ALI CLE

Estate Planning

Advanced
ALI CLE Course /
Live Video Webcast

THE AMERICAN LAW INSTITUTE
Continuing Legal Education

Representing Estate and Trust Beneficiaries and Fiduciaries

Thursday-Friday, July 18-19, 2013

Boston (The Langham Hotel)

and Live Video Webcast

Register online:
www.ali-cle.org/CV005

Back by popular demand: Talk at the Tables!
Small, interactive groups where your issues are discussed one-on-one.

This is the "go-to" program for estate and trust administration professionals. Get the latest insight on the issues, including strategies for addressing the challenges of unhappy beneficiaries and concerned fiduciaries. Expert faculty of seasoned practitioners from across the country examine:

- **Emerging fiduciary issues and how to pick (or be picked as) the best lawyer for the job**
- **What you don't (but should!) know about income taxation of estates and trusts**
- **Hot topics in tax, ethics, and estate and trust administration**
- **The current fiduciary litigation landscape—and what you should do differently**
- **Perils of the lawyer-trustee**
- **The emboldened beneficiary**
- **Deposition devils and details**
- **Decanting illusions**
- **"Side letters" to trustees**

Planning Chairs

Steven M. Fast
Day Pitney LLP, West Hartford, Connecticut (also on faculty)

Robert Whitman
University of Connecticut School of Law, Hartford

Faculty

Dominic J. Campisi
Evans, Latham & Campisi, San Francisco

George L. Cushing
McLane, Graf, Raulerson, & Middleton, Professional Association, Woburn, Massachusetts

Donald P. DiCarlo
Wilmington Trust, N.A., Villanova, Pennsylvania

Robert G. Holdway
Vice President, Fiduciary Trust Company, Boston

Amy K. Kanyuk
McDonald & Kanyuk, PLLC, Concord, New Hampshire

James L. Kronenberg
Bessemer Trust Company, Boston

Stacy K. Mullaney
Vice President, Fiduciary Trust Company, Boston

Suma V. Nair
Goulston & Storrs, Boston

Jeffrey N. Pennell
Richard H. Clark Professor Law, Emory University School of Law, Atlanta

Andrew D. Rothstein
Goulston & Storrs, Boston

Joshua S. Rubenstein
Katten Muchin Rosenman LLP, New York

James Sicilian
Day Pitney LLP, Hartford, Connecticut

Greta E. Solomon
Cohen & Wolf, P.C., Bridgeport, Connecticut

John D. Wilson
Law Offices of John D. Wilson, Los Angeles

Joy Harmon Sperling
Day Pitney LLP, Parsippany, New Jersey

Arthur W. Young III
Assistant General Counsel, Bank of America, N.A., Boston

Raymond H. Young
Young & Bayle, Boston

ALI CLE Program Attorney:
Kevin J. O'Connor (koconnor@ali-cle.org)

Program

All times are Eastern.

Thursday, July 18, 2013

8:00 a.m.	Registration and Continental Breakfast, with an opportunity for **Talk at the Tables** about your issues with speakers from the day (not recorded or webcast)
8:40 a.m.	Administrative Remarks – ALI CLE Staff

VIDEO WEBCAST SEGMENT A | $329

8:45 a.m.	**New Cases, New Risks (and Some Solutions) for Fiduciaries, Part I** – Mr. Campisi
10:30 a.m.	Networking and Refreshment Break
10:45 a.m.	**Income Taxation of Estates and Trusts: What You Haven't Been Thinking About — and May Wish You Had** – Professor Pennell
12:00 noon	Lunch Break

VIDEO WEBCAST SEGMENT B | $329

1:15 p.m.	**Ethics (but Not Just a Boring Parade through the Rules)** – Professor Pennell
2:15 p.m.	**View from the Inside: Emerging Fiduciary Issues and Picking the Right Lawyer for the Right Issue** – Messrs. Sicilian and A. Young
3:00 p.m.	Networking and Refreshment Break
3:15 p.m.	**The Duty to Inform — What It is Now and Are Numbers Really Enough?** – Mr. Kronenberg
4:00 p.m.	**Using Taxes to Settle Disputes** – Mr. Rubenstein
4:45 p.m.	**The "Side Letter" to Trustees: Asset or Liability?** – Ms. Nair and Mr. Rothstein
5:30 p.m.	Adjournment for the Day; **Networking Reception for Registrants and Faculty**

Total 60-minute hours of instruction: 13.25, including one hour of ethics / 1

ALI CLE Curriculum Estate Planning

It's a whole new world for estate planners, and ALI CLE continues to be their premier source of current CLE instruction. A dozen multi-day courses cover well selected topics in unrivaled depth. Two dozen short programs keep practitioners informed year round of developments and flexible planning techniques. Knowledge gained from ALI CLE courses is reinforced by free online access to the program archives for every course registrant. For additional guidance, ALI CLE offers courses on real estate, tax, and other complementary subjects. For career-enhancing professional development, ALI CLE provides ethics, lawyering skills, and law practice programs on both the essential and the latest topics.

