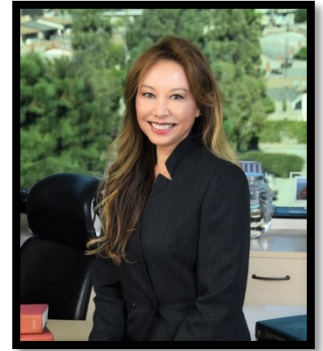


Beti Tsai Bergman

PENINSULA LAW, A Professional Law Corporation

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Beti Tsai Bergman is the founder and principal shareholder of the law firm, Peninsula Law, A Professional Law Corporation. Her firm specializes in probate, trusts, estates, conservatorships, and financial elder abuse. Ms. Bergman has extensive experience in representing conservators, conservatees, trustees, and executors, as well as, heirs and beneficiaries in uncontested and contested trust and estate matters. Before specializing in probate, Ms. Bergman was a Deputy City Attorney for City of Los Angeles and was a business litigator in private practice.



Ms. Bergman is certified by the California Board of Legal Specialization in estate planning, trust and probate law and has earned a Master Advocate Designation from the National Institute of Trial Advocacy, where she returns as a faculty instructor for their annual Building Trial Skills Program at Loyola Law School. Ms. Bergman is also named as a Southern California Super Lawyer, a Super Lawyers Top Women in Southern California, a Top Attorney by Los Angeles Magazine, a 10 Best Estate Planning Attorney by the American Institute of Legal Counsel, a Top 3 estate planning lawyer in Torrance by ThreeBestRated, and a Best Probate Attorney in Torrance by Expertise.com. She has been awarded the Best of Torrance Award in the Local Business Category, inducted in Marquis Who's Who and featured as Marquis Top Lawyer, in the Torrance Business Hall of Fame, and Premier Lawyers of America, and has been featured in Forbes, Fortune 500, Angeleno, and Los Angeles Magazine.

Professional Activities & Community Service

- Mediator & Arbitrator, CourtCall ODR Panel 2021
- Volunteer Settlement Officer for Los Angeles Superior Court, Probate Court 2019-present
- NITA Faculty Instructor for Building Trial Skills Program 2017-present
- LACBA Trust & Estates Executive Committee 2017-present
- Chair of Court Liaison Committee
- Torrance Memorial Hospital Professional Advisory Council 2017-present
- South Bay Inn of Court, Member 2016-present
- Los Angeles Superior Court Probate Court Panel of Court-Appointed Counsel and Guardian Ad Litem 2008-present
- Bench-Bar Coalition Member-at-Large, Southern Region 2018-2020
- Asian Pacific Women Lawyers' Alliance 2000-2020
- Past-President, MCLE Chair, Past Secretary, Board of Governors
- South Bay Bar Association, Probate Co-Chair 2016-2018
- Los Angeles County Bar, LRS Advisory Committee 2016-2018
- Probate Court Guardianship Clinic volunteer 2011-2013
- LASC volunteer mediator 2012-2013
- Southern California Chinese Lawyers Association 2001-2008
- Past President, Past Vice President, Past Secretary, Past Treasurer, Chair of Trial Skills Workshop, Board of Governors
- UCLA Asian Pacific Alumni, Board of Directors 2001-2003
- LACBA iTAP and TAP (Trial Advocacy Project) March 2002 & October 2003

Education:

- Pepperdine Caruso School of Law, Mediating the Litigated Case
- J.D., UC Davis School of Law | *Honors & Activities:* Member of UC Davis Law Review; Dean's List; Legal Research and Writing Teaching Assistant; The Advocate, Associate Editor; Pro Bono Volunteer, Asian Legal Services Clinic; Elected Vice President of Community Affairs, Asian Law School Association.
- M.S. Applied Mathematics with Concentrations in Probability and Statistics and Partial Differential Equations, California State University Long Beach | *Honors & Activities:* Graduated with Departmental Distinction; Member, Math Students Association; Member, Law Students Association.
- B.S. Applied Mathematics, UCLA | *Activities:* Kappa Alpha Theta sorority.

Speaking and Teaching Engagements

“Objections to Accounting”

County Counsel's Association , October 9, 2020

Presented seminar regarding litigating estate accountings. Taught procedure and timelines regarding court accountings, duties and liabilities of a fiduciary regarding financial acts, grounds for objections to accountings, timelines for making objections, burden of proof at trial, types of damages and surcharges.

“Estate Planning from Start to Finish”

National Business Institute (“NBI”), September 29, 2020

Faculty Instructor for comprehensive, step-by-step guide to the estate administration process. Presented segment regarding the probate process, petitioning for final distribution, final distribution of an estate, final tax returns, final accounting, and compensation.

“Estate Planning and Administration”

National Business Institute (“NBI”), September 16, 2020

Faculty Instructor for seminar regarding probate forms, checklists, and expert guidance to fully prepare for drafting and implementing estate plans. Presented two segments: one regarding a probate process overview, covering crucial deadlines, community property issues encountered in probate, intestacy rules, and executor’s duties and powers; and another segment regarding trust administration basics, real property issues, handling creditors, accounting, final tax returns, final distribution, and closing the estate.

“Building Trial Skills”

*National Institute of Trial Advocacy (“NITA”), Loyola Law School, Los Angeles,
January 2-8, 2017, January 2-8, 2018, January 3-7, 2019, January 3-7, 2020*

Faculty instructor for one-week trial skills workshop. Instruct attorneys on trial skills, trial advocacy, and techniques in persuasion and communication. Held in realistic trial setting where participants actively perform opening statements, closing arguments, direct and cross-examinations, impeachment, admission of evidence, objections to evidence, and voir dire. Preside over mock jury trials.

