



PARALEGAL ASSOCIATION OF SANTA CLARA COUNTY

TO ALL ATTORNEYS, PARALEGALS & OTHER LEGAL PROFESSIONALS:

DATE: November 17, 2016
TIME: 6:00 pm – 8:00 pm
TOPIC: Choosing a Fiduciary
SPEAKER: [John W. Prokey, Esq.](#)
LOCATION: [De Anza College](#) (Parking Fee: \$3.00)

As advisors, we are often asked to recommend a fiduciary. Selecting the best fiduciary can be a difficult task. This program will detail factors to consider when recommending or selecting a fiduciary. The program will also provide discussion on the types of services fiduciaries provide. The goal of the program is to allow advisors to be a better resource to clients and more successfully play matchmaker between clients and fiduciaries.

John W. Prokey is the Senior Managing Partner of Ramsbacher Prokey Leonard LLP. His law practice includes advising high-wealth individuals, families and closely-held business owners in tax, business and estate planning. He is a frequent lecturer and guest speaker at numerous tax planning seminars and conferences throughout California and elsewhere, and is a prolific author on various tax and estate planning topics.

Mr. Prokey is a member of the California State Bar and serves on the Taxation and Trusts and Estates Sections thereof. He also is a former member of the Taxation Section Executive Committee and the former Chair (2004-2005) of its Estate and Gift Tax Sub-Committee. Currently, John is a member of the Santa Clara County and American Bar Associations, the Santa Clara County Estate Planning Council, and the Silicon Valley Bar Association. He received his Baccalaureate of Science degree from Santa Clara University in 1994 and his Juris Doctor degree from Santa Clara University School of Law in 1999, graduating cum laude in both undergraduate and law school studies.

Objectives:

1. Enhanced understanding of the services provided by fiduciaries
2. Learn a paradigm for assessing fiduciaries
3. More effectively advise clients on selection of a fiduciary

PASCCO Member: \$25.00

PASCCO Student Member: \$23.00

Non-Member: \$35.00

Register online: <https://www.eventbrite.com/e/pascco-mcle-general-meeting-november-17th-choosing-a-fiduciary-tickets-28787882331>

PASCCO is a State Bar of California approved MCLE provider; this seminar is approved for 1.0 MCLE Credit.

CLE credit is approved by the National Association of Legal Assistants ("NALA")