

ABA SECTION OF REAL PROPERTY, TRUST & ESTATE LAW

2011

22nd Annual Spring Symposia

APRIL 28-29, 2011
WASHINGTON, DC



ABA
AMERICAN BAR ASSOCIATION
Defending Liberty
Pursuing Justice



SECTION OF REAL PROPERTY | TRUST & ESTATE LAW

Your Source for Success

22nd Annual Spring Symposia

I hope you will join me at the 22nd Annual Real Property, Trust and Estate Law Spring Symposia in Washington, D.C. on April 28-29, 2011. We recognize these are chaotic times and this year's symposia feature a remarkable number of cutting edge CLE programs designed to provide both practical and useful information to all levels of practitioners. Through a collaboration between the most experienced practitioners in the real estate and trust and estates fields and younger section leaders full of fresh programming ideas, our CLE Committee has assembled a dynamic meeting designed to keep you on the leading edge of real property and trust and estate law.



PHOTO COURTESY OF HYATT HOTELS

The Spring Symposia will provide:

- Opportunities to develop your expertise and expand your working knowledge of the latest issues and techniques.
- Unparalleled relationship building opportunities.
- The most experienced, diverse and innovative speakers in our legal fields.
- Fulfillment of CLE and professionalism requirements through intense program tracks filled with practical take home tips.



Alan F. Rothschild, Jr.

Chair, ABA Section of Real Property, Trust and Estate Law



Networking Events and Meeting Highlights



22ND ANNUAL SPRING SYMPOSIA 2011

THURSDAY, APRIL 28

7 a.m. – 5 p.m.

Hospitality Area

Continental breakfast and refreshments will be available for all meeting registrants.

11:30 a.m. – 1:30 p.m.

Section of Real Property Trust and Estate Law - Groups and Committees Luncheon

Open to all attendees, tables for each Group will provide a forum for discussion of timely issues vital to real property and trust and estate practitioners, creating an excellent opportunity to network with colleagues.

Cost: \$20

5:30 – 6:30 p.m.

Complimentary Reception with the Sponsors

Join us for cocktails to thank our 2011 Symposia sponsors for their generosity and support. For a complete list of our sponsors, see the inside back cover of this brochure.

Location: Sponsorship Area

7 – 10 p.m.

Library of Congress - Symposia Reception

The Library of Congress, the largest library in the world and America's oldest federal cultural institution, was founded in 1800 to serve the needs of Congress. The Library has grown into an unparalleled treasure house of

the world's knowledge and America's creativity. Our event will take place in the Great Hall in the Library's Thomas Jefferson Building. The two-story room is decorated in the Italian Renaissance style with beautiful murals, mosaics, and vaulted marble ceilings.

Cost: \$25; Co-Sponsored by:



**WILMINGTON
TRUST**

EMPIRE

VALUATION CONSULTANTS, LLC

FRIDAY, APRIL 29

7 a.m. – 5 p.m.

Hospitality Area

Continental breakfast and refreshments will be available for all meeting registrants.

11:30 a.m. – 1:30 p.m.

Real Property Luncheon The State of the US Real Estate Economy in 2011

Hear from a leader in commercial and multi-family industry and policy analysis as economist Jamie Woodwell shares up-to-the-minute facts and figures on the real estate markets across the US in 2011 and projections on things to look for in 2012.

Speaker:

- Jamie Woodwell, Vice President of Commercial/Multi-Family Research, Mortgage Bankers Association, Washington, DC

Cost: \$45

11:30 a.m. – 1:30 p.m.

Trust and Estate Hot Topics Luncheon "I'm So Dizzy, My Head is Spinning"

Speakers:

- Steve R. Akers, Bessemer Trust, Dallas TX
- Catherine V. Hughes, US Department of Treasury, Washington, DC

Cost: \$45; Sponsored by:

BESSEMER TRUST

The Section of Real Property, Trust and Estate Law would like to recognize the following companies for sponsoring our leadership dinner at the National Museum of Women in the Arts.

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Schedule At-A-Glance



22ND ANNUAL SPRING SYMPOSIA 2011

TRUST & ESTATE DIVISION CLE PROGRAMS AT-A-GLANCE

Wednesday, April 27, 2011

1 - 5 p.m.	Registration
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Thursday, April 28, 2011

7 - 5 p.m.	Printing Kiosk Area	
7 - 5 p.m.	Registration	
7 - 5 p.m.	Sponsor Foyer	
8 - 9 a.m.	Guest/Spouse Breakfast	
7:30 - 8:30 a.m.	Symposia Breakfast	
8:15 - 9:45 a.m.	Income and Transfer Tax Planning Group (Part 1) - "You Can't Always Get What You Want"	Business Planning Group - "River Deep Mountain High" - Counseling Closely Held Business Owners About Compensation Planning
9:45 - 10 a.m.	Coffee Break	
10 - 11:30 a.m.	Income and Transfer Tax Planning Group (Part 2) - "I Will Survive!"	Employee Benefit Plans Group - "Lean On Me" - Group Health and Disability Claims and Appeals - The Brave New World for Making, Administering, and Paying Claims
11:30 a.m. - 1:30 p.m.	Groups and Committees Luncheon (ticketed)	
1:30 - 3 p.m.	Non-Tax Estate Planning Considerations Group - "My Bologna Has a First Name" - Hot Topics For The Sandwich Generation	Charitable Planning and Organizations Group - (Part 1) "Where Have All the Donors Gone?" Case Studies in Charitable Planning; (Part 2) All is NOT Quiet on the Charitable Front
3 - 3:15 p.m.	Coffee Break	
3:15 - 4:45 p.m.	Elder Law, Disability Planning and Bioethics Group - "Teach Your Children Well" - The Brooke Astor Case and Ethical Issues	Litigation, Ethics and Malpractice Group - "I [Might] Get By With A Little Help from My Expert" - Expert Witnesses in Trust and Estate Litigation
5:30 - 6:30 p.m.	Sponsor Reception	
7 - 10 p.m.	Symposia Reception (ticketed) - Library of Congress	

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8 - 9 a.m.	Guest/Spouse Breakfast	
7:30 - 8:30 a.m.	Symposia Breakfast	
8 - 9 a.m.	"You've Got a Friend" - What Every Lawyer Should Know About Clients with Disabilities	"Help Me Make It Through the Night" - What Estate Planners Need to Know About Elder Law

