

The Liaison with Corporate Fiduciaries Committee of
The Florida Bar Real Property, Probate and Trust Law Section
in cooperation with Members of the Trust Division of the
Florida Bankers Association present



28th Annual Attorney/Trust Officer Liaison Conference

"Where Questions are Answered and Answers are Questioned"

June 18 - June 21, 2009

The Breakers
Palm Beach, Florida



Conference Chair:

Seth A. Marmor, Boca Raton

Fiduciary Chair:

Joan K. Crain, Fort Lauderdale

Conference Co-Vice-Chairs:

Robin J. King, Fort Lauderdale

Gwynne A. Young, Tampa

Speaker Coordinator:

Mark T. Middlebrook, Clearwater

Other RPPTL CLE courses can be
found at www.floridabar.org/cle

Course No. 0855R

2009 Attorney/Trust Officer Liaison Conference Program

Where Questions are Answered and Answers are Questioned

Course No. 0855R

Thursday, June 18

11:30 a.m. – 5:30 p.m. **Nineteenth Annual Scramble Golf Tournament and Lunch**

Hosted by Wachovia Trust, a Wells Fargo Company

3:00 p.m. – 5:00 p.m. **Registration**

6:15 p.m. – 7:45 p.m. **Reception** (Spouses Welcome)

Hosted by Gibraltar Private Bank & Trust

Friday, June 19

7:30 a.m. – 8:15 a.m. **Breakfast**

Hosted by SunTrust Bank

8:15 a.m. – 8:30 a.m. **Welcome and Announcements**

Liaison with Corporate Fiduciaries Committee:

Seth A. Marmor, Shapiro, Blasi, Wasserman &

Gora, P.A., Boca Raton, Chair

Joan K. Crain, Sr. Director, BNY Mellon Wealth, Management, Fiduciary Co-Chair

Robin J. King, GrayRobinson P.A., Ft. Lauderdale, Vice Chair

Gwynne A. Young, Carlton Fields, P.A., Tampa, Vice Chair

8:30 a.m. – 9:00 a.m. **Self Settled Spendthrift Trusts: An Estate Planning Trend in an Asset Protection World?**

Jerome L. Wolf, Duane Morris LLP, Boca Raton

9:00 a.m. – 9:45 a.m. **I've Just Created a Foundation – Now What? – Guiding Your Clients Through Private (Family) Foundation Administration**

Marguerite H. Griffin, Northern Trust, Chicago

9:45 a.m. – 10:15 a.m. **Current Homestead Topics**

Jeffrey A. Baskies, Katz Baskies LLC, Boca Raton

10:15 a.m. – 10:30 a.m. **Break**

Sponsored by Coconut Grove Bank

10:30 a.m. – 11:30 a.m. **How Much Water Should You Add to a Nuclear Reactor? An Interdisciplinary Approach to Negotiating, Drafting, and Enforcing Prenuptial and Postnuptial Agreements**

James R. George, Greenberg Traurig, P.A.,

Fort Lauderdale, Moderator

Francis B. Brogan, Jr., Greenberg Traurig, P.A., Ft. Lauderdale

Michael Kane Cummings, Ruden McClosky, Ft. Lauderdale

11:30 a.m. – 12:15 p.m. **Keeping the Trustee's Secrets During Administration; But What About Paying Attorney's Fees When You Are Sued for Surcharge?**

Jack A. Falk, Jr., Dunwoody White & Landon, P.A., Coral Gables

12:15 p.m. – 1:30 p.m. **Lunch/Group Discussions**

1:30 p.m. – 2:15 p.m. **Update on Section 67(e) and the Deductibility of Administration Expenses**

Bruce Stone, Goldman Felcoski & Stone, P.A., Coral Gables

Sponsored by U.S. Trust, Bank of America Private Wealth Management

2:15 p.m. – 3:00 p.m. **Here and There – Now and Then (Planning and Administering Ancillary Estates)**

Paul E. Roman, Hodgson Russ LLP, Boca Raton,

Moderator

Mary Jane Olsavsky, BNY Mellon Wealth Management, Ft. Lauderdale

John Catterson, Hodgson Russ LLP, New York City

Elizabeth Musyj, Bartlet & Richardes LLP, Windsor, Ontario, Canada

3:00 p.m. – 3:15 p.m. **Break**

Sponsored by Coconut Grove Bank

3:15 p.m. – 3:45 p.m. **Premium Financing and Life Settlements – What's Hot, What's Not and What Will Burn You!**

Richard M. Flah, Flah & Company, West Palm Beach

3:45 p.m. – 4:15 p.m. **2009 Florida Trust and Probate Legislative Update**

Debra L. Boje, Ruden McClosky Smith Schuster & Russell, P.A., Tampa

4:15 p.m. – 5:15 p.m. **New Tax Incentives For Charitable Gifts, and Solving Old Problems**

