



Orange County  
Bankruptcy Forum

# SEPTEMBER 14, 2023

## Worlds Collide - When Integrated Estate Planning Meets Bankruptcy

### **SPEAKERS**

Thomas H. Casey  
*The Law Offices of Thomas H. Casey, Inc.*

Jeffrey M. Verdon  
*Falcon Rappaport & Berkman LLP*

### **MODERATOR**

Laila Masud  
*Marshack Hays LLP*

**In person with lunch at Snell & Wilmer  
(11:30-1 pm; space is limited)**

\$25 OCBF Member / \$35 non-member

**By Zoom (12-1 pm)**

\$15 OCBF Member / \$25 non-member

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### **HOSTED BY**

Snell & Wilmer  
600 Anton Boulevard, Suite 1400  
Costa Mesa, CA 92626

Comprehensive estate planning often includes planning for tax efficient generational wealth transfer and asset protection from future unforeseen lawsuit creditors and predators. The taxpayer/debtor who ends up in bankruptcy may find the tax and asset protection planning will not hold up under the scrutiny of the bankruptcy court.

This panel of bankruptcy and estate & trust and asset protection practitioners will examine the "why" and "how" of integrated estate planning with asset protection, and just how fragile such planning can be when adjudicated in the bankruptcy forum.

### **PRODUCED BY**

Richard H. Golubow  
*Winthrop Golubow Hollander, LLP*  
David M. Goodrich  
*Golden Goodrich LLP*

*This activity has been approved for Minimum Continuing Legal Education by the State Bar of California in the amount of 1.0 hour of general participatory CLE. The Orange County Bankruptcy Forum certifies that this activity conforms to the standards for the approved education activities prescribed by the rules and regulations of the State Bar of California governing MCLE.*

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