9 - 9:15 a.m.	Coffee Break	
9:15 - 10:15 a.m.	"When I'm Sixty-Four" - Boomers in Retirement	"One is the Loneliest Number" - Collaboration with Allied Professionals
10:15 - 10:30 a.m.	Coffee Break	
10:30 - 11:30 a.m.	"Born To Be Wild" - Assisted Reproduction and Estate Planning	"One Tin Soldier" - Planning For Baby Boomers and Their Toys
11:30 a.m. - 1 p.m.	Trust and Estate Hot Topics Luncheon (ticketed) "I'm So Dizzy, My Head Is Spinning"	
1:15 - 2:30 p.m.	"Welcome to the Jungle" - Health Care Reform Bootcamp	"Purple Haze" - Does Your Client Have Capacity?
2:30 - 2:45 p.m.	Coffee Break	
2:45 - 4 p.m.	"Fixin' to Die Rag" - When Boomer Estate Plans Mature - From Representing the Client to Administering the Estate	"He Ain't Heavy, He's My Brother" - Contested Guardianships

REAL PROPERTY DIVISION CLE PROGRAMS AT-A-GLANCE

Wednesday, April 27, 2011

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8 - 9 a.m.	Guest/Spouse Breakfast	
7:30 - 8:30 a.m.	Symposia Breakfast	
8:15 - 9:45 a.m.	Practice Management Group – (Part 1) The Positive Side of Social Media; (Part 2) What Every RPTE Lawyer should know about Dodd Frank	Residential, Multi-Family and Special Use Group - Origination Changes and Servicing Challenges that are Transforming the Mortgage Industry
9:45 - 10 a.m.	Coffee Break	
10 - 11:30 a.m.	Commercial Real Transactions Group - Revisiting Commercial Real Estate Remedies in Troubling Times	Hospitality, Timesharing & Common Interest Developments Group - Condominium and Resort Rental Management Agreements: Lessons Learned; Timesharing Scams - Resale Promises and Transfer Company Dreams; and What is the Uproar Over Private Transfer Fee Covenants?
11:30 a.m. - 1:30 p.m.	Groups and Committees Luncheon (ticketed)	
1:30 - 3 p.m.	Real Estate Financing Group - The Annotated Real Estate Finance Opinion: Gambol, Guide, Goal, or Gift?	Land Use and Environmental Group - Gas Rush: The Current State and Future Development of Natural Gas Production
3 - 3:15 p.m.	Coffee Break	
3:15 - 4:45 p.m.	Special Investors and Investment Structure Group - There's More than One Way to Form a JV: Alternative Structures for Real Estate Joint Ventures	Leasing Group - Show Me (Your Client) the Money: Understanding Lease Economics, Tenant Improvements and the Performance of the Initial Work by the Landlord or Tenant
5:30 - 6:30 p.m.	Sponsor Reception	
7 - 10 p.m.	Symposia Reception (ticketed) - Library of Congress	

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8 - 9 a.m.	"You've Got a Friend" - What Every Lawyer Should Know About Clients with Disabilities	
9 - 9:15 a.m.	Coffee Break	
9:15 - 10:15 a.m.	Leasing to Lawyers: What You Need to Know on Both Sides of the Deal	The Ethical Duties of Common Interest Communities Counsel in the Age of Economic Distress: Charting the Uncharted Waters and Avoiding the Rocks
10:15 - 10:30 a.m.	Coffee Break	
10:30 - 11:30 a.m.	How Can I Have A Conflict of Interest if I have a Waiver Letter?	"Special Needs" Lease Transfer Clauses: The Answers to Your Questions
11:30 a.m. - 1 p.m.	Real Property Luncheon (ticketed) The State of the US Real Estate Economy in 2011	
1:15 - 2:30 p.m.	Construction Defect Litigation and ADR for the Transactional Attorney	Giving Back the Keys: Deeds in Lieu of Foreclosure
2:30 - 2:45 p.m.	Coffee Break	
2:45 - 4 p.m.	Law Professors' Panel: Recent Developments	Sale and Acquisition of Distressed Debt

PRACTICE MANAGEMENT PROGRAMS

Friday, April 29, 2011

8 - 9 a.m.	Security on Steroids: Controlling and Securing Data
9 - 9:15 a.m.	Coffee Break
9:15 - 10:15 a.m.	Alternative Billing
10:15 - 10:30 a.m.	Coffee Break
10:30 - 11:30 a.m.	60 Tips in 60 Minutes



Trust and Estate Symposium



22ND ANNUAL SPRING SYMPOSIA 2011

☯ BABY BOOMERS ⚖ ETHICS 📱 TECHNOLOGY

The generation that taught us to “make love not war” and “don’t trust anyone over thirty” is beginning to qualify for Medicare. The aging of the Baby Boomer generation brings a constellation of legal issues to the fore for trust and estate lawyers. The TE programs at this year’s CLE Symposia, heralded by favorite songs from the sixties, address the theme of planning for these issues. From retirement plans to incapacity and guardianship, along with the opportunities and challenges posed by wealth transfer planning in the post-EGTRRA world, the topics of these programs will provide information you need to know, mercifully not set to music.

THURSDAY, APRIL 28, 2011

8:15 – 9:45 a.m.

Business Planning Group and Employee Benefit Plans and Other Compensation Arrangements Group

“River Deep Mountain High” - Counseling Closely Held Business Owners About Compensation Planning

Topics to include:

- Integrating compensation planning with succession planning;
- Emerging and optimal planning opportunities in today’s environment;
- Long-term care, executive health benefits and other employee benefit arrangements;
- Corporate and fiduciary law requirements in adopting, implementing and administering plans;
- Section 409A and other compliance issues;
- New developments;
- Traps for the unwary.

Group Chairs: William S. Forsberg, Leonard Street and Deinard, Minneapolis, MN; Cynthia M. Stamer, Cynthia Marcotte Stamer PC, Plano, TX

Speakers:

- Richard E. Barnes, BarnesLaw LLC, Valdosta, GA
- Steven B. Gorin, Thompson Coburn LLP, St. Louis, MO
- Frances M. Palmieri, Palmieri & Eisenberg, Princeton, NJ
- Henry Talavera, Hunton & Williams LLP, Dallas, TX

8:15 – 9:45 a.m.

☯ Income and Transfer Tax Planning Group (Part 1)

“You Can’t Always Get What You Want”

We will begin with a discussion on worldwide demographic changes affecting wealth planning and tax oversight on an international basis. Afterwards, our panel of practitioners and government representatives will review:

- Recent legislative developments defining estate, gift and generation-skipping tax laws;
- Planning, drafting and administration issues in 2011 and beyond.

Group and Program Chair: Julie K. Kwon, McDermott Will & Emery, Menlo Park, CA

Speakers:

- Ellen K. Harrison, Pillsbury Winthrop Shaw Pittman LLP, Washington, DC
- Catherine V. Hughes, US Department of Treasury, Washington, DC
- Beth S. Kaufman, Caplin & Drysdale, Washington, DC
- Isabelle Wheeler, BNP Paribas, Miami, FL

10 – 11:30 a.m.

Income and Transfer Tax Planning Group (Part 2)

“I Will Survive” - Hot Topics in Income and Transfer Tax Planning

We will conclude with a practitioner and government representative leading our discussion:

- Recent international tax planning developments;
- Compliance requirements under FATCA.

