

CHUCK HAROLD, JR.  
SUPERIOR COURT OF THE STATE OF WASHINGTON  
FOR THE COUNTY OF KING  
DECLARATION OF CHARLES A. HAROLD, JR. IN SUPPORT OF  
OPPOSITION OF RESPONDENTS TO TRUSTEE'S MOTION  
FOR PARTIAL SUMMARY JUDGMENT ON TRUSTEE'S ENTITLEMENT TO  
EMPLOY COUNSEL ON BEHALF OF TRUST AND PAY COUNSEL FROM  
TRUST FUNDS

HONORABLE WYMAN YIP  
Hearing Date: October 6, 2023  
Hearing Time: 10:00 a.m.

**SUPERIOR COURT OF THE STATE OF WASHINGTON  
FOR THE COUNTY OF KING**

In re the Matter of

Case No. 22-4-08326-1 KNT

THE SHARON M. HAROLD  
IRREVOCABLE TRUST DATED  
NOVEMBER 12, 2004,

a Trust.

**DECLARATION OF CHARLES A.  
HAROLD, JR. IN SUPPORT OF  
OPPOSITION OF RESPONDENTS TO  
PETITIONER TRUSTEE'S MOTION  
FOR PARTIAL SUMMARY JUDGMENT  
ON TRUSTEE'S ENTITLEMENT TO  
EMPLOY COUNSEL ON BEHALF OF  
TRUST AND PAY COUNSEL FROM  
TRUST FUNDS**

I, Charles A. Harold, Jr. declare as follows:

1. I am a Residual Beneficiary of the Sharon M. Harold Irrevocable Trust dated November 12, 2004 ("Trust"). I also have power of attorney for Sharon M. Harold along with my sister Amy Jane Small, and we are attorneys-in-fact for her as well. I have personal knowledge of the facts set forth herein. I make this declaration in support of the Opposition to Motion for Partial Summary Judgment on Trustee's Entitlement to Employ Counsel on Behalf of Trust and Pay Counsel from Trust Funds.

2. In preparation for this Opposition, I reviewed Paice's Accounting of Trust. My review also included examining the bank records of Grantor.

3. On Schedule J of Paice's 2010 accounting, submitted by David Llewellyn, there was an entry by Paice that stated: "3/29/10 CASHIERS Sharon Harold - Distribution (Note 1) \$8,000." At the bottom of the Schedule J page there was a note

1 from Trustee which read, "Note 1 Documentation for cashier's check for \$8,000 on  
2 3/29/10 is pending."

3 4. I reviewed Grantor's bank records for that time period and found a  
4 deposit in Grantor's USAA bank account for \$2,000 on 4/1/2010, one day after the  
5 \$8,000 cashier's check was issued to Grantor.

6 5. I then reviewed other bank records given to me by Grantor right after the  
7 TEDRA petition was filed. I obtained them during a trip to Grantor's home in  
8 approximately January 2023.

9 6. I located a copy of the \$2,000 cashier's check issued by BECU to  
10 Grantor on 3/29/2010, the same day the \$8,000 cashier check was issued according  
11 to Paice's 2010 Schedule J.

12 7. To date, Grantor nor I have received any explanation or documentation  
13 from Paice per his Note 1 on Schedule J.

14 8. I contacted David Llewelyn and asked why Paice's Accounting of Trust  
15 showed a cashier check for \$8,000 that was actually a cashier check for \$2,000. On  
16 September 19, 2023, I asked Llewelyn to verify if this meant the accounting was  
17 \$6,000 short, which meant that the Trust was missing \$6,000. He said he has received  
18 no back-up documentation from Paice, so he cannot verify the discrepancy without  
19 further tracing.

20 9. I compiled the documents I reviewed and highlighted my findings in  
21 yellow so the reader can trace the money through the various stages of banking.  
22 Attached hereto as Exhibit 1 is a true and correct copy of the documents I reviewed.

23 10. I reviewed Gail Mautner's profile page on the Lane Powell website and  
24 found that she had written an *amicus curiae* brief in the *Jones* case cited in the  
25 Opposition. I also discovered that she is an expert in TEDRA law and teaches WSBA  
26 CLE classes on this and other subjects. Attached hereto as Exhibit 2 is a true and  
27 correct copy of the profile page I printed out from LanePowell.com found at  
28 <https://www.lanepowell.com/Our-People/Gail-E-Mautner>.

1           11. I am in the process of obtaining a copy of the *amicus curiae* brief written  
2 by Ms. Mautner from the Washington State Bar under the Freedom of Information Act.

3           I declare under penalty of perjury under the laws of the State of Washington  
4 that the foregoing is true and correct,

5  
6 DATED: September 25, 2023

s/Charles A. Harold, Jr.

Charles A. Harold, Jr.

