



33rd Annual **Attorney/Trust Officer** **Liaison Conference**

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Golf Tournament: Thursday, June 12, 2014

Live Presentation: Friday, June 13 - Saturday, June 14, 2014

The Ritz-Carlton Golf Resort

Naples, FL 34109

Phone: 239-593-2000

Course No. 1705R



THE FLORIDA BAR

The Florida Bar Continuing Legal Education Committee,
The Attorney Trust Officer Liaison Committee of
the Real Property, Probate and Trust Law Section
in cooperation with Members of the Trust and Private Banking Division of
the Florida Bankers Association

Find us on Facebook & Twitter



2014 Attorney/Trust Officer Liaison Program Outline

Course No. 1705R

Thursday, June 12

- 11:00 a.m. – 5:15 p.m. **Twenty-Fifth Annual Scramble Golf Tournament and Lunch – Hosted by Wells Fargo Private Bank**
- 3:00 p.m. – 5:00 p.m. **Registration – Hosted by Life Audit Professionals, Flash Drive Sponsor**
- 5:45 p.m. – 7:30 p.m. **Reception* – Hosted by The Northern Trust Company and IMC Management Consultants, LLC**

Friday, June 13

- 7:30 a.m. – 8:15 a.m. **Registration and Breakfast – Hosted by SunTrust Banks, Inc.**
- 8:15 a.m. – 8:30 a.m. **Welcome and Announcements**
Jack A. Falk, Jr., Miami – Program Chair
- 8:30 a.m. – 9:10 a.m. **Effective Use of Directed Trusts**
Alyssa Feder, Palm Beach
- 9:10 a.m. – 10:05 a.m. **Roles of the Wealth Management Team and the Estate Planner**
Frank T. Adams, Miami
Debra L. Boje, Tampa
Mark Parthemer, Palm Beach
- 10:05 a.m. – 10:20 a.m. **Break**
- 10:20 a.m. – 11:05 a.m. **Portability-Too Propitiously Practical to Pontificate its Profligate Properties**
Richard S. Franklin, Washington DC
(Abbot-Downing, Speaker Sponsor)
- 11:05 a.m. – 11:50 a.m. **Business Development for Professionals: Top Gun or Daisy Rifle: To Whom Do You Refer?**
Lonni B. Cibants, Fort Lauderdale
Laird A. Lile, Naples
- Noon – 1:10 p.m. **Lunch/Discussion – Hosted by Coral Gables Trust**
- 1:15 p.m. – 1:50 p.m. **Headaches with Homestead**
Shane Kelley, Fort Lauderdale
- 1:50 p.m. – 2:30 p.m. **In Guns We Trust**
Gregory Herman-Giddens, Chapel Hill, NC
- 2:30 p.m. – 2:45 p.m. **Break**
- 2:45 p.m. – 3:25 p.m. **Who Knew? Recent Case Law on Fiduciary Liability**
Thomas M. Karr, Miami
- 3:25 p.m. – 4:10 p.m. **Who Wants to be a Trust Beneficiary? Dynamic Decision Making for Discretionary Distributions**
Tami F. Conetta, Sarasota
- 4:10 p.m. – 5:00 p.m. **Professional Ethics: Oxymoron or Redundancy?**
Paul Roman, Boca Raton
Michael D. Simon, West Palm Beach
- 5:45 p.m. – 7:30 p.m. **Reception* – Hosted by BNY Mellon Wealth Management and Marsh, Private Client Services**

Saturday, June 14

- 7:30 a.m. – 8:00 a.m. **Breakfast**
- 8:00 a.m. – 8:35 a.m. **How International Estate Planning Makes a Difference**
Kevin E. Packman, Miami
- 8:35 a.m. – 9:40 a.m. **Wealth Transfer Developments**
Professor Jeffrey N. Pennell, Atlanta
- 9:40 a.m. – 9:55 a.m. **Break**

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- 9:55 a.m. – 10:40 a.m. **Curing Situs-itis: The Perplexity of Governing Law and Trust Situs**
Francis B. Brogan, Jr., Fort Lauderdale
Stacey Cole, Winter Park
James R. George, Fort Lauderdale
- 10:40 a.m. – 11:30 a.m. **Florida Case Law and Legislative Update**
Brian Felcoski, Miami
- 11:30 a.m. – 12:10 p.m. **Dealing with the 23.8% Tax On Trust Capital Gains by Having the Gain Taxed to the Beneficiary**
John Goldsberry, Charlotte, NC

**Spouse or significant other (1 person) welcome to attend receptions if registered and paid.*

GENERAL SPONSOR: The Naples Trust Company

Law firm Conference Sponsors: Bilzin Sumberg Baena Price & Axelrod LLP; Chapin Ballerano & Cheslack; Cummings & Lockwood, LLC; Duane Morris LLP; Dunwoody White & Landon, P.A.; Fowler White Burnett P.A.; Goldman Felcoski & Stone P.A.; Gray Robinson, P.A.; Greenberg Traurig, LLP; Gunster; Gutter Chaves Josepher Rubin Forman Fleischer & Miller, P.A.; Holland & Knight, LLP; Shutts & Bowen, LLP; Tripp Scott; Quarles & Brady.

Special thanks to these individuals for their dedicated service to the Conference: **Fiduciary Co-Chair:** Sharon DaBrusco; **Vice Chairs:** Deborah Russell, Patrick Lannon and Laura Sundberg. Speaker coordinators: Tattiana Brenes-Stahl, Mitchell Hipsman and Eamonn Gunther. Fiduciary sponsors: Deborah Russell and Robert Bulloch. Exhibitors: Lonni Cibants and Laura Sundberg. Law Firm Sponsors: Chuck Runge and Sharon DaBrusco. Program materials review: Patrick Lannon.

