!

WHERE: Contra Costa County Bar Association
2300 Clayton Rd., Suite 650
Concord, CA 94520

WHEN: Friday and Saturday, September 14 - 15, 2018
9:00 a.m. - 5:00 p.m.
Registration @ 8:30 a.m.

COST: **\$495.00**
\$445.00 Early Bird Registrations through 8/31/2018
For CCCBA members: **\$475.00** | **\$425.00** Early Bird

Includes: Lunch & Beverages
Materials, Demonstrations, Interactive
Exercises, and New Tools to begin practicing.

Co-sponsored by Contra Costa County Bar Association, Collaborative Practice California, Collaborative Practices of Silicon Valley, East Bay

Trainers: *Nancy Ross, LCSW, BCD, *Alan L. Nobler, JD, Maureen O'Connell, JD, *Keith Britany, MFT, *Kamela Laird, JD,
*Beth McClelland, CFP®, CDFA®, and Jeff Lambert, CFP® *Trainers meet IACP standards

The **Contra Costa County Bar Association** certifies that this activity has been approved for 10 hours of Estate Planning and Probate Specialization and 1 hour of Legal Ethics, MCLE credit by the State Bar of California, Provider #393.

Collaborative Practice California (CP CAL) is approved by the **California Psychological Association** to provide 10 Continuing Professional Education Units for psychologists.

The **California Psychological Association** is approved by the **Board of Behavioral Science** for Continuing Education Units for LCSW's and MFT's. CP CAL maintains responsibility for this program and its content. Provider #COL141.

This training is co-sponsored by **Bartholomew & Wasznicky, LLP (BW)**, a CFP Board of Standards Sponsor #2647. This course is approved for 10 hours of credit.

Please register online at bit.ly/2uxZvCD for this training

For more information, go to www.cpcal.com/our-approach/trusts-estates-solutions/ or call Nancy Ross at 408-973-1001

Refunds will be given outside of 30 days of the training, subject to \$50 processing fee. *Refunds within 30 days of the training will not be given.*

Hotel Information:

Clarion Hotel
1050 Burnett Ave, Concord, CA 94520
(480) 719-7971

The Clarion Hotel has provided a special rate for attendees of **\$109.00** a night, which includes, Wi-Fi, breakfast, and free parking.
To obtain this rate, please identify yourself as part of "Collaborative Practice" or "Contra Costa County Bar Association."