# **EXHIBIT 1**

**Sharon M Harold Irrevocable Trust**  
**Prepared Financial Statements**  
**December 31, 2010**

**Llewellyn Accountancy Corporation**  
**1150 Foothill Boulevard, Suite G**  
**La Cañada, California 91011**  
**(818) 952-1040**

To David Paice, Trustee  
**Sharon M Harold Irrevocable Trust**  
Burien, Washington

The accompanying financial statements of the Sharon M Harold Irrevocable Trust as of December 31, 2010 and for the period March 10, 2010 to December 31, 2010, were not subjected to an audit, review, or compilation engagement by us and we do not express an opinion, a conclusion, nor provide any assurance on them.

The Trustee has elected to omit substantially all of the disclosures required by accounting principles generally accepted in the United States of America. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the trust's financial statements. Accordingly, the financial statements are not designed for those who are not informed about such matters.

  
La Cañada, California

June 29, 2022

**SHARON M HAROLD IRREVOCABLE TRUST**  
**Accounting of Trustee**  
**For Period March 10, 2010 to December 31, 2010**

**SCHEDULE J - DISTRIBUTIONS TO BENEFICIARY**

<u>Date of Payment</u>	<u>Check No.</u>	<u>Name</u>	<u>Amount</u>
3/29/2010	CASHIERS	Sharon Harold - Distribution (Note 1)	\$ 8,000.00
4/25/2010	1003	Sharon Harold - Distribution	2,000.00
5/27/2010	1004	Sharon Harold - Distribution	1,700.00
6/27/2010	1005	Sharon Harold - Distribution	1,700.00
6/30/2010	1006	Sharon Harold - Distribution	500.00
7/18/2010	1007	Sharon Harold - Distribution	1,700.00
8/17/2010	1008	Sharon Harold - For expenses incurred	3,500.00
8/23/2010	1010	Sharon Harold - Distribution	1,700.00
9/12/2010	1011	Sharon Harold - Distribution	300.00
10/1/2010	1012	Sharon Harold - Distribution	2,100.00
10/30/2010	1013	Sharon Harold - Distribution	2,100.00
11/30/2010	1014	Sharon Harold - Distribution	2,100.00
12/21/2010	1015	Oregon Imaging Center - Medical Exp Sharon	714.00
12/29/2010	1016	Sharon Harold - Distribution	2,100.00
<b>TOTAL</b>			<b><u><u>\$30,214.00</u></u></b>

Note 1      Documentation for cashiers check for \$8,000 on 3/29/2010 is pending.

THIS DOCUMENT HAS AN ARTIFICIAL WATERMARK PRINTED ON THE BACK. THE FRONT OF THE DOCUMENT HAS A MICRO-PRINT SIGNATURE LINE. ABSENCE OF THESE FEATURES WILL INDICATE A COPY.

more than  
just money

BSU

Purchaser:  
David Paice

OFFICIAL CHECK

16-4220  
1220

42059872

Cashbox: 11029-2063917

Date: 03-29-2010

P.O. Box 97050, Seattle, WA 98124-9750  
206-439-5700 Toll Free 800-233-2328

Sharon Harold Trust

Two Thousand and 00/100\*\*\*\*\*

DOLLARS \$2,000.00

PAY TO Sharon Harold  
THE  
ORDER OF

VOID

Drawer: Boeing Employees' Credit Union

Kathie Elser

J. Dallas

April 2010 Expenses  
Issued By: MONEYGRAM PAYMENT SYSTEMS, INC. P.O. BOX 9476 MINNEAPOLIS MN 55480  
Drawee: PREFERRED BANK LOS ANGELES, CA

MP

⑈42059872⑈ ⑆122042205⑆0160010356058⑈

ENDORSE CHECK HERE

\* Sharon Harold

for deposit only to USA FSB

Acct # [REDACTED] BCB

DO NOT SIGN/WRITEN/STAMP BELOW THIS LINE  
FOR FINANCIAL INSTITUTIONS USAGE ONLY





SHARON M HAROLD  
3615 FRONTAGE RD APT 5  
REEDSPORT OR 97467-1736

	ACCOUNT NUMBER
2	802-2
22	STATEMENT DATE
	04/22/10

PAGE 1

BALANCE LAST STATEMENT	NO OF DEBITS PAID	TOTAL AMOUNT OF DEBITS PAID	NO. OF DEP	TOTAL AMOUNT OF DEPOSITS MADE	SERVICE CHARGES	BALANCE THIS STATEMENT
643.12	24	2,882.43	6	2,992.65	.00	753.34

Please examine immediately and notify if incorrect. If no report is received within 60 days, the account will be considered correct.

	OVERDRAFT (OD) FEES	NONSUFFICIENT FUNDS (NSF) FEES	INTEREST PAID ON OVERDRAWN BALANCES
This Statement	0.00	0.00	0.00
This Year's Statements	0.00	0.00	0.00

Over fee payments/refunds made by USAA will not reduce the totals on this chart.

AS OF 1/31/09, NON-USAA VISA CARDS MAY NO LONGER BE USED  
FOR OVERDRAFT PROTECTION OR TO MAKE CASH ADVANCES TO YOUR  
ACCOUNT. MAKE CHANGES ON USAA.COM (KEYWORD: OVERDRAFT).

