

50th ANNUAL HECKERLING INSTITUTE ON ESTATE PLANNING Digital Recordings
January 11 - 15, 2016 – Marriott's Orlando World Center, Orlando, FL

Monday, January 11, 2016

FUNDAMENTALS PROGRAM - Business Income Tax Issues for the Estate Planner - Samuel A. Donaldson
 Recent Developments 2015 Dennis I. Belcher, Carol A. Harrington, Jeffrey N. Pennell

Tuesday, January 12, 2016

Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change, Joshua S. Rubenstein

Modern Uses of Partnerships in Estate Planning - Paul S. Lee

The Prerogatives of Privileges: The Ethics of Protecting Our Planning Clients (Even From Themselves!) Stephanie Loomis-Price
**** RECORDING NOT AVAILABLE: Loyd Leva Plaine Distinguished Lecture Series/The Supreme Court in the Age of Obama-Jeffrey Toobin ****

Don't Be Afraid of the Dark—Navigating Trusts Through the NIIIT - Robert A. Romanoff

Navigating the Shoals of Nonprofit Board Service: The Legal and Ethical Issues that Can Take You off Course Kathryn W. Miree
 Naked Derivatives and Other Exotic Wealth Transfers - David A. Handler

Effective Estate Planning for Diminished Capacity—Can You Really Avoid a Guardianship? Diana S.C. Zeydel
Wednesday, January 13, 2016

Special Needs—Special Trusts: What You Don't Know Can Hurt Your Clients and You! - Bernard A. Krooks
 Planning & Drafting for the Married Couple in an Era of Mobility, Portability, & Liability Turney P. Berry, Richard B. Covey
 Question and Answer Panel - Dennis I. Belcher, Carol A. Harrington, Jeffrey N. Pennell

FUNDAMENTALS: Basic Estate Planning for Non-U.S. Persons and U.S. Persons with Foreign Connections
 Amy E. Heller, Rachel J. Harris

Special Sessions I

I-A - Make, Remake and Remodel—Trust Design and Redesign to Minimize Taxes and Maximize Family Wealth

Robert A. Romanoff, Suzanne L. Shier

I-B - When \$25 Million Is Middle Class, How Should We Plan and Draft for the Middle Class Married Couple?

Turney P. Berry, Richard B. Covey, Melissa J. Williams

I-C - A Fine Tasting Opinion: The Art of Reviewing an Appraisal, Ethically Protecting Privileges and Popping the

Cork off of Kovel Stephanie Loomis-Price, Louis S. Harrison

I-D - Sophisticated Special Needs Trust Drafting and Administration Issues Bernard A. Krooks, Robert B. Fleming, Lawrence A. Frolik

I-E - LITIGATION SERIES Expert Witnesses in Trust and Estate Litigation - Matiasevich, Lieberman, Meister, Sitkoff

I-F - In Honor of Heckerling's 50th Anniversary, and with Apologies to Paul Simon, There Must Be 50 Ways to Make Insurance
 Planning Mistakes, Lawrence Brody, Donald O. Jansen

Special Sessions II

II-A - Review of the Past Year's Significant, Curious, or Downright Fascinating Fiduciary Cases (at least it seems to me) Dana G. Fitzsimons, Jr.

II-B - Modern Uses of Partnerships that You Might Not Have Considered Paul S. Lee, Richard L. Dees,

Cristin Conley Keane, Richard B. Robinson

II-C - "Both Sides, Now": As Joni Mitchell so Eloquently Penned, There Are Two Sides to Everything in Life Martin E. Basson, John W. Porter

II-D - Estate Planning for Same-Sex and Unmarried Couples after Obergefell: Detriment or Opportunity?

Joshua S. Rubenstein, William P. LaPiana

II-E - When Good Intentions Go Awry: Case Studies, Cautionary Tales, Ethics, and Advice for Nonprofit Board Service

Kathryn W. Miree, Ann F. Cohen

II-F - Can Your Client's Estate Plan Be Protected if You End Up in Guardianship Court? Diana S.C. Zeydel, James R. George, Randy K. Otto

Thursday, January 14, 2016

A New World Order for Estate Planners or Why is it So Difficult to Open a Bank Account? M. Read Moore

The Trustee Selection Minefield Mark R. Parthemer

Diamonds in the Rough: Rejuvenating Stale Irrevocable Trusts Through Trust-To-Trust Transfers Nancy G. Henderson

Lifetime OTIPs: Why Should They Be Ubiquitous in Estate Planning? Richard S. Franklin

FUNDAMENTALS PROGRAM The Nuts and Bolts of Charitable Remainder and Charitable Lead Trusts: Tax Rules, Drafting Guidelines,
 and Creative Planning Ideas Michele A.W. McKinnon, Richard L. Fox

Special Sessions III

III-A - IRD Meets DNI: Everything You Need to Know About Trusts Named as Beneficiary of Retirement Benefits- Natalie B. Choate

III-B - A Deeper Scrutiny of the Trustee Selection Minefield - Mark R. Parthemer, Edward F. Koren

III-C - Lifetime OTIPs: Tax and Asset Protection Strategies and Post-Divorce Concerns - Richard S. Franklin, Barry A. Nelson

III-D - Wealth Transfer Planning with Interests in Private Investment Funds and Other Closely-Held Entities

N. Todd Angkatavanich, David A. Handler, Ivan Taback

III-E - Immigration and Citizenship Law and Related Tax Issues for Estate Planners - M. Read Moore, Michelle B. Graham, Steve Trow

III-F - The Almost-Trial of the Half-Century: The Huguette Clark Saga (Part I) - Bruce S. Ross, Ronald D. Aucutt, Brian P. Corrigan,

Robert W. Lang, John R. Morken, Stacie Polashuk Nelson, Eric W. Penzer

Special Sessions IV

IV-A - Problem Irrevocable Trusts: If It Is Broken, Then Do Fix It - Nancy G. Henderson, Michael M. Gordon

IV-B - Post-Mortem Income and Transfer Tax Planning - Steve R. Akers

IV-C - Asset Protection—Without the Asset Protection Trust - Daniel S. Rubin

IV-D - Dynamic and Effective Communication Skills for Estate Planners - Conrad Teitell

IV-E - The Almost-Trial of the Half-Century: The Huguette Clark Saga (Part II) Bruce S. Ross, Ronald D. Aucutt, Brian P. Corrigan,

Friday, January 15, 2016

Estate Planning for Retirement Benefits: A Step-by-Step, How-to-Do-It Manual for Practitioners - Natalie B. Choate

Chapter 14 "Soup to Nuts": A Practitioner's Guide Through the Minefield - N. Todd Angkatavanich

Practical Planning Strategies for the Future - Jonathan G. Blattmachr, Martin M. Shenkman

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