Christopher R. Hoyt, University of Missouri, Kansas (Sponsored by Community Foundations of Florida)

5:30 p.m. – 7:00 p.m. **Reception (Spouses Welcome)**

Hosted by BNY Mellon Wealth Management

Saturday, June 20

7:30 a.m. – 8:30 a.m. **Breakfast Adjournment**

Hosted by Florida Bar Foundation

8:30 a.m. – 9:15 a.m. **Socially Responsible Investing**

Christopher J. Wolfe, Merrill Lynch, New York

9:15 a.m. – 10:15 a.m. **Estate Planning in Politically Uncertain and Economic Turbulent Times**

Jonathan Blattmachr, Milbank, Tweed, Hadley & McCloy, New York (Retired Partner)

Sponsored by J.P. Morgan

10:15 a.m. – 10:30 a.m. **Break**

Sponsored by Coconut Grove Bank

10:30 a.m. – 11:15 a.m. **Trust and Guardianship Administration**

Honorable Mel Grossman, 17th Judicial Circuit,
Probate Division, Moderator
Michael W. Hill, Gibraltar Private Bank & Trust, Miami
Alexandra V. Rieman, 17th Judicial Circuit,
Ft. Lauderdale

11:15 a.m. – 11:45 a.m. **On the Hook – Ineffective Delegation of Fiduciary Functions**

William T. Hennessey, Gunster, Yoakley & Stewart, P.A.,
West Palm Beach

11:45 a.m. – 12:15 p.m. **Estates & Trusts as Shareholders of S Corporations**

Sydney S. Traum, Syndey S. Traum, P.A., Miami

12:15 p.m. – 1:00 p.m. **Case Law Update**

Steven L. Hearn, Steven L. Hearn, P.A., Tampa

6:00 p.m. – 7:30 p.m. **Reception (Spouses Welcome)**

Hosted by the following Law Firms and CPA Firms:
Arnstein & Lehr, LLP; The Beller Law Firm; Broad & Cassel; Buckingham Doolittle & Burroughs; Carlton Fields, P.A.; Chapin Ballerano & Chestlack; Cohen, Chase, Hoffman & Schimmel, P.A.; Duane Morris, LLP; Dunwody White and Landon, P.A.; Fowler White Burnett, P.A.; Goldman Felcoski & Stone, P.A.; Goldstein, Schechter, Guttenmacher & Bohatch, P.A.; Koch, P.A., GrayRobinson, P.A.; Greenberg Traurig, P.A.; Gunster Yoakley & Stewart, P.A., Holland & Knight LLP; Nelson & Nelson, P.A.; Proskauer Rose LLP; Ruden McClosky Smith Schuster & Russell, P.A.; Shapiro, Blasi, Wasserman & Gora, P.A.; Shutts & Bowen, LLP; Squire, Sanders & Dempsey, L.L.P.; Tescher & Spallina, P.A.; Turner & Associates, LLP; Wicker, Smith, O'Hara, McCoy & Ford, P.A.

Sunday, June 21

9:00 a.m. – 10:30 a.m. **Breakfast: Post Conference Discussion**

Sponsorship Coordinators: Robin J. King, GrayRobinson P.A., Ft. Lauderdale
Patrick Lannon, Goldman Felcoski & Stone, P.A., Coral Gables
Lydia Sprankle, Coconut Grove Bank, Coconut Grove
Scott Poulin, Coconut Grove Bank, Coconut Grove

Speaker Coordinator: Mark T. Middlebrook, Regions Morgan Keegan Trust, Clearwater

Break-Out Session Coordinator: Katherine S. Dely, Law Offices of Katherine S. Dely, P.L., Lighthouse Point and Perry Brown, Northern Trust, West Palm Beach

Event and General Sponsors: Bank of Florida; Coconut Grove Bank; Community Foundations of Florida; Florida Bar Foundation; Gibraltar Private Bank & Trust; J.P. Morgan; BNY Mellon Wealth Management; Regions Bank; SunTrust Bank; Wachovia Trust, a Wells Fargo Company; U.S. Trust, Bank of America Private Wealth Management



Continuing Legal Education Requirement Credit

(Maximum 14.5 hours)
General: 14.5 hours
Ethics: 2.5 hours

CPE Credit: Applied for by the Florida Association of Attorney - CPAs

CFP Credit: Applied For

CTFA Credit: Applied For

Course No. 0855R

Certification Credit

(Maximum 14.5 hours)

Elder Law: 11.0 hours

Tax Law: 1.0 hour

Wills, Trusts & Estates: 11.0 hours

Hotel Reservation Information

To reserve a sleeping room with the The Breakers, Palm Beach, please call toll free 1-888-273-2537. The Florida Bar group rate of \$195/night is guaranteed until May 17th, or until the room block is sold out. If the room block is sold out you may be able to get on a wait list pending cancellations.