#### DEPOSITS AND OTHER CREDITS

DATE.....	AMOUNT.	TRANSACTION DESCRIPTION
03/23	300.00	USAA FUNDS TRANSFER CR
04/01	502.00	ACH CREDIT 040210
		US TREASURY 312 SOC SEC ***** SSA
04/01	2,000.00	DEPOSIT @ HOME
04/19	50.00	USAA FUNDS TRANSFER CR
04/22	140.60	DEPOSIT @ HOME
04/22	0.05	INTEREST PAID

#### CHECKS

DATE..	CHECK NO.....	AMOUNT	DATE..	CHECK NO.....	AMOUNT
03/29	1342	14.50	04/14	1344*	82.86

#### OTHER DEBITS

DATE.....	AMOUNT.	TRANSACTION DESCRIPTION
03/23	17.26	DEBIT CARD PURCHASE 032310
		BUDDYS DINER EUGENE OR
03/24	49.99	ACH DEBIT 032410
		DIRECTV ONLINE PMT *****3POS
03/24	495.80	ACH DEBIT 032410
		CHASE EPAY *****6930
03/25	57.29	ACH DEBIT 032510
		VERIZON ONLINE PMT *****3POS
03/29	16.07	DEBIT CARD PURCHASE 032910
		SAFeway STORE00002840 REEDSPORT OR
03/29	41.00	DEBIT CARD PURCHASE 032910
		MIRASTAR 62001 Q39 COOS BAY OR

10750 McDermott Freeway  
San Antonio, TX 78288-0544  
800-531-2265

In Case of Errors or Questions About Your Electronic Transfers, Telephone us or Write us at the address and number listed at the top of this page as soon as you can, if you think your statement or receipt is wrong or if you need more information about a transfer on the statement or receipt. We must hear from you no later than 60 days after we sent you the FIRST statement on which the error or problem appeared.

- Tell us your name and account number (if any).
- Describe the error or the transfer you are unsure about, and explain as clearly as you can why you believe it is an error or why you need more information.
- Tell us the dollar amount of the suspected error.

**THIS FORM IS PROVIDED TO HELP YOU RECONCILE THIS STATEMENT BALANCE TO YOUR CHECKBOOK BALANCE.**

(Those written which have not been charged to your account)

[illegible]

(1) BALANCE THIS STATEMENT (SHOWN ON FRONT PAGE)	\$ _____
(2) ADD DEPOSITS NOT SHOWN ON THIS STATEMENT (IF ANY)	+ _____
(3) SUBTOTAL	\$ _____
(4) SUBTRACT TOTAL OF CHECKS OUTSTANDING (IF ANY)	- _____
(5) ADJUSTED BANK BALANCE	\$ _____

(6) CHECK REGISTER BALANCE	\$	
(7) ADD CREDITS WHICH APPEAR ON THIS STATEMENT THAT HAVE NOT BEEN RECORDED IN YOUR REGISTER (IF ANY)	+	
(8) ADD INTEREST CREDITED TO YOUR ACCOUNT (IF ANY)	+	
(9) SUBTRACT OTHER CHARGES (IF ANY)	-	
(10) ADJUSTED CHECK REGISTER BALANCE	\$	

\* Be sure to record in your check register.

**Line 5 and Line 10 should now agree. If not, check the following items in your register:**

- Are all deposits accounted for?
- Are all amounts entered correctly?
- Are all automatic transactions accounted for?
- Are all additions and subtractions accurate?



SHARON M HAROLD  
3615 FRONTAGE RD APT 5  
REEDSPORT OR 97467-1736

	ACCOUNT NUMBER
2	802-2
22	STATEMENT DATE
	04/22/10

PAGE 2

BALANCE LAST STATEMENT	NO OF DEBITS PAID	TOTAL AMOUNT OF DEBITS PAID	NO. OF DEP	TOTAL AMOUNT OF DEPOSITS MADE	SERVICE CHARGES	BALANCE THIS STATEMENT
643.12	24	2,882.43	6	2,992.65	.00	753.34

Please examine immediately and report if incorrect. If no report is received within 60 days, the account will be considered correct.

	OVERDRAFT (OD) FEES	NONSUFFICIENT FUNDS (NSF) FEES	INTEREST PAID ON OVERDRAWN BALANCES
This Statement	0.00	0.00	0.00
This Year's Statements	0.00	0.00	0.00

Note: Fee reversals/refunds made by USAA will not reduce the totals on this chart.

