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BANKRUPTCY-CON

37TH ANNUAL INSOLVENCY CONFERENCE

OMNI LA COSTA RESORT & SPA, CARLSBAD, CA • MAY 15-18, 2025



WELCOME TO THE CALIFORNIA BANKRUPTCY FORUM!



It is my honor, as 2024-25 President of the California Bankruptcy Forum, to welcome you to our organization.

Founded in 1988, CBF is the preeminent volunteer organization for insolvency professionals in California, with nearly 1,000 members in seven regional chapters, known as fora, throughout California. Our membership includes bankruptcy and insolvency attorneys, financial advisors, brokers, trustees, accountants, turnaround specialists and other talented professionals who work in the insolvency arena.

CBF plays a critical role in supporting both new and seasoned practitioners in their efforts to serve their clients and ensure that the bankruptcy system remains fair, efficient and effective. For this reason, CBF is committed to clarifying and improving practices and procedures in California bankruptcy courts, providing professional education, and acting as a venue for dialogue between insolvency professionals and bankruptcy judges.

One way we work to accomplish this goal is through the publication of scholarly articles in the California Bankruptcy Journal, which is distributed two to four times a year. Available on Westlaw, the Journal has been cited in more than 70 published opinions, including those of the U.S. Supreme Court. All CBF members receive complimentary subscriptions to the Journal.

Of course, CBF's largest single undertaking is our annual May conference. In an age of remote court appearances and video conferencing, this annual event and those conducted by our regional fora provide essential opportunities for face-to-face interaction and the exchange of ideas. Our 37th Annual Conference, to be held in May 2025 at the OMNI La Costa Resort and Spa in Carlsbad, will include engaging and informative educational programs and plenty of opportunities to unplug and connect with colleagues and friends in a relaxed and comfortable setting. The program will include presentations and panels covering a broad range of issues affecting practitioners who work with both businesses and consumers as well as special programming geared toward our Young Insolvency Professionals.

CBF also supplements the activities of the seven regional fora in California, each of which serves the critical role of furthering the mission of CBF at the community level by sponsoring local educational and professional programs around the state. Representing Sacramento, the San Francisco Bay Area, the Central Valley, Los Angeles, Orange County, the Inland Empire, and San Diego, each local forum has its own board of directors, which sends three representatives to the statewide CBF Board. When you join a local forum and gain access to a wealth of educational and social programs, you automatically become a member of CBF.

Additionally, for many years CBF has worked to promote pro bono bankruptcy services throughout California via its financial support of nonprofit organizations that work with unrepresented bankruptcy filers and litigants. Each year, we have reserved a portion of the proceeds from conference registrations and voluntary contributions for an initiative that improves and enhances the services provided to pro se filers. This highly rewarding work helps to ensure access to bankruptcy services for all Californians.

Finally, I look forward to hearing from you. Whether you have thoughts on improving CBF or simply want to get more involved in our organization, please get in touch with me or any other board member.

There's no telling what the coming year will hold for the bankruptcy and insolvency community, but you can count on one thing: CBF will be there at every step along the way to advocate for and serve our members. I hope you will join me, the board and your fellow members in Carlsbad in May 2025 for our annual conference!

John N. Tedford, IV,
2024-2025 President

2025 CONFERENCE LEADERSHIP TEAM



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SCHEDULE OF EVENTS

Thursday, May 15, 2025

1:00 – 5:30 PM

Conference Registration Desk Open

3:00 – 5:00 PM

California Bankruptcy Forum (CBF) Board of Directors Meeting

5:00 – 5:30 PM

California Bankruptcy Journal (CBJ) Board of Directors Meeting

5:30 – 7:00 PM

Welcome Reception for CBF & CBJ

Board of Directors, conference committee, sponsors, exhibitors and Judges

Friday, May 16, 2025

8:00 – 9:00 AM

California Bankruptcy Journal (CBJ) Editorial Board Meeting

8:30 AM – 5:30 PM

Conference Registration Desk Open

9:00 – 10:00 AM

Receivers Session:

The Enforcement Nexus: Receivers and Law Enforcement*

10:00 – 11:00 AM

Receivers Session 2:

Bar Orders in Receiverships vs BK After Sackler Decision*

10:15 AM – 11:30 AM

Artificial Intelligence: Superhero or Supervillain?*

11:30 AM – 5:00 PM

Exhibitors Open

12:00 – 2:00 PM

Keynote Luncheon featuring Stephanie Wickouski discussing Mentorship

2:00 – 3:00 PM

Judges' Roundtable on Purdue Pharma:

Dr. Strange's Inter-Dimensional Magic*

3:00 – 3:30 PM

Networking Break

3:30 PM – 4:30 PM

V for Vacancy

4:30 – 5:30 PM

Destiny's Children? The Fantastic Four Forecast the Economy

5:30 – 7:00 PM

CLA / ILC Reception for all attendees

Saturday, May 17, 2025

7:00 AM – 5:30 PM

Conference Registration Desk Open

7:00 – 8:30 AM

Breakfast

7:30 AM – 12:00 PM

Exhibitors Open

8:00 – 9:00 AM

Business Session:

Gain BAP Appeal Superpowers! Insights from BAP Judges and Law Clerks on how to Make Your Appeal a Success*

8:00 – 9:00 AM

Ledger League: Accounting Avengers Assemble*

9:00 – 9:30 AM

Break

9:30 – 10:45 AM

Honorable Sheri Bluebond's Game Show: Wordle*

10:45 – 11:00 AM

Networking Break

11:00 AM – 12:00 PM

Judges Roundtable:

Marvel of SubV*

**An application requesting MCLE credit for this activity is pending for approval*

SCHEDULE OF EVENTS

12:30 – 2:30 PM

Young Insolvency Professional (YIP) Keynote Lunch & Judges Roundtable* featuring the Honorable J. Barrett Marum

Please note: This session is only available to YIP, Law Clerks, Externs, and Judges.

OPTIONAL ACTIVITIES

1:00 – 5:00 PM

CBF Annual Golf Tournament

1:00 – 5:00 PM

Pickleball Tournament

1:30 – 4:30 PM

San Diego Botanic Garden

1:30 – 2:30 PM

Consumer Session:

Kryptonite to the Mighty Homestead and Retirement Exemptions*

2:30 – 3:30 PM

YIP Session:

The Superpowers of Section 523(a) Actions: Defeating the Forces of Dischargeability*

2:30 – 2:45 PM

YIP Networking Break

2:30 – 3:30 PM

Consumer Session:

Watchmen of Chapter 13*

3:30 – 4:00 PM

Consumer and YIP Break

4:00 – 5:00 PM

YIP Session:

Tech Heroes: Harnessing the Power of Technology and Social Media to Expand Your Legal Empire*

4:00 PM – 5:00 PM

Consumer Session:

Updates from the (Department of) Justice League*

5:00 – 6:30 PM

YIP Reception & Social Activity: Guacamole Making

6:30 – 9:00 PM

Reception & Dinner

7:00 – 9:00 PM

Dinner and Entertainment

Sunday, May 18, 2025

8:30 AM – 10:30 AM

California Receivers Forum (CRF) Board Meeting

9:00 – 10:00 AM

CBF Future Planning Meeting

**An application requesting MCLE credit for this activity is pending for approval*





Friday, May 16, 2025

9:00 – 10:00 AM

Receivers Session: The Enforcement Nexus: Receivers and Law Enforcement*

The panel discussion focused on the critical role court-appointed receivers play in working alongside law enforcement to address complex legal cases, particularly in situations involving asset recovery, compliance with court orders, and investigations. Panelists included experienced receivers, law enforcement officials, and legal experts, who provided insights into the collaboration between the two parties.

SPEAKERS:

- **Ted Lanes**, *Lanes Management Services*
- **Aaron Kudla**, *Dyversis Group*
- **Aram Ordubegian**, *ArentFox Schiff*

10:00 – 11:00 AM

Receivers Session 2: Bar Orders in Receiverships vs BK After Sackler Decision*

The panel will explore the current state of bar orders in receivership proceedings in the wake of the Supreme Court's decision in *Harrington v. Purdue Pharma L.P.* (commonly referred to as the Sackler decision). Panelists include experienced receiver and legal experts, who have litigated these hot button issues.