Friday, July 19, 2013

8:15 a.m.	Networking and Continental Breakfast, with an opportunity for **Talk at the Tables** about your issues with speakers from the day (not recorded or webcast)

VIDEO WEBCAST SEGMENT C | $329

8:45 a.m.	**New Cases, New Risks (and Some Solutions) for Fiduciaries, Part II** – Mr. Campisi
10:15 a.m.	Networking and Refreshment Break
10:30 a.m.	**Dealing with Diminished Capacity** – Mr. R. Young
11:15 a.m.	**Depositions: A View from the East and the West on Strategy for Fiduciaries** – Ms. Sperling and Mr. Wilson
12:00 noon	Lunch Break

VIDEO WEBCAST SEGMENT D | $329

1:15 p.m.	**Communication and Design Features to Ensure the Effective Implementation of Estate Plans** – Mr. Holdway and Ms. Mullaney
2:00 p.m.	**Perils of the Lawyer-Trustee** – Ms. Kanyuk
2:45 p.m.	Networking and Refreshment Break
3:00 p.m.	**Decanting with No Carafe** – Ms. Solomon
3:30 p.m.	**Managing Business Interests in Trusts Without (Too Much) Liability** – Mr. DiCarlo
4:00 p.m	**The Empowered Beneficiary (and Settlor) as Trustee, Trustee Remover, and Trustee Appointer** – Messrs. Cushing and Fast
4:45 p.m.	Adjournment

5 CPE credit hours in Taxes (live group and group-internet based programs)

Here's what registrants said about recent presentations of this course:

"Good content with good speakers — always find a good nugget or two to take back with me."

"It was the usual excellent ALI course. I have been to about a dozen and they are uniformly the best CLE programs I have attended."

"A great CLE course for trust and estate practitioners. Overall, a great course and worth the time and distance to attend. I will be back." — JP Lee

ALI CLE's Forms Library Subscriptions

Legal forms are designed to solve current client problems, and then adapt as clients and problems change. ALI CLE has collected thousands of forms, *designed* by the top practitioners in their fields and ready for you to *adapt* to your own clients' concerns. All editable. All practice-tested. **And now all available in subscription practice area libraries.**

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Webcast: Can't attend on location? Register for the live webcast or any of its segments and participate by asking questions online, in real time, and get our famous course materials via searchable PDF. Interrupt your viewing at any time and catch up later with the free online archive. Get all the information you need, and satisfy your CLE needs, without leaving your office. $1,099 / $329

Group Webcast: Schedule a convenient group viewing of this course for two or more people and save on tuition. Provide your firm or department with access to the finest legal talent — and train more people at a lower cost — without the additional expense or time constraints of travel. UP TO 30% OFF

On-demand CLE: Online audio and/or video and searchable (PDF) course materials are available 24/7 for every course and course segment. Free To Registrants

DVD / CD-ROM / Audio MP3 Watch or listen to ALI CLE's renowned courses in your car, home, or office — on your computer, DVD player, or MP3 player — at your own pace. $899 / $699

Print + Digital Course Materials ALI CLE's acclaimed course materials are available in print or electronically and can be purchased before or after the course. $149

HOW TO REGISTER

online	**www.ali-cle.org/CV005**
phone	**1-800-CLE NEWS**
fax	**215-243-1664**
mail	return the form on the back panel of this brochure to: **REGISTRAR, ALI CLE, 4025 Chestnut Street, Philadelphia, PA 19104-3099**

GET MANDATORY CLE & CPE CREDIT

Virtually all ALI CLE programs receive CLE credit in AK, AL, AR, AZ, CA, CO, DE, FL, GA, HI, IA, IL, IN, KS, KY, LA, ME, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, PA, RI, SC, TN, TX, UT, VA, VT, WA, WI, and WV. Upon request, ALI CLE will apply for CLE credit in ID, OR, and WY. This course is expected to qualify for 13.25 credits, including one ethics credit, in 60-minute MCLE jurisdictions; and for 15.9 credits, including 1.2 ethics credits, in 50-minute MCLE jurisdictions. In NY, this course is appropriate for both newly admitted and experienced attorneys. For specific information on CLE, CPE, or other professional accreditation in your state, please e-mail the MCLE Team at TeamMCLE@ali-cle.org, go to www.ali-cle.org/mcle, or call 1-800-CLE-NEWS.

