



American Bar Association Section of Real Property, Probate & Trust Law
Probate & Trust Division
Wealth and Non-Tax Estate Planning Considerations Group
ABA-RPPTL SPRING CLE SYMPOSIUM, APRIL 26-27, 2007
GROUP ACTIVITIES SUMMARY

GROUP OFFICERS			
ROLE	NAME	PHONE, FAX	EMAIL
SUPERVISORY COUNCIL MEMBER	Christopher H. Gadsden	(484) 683-2623 (484) 683-7279 fax	cgadsden@gsw-llp.com
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PT DIVISION CHAIR	Steve R. Akers	(214) 981-9407 (214) 981-9410 fax	akers@bessemer.com

(Summary based on conference call 3/28/2007, with the following participants)

Michelle Clayton
Laura Twomey
John Gallo
Susan Gary

Susan Harmon
Bob Karelitz
Mario Mata
Kevin Millard

Dick Nenno
David Neufeld
Chris Riser
Mike Whitty

Uniform Acts (S. Gary, M. Clayton, K Millard)

Conference call, April 12, on Uniform Acts being drafted now
Uniform Law Breakfast @ ABA-RPPTL, Friday April 27th

Emotional and Psychological (J. Gallo)

3 subcommittees:

Collaborative Law in TE (Presentation last year in San Diego)
Grief
Drafting for E&P issues, ind. Incentive Trusts, 2008 article

Non-Tax Issues (L. Twomey, B. Karelitz)

SP Trustee (Nenno, Carter Hood)
Uniform Acts on Probate

Insurance and Financial Planning (S. Harmon/D. Neufeld)

Jan. 2007 conference call: J. Blattmachr on Supercharged CS Trust
Another teleconference in the works
Possible future program on retirement planning interface w/ EP
Website updates (Marty Shenkman)

Asset Protection (C. Riser/M. Mata)

April presentation
Fall Joint Meeting – possible program on Creditor Attacks on Estate Planning Structures