CONTINUING LEGAL EDUCATION REQUIREMENT CREDIT

(Maximum 13.5 hours)

General: 13.5 hours
Ethics: 1.0 hour

CERTIFICATION CREDIT

(Maximum 10.0 hours)

Elder Law: 10.0 hours
International Law: 1.0 hour
Real Estate: 1.0 hour
Wills, Trusts & Estates: 10.0 hours

CFP Credit: Pending
CTFA Credit: Pending

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Hotel Reservation Information

To reserve a sleeping room at **The Ritz-Carlton Golf Resort**, please call toll free **1-888-856-4380**. The Florida Bar group rate of **\$209/night** and is guaranteed until **May 21st**, or until the room block is sold out. Please reference you are part of the 2014 ATO conference when making your reservation.

Alternate Hotel Information

Inn at Pelican Bay • 800 Vanderbilt Beach Road • Naples 34108 • Phone (239) 597-8777
Fairways Resort • 1103 Palm River Boulevard • Naples 34110 • Phone (239) 597-8181
Hampton Inn Naples • 2630 Northbrooke Plaza Drive • Naples 34119 • Phone (239) 596-1299

REFUND POLICY: A \$25 service fee applies to all requests for refunds. Requests must be in writing and postmarked no later than two business days following the live course presentation or receipt of product. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. Registrants who do not notify The Florida Bar by 5:00 p.m., June 7, 2014 that they will be unable to attend the seminar, will have an additional \$80 retained. Persons attending under the policy of fee waivers will be required to pay \$80.



The Florida Bar Real Property, Probate & Trust Law Section
2014 Attorney Trust/Officer Liaison Conference • June 12-14, 2014

Program Registration Form

Course No. 1705R

MAIL PROGRAM REGISTRATION FORM TO: The Florida Bar, Order Entry Department, 651 East Jefferson Street, Tallahassee, Florida 32399-2300, with a check in the appropriate amount made payable to The Florida Bar or credit card information filled in below. Call (850) 561-5831 if you have questions.

Name _____ Florida Bar # _____

Guest Name _____

Address _____

City _____ State _____ Zip Code _____

Phone Number _____ *Email Address (Required) _____

*** Your materials will be sent to the email address you keep on file with The Florida Bar. If you are not a member of The Florida Bar or wish to use a different email address, please list one.**

METHOD OF PAYMENT: ☐ Check enclosed made payable to The Florida Bar

FAX # 850-561-9413

☐ MASTERCARD ☐ VISA ☐ DISCOVER ☐ AMEX Exp. Date: ____/____ (MO./YR.)

Signature: _____

Name on Card: _____ Billing Zip _____

Card No. _____

Conference Registration

☐ Registrant (LIVE) (BEFORE 06/2/14): \$430 1705R304

☐ Registrant (LIVE) (06/2/14 or AFTER): \$455 1705R304

****Electronic Course Material** will be electronically sent via e-mail 2 days prior to the course. You must provide your e-mail address above.

****A flash drive with the course materials will also be provided on-site at no additional charge.**

Conference Events for Registrants

(Conference Events are included in registration fee. Please check the events you plan to attend.)

Thursday, June 12

☐ Reception 1705S3041

Friday, June 13

☐ Continental Breakfast 1705S3042

☐ Luncheon 1705S3043

☐ Reception 1705S3044

Saturday, June 14

☐ Continental Breakfast 1705S3045

Conference Events for Spouses

(The following events are open to spouses. Please check the events your spouse plans to attend. An additional fee applies where indicated.)

Thursday, June 12

☐ Reception \$50 [\$47.16 plus \$2.84 tax] 1705S3041

Friday, June 13

☐ Continental Breakfast \$25 [\$23.58 plus \$1.42 tax] 1705S3042

☐ Reception \$50 [\$47.16 plus \$2.84 tax] 1705S3044

Saturday, June 14

☐ Continental Breakfast \$25 [\$23.58 plus \$1.42 tax] 1705S3045

**Thursday, June 12 – Scramble Golf Tournament
(Sponsored by Wells Fargo Private Bank)**

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

☐ Golf \$85 1705S3046 Handicap or Average
[\$80.19 plus \$4.81 tax] Score _____

☐ Golf - Spouse/Guest \$85 1705S3047 Handicap or Average
[\$80.19 plus \$4.81 tax] Score _____

Total Amount Enclosed \$ _____



☐ Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

COURSE BOOK – AUDIO CD – DVD

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 6/14/14. TO ORDER AUDIO CD / DVD OR COURSE BOOKS, fill out the order form above, including a street address for delivery. Please add sales tax.**

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If tax exempt, include documentation with the order form..

☐ **COURSE BOOK ONLY (1705M)**

Cost \$60 plus tax

(Certification/CLER credit is not awarded for the purchase of the course book only.)

TAX _____ TOTAL \$ _____

☐ **AUDIO CD (1705C)**

(includes Electronic Course material)

\$430 plus tax (section member)

\$455 plus tax (non-section member)

TAX _____ TOTAL \$ _____

☐ **DVD (1705D)**

(includes Electronic Course material)

\$480 plus tax (section member)

\$505 plus tax (non-section member)

TAX _____ TOTAL \$ _____