





CONTINUING EDUCATION PROOF OF ATTENDANCE FORM

46TH ANNUAL HECKERLING INSTITUTE ON ESTATE PLANNING

Many accrediting agencies have imposed mandatory cut-off dates for reporting credits. Attendees who return forms after January 27, 2012 may be denied credits by the accrediting agency.

All registrants must complete this form as proof of attendance. All credit, including ethics credit, will be awarded based on sessions actually attended. LIST ALL JURISDICTIONS AND PROFESSIONS IN WHICH YOU WISH TO RECEIVE CREDIT AND INCLUDE YOUR LICENSE OR IDENTIFICATION NUMBER. PLEASE NOTE THAT IT IS YOUR RESPONSIBILITY TO ASCERTAIN THE CONTINUING EDUCATION GUIDELINES OF YOUR JURISDICTION AND PROFESSION.

4 ways to return Proof of Attendance forms:

	Onsite: Submit during the Institute (Preferred)	 Email: HeckerlingCE@law.miami.edu	 Fax: 305-284-6752	 Mail: Heckerling Institute 1311 Miller Drive, Room C-423 Coral Gables, FL 33146
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Forms **MUST** be received by January 27, 2012.

Name _____

PLEASE TYPE OR PRINT CLEARLY!!

Telephone _____

Firm _____

Firm Address _____

City, State, Zip _____

CREDIT APPLYING FOR:

Attorney

Bar # _____ State _____
 Bar # _____ State _____
 Bar # _____ State _____
 Bar # _____ State _____

CPA

CPA # _____ State _____
 CPA # _____ State _____

CFP

Last 4 digits of Social Security # _____
 License # _____

Insurance

Social Security # _____
 License # _____ State _____
 License # _____ State _____
 License # _____ State _____

Other (CLU, ChFC (PACE), ICB, IRS, etc.)

PLEASE INDICATE SESSIONS ATTENDED:

Monday Morning, January 9, 2012

- Fundamentals Program** - What Your Mother Never Told You About Powers of Appointment: A Most Flexible Estate and Financial Planning Tool (Blattmachr)

Monday Afternoon, January 9, 2012

- Recent Developments - 2011 - Part I (Belcher, Harrington, Pennell)
- Recent Developments - 2011 - Part II (Belcher, Harrington, Pennell)

Tuesday Morning, January 10, 2012

- IRA Distributions and Rollovers - Integrating Estate Planning and Income Tax Planning (Hoyt)
- Straightjacket Trusts: Requested, Needed or Imposed by Default? (Bergner)
- Pressing The "Do Over" Button: Strategies for Modifying Wills and Trusts After Formation (Rubenstein)
- They Say You Can't Take It With You - But How Do You Give It Away? Using the New \$5 Million Exclusion Amount (Burns)

Tuesday Afternoon, January 10, 2012

- The Last Picture Show -- What You Should Do with Your Art (Lerner)
- Portability: The New Estate Planning Wonder Drug? (Abendroth)
- There's No Place Like Home - Unless You Give It Away (Handler)
- Ethics- The ACTEC Commentaries in the 21st Century: Where Have We Been and Where Are We Going? (Ross) ***Ethics**

Wednesday Morning, January 11, 2012

- Use of Irrevocable Income - Only Trusts in Elder Law Planning: Yes, You Can Have Your Cake and Eat It Too (Krooks)
- Gift Tax Audits: A Tale of Two Initiatives (Kaufman)
- Question and Answer Panel (Belcher, Harrington, Pennell)

Wednesday Afternoon, January 11, 2012 (concurrent sessions)

