

**44th Annual Heckerling Institute on Estate Planning
January 25 – 29, 2010**



The National Registry of CPE Sponsors (NASBA) has expanded the “Fields of Study” from seven broad fields to twenty three subject areas. The 44th Annual Heckerling Institute on Estate Planning covers six of the twenty three fields. The table below indicates the number of minutes available per session for each field of study. Your Certificate of Attendance will reflect those six fields of study and the number of CPE credits earned.

Day / Time	Session Title	Admin Practice	Behav'r'l Ethics	Business Law	Comm	Regulatory Ethics	Taxes
General Sessions							
Monday 9:00 – 12:15	Fundamentals- Getting Off to the Right Start – Choosing the Right Entity			180			
2:10 – 5:15	Recent Developments - 2009						170
Tuesday 9:00 – 9:50	Thanks But No Thanks- Disclaiming Assets...						50
9:50 – 10:40	How To Do Your Roth IRA Conversion in 2010						50
10:55 – 11:45	The Good, the Bad and Avoiding the Ugly						50
11:45 – 12:35	Escaping from the World of FLPs						50
2:00 – 3:40	Charting New Paths for Estate Planners...						100
3:55 – 4:45	Planning for Life after Death: Laws of Succession						50
4:45 – 5:35	How to Succeed (Ethically) in Business Succession Planning		50				
Wednesday 9:00 – 9:50	Putting the Horse before the Cart: Non-Tax Issues			50			
9:50 – 10:40	ESOPs – The Most Tax Efficient Transition Strategy						50
10:55 – 12:35	Question and Answer Panel						100
Fundamentals Program (<i>Runs Concurrently w Special Sessions I & II</i>)							
2:00 – 5:20	Keeping It All in the Family - Asset Protection			180			
SPECIAL SESSIONS I							
2:00 – 3:30							
I-A	Integrating the Estate Plan with Business Succession Planning						90
I-B	Family Limited Partnership Valuation & Audit Issues						90
I-C	For Better or Worse : What's Right About a Pre-Nuptial Agreement?	90					
I-D	Where No Ethics Have Gone Before- Doing Right...		90				
I-E	Using Taxes to Settle Trust and Estate Litigation						90
I-F	Planning is No Picnic When the Forecast is Unclear						90

Day / Time	Session Title	Admin Practice	Behav'r'l Ethics	Business Law	Comm	Regulatory Ethics	Taxes
SPECIAL SESSIONS II 3:50 – 5:20							
II-A	What Estate Planners Need to Know About Operating a Closely Held Business						90
II-B (Repeat of I-B)	Family Limited Partnership Valuation & Audit Issues						90
II-C	Current Issues in Charitable Planning						90
II-D	Counseling King Lear & Other Lessons from an Elder Law Practice				90		
II-E	Bomb Proofing the Estate Plan: Version 2.0	90					
II-F	Life Insurance and the Economic Downturn	90					
Thursday 9:00 – 9:50	Frozen Brain: Estate Planning Strategies for QTIP Trust Assets						50
9:50 – 10:40	Still <i>Crummey</i> After all these Years						50
10:55 – 11:45	Looking for Law in all the Right (and Wrong) Places						50
11:45 – 12:35	FATF & the Lawyer Guidance					50	
Fundamentals Program (<i>Runs Concurrently w Special Sessions III & IV</i>)							
2:00 – 3:30 and 3:50 – 5:20	Your Life Preserver! Retirement Benefits Drafting Workshop						180
SPECIAL SESSIONS III 2:00 – 3:30							
III-A	Planning for the Closely-Held Business – Exit Strategies During Life						90
III-B	Qualified Disclaimers						90
III-C	Current International Developments						90
III-D	Estate Planning for QTIP Trust Assets	90					
III-E	Enhance GRATS, Grantor Trusts Sales & Family Loans						90
SPECIAL SESSIONS IV 3:50 – 5:20							
IV-A	Exit Strategies At Death						90
IV-B	Unwinding Bad Transactions						90
IV-C	Forum Shopping in Depth						90
IV-D	Anatomy of a <i>Crummey</i> Power						90
IV-E	What to Do When Clients Bring Dysfunctional Families?	90					
Friday 9:00 – 9:50	Fiduciaries and Their Lawyers- Tempting Targets	50					
9:50 – 10:40	Financed Net Gifts: No Hassle Asset Transfers						50
10:50 – 12:00	Applying What We've Learned from A to Z						70
Total Minutes of Instruction 1680 minutes ►divided by 50 ►rounded down to the nearest half hour		1680 minutes = 33.5 hours					