SPEAKERS:

- **Oren Bitan**, *Buchalter*
- **Krista Freitag**, *E3 Advisors*
- **Matthew Pham**, *Allen Matkins Leck Gamble Mallory & Natsis LLP*

10:15 – 11:30 AM

Artificial Intelligence: Superhero or Supervillain?*

From streamlining bankruptcy processes to expanding access to justice, artificial intelligence has the potential to reshape the legal landscape—but does it play the hero or the villain? Our expert panel will examine real-world successes, cautionary tales, and a judicial perspective on emerging regulations. We'll also explore how lawyers can embrace AI ethically and effectively to stay ahead of the curve.

PRODUCERS:

- **Brandon Iskander**, *Goe Forsythe & Hodges*
- **Cole Nicholas**, *Greenberg Glusker LLP*

SPEAKERS:

- **Hon. Deborah Saltzman**,
US Bankruptcy Court, Central District of California
- **Tracy Green**, *Fennemore LLP*
- **Bryan Lee**, *Ruli AI*
- **Lisa Vandesteeg**, *Levenfeld Pearlstein*

**An application requesting MCLE credit for this activity is pending for approval*



12:00 – 2:00 PM

Keynote Luncheon: Mentorship

Stephanie Wickouski has practiced bankruptcy law for more than 35 years, litigating complex reorganization cases throughout the country and serving as lead bankruptcy counsel in multiple high-profile cases.

Named in New York Super Lawyers and The Best Lawyers in America year after year, she is a well-known presence in the national bankruptcy community. She has been named one of the 12 Outstanding Restructuring Lawyers in the U.S. by Turnarounds & Workouts.

She is the author of the books, *Bankruptcy Crimes* (3rd Ed.) (Beard Books), the leading authoritative treatise on bankruptcy crime, *Mentor X: The Life-Changing Power of Extraordinary Mentors* (Bear Books 2019), and *Indenture Trustee Bankruptcy Powers & Duties* (Beard Books 2015), a practical guide for the distressed debt industry, as well as the Corporate Restructuring Blog (<http://blogs.bankrupt.com/>).

2:00 – 3:00 PM

Judges' Roundtable on Purdue Pharma: Dr. Strange's Inter-Dimensional Magic*

A Judges' Roundtable discussion of the Supreme Court's 5-4 divided Purdue Pharma case, including its aftermath, and impact on third-party releases and related issues.

PRODUCERS:

- **Thomas Phinney**, *Felderstein Fitzgerald Willoughby Pascuzzi & Rios LLP*
- **Leonard L. Gumpert**, *Gumpert Law Firm, PC*

SPEAKERS:

- **Judges in attendance**

3:30 – 4:30 PM

V for Vacancy*

What's hot and what's not for various property types and locations; cap rates & related issues; how exaggerated values affect insolvency professionals; and future predictions.

PRODUCERS:

- **Peter Sauer**, *Fear Waddell, P.C.*
- **Brooke Wilson**, *Pachulski Stang Ziehl & Jones*

SPEAKERS:

- **Hon. Scott Clarkson**,
US Bankruptcy Court, Central District of California
- **Stephen Bethel**, *Frazier Capital Valuation and Brokerage*
- **Mick Lauter**, *Sheppard Mulin*
- **Gerrick Washington**, *Frاندzel Robins Bloom and Csato L.C.*

4:30 – 5:30 PM

Destiny's Children? The Fantastic Four Forecast the Economy*

The program will begin with a snapshot of the current macroeconomic environment in the U.S., including a review of certain macroeconomic indicators that economists use to forecast. The panel will discuss industry trends (including underperforming industries), recent cases, news that is relevant to insolvency professionals, and their expectations for the remainder of 2025 and beyond.

