

Heckerling Institute 2007

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

Introduction

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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The start of the 41th Institute is only two 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 Marriott 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 and make friends with a lot of people.

News from the Exhibit Hall:

The vendor's list this year has significantly expanded and includes the following (in alpha order) that may be of particular interest to many of our readers. Most of these vendors will be covered in more depth in later Reports as the Institute progresses:

ABA Section of Real Property, Probate & Trust Law Academy of Special Needs Planners Advanced Settlements, Inc. Air Planning Alaska Trust Company American Association of Attorney _ CPA's American Endowment Foundation American Guaranty & Trust Company American Society of Appraisers Antiquorum Auctioneers Aon Private Risk Management Appraisers & Planners, Inc. Ashar Group, LLC Ashton Group Asset Management Advisors Atlantic Trust Private Wealth Management Attorney's Will Registry Balsam Settlement Management LLC Bank of America Bayview Financial Exchange Services BNA Tax Management, Inc. Bonhams & Butterfields Brentmark Software, Inc. BRIDGGE ART STRATEGIES, LTD. CCH Charitable Trust Administration Company Christiana Trust Christie's Citigroup Trust Commonwealth Trust Company Community Foundations of Florida ComStock Valuation Advisors, Inc. Connect2A Coventry Crawford & Company Credit Suisse Deutsche Bank Private Wealth Management Donlevy_Rosen & Rosen, PA Doyle New York Eidelman Associates _ WINDRAFT Empire Valuation Consultants LLC Equity Trust Company Estate Valuations & Pricing Systems, Inc. EstateWorks Exeter 1031 Exchange Services FAMILIY OFFICE Services Corporation FASTER Systems, LLC Fast_Tax Fidelity Charitable Services Fiduciary Trust Company International Financial Data Service Fine Art Capital First Capital Surety & Trust Company First PREMIER Bank, Trust Department Firstat RN Care Management Services FMV Opinions, Inc. Fort Pitt Capital Group Foundation Source FREEMAN'S Auction House Gillett Publishing LLC Goldman Sachs Trust Company Gurr Johns Masterson, Inc. Harris Private Bank Harvey E. Morse, P.A. Hays Companies Hemisphere Real Estate Heritage Auction Galleries Heritage System by DataTech Software HSBC Private Bank Insurance Strategies Group LLC InterActive Legal Systems International Genealogical Search Investment Scorecard Incorporated Investors Bank & Trust Company John Hancock Life Insurance Company U.S.A. LAWGIC LLC Lawyer's Weekly, Inc. Leslie Hindman Auctioneers LexisNexis Life Insurance Settlements, Inc. Lucion Technologies M.J. Bohan Co., Inc. Management Planning, Inc. Marcum & Kliegman LLP MassMutual Financial Group Medicaid Practice Systems Mellon's Private Wealth Management Group Mercer Capital Merrill Lynch Millea Bros. Ltd. Nadeau's Auction Gallery Inc. National Philanthropic Trust New York Private Bank and Trust Newman + Cohen Financial Management NIXON PEABODY FIDUCIARY SERVICES Northern Trust Company Paul Comstock Partners PDI Global, Inc. PENSCO Trust Company PinnacleCare Plexus Financial Technologies LP PPC Private Asset Management Real Automation Solutions Riava Realty Advisors Rochdale Offshore Investment Management Rockefeller Philanthropy Advisors RSM McGladrey, Inc. Rumson Capital LP Schumacher Publishing, Inc. Schwab Fund for Charitable Giving Sherwood Partners, LLC Skinner, Inc. Sotheby's, Inc. South Dakota Trust Company, LLC and South Dakota Planning Company LLC Southpac Group Stack's Rare Coins State Street Global Advisors Succession Capital Alliance The Bank of New York _ Directed Trust Services The Insurance Design Center, LLC The Lackner Group, Inc. The Shafe Group, Inc. The InsuranceAdvisor.com Thomson RIA Thomson West Trugman Valuation Associates, Inc. Trusts & Estates U.S. Trust and Practical Drafting ® University of Miami Vanguard National Trust Company Wachovia Exchange Services Wachovia Trust Wealth Manager WealthCounsel Willamette

Management Associates Willis Private Client Group Wyoming Bankers Association _ Trust
Committee Yellowstone Trust Administration

Below is information that will be included at the end of each Report due to its importance and in case any of our readers need to contact the Institute or someone who is there while the Institute is progressing.

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