Margaret M. Hand
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Trust & Estates Private Practice

- Estate planning for individuals and families, including:
  - drafting revocable trusts and wills;
  - drafting irrevocable life insurance trusts, grantor-retained annuity trusts, grantor-retained uni-trusts, charitable remainder trusts;
  - family limited partnerships

- Probate and trust administration, including advising fiduciaries (trustees, executors, conservators, guardians and attorneys-in-fact) on an on-going basis.

- Conservatorships and guardianships

- Estate-related litigation, such as will contests, contested conservatorships, actions against fiduciaries for breach of fiduciary duty, defense and prosecution of elder-abuse actions (primarily financial elder-abuse).

- Mediation of probate, trust and conservatorship disputes

Published Decision

Estate of Lensch (2009) 177 Cal. App. 4th 667

Education

Boalt Hall School of Law (J.D., 1993)

University of California, San Diego (B.A. with honors, 1989)

Bar Admissions/Certifications

Certified Specialist in Estate Planning, Trust and Probate Law, State Bar of California, Board of Legal Specialization

Fellow, American College of Trust and Estate Counsel (ACTEC)

Member (2004 through 2010), Executive Committee, Trusts and Estates Section, State Bar of California: Chair, Trust and Estate Administration sub-committee; Past Editor and Executive Editor, *California Trusts and Estates Quarterly*

Member: Alameda County, Contra Costa County and American Bar Associations; State Bar of California

Past Chair, Estate Planning, Trust & Probate Law Advisory Commission to the Board of Specialization, California State Bar

> The Commission sets the standards for specialist certification in the area of Estate Planning, Trust and Probate Law and administers the specialist exam.

Rated AV by Martindale-Hubble

San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2012, 2013, 2016
San Francisco Magazine, Top 100 Super Lawyers, Northern California, 2009, 2010, 2011, 2012, 2013, 2014, 2015 and 2016
San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2008
San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2007
San Francisco Magazine, Super Lawyers, Northern California, 2006
San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2005

Past Chair, Trust Committee of the Alameda County Bar Association Estate Planning Trust and Probate Law Section

Admitted in 1993 to practice before the California Supreme Court, the Northern California District of the United States District Court and the United States Court of Appeals for the Ninth Circuit

Publications

Fiduciary Accounting Handbook (CEB, 2015)

Author, Chapter 8, "Fiduciary Accounting," *California Trust Practice* (Matthew Bender, 2012 edition)

Consultant, Crossover Issues, (Continuing Education of the Bar, 2012)

Author, Chapter 14, "Creditor's Claims," *Decedent Estate Practice* (Continuing Education of the Bar, 2012 edition)

Author, Chapter 10, "Creditor's Rights Against the Trust," and Chapter 10A, "Creditor's Rights Against Trust Beneficiary's Interest," *California Trust Administration* (Continuing Education of the Bar 2012 edition)

Author, Chapter 15, "Paying, Defending, and Objecting to Trustee's Attorneys' Fees and Fee Shifting in Trust Litigation," *The Matthew Bender ® Practice Guide: California Trust Litigation* (LexisNexis Matthew Bender 2012)

Author, Chapter 1, "Is a Conservatorship Needed?" and Chapter 5, "Starting Conservatorship Proceedings," *California Conservatorship Practice* (Continuing Education of the Bar, 2008 edition)

Author, "Making the Other Guys Pay: Attorney Fees and the Common Fund Theory," Winter 2005, *California Trusts and Estates Quarterly*, Vol. 11, Issue 4 (State Bar of California)

Author, "The Basics of Estate Planning," *California Bar Journal*, October 2005, (State Bar of California)

Author, "A Mechanism to Empty the Bypass Trust," Spring 2003, *California Trusts and Estates Quarterly*, Vol. 9, Issue 1 (State Bar of California)

Author, "The States' Right-to-Die Laws and Active Euthanasia," *Legal Reference Services Quarterly*, Vol. 12(2/3) 1992

Programs and Courses

Alternative Dispute Resolution:

Alameda County Bar Association ADR Executive Committee
Dispute Resolution Before They Die
Oakland, March 16, 2017

Fiduciary Accounting:

California CPA Educational Foundation
Settled and Approved: Fiduciary Accounting from Start to Finish
Los Angeles, January 2017
Los Angeles, December 2016
San Francisco, November 2016
San Francisco, December 2015
Newport Beach, November 2015
Fresno, August 2015
Los Angeles, January 2015
San Diego, January 2015
Los Angeles, December 2014
San Francisco, August 2014
San Francisco, January 2014
Costa Mesa, December 2013
Pasadena, January 2012
San Jose, December 2011
Pleasanton, August 2011
San Diego, July 2011
San Fernando, January 2011
San Francisco, December 2010
Los Angeles, November 2010
Fresno, August 2010