PRODUCERS:

- **Jeremy Burr**, *Teneo's Financial Advisory*
- **Michael D'Alba**, *Levene, Neale, Bender, Yoo & Golubchik LLP*

SPEAKERS:

- **Hon. Victoria Kaufman**,
US Bankruptcy Court, Central District of California
- **Winston Mar**, *CR3 Partners*
- **Ryan Ratcliff**, *Knauss School of Business*
- **David Stapleton**, *Stapleton Group, a part of J.S. Held*

**An application requesting MCLE credit for this activity is pending for approval*

Saturday May 17, 2025

8:00 – 9:00 AM

Concurrent Session: Gain BAP Appeal Superpowers! Insights from BAP Judges and Law Clerks on how to Make Your Appeal a Success*

Join two judges of the Ninth Circuit's Bankruptcy Appellate Panel and their law clerks—the unsung superheroes of bankruptcy appeals—for the inside scoop on bankruptcy appeals. Among other things, the panel will discuss strategies at both the appellate and bankruptcy court levels, procedural pitfalls, and the proper mindset for appellate practice.

PRODUCER:

- **Reno Fernandez**, *Binder & Malter LLP*

SPEAKERS:

- **Hon. Julia Brand**,
US Bankruptcy Court, Central District of California
- **Hon. William J. Lafferty III**,
US Bankruptcy Court, Northern District of California
- **Sarah Stevenson**, *Bankruptcy Appellate Panel of the Ninth Circuit*
- **Teresa Mkhitarian**, *Bankruptcy Appellate Panel of the Ninth Circuit*

8:00 – 9:00 AM

Concurrent Session: Ledger League: Accounting Avengers Assemble*

Learn the accounting principles necessary to be a hero in the bankruptcy court, decipher your client's documents, and work with the financial advisors to emerge from bankruptcy victorious!

PRODUCERS:

- **Jake Diiorio**, *Stapleton Group, a part of J.S. Held*
- **Garrett Leatham**, *McCormick Barstow*

SPEAKERS:

- **Hon. Julia Brand**, *US Bankruptcy Court, Central District of California*
- **Hon. Robert Kwan**, *US Bankruptcy Court, Central District of California*
- **Hon. Alan Ahart**, *retired*
- **Hon. Victoria Kaufman**, *US Bankruptcy Court, Central District of California*
- **Hon. Deborah Saltzman**, *US Bankruptcy Court, Central District of California*

9:30 – 10:45 AM

Honorable Sheri Bluebond's Game Show: Wordle*

Put your word skills to the test in this interactive game show inspired by Wordle! Contestants will take turns guessing five-letter words related to key bankruptcy cases, with clues provided after each attempt. Judges will then break down the legal significance of each case. Audience participation is encouraged—text your suggestions to help contestants crack the code! The contestant with the highest score wins, but in the end, everyone walks away a winner (and a bottle of wine).

MODERATOR

- **Hon. Sheri Bluebond**,
U.S. Bankruptcy Court, Central District of California

JUDGE PANELISTS

- **Pending**

11:00 AM – 12:00 PM **Judges Roundtable: Marvel of SubV***

An interactive discussion on relevant SubV issues including contrary viewpoints.

PRODUCERS:

- **Gary Rudolph**, *Fennemore*
- **Doug Flahaut**, *Echo Park Legal, APC*

JUDGE PANELISTS:

- **Judges in attendance**

**An application requesting MCLE credit for this activity is pending for approval*

YIP SESSIONS

Calling all Young
Insolvency Professionals
(YIP), Law Clerks
and Externs!

SATURDAY, MAY 17, 2025

12:30 pm - 2:30 pm / Keynote Lunch & Judges Roundtable

FEATURING:



Hon. J. Barrett Marum
*United States Bankruptcy Court,
Southern District of California*

**SNACK
BREAK!**

3:30 - 4:00 pm

2:30 pm - 3:30 pm / The Superpowers of Section 523(a) Actions: Defeating the Forces of Dischargeability*

In this high-stakes session, bankruptcy superheroes will break down the anatomy of a Section 523(a) action, equipping attendees with the powers necessary to navigate the complex terrain of nondischargeability litigation. From identifying appropriate debts to crafting strategy, the panelists will guide attendees through the essential steps and offer insider tactics for overcoming the challenges that stand between the client and victory. Whether defending a client's interests or seeking justice for a creditor, attendees will learn how to harness the superpowers of evidence, procedure, and legal argument to ensure success in the courtroom. Do not miss your chance to become the hero in your next Section 523(a) action!

