



Section News

Eleventh Annual Advanced ALI-ABA Course of Study

Estate Planning for the Family Business Owner

Thursday-Saturday
August 1-3, 2002
Loews Coronado Bay Resort
Coronado (San Diego), California

*Co-sponsored by:
ABA Section of Real Property,
Probate and Trust Law and
ABA Section of Taxation*

Are you planning for the succession of the family business by using the latest techniques to preserve the value of the business and reduce estate taxes?

This annual advanced course of study provides a comprehensive overview of estate planning techniques for the family business owner.

The course covers the life cycle of the closely held business, from choice of entity to estate administration, including getting the business ready to sell, with primary attention to tax and estate planning issues, but keeping in mind significant non-tax questions that require attention.

Specially featured in this course are breakfast workshops on Friday and Saturday. These well-received sessions allow registrants to discuss topics of concern with the faculty in informal small group settings. **One breakfast session specifically addresses ethical considerations in representing the family business owner.**

The course is intended for lawyers, accountants, and others who advise privately owned business owners, as well as for the owners and financial officers of such businesses. Time is reserved throughout the program to address registrants' written questions.

Tuition for this course is \$895 (\$845 for members of the ABA Section of Real Property, Probate and

Trust Law or ABA Section of Taxation). ABA members wishing to apply for membership in the Real Property Section or the Tax Section may do so when they register for this course and take advantage of the reduced tuition. Tuition entitles registrants to admission to all sessions, a set of study materials, and continental breakfasts daily. **To register with a valid credit card:**

- Phone: 800-CLE-NEWS (800-253-6397),
- FAX: (215) 243-1664, or
- Access the ALI-ABA web site at www.ali-aba.org.

Additional Information

For more information contact Alexander Hart, Director, Courses of Study, ALI-ABA, 4025 Chestnut Street, Philadelphia, PA 19104-3099, (215) 243-1630 or (800) CLE-NEWS (253-6397), ext. 1630 (toll free, U.S. and Canada). ■

Theme Calendar

Readers are invited to submit articles for consideration, both on the listed themes and on other topics. For more information go to www.abanet.org/rppt/memorandum.html.

Issue—January/February 2003
Leasing and Property Management
Basic Estate Planning
Submission deadline: September 2, 2002

Issue—March/April 2003
Exotic Real Estate
Estate and Trust Administration
Submission deadline: November 1, 2003

Issue—May/June 2003
Title Insurance
Employee Benefits and
Retirement Benefits Planning
Submission deadline: January 2, 2003

RPPT Committee Spotlight

Join a Section Committee

The Section of Real Property, Probate and Trust Law has over 115 substantive committees that cover a variety of subjects that are important to lawyers in the fields of estate planning and real property.

If you are a member of the Section and do not belong to a committee, you are not taking full advantage of your Section membership. To receive a copy of the most recent *RPPT Guide to Committees* or for further information on committee membership, contact Nikki Dennard in the Section office at (312) 988-5651 or visit the Section's "Committees" page at www.abanet.org/rppt/committees/home.html. All Section members may join up to two committees free of charge.

This issue's committee highlights:

Probate and Trust— E-2 Long Term Health Care Committee

This committee focuses on legal, financial, and policy issues connected with long-term care, including Medicare, Medicaid, long-term care insurance, nursing home regulations, and home care. This committee is also concerned with the special needs of persons with disabilities, such as the retarded or the elderly. Another topic of interest concerns whether creditors can require the person in need to elect his or her elective share as surviving spouse and the discretion of guardians, conservators, and committees in this respect. The committee publishes information for Section members on these topics and

participates in or sponsors Section CLE programs. Recent committee activities include a magazine article summarizing the results of a Section-sponsored survey on the use of durable powers of attorney and a program at a recent ABA Annual Meeting.

Chair: John Laster
Vice-Chair: James Palmer Jr.
Committee web site: www.abanet.org/rppt/committees/pt/e2/home.html

Real Property— B-3 Litigation and Dispute Resolution Committee

This committee's role is to explore and communicate techniques for resolving disputes that arise in the context of real estate transactions and ownership. The



Important Dates in July 2002

4th

Independence Day

ABA Office closed

8th

Deadline for Housing for Annual Meeting in Washington, D.C.

11th

Deadline for advanced registration for Annual Meeting

Important Dates in August 2002

9th - 11th

RPPT Annual Meeting in
Washington, D.C.



ABA125

2002 ANNUAL MEETING
WASHINGTON, D.C. AUGUST 8-13

committee addresses alternative approaches to documenting real estate transactions and ownership in order to facilitate dispute resolution. It researches and communicates developments relating to various methods of dispute resolution, including litigation, arbitration, and other alternatives. It also explores evolving dispute resolution techniques, such as mediation and mini-trials, and examines disputes in various substantive areas of real estate law.

Chair: Michael Donner
Vice Chair: James Eischen
Committee web site: www.abanet.org

[org/rppt/committees/rp/b3/home.html](http://www.abanet.org/rppt/committees/rp/b3/home.html)

Information presented in the May/June issue for the A-2 Decisions Committee was incorrect. The correct committee is highlighted below.

Real Property—C-2 Title Insurance and Surveys

This committee provides education on title insurance matters, as well as current information and scholarship on new developments in title insurance, title insurance forms, endorsements, and closing practice. Recent topics include title mergers, creditors' rights issues, and title insurance in multi-state

transactions. The committee serves as a liaison between the providers and the consumers of title insurance and related services. This committee also addresses legal issues and standards relative to real estate surveys. The impact of automation on legal standards for surveying practices continues to be of particular concern.

Chair: Janice Carpi
Vice Chairs: Edward Browne Jr., Lawrence Conn, and Jack Levey.
Committee web site: www.abanet.org/rppt/committees/rp/c2/home.html. ■



The Section of Real Property, Probate and Trust Law thanks the 13th Annual Real Property and Estate Planning Symposia sponsors for their generous support.

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