Additional Speakers:

- Scott D. Michel, Caplin & Drysdale, Washington, DC
- IRS Representative TBA

► 10 – 11:30 a.m.

⚖️ **Employee Benefits and Other Compensation Group and Elder Law, Disability Planning and Bioethics Group**

“Lean On Me” - Group Health and Disability Claims and Appeals: The Brave New World for Making, Administering, and Paying Claims

Attorneys representing clients under employer-sponsored benefit plans must understand and guide clients through tricky and increasingly intricate processes and procedures. Always challenging, the intricacy of health and disability claims and appeals administration has grown significantly in response to legislative reforms and Supreme Court and other emerging precedents. This program will provide:

- Updates on the complex rules governing employment-based health and disability claims and appeals and share practical insights on guiding clients through these procedures;
- Updated Department of Labor rules governing ERISA health and disability claims;
- New Affordable Care Act-mandated claims and appeals for non-grandfathered health plans;
- Recent judicial claims and preemption precedent impacting health and disability claim enforcement;
- Interplay between ERISA and Prompt Pay and other state insurance claims and appeals regulations;
- HIPAA privacy procedures and implications on health and disability claims; and
- Practical tips and insights.

Group Chair and Speakers: Cynthia M. Stamer, Cynthia Marcotte Stamer PC, Plano, TX; Michael A. Kirtland, Kirtland & Seal LLC, Colorado Springs, CO

Speakers:

- Bernard V. Kearse III, Bernard V. Kearse III PC, Atlanta, GA
- Peter M. Kelly, Blue Cross Blue Shield Association, Chicago, IL
- Elizabeth Leight, Society of Professional Benefit Administrators, Chevy Chase, MD
- Scott D. Marquardt, Total Plan Services, Inc., Dallas, TX

1:30 – 3 p.m.

⚖️ **Non-Tax Estate Planning Considerations Group**

“My Bologna Has a First Name” - Hot Topics For The Sandwich Generation

The definition of family is changing. Yet, much of estate planning truly revolves around the family planning. Every five to ten years, your

client's family structure can change. Is the (non-traditional) estate planning keeping up with these changes?

- Nontraditional planning and why state law matters;
- Blended families and how generational gaps can affect planning decisions;
- Sandwich generation planning including the effect of delaying or taking a traditional retirement age;
- Hot topics.

Group Chair and Speaker: Laura M. Twomey, Simpson Thacher & Bartlett LLP, New York, NY

Program Chair and Speaker: Elizabeth Lindsay-Ochoa, AXA Equitable, New York, NY

Speakers:

- Thanda F. Brassard, Fiduciary Trust Co., Boston, MA
- Kelly A. Buist, Murphy Reid LLP, Palm Beach Gardens, FL
- Mary P. O'Reilly, Meltzer Lippe Goldstein & Breitstone, New York, NY
- Lee-Ford Tritt, University of Florida College of Law, Gainesville, FL

1:30 – 3 p.m.

Charitable Planning and Organizations Group

“Where Have All the Donors Gone?” - Case Studies in Charitable Planning (Part 1)

Using a case study approach, the panel will focus on charitable planning techniques that fit the current tax and economic environment. Topics covered will include:

- Retirement benefits – tax efficient alternatives that meet clients' objectives;
- Tangible personal property – identifying and overcoming technical challenges;
- Private operating foundations – a useful tool.

Group and Program Chair: Mary Lee Turk, Levin Schreder & Carey, Chicago, IL

Speakers:

- Christopher R. Hoyt, University of Missouri KC, School of Law, Kansas City, MO
- Jerry J. McCoy, Law Office of Jerry J. McCoy, Washington, D.C.
- Ramsay H. Slugg, U.S. Trust Bank of America, Ft. Worth, TX

(Part2) All is NOT Quiet on the Charitable Front

The panel will cover recent developments and hot topics, including:

- Assessment of the current regulatory environment, including a report from Treasury on 2011 guidance projects and EO business plan;
- Recent judicial trends and developments;
- Private foundation update;

- Uniform Oversight of Charitable Assets Act;
- In-depth focus on recent regulations.

Group and Program Chair: Mary Lee Turk, Levin Schreder & Carey, Chicago, IL

Speakers:

- Grace Allison, The Northern Trust Company, Chicago, IL
- Stephanie B. Casteel, Abrams Davis Wallace Mason Long LLC, Atlanta, GA
- Janne G. Gallagher, Council on Foundations, Arlington, VA
- Ruth M. Madrigal, U.S. Department of Treasury, Washington, DC
- Elaine Waterhouse Wilson, Quarles & Brady LLP, Chicago, IL

3:15 – 4:45 p.m.

Elder Law, Disability Planning and Bioethics Group

“Teach Your Children Well” - The Brooke Astor Case and Ethical Issues

The Brooke Astor case resulted in a criminal conviction for one estate planning attorney and two disciplinary actions against other prominent attorneys. This ethics-based program will provide an interactive discussion of:

- Issues involved in the representation of individuals with diminished capacity;
- Dealing with family members in the estate planning scenario;
- Ethical duties when the attorney knows of or suspects diminished capacity;
- Undue influence;
- How to stay on the right side of the Rules of Professional Conduct in family representation situations.

Program Chair and Speaker: Michael A. Kirtland, Kirtland & Seal LLC, Colorado Springs, CO

Speakers:

- Catherine Anne Seal, Kirtland & Seal LLC, Colorado Springs, CO
- Lori A. Stiegel, ABA Commission on Law and Aging, Washington DC

3:15 – 4:45 p.m.

Litigation, Ethics and Malpractice Group

“I [Might] Get By With A Little Help from My Expert” - Expert Witnesses in Trust and Estate Litigation

Make sure that you can navigate the treacherous waters inhabited by the expert witness, where your own experts may be as much of a danger to you as those on the opposing side:

- Learn the techniques for selecting and preparing your own expert as well as cross-examining the opponent’s;

- Learn to avoid mistakes that bedevil even the most experienced litigators when they deal with experts;
- Learn specific issues that apply to the rogue’s gallery of witnesses you will confront time and again in this area of practice, i.e. standard-of-care experts, treating physicians, competency experts, forensic accountants, and investment experts.

Group Chair: Gerard G. Brew, McCarter & English LLP, Newark, NJ

Program Chair and Speaker: Matthew P. Matiasovich, Evans Latham & Campisi, San Francisco, CA

Speakers:

- David E. Lieberman, Levin Schreder & Carey Ltd., Chicago IL
- Julia B. Meister, Taft Stettinius & Hollister LLP, Cincinnati, OH
- Robert H. Sitkoff, John L. Gray Professor of Law, Harvard Law School, Cambridge, MA

FRIDAY, APRIL 29, 2011

8 – 9 a.m.

