

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

Introduction, Pt. 1

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 Denver, Colorado, Connie T. Eyster Esq. of Hutchinson, Black & Cook LLC in Boulder, Colorado, Jason Havens Esq. of Havens & Miller PLLC in Destin, 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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Scope of the Institute:

The Heckerling Institute on Estate Planning is the nation's leading conference for estate planning professionals. The program is designed for sophisticated attorneys, trust officers, accountants, insurance advisors, and wealth management professionals who are familiar with the principles of estate planning. The Institute offers something of interest to every member of the estate planning team.

- * The recent developments panel on Monday afternoon, featuring three of the nation's foremost estate planning experts, will guide you through the year's developments on the tax front.
- * Our general session lectures, which begin on Tuesday morning and continue throughout the week, will provide in-depth analysis of topics of timely interest to experienced estate planners.
- * On Wednesday and Thursday afternoons, a wide variety of workshops, panel discussions, and case studies will examine and provide practical guidance on sophisticated estate planning techniques, including our popular series on planning with financial assets.
- * A new series of afternoon programs will focus on the controversies that can arise in the planning and administration process, including planning and drafting to avoid litigation, handling tax controversies, risk management for trustees, and the use of mediation in estate planning.
- * Our fundamentals program is of interest to not only entry-level practitioners, but also to experienced planners who would benefit from a thorough review of three important topics. The

programs will cover the use of family limited partnerships and limited liability companies; the income taxation of trusts, estates, grantors, and beneficiaries; and the provisions and planning implications of EGTRRA.

* As the largest gathering of estate planning professionals in the country, the Institute offers a unique opportunity to exchange ideas, to network and to review the latest in technology, products and services displayed by over 100 vendors in an exhibit hall dedicated entirely to the estate planning industry.

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SUBSTANTIVE PROGRAM SCHEDULE AND HIGHLIGHTS:

Due to the length of this Schedule, it will be published as part of a separate Introduction Part II e-mail.

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