15TH ANNUAL NEW ENGLAND CONFERENCE

Estate Planning 2014

Select from Eight Breakout Sessions

Advanced issues and latest developments

MCLE brings together a faculty composed of leading estate planners and nationally recognized practitioners for our *15th Annual New England Estate Planning Conference 2014*. This carefully crafted program features a variety of topics.

- Customize your *Conference*, select from **eight breakout sessions**
- Up-to-the-minute analysis of **the latest legislation**
- Two workshops: **"Especially for newer practitioners"**

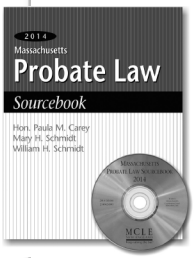
The day begins with the ever-popular Professor Jeffrey Pennell, presenting his annual update on recent developments. Professor Pennell provides an "up-to-the-minute" summary of recent decisions, rulings, regulations, and legislative developments that affect estate planning. The session features ample opportunity for registrants to pose tough questions for Professor Pennell, an unequalled opportunity for interactive participation.

In the afternoon, choose from among eight workshops on timely estate planning topics.

KEYNOTE SPEAKER

Professor Jeffrey N. Pennell on "Recent Developments"

Professor Jeffrey N. Pennell is the Richard H. Clark Professor of Law at Emory University School of Law in Atlanta. He is a member of the American Law Institute and an Advisor for the Restatements of Wills and Other Donative Transfers, and of Trusts, a former member of the Council of the Real Property, Trust & Estate Section of the American Bar Association, an Academic Fellow and Former Regent of the American College of Trust and Estate Counsel, and an Academician of The International Academy of Estate and Trust Law. His various publications include student and practitioner texts, Tax Management portfolios, articles, institute chapters, and he is the successor author of *Casner & Pennell on Estate Planning* (6th ed.).



Special Seminar Materials

In addition to the written program materials, registrants receive the *Massachusetts Probate Law Sourcebook 2014*, a desk reference powerhouse for probate practitioners. With MCLE's supplementation service, new supplements are mailed automatically with an invoice. If you do not wish to subscribe, please note on order form.

FACULTY

Marc J. Bloostein, Esq., *Ropes & Gray LLP, Boston,* Chair; Brian R. Bassett, Esq., *Ropes & Gray LLP, Boston;* Cameron T. Casey, Esq., *Ropes & Gray LLP, Boston;* George L. Cushing, Esq., *McLane, Graf, Raulerson, & Middleton, PA, Woburn;* Anne Katsas, Esq., *Port Estate Planning LLC, Newburyport;* Professor Charles P. Kindregan, Jr., Esq., *Suffolk University Law School, Boston;* Shari A. Levitan, Esq., *Holland & Knight LLP, Boston;* Geoffrey Mead Mason, Esq., *Ropes & Gray LLP, Boston;* Suma V. Nair, Esq., *Goulston & Storrs, PC, Boston;* Professor Jeffrey N. Pennell, *Emory University School of Law, Atlanta, GA;* Kerry L. Spindler, Esq., *Goulston & Storrs, PC, Boston;* Scott E. Squillace, Esq., *Squillace & Associates, PC, Boston;* Kenneth J. Vacovec, Esq., *Vacovec, Mayotte & Singer LLP, Newton*

AGENDA

8:30 A.M. – 12:00 NOON
Keynote Address
Professor Jeffrey N. Pennell on "Recent Developments"

12:00 NOON – 1:00 P.M.
Lunch Break *(on your own)*

1:00 P.M. – 2:10 P.M.
Breakout Session 1 *(choose one)*
- **Net Investment Income Tax**
- **Marital Planning in the Post-ATRA World**
- **Especially for Newer Practitioners: Discussing Professor Pennell's Keynote Address**

2:20 P.M. – 3:30 P.M.
Breakout Session 2 *(choose one)*
- **Assisted Reproduction: Estate Planning Issues**
- **International Estate Planning**
- **Especially for Newer Practitioners: Case Studies—Traps for the Unwary**

3:40 P.M. – 5:00 P.M.
Breakout Session 3 *(choose one)*
- **Estate Planning for Same Sex Couples after *Windsor***
- **Non-Statutory Decanting in Massachusetts after *Morse v. Kraft***

BOSTON

8:30 a.m. – 5:00 p.m.,
Friday, January 10, 2014
MCLE Conference Center,
10 Winter Place, via Winter Street
Program No. 2140107P01

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- $110 MCLE Sponsor Members

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*To receive the eBook instead of the print book of the MCLE manual accompanying this program, please register for the program online at www.mcle.org and select your preferred format.

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- ▶ **WALK UP** on the day of the program or **DROP IN** to MCLE's bookstore, Monday – Friday, 8:30 a.m. – 5:30 p.m.

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Estate Planning Conference 2014

BOSTON
Friday,
January 10, 2014
8:30 a.m. – 5:00 p.m.

KEYNOTE ADDRESS

Professor Jeffrey N. Pennell on "Recent Developments"

MCLE NEW ENGLAND
Keep raising the bar.®