NASBA

ALI CLE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For more information regarding ALI CLE's administrative policies, such as complaint and refund, please call Customer Service at (800) CLE-NEWS. **CPE redit hours for this course: 15.5 in Taxes** (live group and group-internet based programs). **Learning Objective:** Acquisition of knowledge and skills to develop proficiency as a practitioner; maintenance of professional competence as a practitioner; provision of information on recent developments. **Suggested Prerequisite:** Limited experience in practice in subject matter or completion of Basic CLE/CPE Course in subject matter. **Level of Instruction:** Advanced

HOTEL ACCOMMODATIONS

A limited block of rooms has been reserved at The Langham Boston. Room rate: $275 per night, single or double occupancy. These rooms will be held as a block, unless exhausted, until June 28, at which time they will be released to the general public. Registrants must make their own hotel reservations and indicate that they are attending the ALI CLE program to qualify for rooms in the block.

Room reservations may be made by calling The Langham Boston, 250 Franklin Street, Boston, MA 02110; phone (617) 451-1900. Confirmations will be sent by the hotel. Please read the cancellation policy carefully.

Go to www.ali-cle.org/CV005 for more info about: registration/cancellation/requirements for persons with disabilities/scholarships

Also from ALI CLE

Charitable Giving Techniques
May 2-3, 2013
Washington, DC and Video Webcast
www.ali-cle.org/CU038

Estate Planning in Depth
June 23-28, 2013
Madison, WI and Video Webcast
www.ali-cle.org/CU036

Estate Planning for the Family Business Owner
July 10-12, 2013
Chicago and Video Webcast
www.ali-cle.org/CV004

SOCIAL NETWORKING

Start interacting with other course registrants and faculty through these social networking tools. Post topics you would like to see covered during the course, discuss hot topics, and make lunch and dinner plans with other on-site attendees.

Facebook: http://www.facebook.com/events/486020028111704/
Twitter: # BEFIT13

Estate planners, litigators, and corporate fiduciary counsel all want to know what impact (if any) the American Taxpayer Relief Act of 2012 will have on their clients.

This advanced course goes beyond basics and delves into topics that specifically impact beneficiaries and fiduciaries. Plus, you'll find practical solutions to your most pressing concerns through small roundtable discussions and networking opportunities.

Experienced planning chairs Steve Fast and Bob Whitman, and the rest of the nationally-known faculty panel, provide two full days of knowledge, insight, and even a bit of humor as they update you on all the current developments affecting beneficiaries and fiduciaries.

Have a pressing issue? Registrants at the live program have the opportunity to talk to the faculty in small, focused, and interactive discussions during breakfast each day.

WHO SHOULD ATTEND

This multi-disciplinary program will benefit estate planning and estate and trust administration professionals, including lawyers representing fiduciaries and beneficiaries, risk managers, investment officers, relationship managers, investment advisors, and financial planners.

Register online:
www.ali-cle.org/CV005

Online www.ali-cle.org/CV005 **Phone** 1-800-CLE NEWS **FAX** 215-243-1664
Mail Registrar, ALI CLE, 4025 Chestnut Street, Philadelphia, PA 19104-3099

Representing Estate and Trust Beneficiaries and Fiduciaries

Boston, July 18-19, 2013 | $1,399

○ Please enter _______ registration(s) CV005

Please provide my course materials as a (choose only one):
○ Printed course book ○ USB drive

Video Webcast | $999/$299

- ○ The entire program. Tuition: $999 WAV005
- ○ Video Webcast Segment A: $299 WAV005A
- ○ Video Webcast Segment B: $299 WAV005B
- ○ Video Webcast Segment C: $299 WAV005C
- ○ Video Webcast Segment D: $299 WAV005D

Can't attend? You don't have to miss anything! Order the:

- ○ DVD (video), including a complimentary MP3 CD-ROM and PDFs of the course materials | $899 AV005V
- ○ Audio MP3 CD-ROM (including PDFs of the course materials) | $699 AV005
- ○ Printed course materials only | $149 SV005

Partial Scholarships
Scholarships covering 30% of tuition fees, valid for on-site courses, live webcasts, and webcast segments only, are available. Scholarships cannot be combined with other offers.

- ○ I am a full-time employee of the federal, a state, or a local government or governmental agency.
- ○ I am a recent law school graduate (<5 years).
- ○ I am a retired senior lawyer (65 or older).

$_____________ Total ○ Check enclosed (payable to ALI CLE)
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