#### OTHER DEBITS

DATE	AMOUNT	TRANSACTION DESCRIPTION
03/29	45.62	DEBIT CARD PURCHASE 032910 SAFEWAY STORE00002840 REEDSPORT OR
03/29	100.00	USAA FUNDS TRANSFER DB
04/05	69.14	POS DEBIT 040310 1499 HWY AVE REEDSPORT OR
04/05	600.25	USAA FUNDS TRANSFER DB
04/05	157.77	ACH DEBIT 040510 AARP HEALTH CARE PREMIUM *****6231
04/06	29.80	ACH DEBIT 040510 UHG OVATIONS PREMIUM
04/06	104.83	ACH DEBIT 040610 USAA P&C PREMIUM PAY *****1580
04/08	409.39	ACH PAYMENT TRANSFER FROM LOANS 21001000000000000059240440
04/09	300.00	USAA FUNDS TRANSFER DB
04/12	61.58	ACH DEBIT 041210 DIRECTV ONLINE PMT *****3POS
04/12	109.09	ACH DEBIT 041210 AT&T MOBILITY ONLINE PMT *****3POS
04/13	46.00	POS DEBIT 041310 1499 HWY AVE REEDSPORT OR
04/14	9.45	DEBIT CARD PURCHASE 041410 LEONAS REEDSPORT OR
04/15	9.45	DEBIT CARD PURCHASE 041510 PRICE N' PRIDE #09 Q REEDSPORT OR
04/16	11.90	DEBIT CARD PURCHASE 041610 LA COSTA QAE NORTH BEND OR
04/21	43.39	POS DEBIT 042110 1499 HWY AVE REEDSPORT OR



SHARON M HAROLD  
3615 FRONTAGE RD APT 5  
REEDSPORT OR 97467-1736

	ACCOUNT NUMBER
2	802-2
22	STATEMENT DATE
	04/22/10

PAGE 3

BALANCE LAST STATEMENT	NO OF DEBITS PAID	TOTAL AMOUNT OF DEBITS PAID	NO. OF DEP	TOTAL AMOUNT OF DEPOSITS MADE	SERVICE CHARGES	BALANCE THIS STATEMENT
643.12	24	2,882.43	6	2,992.65	.00	753.34

Please examine immediately and report if incorrect. If no report is received within 60 days, the account will be considered correct.

	OVERDRAFT (OD) FEES	NONSUFFICIENT FUNDS (NSF) FEES	INTEREST PAID ON OVERDRAWN BALANCES
This Statement	0.00	0.00	0.00
This Year's Statements	0.00	0.00	0.00

Other fee coverage/refunds made by USAA will not reduce the totals on this chart.

#### ACCOUNT BALANCE SUMMARY

DATE.....	BALANCE	DATE.....	BALANCE
03/22	643.12	04/09	936.41
03/23	925.86	04/12	765.74
03/24	380.07	04/13	719.74
03/25	322.78	04/14	627.43
03/29	105.59	04/15	617.98
04/01	2,607.59	04/16	606.08
04/05	1,780.43	04/19	656.08
04/06	1,645.80	04/21	612.69
04/08	1,236.41	04/22	753.34

#### \* \* \* \* \* INTEREST PAID INFORMATION \* \* \* \* \*

YOUR INTEREST PAID WAS CALCULATED USING YOUR DAILY BALANCE FOR 31 DAYS FOR AN ANNUAL PERCENTAGE YIELD EARNED OF 0.06%. THIS BRINGS YOUR YTD INTEREST PAID TO 0.30.

\*\*\*\*\*USAA REWARDS PROGRAM\*\*\*\*\*

POINTS EARNED THIS PERIOD 77

FOR MORE INFORMATION ABOUT YOUR USAA REWARDS, GO TO YOUR ACCOUNT SUMMARY PAGE ON USAA.COM OR CALL 1-800-980-8722, 9 AM - 8 PM(ET), 7 DAYS A WEEK

SHARON M. HAROLD  
3615 FRONTAGE ROAD, APT #5  
REEDSPORT  
OREGON 97467  
(818) 749-7132

Date 17 Mar 2010 30-7428/3140

Pay to the Order of Rodney Gould \$ 14.50  
Fourteen & 50/100 Dollars

For Postage For Trust *SH Harold*

USAA FEDERAL SAVINGS BANK  
10750 McDERMOTT Fwy  
SAN ANTONIO, TEXAS 78288-0544  
(210) 458-8000 T 800-832-3724

1342

⑆314074269⑆

Check: 1342 Amount:14.50

SHARON M. HAROLD  
3615 FRONTAGE ROAD, APT #5  
REEDSPORT  
OREGON 97467  
(818) 749-7132

Date Apr 10, 2010 30-7428/3140

Pay to the Order of PUD \$ 82.86  
Eighty Two & 86/100 Dollars

For DUST# 122993-9 *SH Harold*

USAA FEDERAL SAVINGS BANK  
10750 McDERMOTT Fwy  
SAN ANTONIO, TEXAS 78288-0544  
(210) 458-8000 T 800-832-3724

1344

⑆314074269⑆

⑆0000008286⑆

Check: 1344 Amount:82.86

# **EXHIBIT 2**

# LANE POWELL



## Gail

Gail E. Mautner  
Shareholder  
Fiduciary Litigation Team  
Chair

Seattle  
D 206.223.7099  
[mautnerg@lanepowell.com](mailto:mautnerg@lanepowell.com)

Known for her extensive litigation background, Gail Mautner leads the firm's Fiduciary Litigation Team, representing fiduciaries, beneficiaries, and family members in disputed trust, probate, and guardianship matters.

