SECTION OF REAL PROPERTY | TRUST & ESTATE LAW

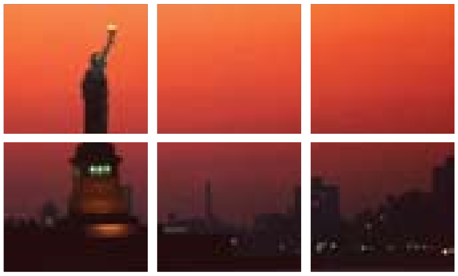
Defending Liberty
Pursuing Justice

Registration Deadline June 25, 2010!

Skills Training for Estate Planners
CLE PROGRAM

JULY 12 – 16, 2010

An intensive Estate Planning program for young or transitioning lawyers new to the practice



This CLE program is sponsored by the American Bar Association, Section of Real Property, Trust and Estate Law will be held at the New York Law School in it's beautiful, new building in New York City. This is a very popular annual estate planning program with limited space - early registration is advised!

WHO SHOULD ATTEND

New estate planners – both young attorneys, new in the profession, and attorneys seeking to make a transition from another area of law.

PROGRAM LOCATION

New York Law School
185 W. Broadway
New York, NY
10013-2960

PROGRAM CO-CHAIRS

Steve R. Akers, Bessemer Trust, Dallas, TX

William P. LaPiana, Professor of Wills, Trusts, and Estates and Director of Estate Planning, Graduate Tax Program New York Law School, NYC, NY

OPTIONAL PRE-PROGRAM INSTITUTE SUNDAY, JULY 11, 2010

Review of the basics of estate tax, gift tax, GST tax and income taxation of trusts and estates. A must for attendees who need or want a refresher in these vital areas.

BASIC FUNDAMENTALS AND SUBSTANTIVE SKILLS DEVELOPMENT

- Marital deduction basics, including analysis of how much to use the use of disclaimers or partial QTIP elections, funding and fiduciary administration problems
- Charitable deduction planning including use of computer software
- Analyzing inter vivos gifting, both basic and sophisticated transactions such as GRATs and QPRTs, including an analysis of when such techniques make sense
- Life insurance planning, particularly with respect to irrevocable insurance trusts and the practical aspects of product selection, premium financing, and due diligence along with GST considerations
- Deferred compensation and employee benefits, including beneficiary designation alternatives and drafting such designations
- Practical tips on planning with the generation-skipping transfer tax
- Preparing flexible trusts with an eye to the future

TECHNICAL SKILLS DEVELOPMENT

- Tax compliance: hands-on manual preparation to learn how the tax law works and how software can produce errors
- Fiduciary administration and accounting and the tax aspects of postmortem and other fiduciary administration
- Valuation in practice, including how to select valuation experts and analyze their work
- Exposure to software programs and web sites that assist in the analysis of estate assets and facilitate construction of planning models

DEVELOPING ETHICAL ATTITUDES

Ethics instruction in practical settings, particularly including representations of spouses and fiduciaries.

TUITION

Tuition includes all instruction and materials; continental break-fasts, lunches each day and two cocktail parties. $1595 general registration, $950 government rate (limited number of spaces for full-time government employees). Financial scholarships are available. Application requests should be sent to Hillary Clark at clarkh@staff.abanet.org

ACCOMMODATIONS

A block of rooms has been secured at the Millenium Hilton (55 Church St., New York, NY) at the rate of $249. Please call the Hilton directly at 212/693-2001 or 888-273-0734 for reservations. Be sure to reference the ABA Real Property Trust and Estate Law Skills Training Program to secure a room at the discounted rate. The deadline for hotel reservations is June 21, 2010. A list of other hotels is available upon request.

CLE REQUESTED: 38 TO 39 TOTAL 60-MINUTE HOURS OF INSTRUCTION

SPACE IS LIMITED FOR THIS PROGRAM!

To register, email **clarkh@staff.abanet.org**.
The registration deadline is **June 25, 2010**. Please contact Hillary Clark at 312/988-5683 with any questions.

CANCELLATION POLICY

Refund requests for this program must be made in writing and received via fax (312/988-5262) in our office by July 5, 2010. There will be a $425 administration fee deducted from the refund. The Section will gladly accept substitutions for cancellations received after July 5th; however, refunds will not be given after that date.

American Bar Association | Section of Real Property, Trust and Estate Law

Skills Training for Estate Planners

CLE PROGRAM

JULY 12-16, 2010 | New York Law School - New York City, NY

REGISTRATION FORM

(Please print, complete and fax to **312/988-5262** *or email to* **clarkh@staff.abanet.org***)*

Name

Firm

Address

City State Zip

Phone

Email

ABA Member? RPTE Member? ABA ID:

REGISTRATION PRE-REQUISITE

Over time we have had registrants who were either too well qualified or not qualified enough to benefit from the course. Please complete the pre-enrollment survey and submit with the registration form. After review of the survey, your registration will be completed or returned.

TUITION

Includes all instruction and materials; continental breakfasts, lunches each day and two cocktail parties

- ☐ $1,595.00 General Registration Rate (Includes Sunday Pre-Program Institute)
- ☐ $950.00 Government Rate (limited number of spaces for full-time government employees)

CREDIT CARD INFORMATION:

☐ Visa ☐ MasterCard ☐ American Express ☐ Check–made payable to the American Bar Association

Card number

Expiration date

Signature

IF MAILING A CHECK, PLEASE RETURN TO THE ATTENTION OF:

Hillary Clark, ABA, Section of RPTE

321 N. Clark Street, Chicago, IL 60654

ABA Defending Liberty Pursuing Justice

SECTION OF REAL PROPERTY | TRUST & ESTATE LAW

Your Source for Success

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CLE PROGRAM

PRE-ENROLLMENT SURVEY
To help us anticipate your learning needs and background

Name

1. Are you a licensed attorney? ☐ Yes ☐ No If so, year of law school graduation

2. Number of years: In Law Practice In Estate Planning Practice

If you are not in private law practice, please articulate your situation
(e.g., practicing CPA; returning from raising a child; bank trust officer; financial planner; etc.)

3. How many professionals are there in your practice setting?

4. How many of those colleagues practice Estate Planning or related work?

5. How much of your time do you currently devote to
   estate planning? %
   probate/trust administration? %
   probate/trust litigation %

Please list other areas in which you do/will practice

6. What % of your expected client base do you estimate has a
   $3.5 million estate? **%**

7. Which of the following law school courses have you taken?
   ☐ Wealth Transfer Tax (Estate & Gift Tax) ☐ Income Tax ☐ Trusts & Estates ☐ Estate Planning ☐ Subchapter J

8. In 2008-2009, approximately how many of the following did you personally draft:
   Wills or trusts with tax planning (e.g. marital/charitable deduction) provisions
   Approximately how many were ILITs IDGTs QPRTs GRATs CRTs CLTs Crummey trusts
   Wills or trusts without tax planning provisions

9. In 2008-2009, approximately how many of the following did you personally create:
   FLPs/LLCs Buy-Sell Agreements Marital property agreements

10. In 2008-2009, approximately how many of the following did you personally prepare/engage in
   706 709 1041 Probate administration Trust administration

Prior CLE relevant to Estate Planning (where/what/when)

PROGRAM ENVIRONMENT
Do you have any special dietary requirements?

Do you have any physical restrictions that a traditional classroom environment will not accommodate? ☐ Yes ☐ No

Please indicate the best way for us to communicate with you (if e-mail, be sure to include your e-mail address):

How did you learn about this program?

Please Return This Form With Your Registration – fax 312/988-5262 or email clarkh@staff.abanet.org