Free Group and Committee Conference Calls

October 2018

All calls are open to RPTE members- you do not need to be a member of the Group/Committee to call in! The calls below are not for eCLE credit.

October 9th
Professors’ Corner
Legal Education and Uniform Laws Group (RP)
11:30 a.m. – 12:30 p.m. CT/12:30 p.m. – 1:30 p.m. ET

*A FREE monthly webinar featuring a panel of law professors, addressing topics of interest to practitioners of real estate and trusts/estates

IS THE FEE SIMPLE PAST ITS PRIME?

Speakers:

Lee Fennell, Max Pam Professor of Law, Co-director of the Kreisman Initiative on Housing Law and Policy, and Ronald H. Coase Research Scholar, University of Chicago Law School

Katrina M. Wyman, Sarah Herring Sorin Professor of Law and Director, Environmental and Energy Law LLM Program, NYU School of Law

Moderator:
Amy Hess, University of Tennessee College of Law

Nearly all privately owned property in the United States is held in fee simple. As the most complete estate known to law, the fee simple is perpetual in duration, freely alienable, inheritable, devisable, and unencumbered by future interests. For centuries, these features have provided owners with long-term investment incentives, stability, security, and autonomy. But increasing urbanization has dramatically altered the way in which land generates value, making patterns of uses paramount and sharpening concerns about the power of owners to block valuable new land assemblies. Should the fee simple form be rethought in light of these changes? Could another way of structuring access to real property do any better than the time-tested fee simple? The panelists will offer divergent views on these questions, which carry implications for both property theory and real estate practice.

Register now for this FREE program and join us every second Tuesday of each month for a discussion of these and other current issues. (The content of this program does not meet
requirements for continuing legal education (CLE) accreditation. You will not receive CLE credit for this program).

**Litigation, Ethics & Malpractice Group (TE)**
12:00 p.m. – 1:00 p.m. CT/1:00 p.m. – 2:00 p.m. ET
Dial in number: 866/646-6488
Participant Pass code: 725 588 7619

The Litigation, Ethics & Malpractice Group will hold its initial quarterly conference call on October 9, 2018. This will be an organizational call, and will set the course for the upcoming bar year, including a recap of the Fall Leadership Meeting, finalization of the proposed seminar topics to be submitted for the 2019 Spring Symposia, and a discussion of substantive topics for future quarterly Group calls.

**October 12th**
**Employee Benefit Plans and Other Compensation Arrangements Group (TE)**
12:00 a.m. – 1:00 p.m. CT/1:00 p.m. – 2:00 p.m. ET
Dial in number: 866/646-6488
Participant Pass code: 725 588 7619

Inaugural group call of the new bar year will begin with a leadership planning discussion at 11:30 a.m. (CDT), followed at noon (CDT) by an informal group discussion of topics of current interest.

**October 15th**
**Elder Law and Special Needs Planning Group (TE)**
2:00 a.m. – 3:00 p.m. CT/4:00 p.m. – 5:00 p.m. ET
Dial in number: 866/646-6488
Participant Pass code: 725 588 7619

**NEW STATE AND FEDERAL LAWS ON REPORTING ELDER FINANCIAL ABUSE -- BIG IMPACT ON BANKS, INVESTMENT FIRMS AND OTHER FINANCIAL INSTITUTIONS**

During the past few years, an increasing number of states have passed amendments to their securities and banking codes that require financial institutions such as broker-dealers (and to a lesser extent, banks and credit unions) to report suspected elder financial abuse. There is also a new federal regulation applicable to investment firms that requires asking new customers to fill out a "Trusted Contact" form and creates some safe harbors for account restrictions and communications of concern to persons other than the account owner. These changes are having a big impact on the reporting duties of financial institutions, and have raised awareness of the risks of elder financial exploitation. Mary Tucker works at Wells Fargo as Manager of
Elder Client Initiatives for the brokerage subsidiary. She will discuss these laws and how financial institutions are evolving to address the risks of elder abuse.

**October 24th**

**Commercial Real Estate Transactions Group (RP)**

**Purchase and Sale Committee**

1:00 a.m. – 2:00 p.m. CT/2:00 p.m. – 3:00 p.m. ET  
Dial in number: 866/646-6488  
Participant Pass code: 601 676 1423

Please join the Purchase and Sale committee for a discussion on Defaults and remedies in purchase and sale agreements.

**October 25th**

**Non-Tax Estate Planning Consideration Group (TE)**

2:00 a.m. – 3:00 p.m. CT/3:00 p.m. – 4:00 p.m. ET  
Dial in number: 866/646-6488  
Participant Pass code: 725 588 7619

Please join David Neufeld of Flaster Greenberg as he leads a discussion on the following aspects of Private Placement Life Insurance (PPLI):

1. Overview on PPLI;
2. The Investor Control Doctrine; and
3. Do you need an insurance dedicated fund (IDF) or not?

David S. Neufeld has practiced law for more than 30 years, advising individuals on sophisticated wealth planning (encompassing income tax, estate tax, state residency tax planning, asset protection, and the legal aspects of insurance and investment planning) and fiduciary due diligence. Additionally, he is an international tax lawyer who has helped business clients engaged in both inbound and outbound transactions as well as the individual tax issues that arise from cross-border business and transactions. He also advises insurance and wealth management institutions on programs, including “private placement life insurance” and captive insurance companies, that deliver to their clients cost-efficient risk mitigation along with tax-efficient investment opportunities.