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Updates and Expert Analysis on all the Key Topics
A Variety of Breakout Sessions —
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Fifth Annual Sophisticated Trusts and Estates Law Institute

Joshua S. Rubenstein, Esq.
Katten Muchin Rosenman LLP
Conference Chair

Thursday, November 8, 2007
and
Friday, November 9, 2007
New York's Hotel Pennsylvania
New York City

Co-sponsored by the Trusts and Estates Law
Section and the Committee on Continuing Legal
Education of the New York State Bar Association



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Program Description

"The New York State Bar Association and its Trusts and Estates Law Section are proud to present the Fifth Annual Sophisticated Trusts and Estates Law Institute—a program of national reach and sophisticated content, featuring many of the most prominent and knowledgeable experts not only from New York, but from across the country. Last year's Institute received rave reviews from a standing room only audience; here are some of their comments:

- "Terrific Program"
- "Looking forward to next year's Institute"
- "Really very well done"
- "This was fantastic...I learned more than I do in a week in Miami. I'll be back next year"

This year's two-day event will cover a wide range of the most timely and important topics in trusts and estates practice. Prominent authorities

from across the nation will cover the latest developments in trusts and estates law. Detailed written materials will accompany each of the presentations.

There will be a number of concurrent workshops, permitting you to focus on those topics of greatest interest to you, pose questions to the presenters and compare notes with fellow practitioners. Luncheons on both days of the program and a cocktail reception on Thursday evening will afford opportunities for networking and enjoying the company of your colleagues in this field. Prominent guest speakers will make topical key note addresses at lunch each day.

If you practice in the area of trusts and estates, you can't afford to miss this excellent program.

Agenda

THURSDAY, NOVEMBER 8

8:30 – 9:00 a.m.	REGISTRATION (outside meeting room)
9:00 – 9:15 a.m.	INTRODUCTION AND OVERVIEW Speaker: Joshua S. Rubenstein, Esq.
9:15 – 10:00 a.m.	RECENT DEVELOPMENTS AND HOT TOPICS Speaker: Andrew M. Katzenstein, Esq.
10:00 – 10:45 a.m.	THE NEW 2053 REGULATIONS Speaker: Stuart J. Gross, Esq.
10:45 – 11:00 a.m.	REFRESHMENT BREAK (in the exhibit hall)
11:00 – 11:45 a.m.	REVOCABLE TRUSTS Speaker: G. Warren Whitaker, Esq.
11:45 a.m. – 12:30 p.m.	DOING RIGHT BY NOT DOING WRONG: LESSONS FROM THE ACTEC COMMENTARIES Speaker: Bruce S. Ross, Esq.
12:30 – 1:30 p.m.	LUNCHEON SPEAKER: UPDATES FROM THE NATIONAL CONFERENCE OF COMMISSIONERS ON UNIFORM STATE LAWS (there is no MCLE credit for this segment) Speaker: Professor John H. Langbein, Yale University
1:30 – 2:20 p.m.	CONCURRENT LECTURES: SET 1 <i>Lecture A: Prenups, Postnups and Cohabitation Agreements</i> Speaker: Judith E. Siegel-Baum, Esq. <i>Lecture B: Beneficiary Designations in Retirement Plans</i> Speaker: Alvin J. Golden, Esq. <i>Lecture C: Update: Elder Care</i> Speaker: Robert M. Freedman, Esq. <i>Lecture D: Grantor Trusts</i> Speaker: Kim E. Baptiste, Esq.
2:30 – 3:20 p.m.	CONCURRENT LECTURES: SET 2 <i>Lecture A: Prenups, Postnups and Cohabitation Agreements</i> Speaker: Judith Siegel-Baum, Esq. <i>Lecture B: Beneficiary Designations in Retirement Plans</i> Speaker: Alvin Golden, Esq. <i>Lecture C: Update: Elder Care</i> Speaker: Robert Freedman, Esq. <i>Lecture D: Grantor Trusts</i> Speaker: Kim E. Baptiste, Esq.
2:20 – 2:30 p.m.	(Travel between workshops)
3:20 – 3:45 p.m.	REFRESHMENT BREAK (in the exhibit hall)
3:45 – 4:45 p.m.	UPDATE: ASSET PROTECTION PLANNING Speaker: John A. (Jack) Terrill, Esq.
4:45 p.m.	ADJOURNMENT
5:00 – 7:00 p.m.	COCKTAIL RECEPTION

