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## Patricia A. Wenthe

### Paralegal

**Patty Wenthe** provides paralegal services for the firm's Estate and Tax Planning and Business Groups. A senior paralegal with particular expertise in investigation and asset transfers, she has 24 years of expertise with a broad knowledge and experience in probate/trust administration, complex estate plans, probate and trust-related litigation, conservatorships, and preparation of fiduciary accountings (informal and court-settled).

**Publications:** "Conservatorship Accountings: How to Get Started and What to Tell Your Clients to Stay on Time!" State Bar of CA *Trusts and Estates Quarterly*, Vol. 33, Issue 3, 2016.

"Conservatorship Accountings: When Certain Figures are Not What they Seem, Market and Carry Values, an Inventory and Appraisal and Bond Primer, and Using the Judicial Council Accounting Schedule Forms." State Bar of CA *Trusts and Estates Quarterly*, Vol. 34, Issue 1, 2017; Article also available as an online self-study test for MCLE credits @ [www.calbar.org/self-study](http://www.calbar.org/self-study).

#### Speaker/Presentations:

- The Numerous Practice Areas referred to as "Probate" (administration of estates, trusts, conservatorships, guardianships, and estate planning) - A Primer on Each; Mt. Diablo Legal Professionals Association (Legal Secretaries, Inc.) – October 9, 2017
- An Overview of Estate Planning and Important Deadlines in Probate, Trust and Conservatorship Administrations; Mt. Diablo Legal Professionals Association (Legal Secretaries, Inc.) – January 8, 2018
- An overview of Estate Planning: What is it? Who needs it? Lafayette Business Women's Connection – March 27, 2018

#### Practice Groups

- BUSINESS
- ESTATE AND TAX PLANNING
- LITIGATION

## **Education**

- Continuing Legal Education (Estate Planning; Probate; Trusts)
- Legal Document Assistant License #153
- Contra Costa County Superior Court - Certificate of Completion of Conservatorship of Estate Workshop (2014)
- California State University, Fullerton - Extended Education, Professional Fiduciary Studies (2012)
- Paralegal Certification (2001)

## **Professional Membership**

- Notary Public (since 1994; currently commissioned through 2022)
- State Bar of California (Trusts and Estates Section)
- Contra Costa County Bar Association (Probate Section)
- Mt. Diablo Legal Professionals Association (MDLPA)/LSI, Inc.