



East Bay Council News

February 2009

President's Message

Greetings All and Happy New Year! As we put 2008 behind us (and the financial, political, and other turmoil that went with it), 2009, by comparison, seems to be filled with opportunity. Our program this month is a perfect start to this year, as it provides us an opportunity – one that will improve our respective practices and enhance our client relationships through collaboration. Coming from an organization that is ever increasing its focus on both internal and external collaboration, I speak from personal experience when I say that it has evolved from a “buzzword”, to a useful tool, to an invaluable way of life. Our speakers are well versed on the topic and sure to please, so be sure to join us on February 9th! Until then, cheers to you all in the New Year! -*Kelly Johnston*

**Monday
February 9, 2009**

Scott's Seafood Restaurant

Jack London Square
Oakland

6:00 PM Wine Reception

6:30 PM Dinner Meeting

\$35.00 paid in advance

\$40.00 at the door

Please make your check payable to “EBEPC” and mail to Bonni in the enclosed return envelope before Thursday, February 5th or call 925.686.4819

Using Collaborative Law—and a Team Approach— to Resolve Estate Disputes

**Team: John D. Raskin, Esq., Stephen D. Popell, CMC
(plus a special guest!)**

As estate planning professionals, we are well aware of the potential for interpersonal conflicts in which our clients may find themselves. If they don't already exist at the outset of the engagement, disagreements between our clients and family members may soon develop, and relationships can deteriorate. When such a conflict surfaces or worsens, the opportunity to provide productive advice and counsel can easily be thwarted. Knowing how to spot and address these potential landmines, however, can provide opportunities to heal relationships, thus providing unique value to the client, while helping to enrich one's overall professional experience.

Mr. Raskin, a certified specialist in Estate Planning, Trust and Probate Law practicing in Berkeley, is an advocate of adapting to estate disputes the collaborative practice model that has been developed for many years in family law. He will explain the collaborative process in which clients and their counsel sign an agreement to work together in good faith to find solutions, and not to litigate.

He will touch on some of the special advantages for the parties to this process, and some of the ethical and logistical issues that are involved in following this model. In addition to his estate planning and administration practice Mr. Raskin is also a mediator concentrating in trust and probate cases, and is vice-chair of the American Bar Association Committee on the Psychological and Emotional Aspects of Estate Planning. He has gone through training to work in the collaborative process and will discuss that as well.

Mr. Popell, from Los Altos, is a certified management consultant and business valuation expert who has worked extensively in collaborative family law cases. He will talk about his experience in how to be a neutral expert in the collaborative process, and how the best settlement results have come from a team approach that may include financial advisors, accountants, and therapists.

Meeting Sponsored By:

**Sara DuBois
East Bay Community Foundation
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Oakland, CA 94612
510.208.0817**