Gail's work has earned her several distinguished accolades — she is an elected Fellow of the American College of Trust and Estate Counsel and lauded in *Chambers High Net Worth* Band One for her private wealth dispute practice. A source notes that she "is one of the go-to people in Seattle for fiduciary litigation." Another *Chambers* source states, "She has won some of the biggest estate cases and is really excellent. Her words carry the weight of her expertise and wisdom." She "is a tremendous partner," added another commentator; "she is responsive, collaborative and incredibly focused on detail. Gail ensures all issues are thoroughly and properly addressed and is able to think outside the box to develop creative and innovative solutions." A fellow Washington state attorney praises her as "one of the toughest trust and estate litigators in Seattle," calling her a "formidable

lawyer." Another peer reports, "Often litigators are tough in court and she does that side of things well, but she is also collaborative and you can brainstorm with her."

Gail is a member of the Estate Planning Council of Seattle and a frequent speaker on topics arising under Washington's Trust and Estate Dispute Resolution Act. Gail has been named as a "Top 50 Women Washington Super Lawyer" (2007, 2011-2017, 2019-2022), "Top 100 Washington Super Lawyer" (2020-2022), and a "Washington Super Lawyer" by *Super Lawyers*® magazine and as a "Top 250 Women in Litigation" and a "Local Litigation Star" by *Benchmark Litigation*.

Gail also maintains an active practice advising clients on best practices for managing human resources and compliance with federal, state and local employment law. Gail's hallmark is being "just a phone call away" for real time practical advice on challenging personnel issues. She also represents clients before federal, state and local employment agencies, such as the EEOC and the Washington Human Rights Commission. In addition, working closely with the firm's business transactions group, Gail negotiates, drafts and litigates executive, noncompetition and other employment-related agreements.

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## Gail's Bios

### Primary

Labor and Employment  
Senior Living & Long Term  
Care

## Professional Experience

Cohen & Kaplan P.S. (1984-1988)

U.S. District Court for the Western District of Washington, Law Clerk (1982-1984)

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## Practices & Industries

## Community Involvement

Endowment for Equal Justice



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## Private Client Services

## Fiduciary Litigation

## Nonprofit & Social Enterprise

## Labor, Employment & Benefits

## Corporate, Securities, and M&A

## Business Dispute Resolution

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- Justice Society Committee, Co-chair
- Board Member

## American College of Trust and Estate Counsel

- Fiduciary Litigation Committee
- Fellow

## Washington State Bar Association, Real Property, Probate and Trust (RPPT) Section; and Labor & Employment Section, Member

- RPPT Subcommittee on Trust and Estate Litigation, Member
- TEDRA Subcommittee of the Editorial Board of the RPPT Section Newsletter, Member

## Estate Planning Council of Seattle, Member

## Washington Women Lawyers, Member

## King County Bar Association, RPPT Section and Labor & Employment Section, Member

## Jewish Family Service of Seattle, Past President

## Seattle Association for Jews With Disabilities Supporting Foundation, Member, Board of Trustees

## Temple De Hirsch Sinai, Past President

## Youth Eastside Services, Pro Bono Counsel

## Rebuilding Together South Sound

Pro Bono Amicus Curiae on behalf of Washington State Bar Association, In re Estate of Jones, 152 Wash.2d 1, 93 P.3d 147 (2004) (urging position unanimously adopted by Washington Supreme Court regarding fiduciary duties of personal representatives during probate)

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## Education

University of California, Hastings College of the Law, J.D., 1982

- Order of the Coif

Pitzer College, B.A., with honors, 1978

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## Admissions

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Washington

California (Inactive)

U.S. District Court, Eastern and Western Districts of Washington

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## Honors

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*Chambers High Net Worth*, Private Wealth Law (2017-2022); Private Wealth Disputes (2023)

“Local Litigation Star,” *Benchmark Litigation*, Labor and Employment Litigation (2012-2021)

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## Thought Leadership

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**August 17, 2023** | News

The *Best Lawyers in America*® 2024 Recognizes 123 Lane Powell Attorneys

Awards & Honors

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**July 31, 2023** | News

Forty-seven Lane Powell Attorneys Recognized by *Super Lawyers* in Washington for 2023

"Labor & Employment Star – West," *Benchmark Litigation* (2019-2021)

"Top 250 Women in Litigation," *Benchmark Litigation* (2012-2019)

"Washington Super Lawyer," Thomson Reuters, Estate & Trust Litigation (2014-2023); Labor and Employment (2003, 2005-2013)

*The Best Lawyers in America*®, Employment Law - Management, Labor Law - Management (2010-2024); Trusts and Estates (2018-2024); Trusts and Estates Litigation (2019-2024)

"Top 50: Women Washington Super Lawyers," Thomson Reuters (2007, 2011-2017, 2019-2023)

"Top 100: Washington Super Lawyers," Thomson Reuters (2020-2023)

"Client Service All-Stars," BTI Consulting (2020)

*Chambers*® USA: America's Leading Lawyers for Business, Labor & Employment (2012-2015)

AV Preeminent® in Martindale-Hubbell® Peer Review Ratings™

Awards & Honors

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**July 28, 2023** | News

Lane Powell Again Receives Top Rankings in *Chambers High Net Worth* 2023

Awards & Honors

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**August 18, 2022** | News

The *Best Lawyers in America*® 2023 Recognizes 90 Lane Powell Attorneys

Awards & Honors

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**July 23, 2022** | Event / CLE