Bar Association of San Francisco
Fiduciary Accounting: The Things They Would Not Let Me Say in the Book
San Francisco, May 4, 2016

38th Annual UCLA/CEB EP Institute
Fiduciary Accounting: The Things They Would Not Let Me Say in the Book
Manhattan Beach, April 29, 2016

Santa Barbara Estate Planning Council
Fiduciary Accounting: The Things They Would Not Let Me Say in the Book
Santa Barbara, April 26, 2016

Alameda County Law Library
Fiduciary Accounting: The Things They Would Not Let Me Say in the Book
Oakland, March 24, 2016

Continuing Education of the Bar
Fiduciary Accounting
Los Angeles, April 23, 2015

Fiduciary Accounting
San Francisco, April 20, 2015

Estate Accounting: Discharging Fiduciary Responsibility
San Francisco, May 28, 2012

6th Annual East Bay Trust & Estates Lawyers Luncheon
How to Spot Problems with an Accounting
Oakland, November 13, 2015

California CPA Advanced Estate Planning Symposium
What CPAs Need to Know About Fiduciary Accounting
Alamo, November 9, 2015

Alameda County Law Library
Fiduciary Accounting in California Probate Court
Oakland, September 22, 2015

Professional Fiduciary Association of California
Fiduciary Accountings: Speak in the First Person
Burlingame, April 20, 2015

Estate Accounting: Discharging Fiduciary Responsibility
San Francisco, May 28, 2012

State Bar Annual Convention
Trust Accounting Boot Camp
Long Beach, September 18, 2011

State Bar, Solo Summit
Trust Accounting Boot Camp
June 24, 2011

State Bar Annual Convention and State Bar "Roadshow"
Fiduciary Accountings: Put 'Em Together, Pick 'Em Apart
San Francisco, November 2, 2007
Anaheim, September 29, 2007

Miscellaneous Programs - Fiduciary Accounting

Fiduciary Accounting (lecturer and moderator)

Sacramento, San Francisco, San Diego, Los Angeles
Autumn 2006

California State University, Fullerton

Fiduciary Accounting (lecturer, Private Professional Fiduciary Certificate Program), San Francisco, California, 2003 and 2004

Conservatorships:

San Joaquin County Trusts & Estates Section

Conservatorship Boot Camp: An Overview of Probate Conservatorships

Stockton, February 25, 2016

East Bay Trust & Estates Lawyers

Conservatorship Boot Camp: Is a Conservatorship Needed?

Oakland, September 25, 2015

Creditor's Claims:

East Bay Trust and Estates Lawyers

Trust Administration Boot Camp: Creditor Rights

Oakland, September 30, 2016

State Bar of California

Creditor's Rights in Decedents' Estates, Including Non-Probate Transfers

Sacramento, June 24, 2016

American Bar Association

Creditors Rights in Decedents' Estates Including Non-Probate Transfers

(Webinar), Oakland, November 17, 2015

Continuing Education of the Bar (CEB)

Tools of The Trade: Sophisticated Techniques in Estate (lecturer)

Planning and Administration
Los Angeles and San Francisco, March 2011

Death, Debts and Taxes: Creditor's Claims Against a Decedent (lecturer)

Sacramento, July 31, 2009
Silicon Valley Bar Association, October 28, 2010

Conservatorships (lecturer)

San Francisco, June 9, 2006

Fundamentals of Estate Planning (lecturer and moderator)

San Francisco (two-day program)
May 2005, April 2002, February 2001, July 1999

Basics of Drafting Revocable Trusts (lecturer and moderator)
San Francisco and Sacramento
August 2006, July 1999

Powers of Attorney (lecturer), 1998

California State Bar, Section Education Institute
"My Debtor Has Died, What Do I Do?"
Santa Monica, January 2006

Elder Abuse:

Legal Assistance for Seniors Seventh Annual Conference on Elder Abuse
Rising to the Challenge: Protection Advocacy Empowerment
San Francisco, May 21, 2012

Recent Developments:

CEB 2016 Estate Planning & Administration Year in Review
Annual Review of Legislative Changes
San Francisco, January 27, 2017

EBTEL Recent Developments
Annual Review of California and Federal Updates
Oakland, February 10 & 17, 2016

