



34th Annual **Attorney Trust Officer Liaison Conference**

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Networking Golf Tournament: Thursday, August 27, 2015

Live Presentation: Friday, August 28 - Saturday, August 29, 2015

The Breakers Palm Beach

Palm Beach, FL 33480

Phone: 561-655-6611

Course No. 1946R



THE FLORIDA BAR

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

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34th Annual Attorney Trust Officer Liaison Program Outline

Course No. 1946R

Thursday, August 27, 2015

11:00 a.m. – 5:15 p.m.

Twenty-Sixth Annual Scramble Golf Tournament and Lunch – Hosted by Wells Fargo Private Bank

3:00 p.m. – 6:00 p.m.

Registration

6:00 p.m. – 8:00 p.m.

Reception – Hosted by The Northern Trust Company

Friday, August 28, 2015

ATO App sponsored by Evercore Wealth Management

7:30 a.m. – 8:15 a.m.

**Registration and Breakfast –
Hosted by SunTrust Bank, Inc.**

8:15 a.m. – 8:30 a.m.

Welcome and Announcements

Laura Sundberg, Orlando – RPPTL Program Chair

Stacey Cole, Orlando – Trust Officer Vice Program Chair

8:30 a.m. – 9:30 a.m.

Current Developments and Estate Planning for Clients with \$2 - \$10 Million

Steve R. Akers, Dallas (Presented by Bessemer Trust)

9:30 a.m. – 10:15 a.m.

Trust Protectors: You Can't Live With Them, But You Shouldn't Live Without Them

Charles Ian Nash, Melbourne

Alex Hamrick, Orlando

10:15 a.m. – 10:30 a.m.

Break – Hosted by The Naples Trust Company

10:30 a.m. – 11:20 a.m.

The New Reality – Fiduciary Investment Considerations Post Great Recession

Joseph Curtin, New York City (Presented by US Trust)

11:20 a.m. – 12:20 p.m.

Point Counterpoint: The Problem With Problems Is They Are Problematic

Bruce Stone, Miami

R. Hugh Magill, Chicago (Presented by Northern Trust)

Robert Goldman, Naples

12:20 p.m. – 1:20 p.m.

Lunch – Hosted by Coral Gables Trust

1:20 p.m. – 2:10 p.m.

Trustees at the Family Reunion: The Cascade of Fiduciary Responsibilities when Your Trust Holds Closely Held Business Interests

Stephen G. Salley, Orlando

2:10 p.m. – 2:50 p.m.

Ensuring that Your Clients' Good Fortune Doesn't Become Their Children's Misfortune

Jill Shipley, Palm Beach (Presented by Abbot Downing)

2:50 p.m. – 3:05 p.m.

Break – Hosted by The Naples Trust Company

3:05 p.m. – 4:05 p.m.

Income Tax Consequences of Funding Bequests

Jeremiah W. Doyle, IV, Boston (Presented by BNY Mellon)

4:05 p.m. – 4:50 p.m.

GST: An Acronym for Gimme Some Tylenol

Sarah S. Butters, Tallahassee

Lee-Ford Tritt, Gainesville

4:50 p.m. – 5:20 p.m.

Fiduciary Trivia

George D. Karibjanian, Boca Raton

Adam M. Workman, Boca Raton

5:30 p.m. – 6:30 p.m.

Reception – Hosted by BNY Mellon Wealth Management

Saturday, August 29, 2015

7:30 a.m. – 8:15 a.m.

Breakfast – Hosted by Coconut Grove Bank - Trust and Wealth Management Division

8:15 a.m. – 9:05 a.m.

The New Normal: Planning for the Modern Family

George D. Karibjanian, Boca Raton

9:05 a.m. – 9:50 a.m.

Changing the Unchangeable: Modifying Irrevocable Trusts by Reformation, Construction, Decanting and Early Termination

Diana S.C. Zeydel, Miami

9:50 a.m. – 10:30 a.m.

Unitrusts and Powers to Adjust In Action

Tami Conetta, Sarasota

Gentry Barnett Byrnes, Tampa

Kirt D. DeHaan, Kansas City (Presented by US Trust)

Gail E. Cohen, New York (Presented by Fiduciary Trust International)

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10:30 a.m. – 10:45 a.m.

Break – Hosted by The Naples Trust Company

10:45 a.m. – 11:40 a.m.

Florida Case Law and Legislative Update

William T. Hennessey, West Palm Beach

11:40 a.m. – 12:30 p.m.

Litigation Cannot Be Prevented, But It Can be Tamed

Robert Goldman, Naples

6:00 p.m. – 8:00 p.m.

