

FINAL Report

This is the final report on the 2003 Heckerling Institute on Estate Planning. It contains several reports from Jason Havens.

Also, I received the following from Joe Hodges:

The Moderators of the ABA-PTL List wish to thank the following people for providing all of this year's reports:

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As we have done in January for the last six years, and again with the permission of the University of Miami School of Law Center for Continuing Legal Education, we will be posting to this list throughout the coming week highlights of the proceedings of the 37th Annual Philip E. Heckerling Institute on Estate Planning that is being held January 6-10, 2003 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>.

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FINAL REPORT

The following report has been filed concerning the software vendors who are in the Exhibit Hall this year and other technology news by our on-site Reporter, Jason Havens, Esq. of Destin, Florida, the creator of the Legal Research for Estate Planners Web site (<http://www.jasonhavens.net>). This report continues the coverage of software and some other vendors who are exhibiting at the Institute. Although our reports do not include direct hyperlinks, we would recommend that users search for a particular vendor using a search engine such as Google (<http://www.google.com>).

Following are the highlights from the "third round" among the software and other vendors. These highlights are generally classified in categories that will hopefully prove helpful to list members. This final "round" concludes these reports for the 2003 Institute.

A. CALCULATION SOFTWARE:

(N/A for 2003 software report #3)

B. DRAFTING SOFTWARE:

1. Lawgic (continued): Lawgic is apparently offering a discounted renewal license to its users. Lawgic has also reestablished its customer service efforts. For basic users, a "Getting Started Guide" is available within the 2001 updated program and also via Lawgic's website. A "How To" question is also available at the beginning of the program on question number one ("Select An Activity"). Lawgic was featured during the Institute's Special Session on technology.

2. Datatech Software, Inc. (continued): ThinkDOCS (drafting) was also featured during the Institute's Special Session on technology.

3. LawontheWeb.com/Wealth Transfer Planning: I spoke with Jonathan Blattmachr, Esq., the author of LawontheWeb.com/Wealth Transfer Planning, which was historically an excellent drafting system and was mentioned in the Special Session's materials. I do not have any details for this final report, but will post an update on this drafting system on this list serve in the future which will likely be entitled "Wealth Transfer Planning Software Updated" (if a user wants to search the archives for this topic).

C. TRUST ACCOUNTING & RELATED ADMINISTRATION SOFTWARE:

1. The Lackner Group, Inc. (continued): The 6-in-1 Estate Administration System is a Windows- or Mac-based system that includes the latest tax preparation forms, including the new Form 1041. Lackner has also updated its system to anticipate all known "decoupling" states (i.e., those states that are deviating from the "pick-up" tax, based on the state credit for federal estate taxes, the process of which is probably summarized in another report and is definitely included in the Institute's materials prepared by Pam Schneider, Esq. and others). Lackner is compatible with the well-known File Maker Pro database program. The Lackner 6-in-1 Estate Administration System was featured during the Institute's Special Session on technology.

2. Datatech Software, Inc. (continued): Quick and Easy (tax preparation) was also featured during the Institute's Special Session on technology.

D. APPRAISAL & VALUATION SOFTWARE:

(N/A for 2003 software report #3)

E. RESEARCH SOFTWARE & SERVICES:

(N/A for 2003 software report #3)

F. MISCELLANEOUS VENDORS:

(N/A for 2003 software report #3)

If any vendors or any important developments were omitted that we should have mentioned, please stay tuned. We will attempt to cover all items of interest in future reports as time permits. Thank you.

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Following are the highlights from the Institute's Special Session on estate planning technology. These highlights are generally classified in categories that will hopefully prove helpful to list members. Some of these comments update the materials provided at the Institute's Special Session on estate planning technology.

E-MAIL and E-MAIL SOFTWARE PROGRAMS:

1. Eudora e-mail program: The Special Session mentioned Eudora, an e-mail program that offers much of the same functionality as popular e-mail programs such as Microsoft Outlook. (Please note that this vendor was not displayed at the Institute.)

2. McAfee Spam Killer: The Special Session also mentioned McAfee Spam Killer, a program that will evidently minimize and hopefully eliminate spam.

E-MAIL DISCUSSION LISTS

Besides this list, which is probably the premier list for professionals and others in the area of estate planning and administration, the following lists were also mentioned at the Special Session:

1. LISI/Leimberg Information Services, Inc.: These newsletters are authored by a number of well-known estate planning experts. The newsletters are not in a discussion-based format, but provide excellent coverage on a variety of topics.

INFORMATION MANAGERS:

1. Amicus Attorney: This program functions as an amazing organization tool. Amicus Attorney includes group calendaring, contacts management, and conflicts checking. The program also integrates with e-mail, billing, and word processing programs. Timers are included in each aspect of the program to allow for easy time tracking. The more advanced versions of the program also include synchronization with Palm- and Windows-based personal data assistants. All of these information management programs integrate with time and billing software such as Timeslips.

DOCUMENT ASSEMBLY:

Please see the technology reports from the Institute, which include many

highlights on document assembly programs.

ESTATE PLANNING SOFTWARE:

Again, please see the technology reports from the Institute, which include many highlights on estate planning software.

TAX RETURN PREPARATION SOFTWARE:

Again, please see the technology reports from the Institute, which include many highlights on tax return preparation software.

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