“14th Annual Superior Court Boot Camp: The Nuts and Bolts”

Pincus Professional Education, Los Angeles, CA, November 8, 2019

Presented seminar regarding motions encountered in civil litigation. Discussed substance, procedures, timelines, and deadlines for *ex parte* applications, motions for continuance, motions for reconsideration, motions for sanctions in non-discovery contexts, 998 offers to compromise, and motions to exclude witnesses at trial. Covered Civil Procedure Code, Local Rules, and California Rules of Court concerning motions and *ex parte* applications.

“How to Legally Help a Person with Incapacity”

Alzheimer's Support Group, Cerritos Senior Center, September 23, 2019

Presented a seminar to an Alzheimer’s support group about how to legally help a person who has lost capacity. Topics included how to plan ahead by preparing a comprehensive estate plan that includes a trust, will, power of attorney, and advance healthcare directive. Also provided education about conservatorships, elder abuse restraining orders, and court procedures for both.

“Probate Litigation 101: The Nuts and Bolts”

Pincus Professional Education, Los Angeles, CA, September 20, 2019

Presented an MCLE seminar regarding procedures, timelines, and statutory deadlines in probate and trust litigation, and regarding legal standards of capacity in probate litigation. Discussed different types of actions encountered in probate litigation. Covered Probate Codes, California Rules of Court, and local rules concerning petitions, objections, and *ex parte* applications. Also, examined legal standards for determining capacity, burdens of proof, and case law regarding how capacity is ascertained.

“Conservatorship Basics 101”

CEB, Oakland, CA, July 29, 2019

Presented an MCLE webcast about the basics of conservatorships, when conservatorships are needed, the difference between conservatorships and powers of attorney and other estate planning instruments, court proceedings, and different types of conservatorships.

“Late Life Planning – Beyond Caregivers, What Should I Plan?”

Torrance Memorial Hospital Professional Advisory Council, July 13, 2019

Presented an educational seminar to the community on the differences between powers of attorney and conservatorships, advance healthcare directives, and estate planning.

“Welcome to EPIC and How to Take the Specialization Exam”

CEB, Oakland, CA, June 13, 2019

Presented an MCLE seminar about how to take the Probate Specialization Exam and what to expect on the day of the exam. Discussed a sample essay question and a sample multiple choice question. Demonstrated how to outline answers to questions and how to best manage time during the exam.

“Trial Preparation and Advocacy: Part II”

LACBA, Los Angeles Superior Court, Central, District, May 7, 2019

Presented segment about Statements of Decisions for this MCLE program that covered topics about trial advocacy, such as, evidentiary objections and preserving the record for appeal.

“Conservatorships, Probate, and Estate Planning”

Alzheimer’s Support Group, Cerritos Senior Center, December 21, 2018

Presented an educational seminar to an Alzheimer’s support group about how to obtain legal authority to act and protect a person who has lost capacity, how to put proper estate planning instruments in place to prevent the possibility of a conservatorship, and how to petition for a conservatorship if one is necessary.

“Know Your Limits: PVP Training for the Limited Conservatorship Practitioner”

LACBA, October 20, 2018

Speaker for MCLE seminar presented to court-appointed attorneys on the topic of limited conservatorships. Discussed understanding the surrounding circumstances of the conservatee that will likely affect the nature of the proceedings, such as, the personalities of the proposed conservator, the proposed conservatee, and the family dynamics. Analyzed the seven powers involved in limited conservatorships, how to modify those powers if necessary, and the proposed conservatee’s voting rights.

“Quarterly Mentoring Circle”

APAWLA, September 9, 2018

As one of my main focuses as President of APAWLA, we enhanced our mentoring efforts and partnered up with our sister bar, SCCLA, to present our inaugural joint quarterly mentoring circle to advance and support young women lawyers.

“Los Angeles Minority/Ethnic Bar Association Meet & Greet Event with Gavin Newsom”

Los Angeles City Club, September 6, 2018

Selected to represent the Asian legal community to present issue and question to the then gubernatorial candidate Gavin Newsom.

“Protecting Yourself, Your Assets, and Your Relationships”

Torrance Memorial Professional Advisory Council, Torrance Memorial Hospital, April 14, 2018

Speaker for seminar to educate the public on how financial elder abuse can happen, how to recognize and address it, and types of legal protections that can be implemented to prevent financial elder abuse.

“Judge Beverly Reid O’Connell Power Lunch Program”

Los Angeles Superior Court, Central District, January 26, 2018

Helped provide civic education, mentorship, and exposure to the court system for high school students from underserved communities. Participated in mentoring sessions with students, worked through legal educational exercises with students, and answered student questions about the practice of law.

“Probate Litigation 101: Nuts and Bolts”

Pincus Professional Education, DoubleTree by Hilton Downtown Los Angeles, November 10, 2017

Speaker for MCLE program. Presented segments on statutory deadlines in estate and trust litigation proceedings, procedural aspects of petitions, motions, and ex parte applications. Discussed civil discovery procedures, legal standards for capacity, and 850 petitions.

“Estate and Incapacity Planning II”

CEB Estate Planning Intensive Course, August 22, 2017

Presented a preparation course for the CA State Board of Legal Specialization exam in estate planning, trust, and probate law on the topics of retirement benefit planning, business succession planning, use of business entities, charitable planning, and gifts.

“Drafting Revocable Trusts: Tricky Clauses”

CEB, March 24, 2017

Presented an MCLE seminar covering an in-depth focus on select tricky and hence problematic clauses found in a revocable trust that raise challenges and confusion for estate planners. Instruction included explanations on the meaning of clauses and sensible guidance to help aid practitioners in the trust drafting process.

“Amending a Revocable Living Trust”

CEB, October 4, 2016

Presented an MCLE seminar on the mechanics and best practices about how to amend a revocable living trust.