Beach Party – Hosted by Empire Valuation Consultants and Raymond James Trust, NA

GENERAL SPONSOR: Regions Private Wealth Management

Law firm Conference Sponsors: Akerman LLP; Carlton Fields Jorden Burt; Chapin Ballerano & Cheslack; Cummings & Lockwood, LLC; Duane Morris, LLP; Dunwoody White & Landon, P.A.; Fox Rothschild, LLP; Goldman Felcoski & Stone P.A.; Greenberg Traurig, LLP; Gunster; Gutter Chaves Josepher Rubin Forman Fleischer & Miller, P.A.; Harlee and Bald; Holland & Knight, LLP; Katz Baskies; Linda Suzanne Griffin, P.A.; Pressly & Pressly, P.A.; Proskauer Rose, LLP; Quarles & Brady, LLP; Shutts & Bowen, LLP; The Virgil Law Firm; Tripp Scott; Williams Parker Harrison Dietz & Getzen; Zimmerman, Kiser & Sutcliffe, PA.

Special thanks to these individuals for their dedicated service to the Conference: **Fiduciary Vice Chair:** Stacey Cole; **RPPTL Vice Chair:** Deborah Russell; **Speaker Coordinators:** Deborah Russell, Mitchell Hipsman and Eamonn Gunther; **Fiduciary Sponsors:** Chuck Runge and Paul Roman; **Exhibitors:** Lonni Cibants and Lila Miller; **Law Firm Sponsors:** Kimberly Bald and Michael Adams; **Social Media:** Michelle Adams, Patrick Emans and Steven Goodall.

CONTINUING LEGAL EDUCATION REQUIREMENT CREDIT

(Maximum 13.0 hours)

General: 13.0 hours
Ethics: 0.0 hours

CERTIFICATION CREDIT

(Maximum 10.0 hours)

Elder Law: 10.0 hours
Wills, Trusts & Estates: 10.0 hours

CFP Credit: AVAILABLE
CTFA Credit: AVAILABLE

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Hotel Reservation Information

To reserve a sleeping room at **The Breakers Palm Beach**, go to <https://RESWEB.PASSKEY.COM/GO/FLABR15>. The Florida Bar group rate of **\$225/night** is guaranteed until **July 12th**, or until the room block is sold out. Please reference you are part of the 2015 ATO conference when making your reservation.

Alternate Hotel Information

The Brazilian Court • 301 Australian Avenue • Palm Beach 33480 • Phone (561) 655-7740
The Colony Palm Beach • 155 Hammond Avenue • Palm Beach 33480 • Phone (561) 655-5430
The Four Seasons • 2800 South Ocean Blvd. • Palm Beach 33480 • Phone (561) 582-2800

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., August 21, 2015 that they will be unable to attend the seminar, will have an additional \$150 retained. Persons attending under the policy of fee waivers will be required to pay \$150.



Program Registration Form

Course No. 1946R

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 07/10/15): \$495 1946R105

☐ Registrant (LIVE) (07/10/15 or AFTER): \$550 1946R105

☐ Persons attending under the policy of fee waivers: \$200 1946R105

Members of The Florida Bar who are Supreme Court, Federal, DCA, circuit judges, county judges, magistrates, judges of compensation claims, full-time administrative law judges, and court appointed hearing officers, or full-time legal aid attorneys for programs directly related to their client practice are eligible upon written request and personal use only, complimentary admission to any live CLE Committee sponsored course. Not applicable to webcast. (We reserve the right to verify employment.)

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

****ATO App** sponsored by Evercore Wealth Management will be available to provide all attendees with complimentary access to an electronic version of the materials on site.

Conference Events for Registrants

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

Thursday, August 27

☐ Reception 1946S1051

Friday, August 28

☐ Continental Breakfast 1946S1052

☐ Luncheon 1946S1053

☐ Reception 1946S1054

Saturday, August 29

☐ Continental Breakfast 1946S1055

☐ Beach Party and Reception 1946S1058

Conference Events for Spouses/Guests

Spouse/guest is welcome to attend receptions if the guest is registered and paid. Spouses/guests are not complimentary.

- All prices include applicable sales tax. -

Thursday, August 27

☐ Reception \$75 1946S1051

Friday, August 28

☐ Continental Breakfast \$25 1946S1052

☐ Reception \$60 1946S1054

Saturday, August 29

☐ Continental Breakfast \$25 1946S1055

☐ Beach Party and Reception - Adult \$60 1946S1058

☐ Beach Party and Reception - Child \$25 1946S1058

Thursday, August 27 – 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 1946S1056 Handicap or Average Score _____

☐ Golf - Spouse/Guest \$85 1946S1057 Handicap or Average 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 08/28/15. 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 (1946M)**

Cost \$60 plus tax

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

+ TAX _____ = TOTAL \$ _____

☐ **AUDIO CD (1946C)**

(includes Electronic Course material)

\$495 plus tax (section member)

\$550 plus tax (non-section member)

+ TAX _____ = TOTAL \$ _____

☐ **DVD (1946D)**

(includes Electronic Course material)

\$495 plus tax (section member)

\$550 plus tax (non-section member)

+ TAX _____ = TOTAL \$ _____