“Help Me Make It Through the Night” - What Estate Planners Need to Know About Elder Law

This program will provide a general overview of elder law issues and detail what estate planners need to know to properly deliver trust and estate services to aging Baby Boomers. Topics include:

- Medicare/Medicaid;
- Social Security and pension issues;
- Estate planning for seniors;
- Planning for incapacity;
- The role of the courts, i.e. probate, guardianship and conservatorship;
- Ethical issues.

Program Chair: Catherine Anne Seal, Kirtland & Seal LLC, Colorado Springs, CO

Speakers:

- Rebecca Morgan, Stetson University College of Law, Gulfport, FL
- Arnetta S. Wright, Wright Law Group, Washington, DC

8 – 9 a.m.

“You’ve Got a Friend” - What Every Lawyer Should Know About Clients with Disabilities

Panelists with different disabilities will discuss how common misconceptions faced by people with disabilities can affect their relationships with lawyers and the legal system, and what lawyers need to consider when dealing with clients who are persons



▶ with disabilities. Professionalism credit for this session has been applied for. Topics will include:

- How different disabilities manifest themselves, even if not readily apparent;
- How lawyers should interact with clients/ persons with disabilities;
- What every lawyer should know about working with persons with disabilities;
- What kinds of accommodations should be considered and implemented when working with persons with disabilities.

Program Chair and Moderator: Orlando Lucero, Stewart Title of Albuquerque, Albuquerque, NM

Speakers:

- Richard W. Nenno, Wilmington Trust Company, Wilmington, DE
- Patti S. Klein, MD, Tenafly, NJ

9:15 – 10:15 a.m.

☯ **“When I’m Sixty-Four” - Boomers in Retirement**

Practitioners who specialize in estate planning and retirement distribution strategies will discuss techniques used to maximize a sustainable income, as well as special estate planning issues that arise with retirement assets. The impact on both traditional and non-traditional couples will be addressed in:

- Managing assets in retirement;
- Moving assets from pre-retirement accumulation to post-retirement income distribution;
- Managing income with spousal considerations;
- Managing income in unconventional unions and same sex situations;
- Answering critical questions that arise when a client’s estate includes retirement assets;
- Estate planning for non-married and same sex married couples.

Program Chair: Jo Ann Engelhardt, Bessemer Trust, Palm Beach, FL

Speakers:

- April Caudill, Northwestern Mutual Life, Milwaukee, WI
- John Oliver, Transamerica Life Insurance Company, Los Angeles, CA
- Richard Weber, Ethical Edge Inc., Pleasant Hills, CA

9:15 – 10:15 a.m.

☯ **“One is the Loneliest Number” - Collaboration with Allied Professionals**

The estate planning attorney can best address the full spectrum of an aging client’s needs by serving as the “quarterback” of a team of allied professionals. This program will explore:

- Geriatric care managers (GCM) as an indispensable team members in the estate

planning context;

- Most frequently encountered legal issues as the team works to serve the client (and the client’s family);
- Sample professional services agreements for the GCM and other team members.

Program Chair and Speaker: Kristen M. Lewis, Smith, Gambrell & Russell LLP, Atlanta, GA

Speakers:

- Lawrence A. Frolik, University of Pittsburgh Law School, Pittsburgh, PA
- Valerie D. Rufo, Broadspire Care Management, Atlanta, GA

10:30 – 11:30 a.m.

☯ **“Born To Be Wild” - Assisted Reproduction and Estate Planning**

Now that more than 500,000 embryos, and countless sperm and eggs, are stored for future use, estate planners must consider the possibility that their Baby Boomer clients, or the adult children of their clients, may have a postmortem conception child – a child born years, even decades, after a parent’s death. Our panel will focus on three areas in which a postmortem conception child can have a huge impact on the estate plan.

- Clients about to begin assisted reproduction who need advice on what might happen to frozen sperm, eggs or embryos should the couple divorce; when one or both of them dies; or if the material is donated for use by another couple.
- Clients creating a will or trust, where there is a possibility of a postmortem conception child.
- Your client has died naming you as executor or trustee – and your client has frozen sperm, eggs or embryos. Are those assets of the estate? How are they valued? Do you have implied authority over them if there is no express agreement?

Program Chair and Moderator: Kristine S. Knaplund, Pepperdine School of Law, Malibu, CA

Speakers:

- Teresa C. Baird, Fairfield and Woods, Denver, CO
- Cynthia E. Fruchtmann, Law Offices of Cynthia E. Fruchtmann, Santa Monica, CA
- Cara M. Koss, Holland & Knight, McLean, VA

10:30 – 11:30 a.m.

☯ **“One Tin Soldier” - Planning For Baby Boomers and Their Toys**

Affluent baby boomers have acquired all sorts of valuable items, from cars, to artwork, to memorabilia. This panel will discuss:

- Helping these clients make long term plans for their collections - what to keep in the

family and what to give to charity;

- How and when to give away valuable tangible personal property in the most tax efficient and personally satisfying way.

Group, Program Chair and Speaker: Mary Lee Turk, Levin Schreder & Carey Ltd., Chicago, IL

Speakers:

- Farleigh Earhart, Office of General Counsel Smithsonian Institution, Washington, DC
- Ralph E. Lerner, Withers Bergman LLP, New York, NY

1:15 – 2:30 p.m.

☯ **“Welcome to the Jungle” - Health Care Reform Bootcamp**

With the sweeping health care reforms enacted under the Patient Protection and Affordable Care Act (ACA), lawyers increasingly are asked to identify health benefit planning opportunities, define and meet health benefit responsibilities and solve health benefit problems for individual and business clients, their firms, and their families. This program will examine:

- Key health benefit reforms enacted under ACA, their impact on Americans and their families and businesses, and strategies that attorneys can use;
- New nondiscrimination rules, special tax incentives and market issues that may create additional challenges and opportunities for closely held businesses;
- Options and coverage in light of the changing health coverage landscape for patients and their families with special needs;
- New mandates and obligations for employers, insurers and health care providers.

Program Co-Chair and Speaker: Cynthia Marcotte Stamer, Cynthia Marcotte Stamer PC, Plano, TX

Program Co-Chair: Michael A. Kirtland, Kirtland and Seal LLC, Colorado Springs, CO

Speakers:

- Alfred J. Chiplin, Center for Medicare Advocacy Inc., Washington, DC
- Elizabeth V. Leight, Society of Professional Benefit Administrators, Chevy Chase, MD
- Robert A. Miller, Calfee Halter & Griswold LLP, Cleveland, OH

1:15 – 2:30 p.m.

☯ **“Purple Haze” - Does Your Client Have Capacity?**

- How do the medical professionals assess capacity?
- What is the relationship between the medical diagnosis and a client’s functional capabilities?
- Does my client with a dementia diagnosis have the ability to understand the estate

planning process?

