

## Introduction, Pt. 1

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 ten 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 41th Annual Philip E. Heckerling Institute on Estate Planning that is being held January 8-12, 2007 at the Orlando World Center Marriott Resort and Convention Center in Orlando, Florida, a new venue for the Institute this year. A complete listing of the proceedings and speakers will be published here later and is also available on the Institute's Web site at <http://www.law.miami.edu/heckerling>.

Our on-site local reporters who are present in Orlando this year are Gene Zuspann Esq. of Zuspann & Zuspann in Denver, Colorado, Herb Braverman Esq. of Walter & Haverfield, LLP in Cleveland, Ohio, Merry Balson Esq. of Wade, Ash, Woods, Hill & Farley in Denver, Colorado, Paul Hood Esq. of L. Paul Hood Jr. (APLC) in Mandeville, Louisiana, Joanne Hindel Esq. of Fifth Third Bank in Cleveland, Ohio. Jason Havens Esq. of Havens & Miller PLLC in Destin, Florida. Alan Rothschild Esq. of Hatcher, Stubbs, Land, Hollis and Rothschild, LLP in Columbus, Georgia, and Kimon Karas Esq. of McCarthy, Lebit, Crystal and Liffman Co., LPA in Cleveland, Ohio. The editor again this year will be Joseph G. Hodges Jr. Esq, a solo practitioner in Denver, Colorado, who also 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 recent developments panel on Monday afternoon, featuring three of the nation's foremost estate planning experts, will guide you through the year's most significant developments in estate planning, including the latest 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. Sessions in the financial assets series are designated:
- A second series of afternoon programs will focus on trust and estate litigation, including an update on FLP audit and litigation issues and a session on reducing the risk of malpractice claims. The series will also include a full afternoon session on a new simplified trial resolution process to resolve disputes that cannot be successfully mediated. Sessions in the litigation series are designated:
- 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 selected wealth transfer tax issues, buy-sell agreements, and Subchapter K.

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.

Our new headquarters hotel, the Orlando World Center Marriott Resort & Convention Center, offers nearly 2,000 hotel rooms as well as expanded meeting and exhibit space. Please join us in Orlando, January 8 -12, 2007, to take advantage of this exciting event!

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