

Estate Planning/Probate - Contested Nonprobate Transfers: When the Estate Plan Trumps

Webinar

05.15.2025 | 12:00-1:30 PM PT

Event Sponsor: San Mateo County Bar Association

This presentation will cover best practices for handling nonprobate transfers when the documents on file with the bank conflict with the decedent's estate plan. For example, what should the fiduciary do when the person named in the beneficiary designation form for a pay-on-death account differs from the beneficiaries named in the decedent's will or trust disposing of the account? What about a general assignment that assigns all assets to a trust—does the assignment override the bank's forms? These questions and more are addressed as the speakers explore the default rules for nonprobate transfers, as well as the clear-and-convincing-evidence exception to those rules, which is fueling a tidal wave of probate litigation across California.

Credit has been approved with the State Bar Of California for 1.00 General credit and 1.00 Specialization in Estate Planning, Trust & Probate Law credit.

Speakers:

- Matthew Owens, Partner, Sheppard Mullin
- Jenny Hill Bratt, Partner, Sheppard Mullin

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Attorneys

Jenny Hill Bratt

Matthew R. Owens

Practice Areas

Estate Planning and Wealth Transfer

Tax