- Understanding and operating in the “grey zone” of a client between mild dementia and advanced dementia.

Program Chair: Catherine Anne Seal, Kirtland & Seal LLC, Colorado Springs, CO

Speakers:

- Jason Schillerstrom MD, University of Texas Health Science Center, San Antonio, TX
- Kathleen T. Whitehead, Law Office of K. T. Whitehead, San Antonio, TX

2:45 – 4 p.m.

☯ **“Fixin’ to Die Rag” - When Boomer Estate Plans Mature - From Representing the Client to Administering the Estate**

Planners and litigators will discuss important challenges and opportunities that arise when your client is no longer the person, but the estate. Topics will include:

- Defending against pitfalls and capitalizing on opportunities that arise in an estate administration;
- The impact on the estate planning profession of Baby Boomers and their estate plans;
- Last-minute planning opportunities for deathbed clients and important obstacles and options to consider;
- Planning opportunities in light of changes in the estate tax law;
- Maximizing planning opportunities with existing vehicles passing to younger generations.

Program Chair and Speaker: Keri D. Brown, Baker Botts LLP, Houston, TX

Speakers:

- N. Todd Angkatavanich, Withers Bergman LLP, Greenwich, CT and New York, NY
- Rose K. Drupiewski, Chamberlain Hrdlicka White Williams & Martin, Atlanta, GA

2:30 – 4 p.m.

☯ **“He Ain’t Heavy, He’s My Brother” - Contested Guardianships**

- Dealing with dysfunctional families in guardianship and conservatorship cases;
- Handling interstate jurisdictional issues in guardianship and conservatorship cases;
- Multi-generational issues and multiple marriages issue arising in guardianship and conservatorship cases.

Program Chair: Catherine Anne Seal, Kirtland & Seal LLC, Colorado Springs, CO

Speakers:

- Marco D. Chayet, Chayet & Danzo, Denver, CO
- Shirley Whitenack, Schenck Price Smith & King, Florham Park, NJ

Real Property Symposium



22ND ANNUAL SPRING SYMPOSIA 2011

☯ **BABY BOOMERS** ⚖ **ETHICS** 📱 **TECHNOLOGY**

Unprecedented change is confronting the real estate industry. Even practitioners who have weathered prior economic downturns face significant new challenges. Amid a new regulatory environment, slowly emerging capital markets and hints of economic recovery, this year's Symposia presents a wide range of topics addressing the issues confronting real estate lawyers in this time of flux. All programs are CLE accredited. Programs feature hot-topics and current development discussions led by experts in the field. The open format is designed to provide attendees with the opportunity to ask questions and share experiences with practitioners throughout the country.

THURSDAY, APRIL 28, 2011

8:15 – 9:45 a.m.

Residential, Multi-Family and Special Use Group

Origination Changes and Servicing Challenges that are Transforming the Mortgage Industry

This will be a timely discussion on the changes in practice and regulations within the mortgage industry that will include:

- An overview of the origination loan process, mortgage lending activities, legislative changes to existing mortgage lending and foreclosure laws;
- Changing role of the real estate attorney in the closing process;
- The impact of the mortgage industry on both residential and commercial real estate law practices.

Group and Program Chair: Stephanie M. Smith, USDA Rural Development, Washington, DC

Speakers:

- Rodrigo Alba, American Bankers Association, Washington, DC
- Chris Christensen, Peirson Patterson LLP, Dallas, TX
- Christina Jenkins, Middleberg Riddle & Gianna, Dallas TX

8:15 – 9:45 a.m.

Practice Management Group – (Part 1) The Positive Side of Social Media; (Part 2) What Every RPTE Lawyer should know about Dodd Frank

(Part 1) - The Positive Side of Social Media
Clients routinely use Google to search the internet, not only for corporate information about products and services, but also for more information about attorneys they

intend to hire. The panel will discuss:

- What will they discover about you?
- What will they learn about your online "brand"?
- How can you use the social media (Facebook, LinkedIn and Martindale's Connected) to "build your brand"?

Group and Program Chair: Nancy N. Grekin, McCorriston Miller Mukai MacKinnon, Honolulu, HI

Speaker

- Daniel J. Homick, Carolina Equity Investments Inc., Raleigh, NC

(Part 2) - What Every RPTE Lawyer should know about Dodd Frank

Not only is the Dodd-Frank Wall Street Reform and Consumer Protection Act the major financial market regulatory statute of our time, but much of it remains to be defined through the regulatory process. This program will seek to highlight for the real estate practitioner the major relevant areas of change including:

- Major changes in financial institution oversight, including the role of the Financial Stability Oversight Council and expanded FDIC receivership and liquidation authority;
- Overview of changes in bank and thrift regulation;
- The new Bureau of Consumer Financial Protection;
- Mortgage reform and anti-predatory lending provisions;
- What's still to come on the regulatory agenda.

Speaker

- David A. Sprentall, Snell & Wilmer LLP, Phoenix, AZ

► 10 – 11:30 a.m.

Commercial Real Estate Transactions Group

Revisiting Commercial Real Estate Remedies in Troubling Times

This program will take a fresh look at:

- Remedies provisions in commercial purchase sale agreements in light of the current economy and possible instability in the common law;
- Doctrines and legal principles behind the remedies structures currently in use, including specific contract language examples;
- Alternative and suggested approaches for provisions warranting a change.

Group and Program Chair: Neil S. Kessler, Troutman Sanders LLP, Richmond, VA

Speakers:

- Monica K. Gilroy, Dickenson Gilroy LLC, Alpharetta, GA
- Tanya D. Marsh, Wake Forest Law School, Winston-Salem, NC

10 – 11:30 a.m.

Hospitality, Timesharing and Common Interest Developments Group

Condominium and Resort Rental Management Agreements: Lessons Learned; Timesharing Scams - Resale Promises and Transfer Company Dreams; and What is the Uproar Over Private Transfer Fee Covenants?

This program will address the hottest issues of the day:

- An analysis of what condo and resort rental management provisions are working, what provisions have proven to be problematic, and what terms should be added;
- An exploration of the nuances of resale and transfer company scams, a description of these scams and those that are impacted, and an examination of the various options available to timeshare associations and their counsel to help protect the associations and their owners;
- A history of private transfer fee covenants that have recently garnered attention, primarily as a result of unscrupulous developers/sellers/sponsors creating perpetual annuity covenants against property that damages property values and restrains alienation and an exploration the nature of these covenants, both good and bad, and the potential impact of the federal regulators' actions.

Group, Program Chair and Moderator: Robert S. Freedman, Carlton Fields PA, Tampa, FL

Speakers:

- Nancy Leary Haggerty, Michael Best & Friedrich LLP, Milwaukee, WI

- Joseph Lubinski, Ballard Spahr LLP, Denver, CO
- Daniel Q. Orvin, Buist Moore Smythe McGee PA, Charleston, SC

1:30 – 3 p.m.

