

**Heckerling Institute 2006**

Reports from the event, as posted to the ABA-PTL List Serve

# 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 nine 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 40th Annual Philip E. Heckerling Institute on Estate Planning that is being held January 9-13, 2006 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](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 Zuspahn Esq. of Zuspahn & Zuspahn in Denver, Colorado, Bruce Stone of Goldman, Felcoski & Stone, PA in Coral Gables, Florida (a member of the Institute's Advisory Committee), Herb Braverman of Walter & Haverfield, LLP in Cleveland, Ohio, Jeff Weiler of Benesch, Friedlander, Coplan & Aronoff, LLP in Cleveland, Ohio, Merry Balson of Wade, Ash, Woods, Hill & Farley in Denver, Colorado, Barbara Dalvano of Isaacson & Rosenbaum, PC in Denver, Colorado, Paul Hood of L. Paul Hood Jr. (APLC) in Manderville, Louisiana, and Joanne Hindel of Fifth Third Bank in 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 40th Institute is only a few 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.

## Institute Opening Reception

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 a great place to meet a lot of people.

## News from the Exhibit Hall:

The vendor's list this year includes the following (in alpha order) which may be of particular interest to many of our readers and will be covered in more depth as the Institute progresses:

ABA Section of Real Property, Probate & Trust Law Attorney's Will Registry BNA/Tax Management, Inc.

Brentmark Software, Inc.  
CCH Inc.  
Connect2A  
Eidelman Associates - WINDRAFT  
Estate Valuations & Pricing Systems, Inc. [EVP] EstateWorks FASTER Systems, LLC Bronze  
Sponsor Fast-Tax Financial Data Service Gallo Institute Gillett Publishing LLC [GEMS] Heritage  
System by DataTech Software InterActive Legal Systems The Lackner Group, Inc.  
LAWGIC LLC  
LexisNexis  
PPC  
Schumacher Publishing, Inc.  
Thomson RIA  
Thomson West  
University of Miami, Office of Estate and Gift Planning U.S. Trust and Practical Drafting ®  
Platinum Sponsor WealthCounsel

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GENERAL INFORMATION ABOUT INSTITUTE:

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