



THE
FLORIDA
BAR
CLE

The Florida Bar Continuing Legal Education Committee and
the Tax Section present

How to Be an Estate Planning Wizard

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live Presentation: Friday, October 9, 2015

Loews Portofino Bay Hotel • 5601 Universal Blvd. • Orlando, FL 32819
(407) 503-1000



Course No. 1991R

8:15 a.m. – 9:00 a.m.

Registration

9:00 a.m. – 9:10 a.m.

Introduction & Welcome

James Barrett, Baker & McKenzie, LLP, Miami

9:10 a.m. – 10:10 a.m.

Basis Planning

John Scroggin, Scroggin & Co., P.C., Roswell, GA

This presentation will focus on tax-basis opportunities and traps that you may never have considered in your client's planning. It will provide a practical planning approach to the topic and be illustrated with numerous examples.

10:10 a.m. – 10:50 a.m.

Top 10 Estate Planning Traps

Keith Braun, Comiter, Singer, Baseman & Braun, LLP, Palm Beach Gardens

Mark Brown, Kaye Scholer LLP, West Palm Beach

A practical discussion designed to alert attorneys to traps in estate planning, which can lead to unexpected and undesirable results, including tax-apportionment issues, generation skipping tax traps and funding dilemmas.

10:50 a.m. – 11:05 a.m. **Break**

11:05 a.m. – 12:05 p.m.

What You Must Know to Designate a Trust as a Beneficiary of an IRA

Lester Law, Abbot Downing, Naples

Kristen Lynch, Fowler White Burnett, P.A., Ft. Lauderdale

Why and how to designate a trust as the beneficiary of an IRA, including a review of sample provisions.

12:05 p.m. – 1:15 p.m.

Lunch – Sponsored by Management Planning, Inc.

Practical Drafting Solutions

Mark Parthemer, Bessemer Trust Company, Palm Beach

This session will compare "standard" form language with an emphasis on tax issues to analyze how your drafting efforts can substantially facilitate the trustee in achieving your client's goals.

TAX SECTION

James H. Barrett, Miami — Chair
William R. Lane, Jr., Tampa — Chair-elect
Mark Brown, West Palm Beach — CLE Chair

CLE COMMITTEE

Booter Imhof, Tallahassee, Chair
Terry L. Hill, Director, Programs Division

FACULTY & STEERING COMMITTEE

Jennifer Wioncek, Miami
Brian Malec, Orlando

1:15 p.m. – 2:05 p.m.

Avoiding International Estate Planning Mishaps

Kevin Packman, Holland & Knight, LLP, Miami

Jennifer J. Wioncek, Baker & McKenzie, LLP, Miami

This presentation will focus on overlooked issues in relation to common gift and succession planning opportunities for international clients.

2:05 p.m. – 2:55 p.m.

What Every Attorney and CPA Needs to Know to Prepare and Review Gift and Estate Tax Returns

Brian Malec, Dean Mead, Orlando

Mark Scott, Kaufman Rossin, Miami

This presentation will discuss a variety of advanced issues, including preparing returns for portability, automatic and late allocations of GST exemption during life and upon death, and limitations on gift-splitting, as well as provide tips for avoiding common mistakes and fixing prior returns.

2:55 p.m. – 3:10 p.m. **Break**

3:10 p.m. – 4:30 p.m.

Best Ideas

Joel Bronstein, Johnson, Pope, Bokor, Ruppel & Burns, LLP, St. Petersburg

Donald Tescher, Tescher & Associates, P.A., Boca Raton

Leading practitioners will discuss some of their best ideas, including shifting investment and business opportunities to lower generations, utilizing grantor trusts and planning with charitable lead trusts.

4:30 p.m. – 5:20 p.m.

Drafting Premarital Agreements and Related Tax Issues

Charles Rubin, Gutter Chaves Josepher Rubin Forman

Fleisher, Miller P.A., Boca Raton

A practitioner's review of the practical, legal and tax planning ins and outs of preparing premarital agreements in Florida, with specific advice and suggested form language for key provisions.