CEB 2015 Estate Planning & Administration Year in Review
Annual Review of Legislative Changes
San Francisco, January 29, 2016

32nd Annual UCLA/CEB Estate Planning Institute
Highlights of Current California Developments
Los Angeles, May 1 and 2, 2015

32nd Annual UCLA/CEB Estate Planning Institute
Highlights of Current California Developments
Los Angeles, May 14, 2010

Fresno County Bar Association
2010 California State Court Recent Developments in Trusts & Estates
January 22, 2010

File Retention:

Estate Planning, Trust & Probate Law Sections, Local Bar Associations
My Lips (and Files) Are Sealed! Or Are They?
When an Attorney and the Attorney's Files Become Evidence
San Francisco, October 7, 2008
Marin, April 16, 2008, Alameda, March 12, 2008

Attorneys' Fees and Fiduciaries' Fees:

Professional Fiduciary Association of California
Best Practices: Accountings and Fee Petitions
San Francisco, September 12, 2013

Bar Association of San Francisco
Best Practices When Representing a Private Professional Fiduciary in Litigation
San Francisco, September 10, 2013

Tri-Valley Estate Planning Council
Helping Private Professional Fiduciaries Collect Reasonable Fees for Superlative Services
Pleasanton, May 2, 2013

Redwood Empire Estate Planning Council
Helping Private Professional Fiduciaries Collect Reasonable Fees for Superlative Services
Santa Rosa, February 6, 2013

East Bay Trust and Estates Lawyers
Helping Private Professional Fiduciaries Collect Reasonable Fees for Superlative Services
Oakland, January 9 and 16, 2013

15th Annual Contra Costa County Estate Planning Symposium
Trustee's Attorney Fees: Paying Them, Making Someone Else Pay Them, Fighting About Them
March 6, 2008

Estate Planning, Trust & Probate Law Section, Bar Association of San Francisco
Making the Other Guys Pay: Attorneys' Fees and the Common Fund Theory
San Francisco, May 3, 2006

Estate Planning, Trust & Probate Law Section, Alameda County Bar Association
Making the Other Guys Pay: Attorneys' Fees and the Common Fund Theory
Oakland, March 15, 2006

Estate Planning:

Diablo Valley Estate Planning Council
Spendthrift Trusts, Limited Protection for Deadbeat Beneficiaries
Lafayette, January 18, 2017

Women's Cancer Resource Center
Factors that Influence the Cost of an Estate Plan
Oakland, July 2015

Golden Gate University
Estate Planning Lab
San Francisco, November/December 2012

76th Annual Meeting, State Bar of California
"They're Everywhere! The Use and Taxation of Powers of Appointment in Estate Planning," Anaheim, September 2003

National Business Institute (NBI)
A Practical Guide to Estate Administration in California
Oakland, California, 1998

How to Draft Wills and Trusts in California,
Oakland, California, March 1997

Litigation:

San Francisco State University
Paralegal Studies Program, Lecture: Probate Litigation, May 1999

Miscellaneous:

"Changed Circumstances in Property and People: The Four A's - Ademption, Abatement, Anti-lapse and Advancements"
2011 Probate and Mental Health Institute -
Administrative Office of the Courts Education Division/CJER
San Ramon, California, March 2011

"Marital Agreements, the Third Rail of Estate Planning?"
Continuing Education of the Bar
Tools of the Trade: Sophisticated Techniques in Estate Planning and Administration
March 18, 2011

Tri-Valley Estate Planning Council,
March 3, 2011

Mediation Training:

Harvard, Mediating Disputes
October 2016

Steven Rosenberg, Advanced Mediation Training
June 2015

ACBA, Probate Mediation: Psychology, Law and Practice
February 7, 2013

Hon. Barry Goode, Peter Mankin, Esq.
Mediating Self-Represented Litigants
December 19, 2012

Steven Rosenberg, Kathy Siegel, Jayne Lee, et al.
Probate Mediation Training
January 7, 2011

CCBA, Mediating with Self-Represented Litigants
September 2010

Steven Rosenberg, Advanced Mediation Training
April 2009

Steven Rosenberg, 15-hour Advanced Mediation Training
March 2007

Steven Rosenberg, 40-hour Basic Training
February 2004

Employment:

Hartog, Baer & Hand, PC
January 1, 2016 to current

Hand & Little, PC
January 1, 2014 to December 31, 2015

Law Offices of Margaret M. Hand
February 23, 2004 to December 31, 2013

Horton, Roberts & Hand
1998 to February 22, 2004

Johnston, Horton & Roberts
Associate: April 1994 until 1998