

Preliminary Report

A complete listing of the proceedings and speakers is available on [the Institute's Web site](#)

As we have done in January for the last eight years, and again with the permission of the University of Miami School of Law Center for Continuing Legal Education, we will be posting daily Reports to this list containing highlights of the proceedings of the 39th Annual Philip E. Heckerling Institute on Estate Planning that is being held January 10-14, 2005 at the Fontainebleau Hilton Resort and Towers in Miami Beach, Florida. A complete listing of the proceedings and speakers is available on the Institute's Web site. The URL for that site is <http://www.law.miami.edu/heckerling>.

We also will be posting the full text of each of these Reports on the ABA RPPT Section's Web site, as we have since the 2000 Institute. Those Reports can be found at URL http://www.abanet.org/rppt/meetings_cle/heckerling. In addition, each Report can also be accessed at any time from the ABA-PTL Discussion List's Web-based Archive at URL <http://mail.abanet.org/archives/aba-ptl.html>.

Our on-site local reporters who are present in Miami this year are Gene Zuspann Esq. of Zuspann & Zuspann in Denver, Colorado, Shelly Merritt Esq., a solo practitioner in Boulder, Colorado, Connie T. Eyster Esq. of Hutchinson, Black & Cook LLC in Boulder, Colorado, Jason Havens Esq. of Havens & Miller PLLC in Dustin, Florida, Bruce Stone of Goldman, Felcoski & Stone, PA of Coral Gables, Florida, Herbert L. Braverman Esq. of Walter & Haverfield LLP in Cleveland, Ohio, and Jeffry L. Weiler of Benesch, Friedlander, Coplan & Aronoff LLP of Cleveland, Ohio. The editor again this year will be Joseph G. Hodges Jr. Esq, a solo practitioner in Denver, Colorado who is the Chief Moderator of the ABA-PTL List.

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The start of the 39th Institute is only two days away now and, as we prepare for that, we want to pass along a few news items we have received recently or need to broadcast.

Administrative Matters:

Reporter Shelly Merritt Esq. has informed us that she practices law in Boulder, Colorado, not Denver, and that this is so despite her recent change of law firms. Sorry for the oversight there Shelly.

Organization Meetings:

The Heckerling Institute staff reminds everyone to attend the Complementary Reception for Registrants that will be held in the exhibition hall at the Fontainebleau Hotel from 6:00 to 7:00 p.m. on Monday evening. This is a don't miss function - plenty of food and lots of things to drink, plus great people to meet.

The principals of WealthCounsel have asked their members to join them at 5:30 p.m. on Monday in the WealthCounsel Hospitality Suite at the Fontainebleau Hotel for a kickoff meeting to discuss the reporting process for their Putting Heckerling into Practice program and their Heckerling wrap-up luncheon on Friday.

News from the Exhibit Hall:

EstateWorks will be demonstrating their Trusts and Estates case management system and the beta version of their workflow and tracking system for estate planning (Booths 51 & 52).

TEdec Systems Inc. will be unveiling Version 6 of their Fiduciary Accounting system, a Windows product. The pre-January discounted upgrade price has expired, but ask them if they will be offering a special upgrade price during Heckerling.

The Center for Estate Planning LLC will be unveiling their new Estate Profiler PRO software at Heckerling. It is designed to track real time and with visuals the consequences of various changes in a client's proposed estate plan. A free evaluation copy will be available at Heckerling.

The Probate & Trust Division of the ABA Section of Real Property, Probate and Trust Law will be marketing the new book "Asset Protection Strategies, Volume II" by Alexander Bove, the author and editor at Heckerling. On Tuesday morning during the morning break you can stop by the Section's Booth 39 and personally meet Alexander. The book will not be available for shipping until March but discounts on all the Section's publications will be offered for orders placed during Heckerling.

Connect2A.Com LLC, which is celebrating it's fourth anniversary at Heckerling this year, has announced several new features and enhancements to its data manager and communicator, including their newest product, Document Connect(tm), which is a document storage and sharing service.

And last but not least, Brentmark Software will be celebrating 20 years in business during Heckerling. In honor of that event, they are offering a special unprecedented one-time 20% discount on any of their software products that is licensed during the Institute. A free demo CD-ROM will also be available at their Booths 69 and 70.

GENERAL INFORMATION ABOUT INSTITUTE:

Inquiries/Registration:

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