FRIDAY, NOVEMBER 9

8:30 – 9:00 a.m.	REGISTRATION (outside meeting room)
9:00 – 9:45 a.m.	UPDATE: CHARITABLE PLANNING (including planning with the new IRS charitable lead trust forms) Speaker: Lawrence P. Katzenstein, Esq.
9:45 – 10:30 a.m.	UPDATE: LIFE INSURANCE Speaker: Lawrence Brody, Esq.
10:30 – 11:00 a.m.	REFRESHMENT BREAK (in the exhibit hall)
11:00 – 11:45 a.m.	UPDATE: DISCLAIMERS Speaker: Professor William P. LaPiana, New York Law School
11:45 a.m. – 12:30 p.m.	DAMAGES: NEW YORK, THE RESTATEMENT AND THE UNIFORM TRUST CODE Speaker: Professor Kenneth Joyce, SUNY at Buffalo Law School
12:30 – 1:30 p.m.	LUNCHEON SPEAKER: ISSUES CONFRONTING THE SURROGATE'S COURTS (There is no MCLE credit for this segment) Speaker: Hon. John M. Czygier, Jr. Suffolk County Surrogate's Court
1:30 – 2:20 p.m.	CONCURRENT LECTURES: SET 3 <i>Lecture E: Making Trusts Flexible</i> Speaker: Gideon Rothschild, Esq. <i>Lecture F: Estate Litigation Strategies</i> Speaker: Gary B. Freidman, Esq. <i>Lecture G: New Life Insurance Planning Opportunities</i> Speaker: Louis C. Ciliberti, CFP. CLU. ChFC
2:30 – 3:20 p.m.	CONCURRENT LECTURES: SET 4 <i>Lecture E: Making Trusts Flexible</i> Speaker: Gideon Rothschild, Esq. <i>Lecture F: Estate Litigation Strategies</i> Speaker: Gary B. Freidman, Esq. <i>Lecture G: New Life Insurance Planning Opportunities</i> Speaker: Louis C. Ciliberti, CFP. CLU. ChFC
3:20 – 3:45 P.M.	REFRESHMENT BREAK (in the exhibit hall)
3:45 – 4:45 P.M.	TERMINAL ILLNESS PLANNING Speaker: T. Randolph Harris, Esq. and Barbara A. Sloan, Esq.
4:45 p.m.	ADJOURNMENT

13.5 TOTAL CREDITS

13.5 credit hours of practice management and/or professional practice;

This **advanced-level** course may be used for New York MCLE credit by all attorneys, except those who are newly admitted (less than 24 months).

This program has been approved for MCLE credit by the **State Bar of California** in the amount of **11.5** hours, and by the **Pennsylvania Continuing Legal Education Board** for **11.5** credit hours of substantive law. All inquiries regarding MCLE credits may be directed to **(518) 487-5586**.

The New York State Bar Association's Committee on Continuing Legal Education has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York.

IMPORTANT NOTICE: PARTIAL CREDIT FOR PROGRAM SEGMENTS NOT ALLOWED. Under the New York State Continuing Legal Education Board Regulations and Guidelines, attendees at CLE programs cannot receive MCLE credit for a program segment unless they are present for the entire segment. Persons who arrive late, depart early, or are absent for any portion of the segment will not receive credit for that segment.