Disinheritance Planning: Strategies to Assist Clients Who Want to Disinherit Their Children

American College of Trust and Estate Counsel | Girdwood, Alaska

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**July 14, 2022** | News

Forty-four Lane Powell Attorneys Recognized by *Super Lawyers* in Washington for 2022

Awards & Honors

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**July 14, 2022** | News

Lane Powell Again Receives Top Rankings in *Chambers High Net Worth* 2022

Awards & Honors

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**June 5, 2022** | Event / CLE

Drafting and Litigating Prenuptial and Property Status Agreements

Washington State Bar Association | Stevenson, Washington

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**June 5, 2022** | Event / CLE

Negotiating and Litigating Prenups and Postnups

Washington State Bar Association | Stevenson, Washington

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**April 22, 2022** | Event / CLE

The Ties that Bind: Virtual Representation and Binding Nonparties

Washington State Bar Association | Virtual

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**March 24, 2022** | Event / CLE

## Recent Changes in Estate Planning

Washington State Bar Association | Virtual

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### **December 2, 2021** | Event / CLE

#### Probate and Trust Seminar

Washington State Bar Association | Virtual

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### **October 8, 2021** | Event / CLE

#### Settlement Agreements: Getting Across the Goal Line

American College of Trust and Estate Counsel | Virtual

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### **August 19, 2021** | News

#### *The Best Lawyers in America*® 2022 Recognizes 90 Lane Powell Attorneys

Awards & Honors

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### **July 22, 2021** | News

#### Lane Powell Again Receives Top Rankings in *Chambers High Net Worth* 2021

Awards & Honors

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### **July 15, 2021** | News

#### Forty-Three Lane Powell Attorneys Recognized by *Super Lawyers* for 2021

Awards & Honors

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### **May 19, 2021** | Event / CLE

#### The Rathbone Decision and the New Amendments to Chapters 11.68 and 11.96A RCW

Estate Planning Council of Seattle | Virtual

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### **May 3, 2021** | Event / CLE

#### Gender Issues in Trust and Estate Planning and Litigation

American College of Trust and Estate Counsel | Virtual

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### **April 30, 2021** | Event / CLE

#### Nonintervention Powers, the Rathbone Decision and Judicial Jurisdiction Under Chapters 11.68 and 11.96A RCW

Washington State Bar Association | Virtual

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**April 20, 2021** | Event / CLE

Mama Wanted Me to Have the Teacups

Estate Planning Council of Southwest Washington | Virtual

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**March 26, 2021** | Event / CLE

Recent Changes in Estate Planning

Washington State Bar Association | Virtual

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**March 18, 2021** | Event / CLE

Current Issues in Elder Abuse

Snohomish County Estate Planning Council | Virtual

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**December 11, 2020** | News

Six Lane Powell Attorneys Recognized as 2020 'Client Service All-Stars' by BTI Consulting

Awards & Honors

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**November 3, 2020** | Event / CLE

Planning for the Washington State Estate Tax – What Could Go Wrong?

65th Annual Estate Planning Seminar | Virtual

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**October 28, 2020** | News

Lane Powell Attorneys Recognized in *Benchmark Litigation* 2021

Awards & Honors

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**August 27, 2020** | Event / CLE

Recent Changes in Estate Planning

Washington State Bar Association Law and Practice Refresher | Webinar

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**August 20, 2020** | News

*The Best Lawyers in America*® 2021 Recognizes 92 Lane Powell Attorneys

Awards & Honors

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**August 20, 2020** | Publication

2020 Gifting Considerations

Private Client Services Legal Update

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**July 16, 2020** | News

Thirty-Two Lane Powell Attorneys Recognized by *Super Lawyers* in Washington for 2020

Awards & Honors

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**July 9, 2020** | News

Lane Powell Again Receives Top Rankings in *Chambers High Net Worth* 2020

Awards & Honors

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**June 17, 2020** | Publication

Estate Planning, Probate, and Trust Administration in Washington  
Washington State Bar Association Deskbook

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**March 6, 2020** | Event / CLE

A Baker's Dozen of Tips for Successful Mediation

American College of Trust and Estate Counsel Annual Meeting | Boca Raton, Florida

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**January 15, 2020** | Event / CLE

Who Decides? Surrogate Decision-Making in Assisted Living Communities

Washington Health Care Association Winter Conference | Olympia, Washington

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**November 19, 2019** | Event / CLE

Look Both Ways Before Crossing: Warning Signs for Cross-Border Estates  
64th Annual Estate Planning Seminar | Seattle

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**October 3, 2019** | Event / CLE

On Beyond Zebra! — Working With Modern High Net Worth Clients  
Lane Powell Trusts & 'Tinis Seminar | Seattle