CLE CREDITS

CLER PROGRAM

(Max. Credit: 9.0 hours)

General: 9.0 hours Ethics: 0.0 hours

CERTIFICATION PROGRAM

(Max. Credit: 9.0 hours)

Tax Law: 9.0 hours

Wills, Trusts & Estates: 9.0 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

TO REGISTER



ON-LINE:
www.floridabar.org/CLE



MAIL:
Completed form with check



FAX:
Completed form to 850/561-9413

WEBCAST: <http://tinyurl.com/FloridaBarCLE1991R>

REFUND POLICY: A \$25 service fee applies to all requests for refunds. Requests must be in writing and postmarked no later than two business days following the live course presentation or receipt of product. Registration fees are non-transferable, unless transferred to a colleague registering at the same price paid. Registrants who do not notify The Florida Bar by 5:00 p.m., October 2, 2015 that they will be unable to attend the seminar, will have an additional \$55 retained. Persons attending under the policy of fee waivers will be required to pay \$55.

HOTEL RESERVATIONS: A block of rooms has been reserved at the Loews Portofino Bay Hotel, at the rate of \$219 single/double occupancy. To make reservations, call the Loews Portofino Bay Hotel directly at (407) 503-1000. Reservations must be made by September 6, 2015 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

Register me for the "How to Be an Estate Planning Wizard" Seminar

ONE LOCATION: (369) LOEWS PORTOFINO BAY, ORLANDO (OCTOBER 9, 2015)

TO REGISTER OR ORDER AUDIO CD / DVD OR COURSE BOOKS BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department, 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831. ON-SITE REGISTRATION, ADD \$25.00. **On-site registration is by check only.**

Name _____ Florida Bar # _____

Address _____ Phone: () _____

City/State/Zip _____ E-mail* _____

**E-mail address required to transmit electronic course materials and is only used for this order.*

AJC: Course No. 1991R

ELECTRONIC COURSE MATERIAL NOTICE: Florida Bar CLE Courses feature electronic course materials for all live presentations, live webcasts, webinars, teleseminars, audio CDs and video DVDs. This searchable electronic material can be downloaded and printed and is available via e-mail several days in advance of the live presentation or thereafter for purchased products. Effective July 1, 2010.

Register Now! How to Be an Estate Planning Wizard

**The Florida Bar
651 E. Jefferson Street
Tallahassee, FL 32399-2300**

PRSRT-STD
U.S. POSTAGE
PAID
TALLAHASSEE, FL
Permit No. 43

To register for **WEBCAST:** <http://tinyurl.com/FloridaBarCLE1991R>

In-Person Attendance Online Webcast

Orlando, FL

- Member of the Tax Section\$260
- Non-section Member\$320
- Full-time law college faculty or full-time law student ...\$188
- Fee waiver (documentation required).....\$55

*On-site registration add \$25

- Section Member\$310
- Non-section Member\$370

*Webcast registrants receive an email two days prior to the seminar, with log-in credentials to access course materials and the webcast link. Call InReach at (877) 880-1335 with any questions.

How to Register

- Check** (made payable to The Florida Bar) – 651 E. Jefferson St., Tallahassee, FL 32399
- Enclosed is my check in the amount of \$60 to join the Tax Law Section. *Membership expires June 30, 2016.*
- Credit Card** • Online (www.flabar.org/cle) • Phone (850-561-5831) • Fax (850-561-9413)
 - Visa Master Card AMEX Discover

Name on Card: _____ Card No.: _____

Exp. Date: _____ Billing Zip: _____ Signature: _____

 Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

COURSE BOOK – AUDIO CD – VIDEO DVD – PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 10/9/15.**
Please include sales tax unless tax-exempt or a nonresident of Florida. If tax exempt, include documentation with the order form.

<input type="checkbox"/> COURSE BOOK ONLY (1991M) Cost \$60 plus tax (Certification/CLER credit is not awarded for the purchase of the course book only.) + TAX \$ _____ = TOTAL \$ _____	<input type="checkbox"/> AUDIO CD (1991C) (includes electronic course material) \$260 plus tax (section member) \$320 plus tax (non-section member) + TAX \$ _____ = TOTAL \$ _____	<input type="checkbox"/> VIDEO DVD (1991D) (includes electronic course material) \$ 310 plus tax (section member) \$ 370 plus tax (non-section member) + TAX \$ _____ = TOTAL \$ _____
--	---	--

Related Florida Bar Publications can be found at <http://www.lexisnexis.com/flabar/>