CEB *knows* California.

Trusts & Estates

Driven by content, powered by technology, CEB is the most comprehensive legal resource for California law, providing a perfect mix of hyper-local content, practical guidance and education.

Why CEB?

- Unmatched county-specific local guidance created in collaboration with sitting judges
- Trusted by law firms of all sizes to provide high-quality resources
- Nonprofit organization with a public service mission of improving access to justice and the delivery of legal services to underserved communities in California
- Best-in-class legal search to find the most relevant answers, faster

58	1,100	75+	1,142	37
California counties with their own courts and local rules all covered by CEB	Active contributors to CEB content, including top law firms and sitting judges	Years of experience with California law	Documents addressing Trusts & Estates issues	County-specific Probate Court how-to guides for California's 20 busiest counties

Simplify Your Approach to California Trusts & Estates

Get actionable guidance from CEB secondary sources and workflows that break down the most complex regulatory issues in the country. Access key titles with information you can't get anywhere else.

California Conservatorship Practice

- The most thorough, practice-oriented treatment of conservatorships, including over 150 attorney-drafted forms.
- Covers the entire process from evaluating the need, initiating the proceedings, conservator duties and responsibilities, accountings, estate management, representing the conservatee and terminating the conservatorship.

California Decedent Estate Practice

- Comprehensive, in-depth coverage of probate practice and procedures, summary probate proceedings and transfers outside of probate.
- Includes nearly 300 attorney-drafted forms to ensure confident administration.

California Trust Administration

- A practical guide to all trustee responsibilities, legal duties, liabilities and common administrative responsibilities.
- Includes 126 attorney-drafted sample letters, charts, petitions and other court documents, and spreadsheets.

CEB Trusts & Estates

Titles & Workflows

TRUST & PROBATE LITIGATION

Practice Guides:

- ★ California Trust and Probate Litigation
- California Will Drafting
- California Civil Discovery Practice
- California Civil Procedure Before Trial

Workflows:

- Asserting a Claim as an Omitted Spouse or Child
- Contesting a Will or Trust
- Quieting Title to Property Using Probate Code Section 850
- Recovery of Property by the Estate Representative or Trustee Using Probate Code Section 850
- Removing an Estate Representative or Trustee
- Requesting Allocation of Debts Between Surviving Spouse and Estate or Trust

PROBATE ADMINISTRATION

Practice Guides:

- California Local Probate Rules
- California Probate Workflow Manual Revised
- Handling a Probate

Workflows:

- Probate Administration

FAMILY LAW

Practice Guides:

- ★ Crossover Issues in Estate Planning and Family Law

GUARDIANSHIPS & CONSERVATORSHIPS

Practice Guides:

- ★ California Conservatorship Practice
- California Guardianship Practice

Workflows:

- ★ Establishing Conservatorships (and Supported Decision-Making Agreements)

ESTATE PLANNING

Practice Guides:

- California Estate Planning
- California Powers of Attorney and Health Care Directives
- California Will Drafting
- Complete Plans for Small and Mid-Size Estates
- Drafting California Irrevocable Trusts
- ★ Drafting California Revocable Trusts
- ★ Marital Deduction Subtrust Funding

Workflows:

- Assessing and Maximizing Other California and Federal Benefits Beyond Medi-Cal
- Assessing and Maximizing Social Security Benefits
- Drafting A/B Trusts
- Estate Tax Planning for High-Net-Worth Clients
- Estate Planning: Married Person Trust
- Estate Planning: Single Person Trust
- Probate Avoidance, High Net Worth and Advance Estate Planning Techniques
- Qualifying for Medi-Cal
- Succession Planning for Closely Held / Family Businesses
- Using and Terminating Medi-Cal

ADVANCED TAX PLANNING

Workflows:

- Asset Protection Strategies for California Residents
- Charitable Lead Trusts
- Charitable Remainder Trusts
- Grantor Retained Annuity Trusts
- Estate Tax Planning for High Net Worth Clients
- Intentionally Defective Grantor Trusts
- Irrevocable Life Insurance Trusts
- Marital Deduction Trusts
- Qualified Domestic Trusts for Non-Citizen Spouses
- Qualified Personal Residence Trusts
- Spousal Lifetime Access Trusts

BUSINESS ENTITIES

Practice Guides:

- Forming and Operating California Limited Liability Companies
- Selecting and Forming Business Entities

REAL PROPERTY

Practice Guides:

- Transferring Property Without Probate

Workflows:

- Real Property Crossover Issues for Trust Administration and Probate Attorneys
- Real Property Tax Reassessment

TRUST ADMINISTRATION

Practice Guides:

- Administering a Single-Person Trust After Settlor's Death
- ★ California Decedent Estate Practice
- ★ California Trust Administration
- Fiduciary Accounting Handbook
- Handling Postmortem Trust Administration: a Checklist

Workflows:

- Administering a Trust During Life of Settlor-Beneficiary
- Forcing a Fiduciary to Account
- Post-Death Trust Administration
- Preparing Fiduciary Accountings for a Trust

LAW PRACTICE MANAGEMENT

Practice Guides:

- California Basic Practice Handbook
- California Client Communications Manual: Sample Letters and Forms
- Fee Agreement Forms Manual

ELDER LAW

Practice Guides:

- California Elder Law Litigation: an Advocate's Guide
- California Elder Law Resources, Benefits and Planning: an Advocate's Guide

SPECIAL NEEDS TRUST

Practice Guides:

- ★ Special Needs Trusts: Planning, Drafting and Administration

Workflows:

- Administering Special Needs Trusts
- Establishing Special Needs Trusts

★ Content Exclusive to CEB