Alternate Hotel Information

The Brazilian Court • 301 Australian Avenue • Palm Beach 33480 • Phone (561) 655-7740
The Colony Palm Beach • 155 Hammon Avenue • Palm Beach 33480 • Phone (561) 655-5430
The Four Seasons • 2800 South Ocean Blvd. • Palm Beach 33480 • Phone (561) 582-2800

The Florida Bar Real Property, Probate & Trust Law Section
2009 Attorney Trust/Officer Liaison Conference

Program Registration Form

Please Print or Type

Course No. 0855R

MAIL PROGRAM REGISTRATION FORM TO: The Florida Bar, 651 East Jefferson Street, Tallahassee, Florida 32399-2300, Attn: Order Entry, with a check in the appropriate amount made payable to The Florida Bar or credit card information filled in below. **The Florida Bar only accepts Mastercard and Visa.**

Name _____ Attorney Number _____
Last First Required for CLE Credit

Name to be Used on Badge _____ Name to be Used on Spouse/Guest Badge _____

Address _____

City _____ State _____ Zip Code _____

Phone Number _____ Email Address _____

METHOD OF PAYMENT: Check enclosed made payable to The Florida Bar **FAX # 850-561-5816**
 MASTERCARD VISA DISCOVER AMEX CVV# _____ * Exp. Date: ____/____ (MO./YR.)

Signature: _____

Name on Card: _____ Billing Zip _____

Card No. _____

** To aid in the prevention of fraudulent credit card use, we now require the 3 - 4 digit CVV (Credit Validation Verification) Code from the back of your Master Card, Discover or Visa credit card, or from the front of your American Express card.*

Registration and Refund Policy:

- Refunds will be honored [less \$25.00 cancellation fee] if postmarked before 6/12/09.
- Registrations will be accepted on a first-registered basis at The Florida Bar through 6/12/09, or until full.
- Credit card registrations can be faxed to 850-561-5816. Please do not fax check registrations.
- No telephone cancellations accepted [faxed cancellations will be accepted (850-561-5816)].
- On-Site registrations accepted on a space-available basis. **NO GUARANTEE SPACE WILL BE AVAILABLE.**
- **ON-SITE REGISTRATION, ADD \$25.** On-site registration is by check only.
- ONE REGISTRANT PER FORM/ONE CHECK PER REGISTRANT.

Conference Registration: 0855R105

____ Attorney Registrant	\$350.00	____ Attorney Registrant (06/12/09 or AFTER)	\$375.00
____ Non Attorney Registrant	\$350.00	____ Non Attorney Registrant (06/12/09 or AFTER)	\$375.00

Conference Events for Registrants:

Course materials and the following Conference Events are included in registration fee. Please check the events you plan to attend.

Thursday, June 18	Friday, June 19	Saturday, June 20	Sunday, June 21
____ Reception 0855 S1051	____ Continental Breakfast 0855S1052	____ Continental Breakfast 0855S1055	____ Breakfast 0855S1057
	____ Luncheon 0855S1053	____ Reception 0855S1056	
	____ Reception 0855S1054		

Conference Events for Spouses:

The following events are open to spouses. Check the events your spouse plans to attend. An additional fee applies where indicated.

Thursday, June 18	Saturday, June 20
____ Reception 0855S1051	____ Continental Breakfast \$25 [\$23.58 plus \$1.42 tax] 0855S1055
	____ Reception 0855S1056
Friday, June 19	Sunday, June 21
____ Continental Breakfast \$25 [\$23.58 plus \$1.42 tax] 0855S1052	____ Breakfast \$25 [\$23.58 plus \$1.42 tax] 0855S1057
____ Reception 0855S1054	

Thursday, June 18 – Scramble Golf Tournament (Sponsored by Wachovia Bank, N.A.):

NOTE: An additional fee applies to both registrants and spouses. (Please provide us with your Handicap or Average Score)

____ Golf \$50 [\$47.17 plus \$2.83 tax] 0855S1058	Handicap or Average Score _____
____ Golf - Spouse/Guest \$50 [\$47.17 plus \$2.83] 0855S1058	Handicap or Average Score _____

Course Materials (One (1) set Included in Conference Registration Fee):

____ Course materials only or additional copies of course material \$60 [plus sales tax for your city] 0855M

Total Amount Enclosed \$ _____