The 27th Annual Forum Agenda

Thursday, October 18, 2007

6:30 A.M. TO 8:00 A.M. - Registration and Continental Breakfast

8:00 A.M. TO 9:00 A.M.
Estate and Income Tax Planning for the Passage of Family Vacation Homes Using Conservation Easements, QPRTs, Family LLCs, Dynasty Trusts, and Other Strategies (with Forms)
Nancy G. Henderson

9:00 A.M. TO 10:00 A.M.
A Hitchhiker's Guide to International Estate Planning (Estate Planning for US Citizens with Assets Abroad and for Nonresidents with US Assets)
Samuel A. Donaldson

10:15 A.M. TO 12:15 P.M.
Flaws in Asset Protection Schemes: A View from the Creditor's Bar
Jay Adkisson (Moderator), Christopher L. Pitet and Richard L. Enkelis

1:45 P.M. TO 2:45 P.M.
Avoiding Catastrophes in Handling Partnerships in the Estate or Trust Administration
Carol A. Cantrell

2:45 P.M. TO 3:45 P.M.
The Extra Mile - Drafting for Flexibility in the Face of Possible Estate Tax Reform (Forms)
Steven E. Trytten

4:00 P.M. TO 5:00 P.M.
Ethical and Professional Conflict Conundrums for Trusts and Estates Practitioners [1 Hour Ethics CLE Credit]
Sean SeLegue

5:00 P.M. TO 6:30 P.M.
The Captive Insurance Company and its Role in Multi-Generation Wealth Transfers
Jay Adkisson (Moderator), Donnie Spann and Frederick E. Turner

Friday, October 19, 2007

6:30 A.M. TO 8:00 A.M. - Continental Breakfast

8:00 A.M. TO 11:15 A.M.
Recent Developments in Retirement Planning: Hot Topics and New Ideas [1 Hour]
The 170 Best & Worst Planning Ideas for Your Client's Retirement Benefits [2 Hours]
Natalie B. Choate

11:15 A.M. TO 12:15 P.M.
Handling Affirmative and Deemed Allocation of GST Exemption (Trust Forms and Compliance Forms)
Diana S.C. Zeydel

2:00 P.M. TO 3:00 P.M. - Workshops

#1: The Generation-Skipping Transfer Tax: Current Problems and Developments - Diana S.C. Zeydel

#2: Creditors vs. Asset Protection Strategies - Jay Adkisson, Christopher L. Pitet, Richard Enkelis, and Joseph Petrucelli

#3: Medicaid Planning Strategies & Special Needs Trusts (Forms) Michael Gilfix

#4: The Best Zero Tax Planning Tools - Tim L. Voorhees

#5: Problems & Solutions in Exercising Trust Discretionary Distribution Powers
Seth M. Skootsky (Moderator), Michael L. Dobrov and David Lauer

Friday, October 19, 2007 Continued

3:15 P.M. TO 4:15 P.M. - Workshops

#6: The Nuts and Bolts of Dividing the Joint Trust at the First Death
Steven E. Trytten

#7: Factors to Consider in Selecting the Situs of a Domestic Discretionary Trust
Mark Merric, Frances Becker and Pierce H. McDowell, III

#8: Ethical Concerns in Trusts and Estates Litigation
Margaret G. Lodise [1 Hour Ethics CLE Credit]

#9: Practical Considerations for Achieving Success in the Ownership and Administration of Cherished Family Properties, including Dispute Avoidance and Resolution (Forms)
Kristen E. Caverly

#10: Trustee's Alternatives to Mandatory Distribution of Net Income:The Unitrust and The Power to Adjust
Seth M. Skootsky, Michael L. Dobrov and David Lauer

4:30 P.M. TO 5:30 P.M. - Workshops

#11: The Nonprofessional Trustee and the Uniform Prudent Investor Act
John A. Hartog

#12: Captive Insurance Company for Estate Planning
Jay Adkisson, Donnie Spann and Frederick E. Turner

#13: Case Study: Trust Accounting and Preparation of the Federal Estate Tax Return Made Easy Using the Gillett Estate Management Suite
Mark Gillett

#14: The Transfer Tax Audit: The Beginning of the Litigation Discovery Process
John W. Porter

#15: California 2007 Legislation Affecting Estate Planning, Trusts, Probate, Conservatorships and Guardianships
James R. Birnberg