Real Estate Financing Group

The Annotated Real Estate Finance Opinion: Gambol, Guide, Goal, or Gift?

Panelists will discuss the Annotated Real Estate Finance Opinion, a collaborative endeavor of the ABA RPTE Legal Opinions in Real Estate Transactions Committee, the ACREL Attorneys' Opinions Committee, and the ACMA Opinions Committee. They will address the update of the 1998 Inclusive Real Estate Secured Transaction Opinion including:

- The role of customary practice;
- Benefits of an illustrative opinion;
- Positives and negatives of an illustrative opinion;
- The angels are in the footnotes;
- Is inside-out better.

Program Chair: Cheryl A. Kelly, Thompson Coburn LLP, St. Louis, MO

Group Chair and Speaker: Edward J. Levin, Gordon Feinblatt Rothman Hoffberger & Hollander LLC, Baltimore, MD

Speakers:

- Kenneth M. Jacobson, Katten Muchin Rosenman LLP, Chicago, IL
- Robert J. Krapf, Richards Layton & Finger PA, Wilmington, DE
- David L. Miller, Pillsbury Winthrop Shaw Pittman LLP, McLean, VA
- Lydia C. Stefanowicz, Edwards Angell Palmer & Dodge LLP, Madison, NJ
- Robert A. Thompson, Sheppard Mullin Richter & Hampton LLP, San Francisco, CA

1:30 – 3 p.m.

Land Use and Environmental Group

Gas Rush: The Current State and Future Development of Natural Gas Production

This program will examine legal issues related to natural gas and oil extraction from shale formations via hydraulic fracturing with a particular emphasis on the Marcellus Shale. Topics covered will include:

- Description of the hydraulic fracturing process and the associated benefits and potential pitfalls;
- Overview of environmental concerns related to drilling impacts, especially groundwater contamination;
- Recent enforcement and regulatory



- ▶ initiatives from the EPA, state agencies and regional bodies (such as the Delaware River Basin Commission);
- Permitting concerns, including challenges under state equivalents to the National Environmental Policy Act ("NEPA");
- The anticipated economic impacts of exploiting the Marcellus Shale and similar formations.

Group Chair: Melinda D. Blackwell, Brusniak Blackwell PC, Dallas, TX

Program Chair: Robert A. Stout, Jr., Whiteman Osterman & Hanna LLP, Albany, NY

Speakers:

- Samantha R. Corson, Greenberg Traurig, LLP, Philadelphia, PA
- Jane P. Davenport, Delaware Riverkeeper Network, Bristol, PA
- Jennifer L. Maglienti, New York State Department of Environmental Conservation, New York, NY
- David G. Mandelbaum, Greenberg Traurig, LLP, Philadelphia, PA

3:15 – 4:45 p.m.

Special Investors and Investment Structure Group

There's More than One Way to Form a JV: Alternative Structures for Real Estate Joint Ventures

This program will provide:

- Analysis of the traditional form of joint venture (e.g., a partnership between a developer and an investor) and its structural and legal implications;
- Analysis of alternatives to the traditional joint venture (e.g., mezzanine financing, subordinated and unsubordinated ground leases, and other arrangements); and
- Panel discussion considering these alternatives from a variety of perspectives, including federal and state tax, bankruptcy and mortgage finance.

Group Chair: Dennis M. Horn, Holland & Knight LLP, Washington, DC

Program Chair and Speaker: Demetrios M. Datch, Linowes and Blocher LLP, Bethesda, MD

Speakers:

- Michael D. Goodwin, Arnold & Porter LLP, Washington, DC
- Charles A. Malloy, Arnold & Porter LLP, Washington, DC
- Andrea M. Whiteway, McDermott Will & Emery, Washington, DC
- Keith J. Willner, Mayer Brown, Washington, DC

3:15 – 4:45 p.m.

Leasing Group

Show Me (Your Client) the Money: Understanding Lease Economics, Tenant Improvements and the Performance of the Initial Work by the Landlord or Tenant

This program is an overview of the economics of a lease transaction, including:

- FASB accounting standards for leases (current standards and proposed changes);
- The elements included in rent (including base rent, percentage rent, and operating expenses);
- The methods of calculating rent and, when appropriate, rent abatements;
- Tenant improvements funded by the landlord, whether constructed by the landlord or the tenant;
- Tenant improvements funded and constructed by the tenant;
- Minimizing landlord and tenant risks in landlord construction, including work letters, acceptance certificates, and rent commencement clauses;
- Minimizing landlord and tenant risks in tenant construction, including security payment of the tenant improvement allowance and avoiding relocation;
- Securing the tenant's rent payment obligations.

Group Chair: Jack Fersko, Farer Fersko PA, Westfield, NJ

Program Chair and Speaker: Grace H.I. Tate, Grace Henrietta Inez Tate Butler Snow et al, Ridgeland, MS

Speakers:

- Susan J. Borschel, Lockheed Martin Global Training and Logistics, Centreville, VA
- Marie A. Moore, Sher Garner Cahill Richter Klein & Hilbert LLC, New Orleans, LA
- M. Margaret Sullivan, Frost Brown Todd LLC, Cincinnati, OH

FRIDAY, APRIL 29, 2011

8 – 9 a.m.

"You've Got a Friend" - What Every Lawyer Should Know About Clients with Disabilities

Panelists with different disabilities will discuss how common misconceptions faced by people with disabilities can affect their relationships with lawyers and the legal system, and what lawyers need to consider when dealing with clients who are persons with disabilities. Topics will include:

- How different disabilities manifest themselves, even if not readily apparent;
- How lawyers should interact with clients/

persons with disabilities;

- What every lawyer should know about working with persons with disabilities;
- What kinds of accommodations should be considered and implemented when working with persons with disabilities.

Program Chair and Speaker: Orlando Lucero, Stewart Title of Albuquerque, Albuquerque, NM

Speaker:

- Richard W. Nenno, Wilmington Trust Company, Wilmington, DE
- Patti S. Klein, MD, Tenafly, NJ

9:15 – 10:15 a.m.

Leasing to Lawyers: What You Need to Know on Both Sides of the Deal

The speakers will discuss unique issues to be considered in leases with law firms, from both the landlord and law firm tenant perspectives.

- How do landlords secure the obligations of law firm tenants, which are typically limited liability entities with few tangible assets?
- What attorney-client privilege and client confidentiality concerns need to be addressed in leases and subleases of law firm space?
- How do landlords and law firm tenants address issues relating to new and departing law firm partners?
- Do typical law firm build-out standards create issues for landlords and law firm tenants?

Program Chair and Moderator: Scott W. Dibbs, Hill Ward Henderson, Tampa, FL

Speakers:

- Brad A. Molotsky, Brandywine Realty Trust Legal Department, Radnor, PA
- Earl L. Segal, Principal, Newmark Knight Frank, Washington, DC

9:15 – 10:15 a.m.