Program Faculty

Conference Chair

Joshua S. Rubenstein, Esq.
Katten Muchin
Rosenman, LLP
New York, NY

Speakers

Kim E. Baptiste, Esq., Schulte Roth & Zabel LLP, New York, NY * **Lawrence Brody, Esq.**, Bryan Cave LLP, St. Louis, MO * **Louis C. Ciliberti, CFP,CLU,ChFC**, Louis C. Ciliberti and Associates Ltd., Melville, NY * **Hon. John M. Czygier, Jr.**, Surrogate Court of Suffolk County, Riverhead, NY * **Robert M. Freedman, Esq.**, Freedman & Fish, New York, NY * **Gary B. Freidman, Esq.**, Greenfield Stein & Senior, LLP, New York, NY * **Alvin Golden, Esq.**, Ikard & Golden, P.C., Austin, TX * **Stuart Gross, Esq.**, Roberts & Holland, New York, NY * **T. Randolph Harris, Esq.**, McLaughlin & Stern, LLP, New York, NY * **Professor Kenneth Joyce**, SUNY at Buffalo Law School, Buffalo, NY * **Andrew M. Katzenstein, Esq.**, Katten Muchin Rosenman, Los Angeles, CA * **Lawrence P. Katzenstein, Esq.**, Thompson Coburn LLP, St. Louis, MO * **Professor John Langbein**, Yale University, New Haven, CT * **Professor William LaPiana**, New York Law School, New York, NY * **Bruce S. Ross, Esq.**, Luce Forward, Los Angeles, CA * **Gideon Rothschild, Esq.**, Moses & Singer, LLP, New York, NY * **Joshua S. Rubenstein, Esq.**, Katten Muchin Rosenman LLP, New York, NY * **Judith Siegel-Baum, Esq.**, Wolf Block Schorr & Solis-Cohen, New York, NY * **Barbara A. Sloan, Esq.**, McLaughlin & Stern, LLP, New York, NY * **John A. Terrill, Esq.**, Heckscher, Teillon, Terrill & Sager, P.C., Philadelphia, PA * **G. Warren Whitaker, Esq.**, Day Pitney, New York, NY

Program Location

Important Note: If you plan to pre-register within 10 days of the program or register at the door, please call us at **1-800-582-2452** or in Albany and surrounding area, dial **518-463-3724**, to verify that the program is not sold out or that the date or location has not been changed. Those who pre-register in advance of the program will automatically be notified of any such changes and will receive a full refund up to the day prior to the program, if they cannot attend and notify us of their cancellation. Please pre-register as early as possible.

Thursday and Friday
November 8-9
New York City

New York's Hotel Pennsylvania
401 Seventh Avenue at 33rd Street
New York, NY 10001
(212) 736-5000

A limited number of rooms have been reserved at the Affinia Manhattan, 371 Seventh Avenue @31st Street for those attending the Trusts & Estates Institute. Discount rates for attendees are \$339 per night for single or double occupancy. Reservations must be made by **October 17, 2007** to secure this special meeting rate. (Rates are subject to applicable taxes). Reserve your rooms directly with the Affinia Manhattan at **1-866-233-4642**. Be sure to mention that you are attending the NYSBA Fifth Annual Trusts and Estates Institute.

Information and Policies

Pre-registration Strongly Advised: You can save money and guarantee your seat and course materials by registering early. Registrations received or postmarked within 10 days of the event, or at the door, are subject to a higher registration fee. Seating is limited in all locations and registrations are taken on a first-come, first-served basis. If you plan to pre-register within 10 days of the program or to register at the door, please call the CLE Registrar's Office at **(800) 582-2452** to verify that the program is not sold out or that the date or location has not been changed. Pre-registrants are guaranteed a seat and set of course materials, and will automatically be notified if there are any such changes in the date or location of the program.

Cancellations are easy - full refunds are given: Your full registration fee will be refunded if you give us notice no later than the close of business (4:45 p.m. EST) on the day prior to the date of the program for which you registered. To cancel, write the CLE Registrar's Office at One Elk Street, Albany, New York 12207; or fax **(518) 487-5618**; or call **(800) 582-2452**. If you do not cancel and do not attend the program, a complete set of materials will be forwarded to you in consideration of the registration fee. Non-registrants may purchase program materials after the final program date. **MCLE Credit:** This program is acceptable for MCLE credit in New York and many other MCLE jurisdictions. Please see inside of this brochure for details.