- Fundamentals Program** What Every Estate Planner Needs to Know About Tax-Exempt Organizations and Charitable Gift Planning (A. Rothschild, Fox)
- OR
- I-A** - Planning for Clients with \$5 Million or Less (G. Rothschild, Krooks, Nelson)
- I-B** - Family Limited Partnerships: Not Just a Passing Phase? (Porter, Pratt)
- I-C** - Planning and Administering the Artist's Estate and the Artist's Foundation (Lerner, Sare, Vincent)
- I-D** - Twenty Tax Traps and Other Trustee Selection Considerations (Parthemer)
- I-E** - Expert Witnesses in Trust and Estate Litigation (Matiasevich, Lieberman, Meister, Sitkoff)
- I-F** - Using Annuities in Estate Planning: Opportunities and Pitfalls (Mancini, Olsen, Warshaw)

- II-A** - Planning for the "New Medium Sized" Estate of \$5 to \$15 Million (Abendroth, Hoyt, Rubenstein)
- II-B** - Recent Developments for Fiduciaries (Berry, Fitzsimons) ***Ethics**
- II-C** - What's New for U.S. Clients with Non-U.S. Assets? (Moore, Barmes, Zagaris)
- II-D** - New Technologies to Deliver Better Client Services (Hodges, Reach)
- II-E** - Taking a Look Under the Hood - A 10 Point Diagnostic Test for Your Family Limited Partnership (Loomis-Price, Angkatavanich)
- II-F** - Tax, Business, and Drafting Considerations of Buy-Sell Agreements (Roush, Aghdami)

Thursday Morning, January 12, 2012

- 7:45 - 8:45 a.m.** Unauthorized Entities Session for Florida Insurance Professionals
Attendance is required to receive continuing education credit in Florida. No credit will be awarded for other jurisdictions.
- A Hop, Jump and Generation-Skip Away with GST Tax (Kwon)
- In-Plan Roth Rollovers: A Good Idea? Or Just Another Revenue Raiser? (Holt)
- Let My Trustees Go! Planning to Minimize or Avoid State Income Taxes on Trusts (Nenno)
- You're What? With Whom? But Have You Thought About...? Marriage, Domestic Partnerships, Civil Union - The Developing Legal Landscape (Goffe)

Thursday Afternoon, January 12, 2012 (concurrent sessions)

- Fundamentals Program:** Grantor Trusts: Take Nothing for Granted (Heller, Halperin)
- OR
- III-A** - Planning for the Large Estate of Over \$15 Million (Burns, Bergner, Handler)
- III-B** - Family Limited Partnerships: Not Just a Passing Phase? (*Repeat of Session I-B*) (Porter, Pratt)
- III-C** - GST Tax: Pitfalls, Pratsfalls and Practical Pointers (Kwon, Kaufman)
- III-D** - Anyone Can Whistle - What You Should Know About the Newly Revised IRS Whistleblower Program (Basson, Applebaum, Sullivan)
- III-E** - Elder Financial Abuse: Protecting the Aging Client from the Den of Thieves (Ross, Fitzsimons, Thoreen) ***Ethics**
- III-F** - Traditional and Roth IRAs: Conversions, Creditors, Caveats and Community Property (Holt, Golden)

- IV-A** - The Trust Protector - Trust(y) Watchdog or Expensive Exotic Pet? (G. Rothschild, Bove)
- IV-B** - The State Income Taxation of Trusts from A (Alabama) to W (Wyoming) (Nenno, Albright, Gutierrez, Peebles, Twomey)
- IV-C** - Charitable Gift Planning for Unmarried Couples (Goffe, Wolven)
- IV-D** - New Technologies to Deliver Better Client Services (*Repeat of Session II-D*) (Hodges, Reach)
- IV-E** - Monitoring Life Insurance Policies in ILITs - Guidelines for Trustees to Minimize Fiduciary Liability (Slavutin)

Friday Morning, January 13, 2012

- Asset Protection & Estate Planning - Why Not Have Both? (Nelson)
- Charitable Gifts: Annuities and Remainders in Personal Residences and Farms (Teitell)
- That's a Wrap! (Stone, Bucher, Goffe)

SIGNATURE _____

DATE _____

I certify that I personally attended the sessions marked on this Proof of Attendance form.

**Ethics credit may be available for this session.*

Please reference the ethics accreditation information for your specific jurisdiction and profession.