PRODUCERS:



Ryan Coy
Saul Ewing



Allison Rego
Mojdehi Galvin Rego LLP

PANELISTS:



Hon. Charles Novack
*United States Bankruptcy Court,
Northern District of California*



Christopher Ghio
Dinsmore & Shohl LLP



Jessica Bagdanov
BG Law LLP



Julie Rome-Banks
*Binder Malter
Harris & Rome-Banks LLP*

4:00 pm - 5:00 pm / Tech Heroes: Harnessing the Power of Technology and Social Media to Expand Your Legal Empire*

In this electrifying session, a panel of legal superheroes will reveal how attendees can wield the latest tools and platforms to grow their practice, and amplify their reach to connect with prospective clients, employers, and fellow attorneys. Attendees will learn how to leverage technology and social media to enhance their brand, build a powerful online presence, and engage with a wider audience—turning legal skills into a dynamic business force. The panelists will explore navigating the ethical landscape while maximizing visibility. Whether looking to improve client acquisition or expand your network, this session will provide attendees with strategies to become a modern-day legal hero in the digital world.

PRODUCERS:



Joseph Boufadel,
Salvato Boufadel LLP



Anerio Altman
Lake Forest Bankruptcy

PANELISTS:



Hon. Ronald Clifford, III
*United States Bankruptcy Court,
Central District of California*



Jenny Doling
J. Doling Law, PC



David Goodrich
Golden Goodrich LLP



Jennifer Nassiri
Sheppard Mullin





Saturday, May 17, 2025

1:30 – 2:30 PM

Kryptonite to the Mighty Homestead and Retirement Exemptions*

After the California legislature greatly increased the homestead exemption limits in California in 2021, the prevailing belief was that it would become increasingly rare for homes to be administered as assets in bankruptcy. However, recent cases have brought into question whether the exemption is as bulletproof as the legislature intended it to be, and opened the door for more obscure provisions of the Bankruptcy Code to be brought into play such as Section 522(p) and 522(q). If time permits, the panel will briefly discuss personal property exemptions based on retirement and California ScholarShare education plans.

PRODUCERS:

- **Mikayla Kutsuris**, *Felderstein Fitzgerald Willoughby Pascuzzi & Rios LLP*
- **Sophia Wang**, *ArentFox Schiff LLP*

SPEAKERS:

- **Meredith Jury**, *Bankruptcy Judge, Ret.*
- **Christopher Langley**, *Shioda Langley & Chang LLP*
- **Larry Simons**, *Janus Law*

2:30 – 3:30 PM

Watchmen of Chapter 13*

Join the Chapter 13 trustees of San Diego and Riverside to discuss recent developments in Chapter 13 caselaw and keys to success in filing and seeking confirmation of Chapter 13 plans, from the watchmen of Chapter 13.

PRODUCERS:

- **Talvinder Bambhra**, *Desmond, Nolan, Livaich and Cunningham*
- **Summer Shaw**, *Shaw & Hanover, PC*

SPEAKERS:

- **Hon. Vincent Zurzolo**, *US Bankruptcy Court, Central District of California*
- **Ron Danielson**, *Chapter 13 Trustee*
- **Michael Koch**, *Chapter 13 Trustee*

4:00 – 5:00 PM

Updates from the (Department of) Justice League*

Hear important updates from the Justice League, including relevant updates for debtors' counsel around the Small Business Administration and SBA loans, tax issues, and fraud.