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**August 15, 2019** | News

*The Best Lawyers in America*® 2020 Recognizes 63 Lane Powell Attorneys

Awards & Honors

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**August 15, 2019** | News

## Lane Powell Attorneys Recognized as 'Top 250 Women in Litigation' for 2019 by *Benchmark Litigation*

Awards & Honors

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### July 12, 2019 | News

#### Fiduciary Litigation and Trusts & Estates Teams Receive Top Rankings in *Chambers High Net Worth* 2019

Awards & Honors

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### June 29, 2019 | Event / CLE

#### Critical Cross-Border Considerations for Clients Who Travel and Live Internationally

ACTEC Summer Meeting | Vancouver, British Columbia

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### June 10, 2019 | News

#### Thirty-one Lane Powell Attorneys Named 'Washington Super Lawyers' and Nine Named 'Washington Rising Stars'

Awards & Honors

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### June 9, 2019 | Event / CLE

#### Charitable Gifts Gone Awry: Equitable Deviation and *Cy Pres*

Washington State Bar Association RPPT Mid-Year Meeting | Spokane, Washington

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### June 4, 2019 | News

#### Lane Powell Announces New Leaders, Reinforcing Focus on Innovation & Talent

Firm Announcement

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### March 8, 2019 | Event / CLE

#### Recent Changes in Estate Planning

Washington State Bar Association Law and Practice Refresher Seminar | Seattle

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### March 6, 2019 | Event / CLE

#### Refresher Course

Washington State Bar Association | Seattle

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### February 14-15, 2019 | Event / CLE

#### Practical & Inspired Planned Giving Seminar

Lane Powell and del Prado Philanthropy | Seattle

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**January 31, 2019** | Event / CLE

**Mama Wanted Me to Have the Teacups**

East King County Estate Planning Council Meeting | Bellevue, Washington

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**January 15, 2019** | Event / CLE

**Capacity and Undue Influence Issues Encountered by Professional Advisors**

Walla Walla Valley Estate Planning Council Meeting | Walla Walla, Washington

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**October 18, 2018** | News

**Fiduciary Litigation and Trusts & Estates Teams Receive High Rankings in *Chambers High Net Worth* 2018**

Awards & Honors

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**October 12, 2018** | News

**Lane Powell Highly Recommended in *Benchmark Litigation* 2019**

Awards & Honors

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**September 25, 2018** | Event / CLE

***From Taxes to Taxidermy: A Taxonomy of Topics for High Net Worth Clients***

Lane Powell Trusts & 'Tinis Seminar | Seattle

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**August 15, 2018** | News

***The Best Lawyers in America*® 2019 Recognizes 62 Lane Powell Attorneys**

Awards & Honors

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**August 1, 2018** | News

**Lane Powell Attorneys Recognized as 'Top 250 Women in Litigation' and on '40 & Under Hot List' for 2018 by *Benchmark Litigation***

Awards & Honors

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**June 18, 2018** | News

**Thirty-two Lane Powell Attorneys Named 'Washington Super Lawyers' and 14 Named 'Washington Rising Stars'**

Awards & Honors

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**May 19, 2018** | Publication

The Protection of Vulnerable Adults and Undue Influence

Washington State Bar Association Real Property, Probate and Trust  
Newsletter

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**April 20, 2018** | Event / CLE

Identification, Proof and Consequences of Financial Exploitation and  
Undue Influence

Washington State Bar Association Seattle

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**February 8-9 2018** | Event / CLE

Practical & Inspired Planned Giving Seminar

Lane Powell and del Prado Philanthropy | Seattle

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**December 8, 2017** | Event / CLE

Anatomy of Trust and Estate Litigation – Disputes, Nuts and Bolts of  
TEDRA and ADR Plus Case Law and Statutory Updates

Washington State Bar Association | Seattle

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**October 26, 2017** | News

Lane Powell Highly Recommended in *Benchmark Litigation* 2018  
Awards & Honors

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**September 28, 2017** | Event / CLE

You Decant Take It With You... But We Have a Few Ideas to Share

Lane Powell Trusts & ‘Tinis Seminar | Seattle

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**August 15, 2017** | News

Fifty-nine Lane Powell Attorneys Named in *The Best Lawyers® in  
America* 2018

Awards & Honors

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**August 1, 2017** | News

Lane Powell Attorneys Recognized as ‘Top 250 Women in Litigation’ and  
on ‘Under 40 Hot List’ for 2017 by *Benchmark Litigation*

Awards & Honors

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**June 9, 2017** | News

Thirty-one Lane Powell Attorneys Named ‘Washington Super Lawyers’



**and 16 Named 'Washington Rising Stars'**Awards & Honors

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**May 30, 2017** | NewsTrusts & Estates Team Receives High Rankings in *Chambers® High Net Worth* 2017Awards & Honors

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**March 17, 2017** | Event / CLE

Recent Changes in Estate Planning

Seminar | Seattle

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**December 1, 2016** | Publication

New Uniform Power of Attorney Act, Effective January 1 (Bankers' Edition)

Financial Institutions Legal Update

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**October 20, 2016** | NewsLane Powell Highly Recommended in *Benchmark Litigation* 2017Awards & Honors

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**October 5, 2016** | Publication