The Ethical Duties of Common Interest Communities Counsel in the Age of Economic Distress: Charting the Uncharted Waters and Avoiding the Rocks

As the economic climate has continued to sour, new issues are emerging in the arena of common interest communities. This session will:

- Identify and address issues which can create conflicts of interests and significant ethical concerns for counsel (whether representing an owners association, a developer, a successor purchaser, a lender or an owner);
- Focus on practical situations;
- Provide guidance so that counsel can understand a proper means for navigating these new and uncharted waters and avoiding a crash upon the rocks.

Program Chair and Moderator: Robert S.

Freedman, Carlton Fields PA, Tampa, FL

Speakers:

- Daniel Q. Orvin, Buist Moore Smythe McGee PA, Charleston, SC
- Wilbert Washington III, Chadwick Washington Moriarty Elmore & Bunn PC, Fairfax, VA

10:30 – 11:30 a.m.

How Can I Have A Conflict of Interest if I have a Waiver Letter?

Waiver letters don't always solve every problem. Mike Rubin conducts a fast-paced program filled with hypotheticals that will give you points to ponder and situations that may hit too close to home. Topics include:

- Waiver letters for new clients;
- Waivers involving stakeholders in the formation of a new business;
- Waivers impacting existing clients;
- "Issue" waivers;
- "Situational" waivers;
- What does it really take to "confirm in writing" the waiver?

Program Chair and Speaker: Michael H. Rubin, McGlinchey Stafford PLLC, Baton Rouge, LA

10:30 – 11:30 a.m.

"Special Needs" Lease Transfer Clauses: The Answers to Your Questions

This program will tell you everything you need to know about "special" assignment and sublet provisions including:

- Why do REITs need to prohibit subleases that base rental on profits?
- What special protections do lawyers, doctors, public corporations, and retailers (among others) need on transfer of lease rights?
- What should be the parameters for "Permitted Transactions" that do not require landlord consent?

Program Chair and Speaker: Nancy A. Connery, Schoeman, Updike & Kaufman LLP, New York, NY

Speakers:

- Dorothea W. Dickerman, McGuireWoods LLP, McLean, VA
- Christopher Roman, Clifford Chance, New York, NY
- Mark Senn, Senn Visciano PC, Denver, CO

1:15 – 2:30 p.m.

Construction Defect Litigation and ADR for the Transactional Attorney

During this session, you will learn from our

► expert panelists:

- How construction defect litigation begins with the purchase agreement;
- Why indemnity, insurance and dispute resolution forums are important considerations from the beginning of the deal;
- How insurance and forum choices play out in litigation, so that your client's intentions are realized in the event of construction defect litigation.

Program Chair and Speaker: Nelse T. Miller, Lorber Greenfield & Polito LLP, San Diego, CA

Speakers:

- Paul Primavera, Lockton Companies LLC, Washington, DC
- Stanley P. Sklar, Dispute Resolution Services

Giving Back the Keys: Deeds In Lieu of Foreclosure

This program will discuss the legal and business issues associated with a consensual transfer of commercial real property from a Borrower to its Lender in full or partial satisfaction of a debt. Topics will include:

- Benefits and risks, especially when compared to a consensual foreclosure
- Tax consequences to borrower and lender
- The Deed in Lieu Agreement – practical tips on drafting and negotiation
- Special issues associated with operating businesses such as hotels

Program Chair and Moderator: Elizabeth C. Lee, Womble Carlyle Sandridge & Rice PLLC, Washington, DC

Speakers:

- Dean N. Alterman, Folawn Alterman & Richardson LLP, Portland, OR
- Michael M. Hirschfeld, Dechert LLP, New York NY
- George A. Kurlyandchik, Womble, Carlyle, Sandridge & Rice, PLLC, Atlanta, GA



2:45 – 4 p.m.

Law Professors' Panel: Recent Developments

Teachers of basic and advanced property report on recent cases of interest to practitioners. Topics will include:

- Adverse possession;
- Concurrent estates;
- Landlord-tenant;
- Easements;
- Covenants;
- Mortgages;
- Eminent domain.

Program Chair and Speaker: John V. Orth, University of North Carolina, Chapel Hill, NC

Speakers:

- R. Wilson Freyermuth, University Missouri Columbia Law School, Columbia, MO
- Faith Rivers James, Elon University School of Law, Greensboro, NC
- Eileen M. Roberts, William Mitchell College of Law, St. Paul, MN

2:45 – 4 p.m.

Sale and Acquisition of Distressed Debt

This program will discuss some of the ins and outs of negotiating:

- Distressed debt deals;
- Documenting the loan sale agreement;
- Conducting due diligence;
- Analyzing potential litigation risks, and closing the transaction.

Program Chair and Moderator: James M. Wilson, Buist Moore Smythe McGee PA, Charleston, SC

Speakers:

- Diana C. Liu, Artemis Real Estate Partners, Chevy Chase, MD
- John P. McNearney, Husch Blackwell LLP, St. Louis, MO
- John M. Trott, Cox Castle & Nicholson LLP, Los Angeles, CA



PRACTICE MANAGEMENT

Listen to the experts as they present tools and tips for making your practice more efficient, keeping your documents and client information safe and responding to the growing demand clients have for alternative billing arrangements.

8 – 9 a.m.

Security on Steroids: Controlling and Securing Data

This session will discuss a wide range of issues concerning the security of your law firm's data, a danger which has become much more complicated over the last several years:

- Learn to secure confidential data on your firm's network, at your home, in the cloud, on your smart phone, and on the road;
- Understand the essentials of security;
- Hear shocking real-life stories of data breaches (yes, in law firms too);
- Learn how to build multiple redundant defenses to protect your data through technology, policies and training.

Program Chair: Michael D. Goler, Miller Goler Faeges, LLP, Cleveland, OH

Speakers:

- Sharon D. Nelson, Sensei Enterprises Inc., Fairfax, VA
- John W. Simek, Sensei Enterprises Inc., Fairfax, VA

9:15 – 10:15 a.m.

Alternative Billing

This session will explore the following issues, which are particularly relevant in the current economic climate:

- Whether clients are demanding changes to their fee structures;
- Alternatives to hourly billing, such as fixed fee, task-based, value billing and other methods;

- A comparison of how different time and billing products handle alternative billing methods and facilitate innovative billing approaches;
- How to redefine productivity in an alternative billing environment and how to set appropriate goals for attorneys and staff;
- How a firm's ability to fairly quantify its cost, profit and price will enhance its ability to succeed with alternative billing methods.

Program Chair: Michael D. Goler, Miller Goler Faeges, LLP, Cleveland, OH

Speakers:

- Paul J. Unger, HMU Consulting Inc., Columbus, OH

10:30 – 11:30 a.m.