#16: Arizona 2007 Judicial Decisions and Legislation Affecting Estate Planning, Trusts, Probate, Conservatorships, and Guardianships
John Paul Parks

Saturday, October 20, 2007

7:00 A.M. TO 8:00 A.M. - Continental Breakfast

8:00 A.M. TO 9:00 A.M.
The Evolving World of Asset Preservation and Long Term Care
Michael Gilfix

9:00 A.M. TO 12:15 P.M.
Professor Pennell's Review and Analysis of the Current Tax & Estate Planning Developments
Jeffrey N. Pennell

1:15 P.M. TO 2:15 P.M.
An Alternative Strategy to the Bypass and Marital Trusts (Forms)
John A. Hartog

2:15 P.M. TO 3:15 P.M.
Family Limited Partnership Wars Updated
John W. Porter

3:30 P.M. TO 5:00 P.M.
The Grantor Trust Rules: What Every Estate Planner Must Know
Mark Merric - Merric Law Firm - Denver, CO

Forum Registration

To register for the 2007 Forum, make your check payable (or complete your credit card information below) and send it, to: *The Southern California Tax & Estate Planning Forum*, 2470 Union Street, San Diego, CA 92101 (or fax this form to (619) 696-7010). Registration fee $795 if postmarked on or before September 18, 2007, thereafter $895.

Print Name: ____________________
Guest's Name: ____________________
Profession: __________ State: ____ No. __________
Firm: ____________________
City/State/Zip: ____________________
Telephone: __________ Fax: __________
Email: ____________________

Workshops Friday, October 19th (Select ONE from each LINE):
2:00 P.M. TO 3:00 P.M. [ ]#1 [ ]#2 [ ]#3 [ ]#4 [ ]#5
3:15 P.M. TO 4:15 P.M. [ ]#6 [ ]#7 [ ]#8 [ ]#9 [ ]#10
4:30 P.M. TO 5:30 P.M. [ ]#11 [ ]#12 [ ]#13 [ ]#14 [ ]#15 [ ]#16

Forum Registration Fee:
[ ] $795 If postmarked on or before 9/18/2007; thereafter $895 $ ________

Optional Activities:
[ ] Interactive Nutrition Workshop - $50 per person $ ________
[ ] Historic Gaslamp Walking Tour - $15 per person $ ________
[ ] Dinner and Play (The Old Globe Theatre) - $120 per person $ ________

I Cannot Attend The Forum But Would Like To Purchase:
[ ] The CDs and Written Materials For $695 $ ________
[ ] Check enclosed in the amount of: $ ________
[ ] Charge my [ ] Am Exp [ ] MasterCard [ ] Visa Card for $ ________

Card Number: ____________________ Exp. Date: __________
Signature: ____________________

Hotel Reservation

To make hotel reservations mail this form to: Reservation Manager, *The Manchester Grand Hyatt,* One Market Place, San Diego, CA 92101, for The Southern California Tax & Estate Planning Forum, Dates October 18 - 20, 2007, or fax it to (619) 358-6729.

Print Name: ____________________
Street: ____________________
City/State/Zip: ____________________
Arrival Date: ____________________ AT ____ AM ____ PM
Departure Date: ____________________ AT ____ AM ____ PM

PLEASE RESERVE:
___ SINGLE ROOMS @$247/NIGHT * King Size Bed ___ 2 Double Beds____
___ DOUBLE ROOMS @ $247/NIGHT*
*PLUS ROOM TAX
CHECK-IN TIME 3:00 PM CHECK-OUT TIME 12:00 NOON

FIRST NIGHT'S DEPOSIT REQUIRED, CHECK ONE:
[ ] CHECK ENCLOSED IN THE AMOUNT OF $
[ ] CHARGE MY ____________________ CREDIT CARD
[NAME OF CARD]

CARD NUMBER: ____________________
EXPIRATION DATE: ____________________
SIGNATURE: ____________________

MAKE YOUR HOTEL RESERVATIONS EARLY
BUT NO LATER THAN SEPTEMBER 18, 2007
Hotel Reservations: 1-800-233-1234 - Fax (619) 358-6729

For additional information, call the FORUM toll free at 1-800-332-3755 or go to the FORUM'S website at http://www.clenet.com.