New Uniform Power of Attorney Act, Effective January 1

Senior Living and Long Term Care Legal Update

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**August 17, 2016** | NewsFifty-one Lane Powell Attorneys Named in *The Best Lawyers in America®* 2017Awards & Honors

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**June 21, 2016** | NewsDuffy, Mautner and Payton Named 2016 'Top 250 Women in Litigation' by *Benchmark Litigation*Awards & Honors

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**April 26, 2016** | Event / CLE

Everything You Never Wanted the Public to Know About Your Estate Planning Clients

East King County Estate Planning Council | Bellevue, Washington

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**April 21, 2016** | News

Lane Powell Recognized as One of the '100 Best Law Firms for Female Attorneys'

Awards & Honors

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**March 4, 2016** | Event / CLE

Working Effectively With Long Term Care and Senior Housing Communities

Washington State Bar Association | Seattle

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**October 27, 2015** | News

Lane Powell Highly Recommended in 2016 *Benchmark Litigation*

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**August 17, 2015** | News

Forty-eight Lane Powell Attorneys Named in *The Best Lawyers in America*® 2016

Awards & Honors

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**June 19, 2015** | News

Duffy, Mautner and Payton Named as 2015 'Top 250 Women in Litigation' by *Benchmark Litigation*

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**June 13, 2015** | Event / CLE

Everything You Never Wanted the Public to Know About Your Estate Planning Clients: Privacy Issues in Probate and Trust Proceedings

Washington State Bar Association | Spokane, Washington

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**June 12, 2015** | News

Thirty-two Lane Powell Attorneys Named 'Washington Super Lawyers' and 11 Named as 'Washington Rising Stars'

Awards & Honors

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**May 21, 2015** | News

*Chambers*® USA Recommends Lane Powell in Multiple Categories for 2015

Awards & Honors

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**February 11, 2015** | News

Twenty-one Lane Powell Attorneys and 11 Practice Groups Recommended in *Chambers*® USA 2015

## Awards & Honors

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### **November 25, 2014** | Publication

Trustee Selection: Choose Wisely if Your Family-owned Business Will Be Held in a Trust

*Seattle Business*

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### **October 20, 2014** | News

Eleven Lane Powell Attorneys Recognized as “Litigation Stars,” Two Named as “Future Stars” in 2015 *Benchmark Litigation* Legal Guide

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### **August 18, 2014** | News

Fifty-One Lane Powell Attorneys Named in *The Best Lawyers in America*® 2015

Awards & Honors

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### **June 13, 2014** | News

Thirty-five Lane Powell Attorneys Named ‘Washington Super Lawyers’ and Fifteen Named as ‘Washington Rising Stars’

Awards & Honors

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### **June 3, 2014** | News

*Chambers*® USA Recommends Lane Powell in Multiple Categories for 2014

Awards & Honors

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### **May 7, 2014** | Event / CLE

Trusts and Estates: Annual Case Law and Legislative Update

Washington State Bar Association | Seattle

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### **January 29, 2014** | News

Twenty-two Lane Powell Attorneys and 12 Practice Groups Recommended in *Chambers*® USA 2014

Awards & Honors

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### **June 14, 2013** | News

Thirty-Six Lane Powell Attorneys Named ‘Washington Super Lawyers’ and Sixteen Named as ‘Washington Rising Stars’

Awards & Honors

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**June 13, 2012** | News

28 Lane Powell Attorneys Named 'Washington Super Lawyers;' 12 Named as 'Washington Rising Stars'

Awards & Honors

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**November 16, 2011** | Event / CLE

New Washington Trust Act Amendments

Eastside King County Estate Planning Council

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**October 31, 2011** | Event / CLE

Conflicts of Interest, Loyalty, and Privilege From the Perspective of an Estate Planner and an Estate Litigator

Seminar | Seattle

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**August 9, 2011** | News

Thirty-six Lane Powell Attorneys Listed as Top Lawyers in *Seattle Metropolitan Magazine*

Awards & Honors

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**June 20, 2011** | News

Twenty-six Lane Powell Attorneys Named 'Washington Super Lawyers;' Ten Lane Powell Attorneys Named As 'Washington Rising Stars'

Awards & Honors

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**March 1, 2011** | Event / CLE

Disputes Between Estates and Decedent's Surviving Business Partners

Seminar | Seattle

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**July 20, 2010** | News

58 Lane Powell Attorneys Listed as Top Lawyers in *Seattle Metropolitan Magazine*

Awards & Honors

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**June 6, 2010** | News

28 Lane Powell Attorneys Named Washington Super Lawyers 2010

Awards & Honors

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**November 23, 2009** | Publication

A Brave New World: Nonjudicial Dispute Resolution Procedures Under the Uniform Trust Code and Washington's and Idaho's Trust and Estate

## Dispute Resolution Acts

*The American College of Trust and Estate Counsel Journal*

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**June 1, 2009** | Event / CLE

Drafting and Litigating Prenuptial and Property Status Agreements

Seminar | Seattle

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**December 1, 2008** | Event / CLE

Drafting and Litigating Charitable Gifts

Seminar | Seattle