Discounts and Scholarships: NYSBA members may apply for a discount or scholarship to attend this program, based on financial hardship. Under that policy, any member of our Association who has a genuine financial hardship may apply in writing, not later than two working days prior to the program, explaining the basis of his/her hardship, and, if approved, may receive a discount or scholarship, depending on the circumstances. For more details, please contact our CLE Registrar's Office at **(800) 582-2452**.

Non Members - Join the NYSBA and enjoy great discounts on CLE seminars, products, and other valuable NYSBA services. NYSBA members can save 30 percent or more over non-members on CLE seminars alone. Join now and take advantage of NYSBA membership discounts throughout the year.

Please check the appropriate box on the registration form if you wish to join, or contact NYSBA Membership Services at **(518) 487-5577** and an application will be sent to you.



Tape Recording of NYSBA Seminars is not permitted.

Accommodations for Persons with Disabilities: We will make every reasonable effort to ensure that our programs are held in locations with barrier-free access for persons with mobility impairments. If you are planning to attend one of our programs and need assistance relating to some other type of disability, please contact us sufficiently in advance and let us know so that we can be prepared to make reasonable accommodations.

REGISTRATION FORM

Please photocopy or clip out and return the bottom portion of this page when registering, including the mailing label on the back page.

Registrant: Please check your name and address on mailing label on back page and indicate corrections if needed

Business Phone () _____ Years in Practice _____ No. of Lawyers in Firm _____

Primary Subject Area(s) of Practice _____

Are you a member of the New York State Bar Association? Yes No Please send me a special application.

Are you a member of the Trusts and Estates Law Section? Yes No

Please enroll me in "Fifth Annual Sophisticated Trusts and Estates Law Institute" New York City (07644)

I will attend the following workshops (select a different one from each set, for a total of four (4) different workshops):

THURSDAY: SET 1: 130A (Prenups) 130B (Retirement Plans) 130C (Elder Care) 130D (Grantor Trusts)

SET 2: 230A (Prenups) 230B (Retirement Plans) 230C (Elder Care) 135D (Grantor Trusts)

FRIDAY: SET 3: 130E (Trusts flexible) 130F (Litigation) 130G (Life Insurance)

SET 4: 230E (Trusts flexible) 230F (Litigation) 230G (Life Insurance)

COCKTAIL RECEPTION: I will attend I will not attend

LUNCHEON: Special dietary concerns: Kosher meal Vegetarian Other: _____

PROGRAM FEES:

Early registrations, received or postmarked 10 days prior to the date of the session for which you register:

NYSBA members-\$700 non-members-\$800

Late registrations, received or postmarked thereafter, and on-site registrations:

NYSBA members-\$750 non-members-\$850

Special discount pricing for the second or subsequent registrants from the same firm, regardless of when they register:

NYSBA members-\$525 non-members-\$600

IMPORTANT NOTE: CLE Seminar Coupons and Complimentary Passes CANNOT be used for this program.

Check or money order enclosed in the amount of \$ _____ (Please make checks payable to the New York State Bar Association.)

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For more information on our CLE Coupon Plan offering substantial savings on full-day, live programs, please contact the Registrar's Office at **1.800.582.2452**.

4 EASY WAYS TO REGISTER

Online at www.nysba.org/cle/fall2007

Call us at **1.800.582.2452** (U.S. and Canada) or **518.463.3724** in the Albany & surrounding area

Mail to: Registrar's Office
New York State Bar Association
One Elk Street, Albany, NY 12207

Fax the order form to **518.487.5618**

Sponsors/Exhibitors

We gratefully acknowledge the support of the following Sponsors/Exhibitors participating in this Institute. Please plan to visit their exhibits at the meeting.

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 See our Fall 2007 schedule online at www.nysba.org/cle/fall2007.

REGISTER EARLY, SAVE MONEY, AND GUARANTEE YOUR SEAT AT THE PROGRAM!!!

New York State Bar Association – Continuing Legal Education

NYSBA **CLE** *presents*

Fifth Annual Sophisticated Trusts and Estates Law Institute



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