60 Tips in 60 Minutes

Get ready to move quickly as our experts offer you 60 law practice management tips in an hour:

Get the latest on legal technology for your office, cool utilities to aid you in your practice and ways to reduce the paper glut!

- Learn how to manage your practice with better policies, new software and news ideas born of the electronic era.
- We'll touch upon the things that plague us all – from computer security to Inbox control to helpful tips for traveling lawyers.
- This is a fun and fast-paced session, so fasten your seat belts and let's rev up!

Program Chair: Michael D. Goler, Miller Goler Faeges, LLP, Cleveland, OH

Speakers:

- Sharon D. Nelson, Sensei Enterprises Inc., Fairfax, VA
- John W. Simek, Sensei Enterprises Inc., Fairfax, VA
- Paul J. Unger, HMU Consulting Inc., Columbus, OH



General Information



22ND ANNUAL SPRING SYMPOSIA 2011

SYMPOSIA REGISTRATION FEE

The registration fee includes access to all programs and meetings, one CD or flash drive with all the Real Property, Trust and Estate Law CLE program materials, continental breakfast (both days), refreshments, and a reception with the sponsors.

RATES

General Attendee	\$650	
ABA Member	\$625	
RPTE Member	\$535 (On or before by March 25, 2011)	\$575 (After March 25, 2011)
One Day Symposia Admission	\$315	
First Time Attendee	\$400	
Academic/Government Attendee	\$325	
Law Students	No Charge	
First Time Minority Bar Association Members	No Charge	
Program Materials Only	\$95	

TICKETED EVENTS

Thursday, April 28	Symposia Reception	\$25
Thursday, April 28	Groups and Committees Luncheon	\$20
Friday, April 29	Trust and Estate Hot Topics Luncheon	\$45
Friday, April 29	Real Property Luncheon	\$45

A \$100 fee will entitle your spouse/guest to attend the Symposia Reception and two breakfasts. (Children under the age of 12 may attend these functions free of charge).

REGISTERING ONLINE

Register online at www.abanet.org/rpte/2011. Members will need your ABA ID number, located on your ABA membership card or on the mailing label above your name on this brochure. Non-ABA members may register online by creating a new customer account. You can also join the Section to take advantage of the discounted member rates. Please contact (800) 285-2221 for help with the online system.

On-site registration will take place at the Grand Hyatt Washington during the following hours:

Wednesday, April 27	1:00 p.m. – 5:00 p.m.
Thursday, April 28	7:00 a.m. – 5:00 p.m.
Friday, April 29	7:00 a.m. – 5:00 p.m.

PLEASE NOTE: On-site registration will include an additional \$50 administrative fee.

For additional information regarding registration, please contact Michael Kesler at (312) 988-5260.

CANCELLATION POLICY

Requests for refunds must be made in writing and faxed to Michael Kesler (312) 988-5262 by April 8, 2011. A \$75 administrative fee will be deducted from the refund. The Section will gladly accept substitute registrants for cancellations received after April 8, 2011; however, refunds will not be given after that date.

SPRING SYMPOSIA GENERAL INFORMATION

Program Materials

In the event that you are unable to attend the Symposia, a CD or flash drive of the program materials is available for \$95. CDs and flash drives may be purchased through the online registration system, www.abanet.org/rpte/2011 by choosing the “Materials Only” option.

AIRLINE INFORMATION

The ABA offers discounted airfares on selected airlines. Contact Orbitz for Business, the ABA’s official travel management company at (877) 222-4185 or visit the ABA travel website at www.abanet.org/travel.

HOTEL RESERVATIONS

All Symposia meetings and events will take place at the Grand Hyatt Washington, 1000 H Street NW, Washington, D.C. 20001. A block of sleeping rooms has been reserved at the Grand Hyatt Washington from Wednesday, April 27, 2011 through Sunday, May 1, 2011 at a group rate of \$269 per night for a single or double room. The group rates are guaranteed until 5:00 p.m. CST, Monday, March 28, 2011. Reservations received after 5 p.m. on March 28, 2011 will be based on availability. Be sure to mention that you are attending the ABA Section of Real Property Trust and Estate Law Symposia when making your hotel reservations.

FOR RESERVATIONS

Grand Hyatt Washington – (888) 233-1234 or directly at (202) 582-1234.

SERVICES FOR THE DISABLED

If services for the disabled are required, please contact the Michael Kesler at (312) 988-5260 by April 15, 2011.

CONTINUING LEGAL EDUCATION CREDIT

Accreditation has been requested for this program from every state with mandatory continuing legal education (MCLE) requirements for lawyers. Please be aware that each state has its own rules and regulations, including its own definition of CLE. Certificates of Attendance will be available at the conclusion of the program for both attendees and speakers.

CONFERENCE ATTIRE

Business casual is recommended for Symposia attendees.

TO REACH US THROUGH THE WEB

For more information on the Spring Symposia and to register online, log on to the RPTE web site at www.abanet.org/rpte/2011.

The Section of Real Property, Trust and Estate Law



22ND ANNUAL SPRING SYMPOSIA 2011

THANK YOU

Thank you to the Division CLE Committees and a special thank you to the 2011 Spring Symposia Education Planning Committee and Host Committee.

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Group or Committee Participation – Get Involved!

Join one or more Groups or Committees covering the most important areas of trust and estate and real property practice.

- Collaborate with colleagues across the country on substantive conference calls, list serve discussions, and at ABA and Section meetings.
- Discover practical planning, drafting and business development strategies.
- Work on legislative issues for a particular law specialty on a national and/or state level.
- Get Published! Group and Committee work provides much of the basis for the Section's high quality educational programs and content for the Section's publications.

Continuing Legal Education

Easily fulfill your MCLE requirements by attending CLE programs face-to-face at ABA and Section meetings, or by participating in low cost eCLE programs by telephone at your desk.

Up-to-date Practice Information

Tap into a wealth of industry information, and practical tips and tools for your practice via the Section's publications:

- RPTE eReport – A bi-monthly electronic publication featuring news articles, Section events and activities, and resources for young lawyers and law students.
- Probate & Property – The Section's bi-monthly flagship magazine providing lawyers with practical information on real property and trust and estate planning.
- Real Property, Trust and Estate Law Journal – A quarterly journal providing in-depth articles of interest to real property, and trust and estate law lawyers.

Be sure to take advantage of all RPTE member benefits. Stay in touch and stay current! See our website at www.abanet.org/rpte for more Section information and practice resources.

Sponsors



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The Section acknowledges the generous support of our sponsors for their involvement in this year's Spring Symposia.

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Meet our Symposia Sponsors

Visit the expo to learn more about the companies that sponsor the symposia and the services they provide. Their support is very valuable to us and we encourage you to take advantage of their presence at the symposia.



22ND ANNUAL SPRING SYMPOSIA

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