PRODUCERS:

- **Timothy Evanston**, *Skarzynski, Marick & Black LLP*
- **Gabriel Herrera**, *Kronick Moskovitz Tiedemann & Girard*

SPEAKERS:

- **Gina Klump**, *Klump Law Group, PC*
- **Uzzi Raanan**, *Greenberg Glusker LLP*
- **Jolene Tanner**, *US Attorney's Office*

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OPTIONAL ACTIVITIES - SATURDAY, MAY 17

San Diego Botanic Garden - \$40/person - 1:30-4 pm

San Diego Botanic Garden (SDBG) is a 37-acre urban oasis that creates, shares and applies plant wisdom with people of all backgrounds, ages and interests. The Garden's four miles of trails display more than 5,000 plant species and varieties, including 300 plants for which SDBG is the only garden maintaining a population. SDBG has 15 gardens that represent different regions of the world, 12 demonstration gardens, and the largest public bamboo collection in North America. *Includes access to the World of Orchids exhibit, transportation to/from the OMNI La Costa, and admission to the garden. Located 4 miles from the conference hotel.*

Learn more at sdbg.org

Kid Friendly!

SDBG has three children's gardens, including its flagship, one-acre Hamilton Children's Garden, the largest kids' garden on the west coast.



Pickleball Tournament at OMNI La Costa Pickleball Courts \$85/person - 2-4 pm

This two-hour program combines a round robin tournament and an instruction class. Spend the first 30-60 minutes learning new skills or developing your existing ones with our staff pickleball professionals. The second portion is a fun round robin tournament format. This ensures that all players play matches against different opponents and with different partners. Want to play with your own partner? No problem! One of the pro team will act as the tournament director and ensure even play and that all guests have a fantastic time. Includes balls, paddles, light refreshments & towels courtside.

Annual Golf Tournament \$360/person - 12:15-5 pm

Aviara Golf Club features a memorable coastal layout. Uniquely sculpted around rolling hillsides and landscaped with wildflowers native to Southern California, the par 72 course offers plenty of bunkers and water features over 7,007 yards. San Diego's only golf course designed by Arnold Palmer. *Includes transportation and light lunch. Pricing does not include club rental.*

Learn more at parkhyattaviara.com/golf/aviara-golf



Saturday, May 17, 2025, 5-6:30 PM YIP Reception & Social Activity

Holy Guacamole!? Join us for an action-packed guac-making showdown where you become the superhero of flavor! Grab your sidekicks (aka avocados), mix up your best creation, and enjoy a smashing good time. Capes optional, but enthusiasm required!

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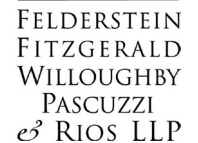


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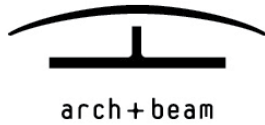
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EXHIBITORS





HOTEL INFORMATION

Hotel Information:

OMNI La Costa Resort and Spa
2100 Costa Del Mar Rd, Carlsbad, CA 92009
www.omnihotels.com/hotels/san-diego-la-costa

A limited number of rooms has been set aside at a discounted room rate starting at \$292 plus applicable taxes and fees* for a standard room. <https://cbf.memberclicks.net/cbf-conference>



The discounted rate is valid until Wednesday, April 23, 2025, but rooms may sell out before that time. A link to book your hotel room will be provided in your confirmation email after you register for the conference. There is no resort fee and self-parking is complimentary

Cancellation & Early Departure Fees

If you do not cancel your hotel room reservation 72 hours before arrival, you forfeit a one night room and tax non-refundable deposit as a cancellation fee. If you check out before your reserved checkout date, the hotel charges an early departure fee in the amount equal to one night room and tax.

*Taxes and fees consist of a 10% Transient Occupancy Tax, 2% City Tourism Business Improvement District Assessment plus a \$1 California Tourism Assessment Fee, and a \$2 Golf Lodging Business Improvement District Assessment per each occupied room night. All taxes and assessments are subject to change at any time without notice.





PO BOX 10, MANHATTAN BEACH, CA 90267

- California Bankruptcy Education
- Young Insolvency Professionals
- Consumer Bankruptcy Program
- California Receivers Forum
- Statewide Networking with Practitioners & Judges
- MCLE/CPE Credit Hours Provided

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