8:30 – 9:45 a.m.  **RECENT DEVELOPMENTS IN SUCCESSIONS, DONATIONS AND TRUSTS**  
Joseph W. Mengis, Perry, Atkinson, Balhoff, Mengis & Burns, LCC, Baton Rouge, LA

9:45 – 10:00 a.m.  Break

10:00 – 11:00 a.m.  **COUNSELING CLIENTS ON THE DRAFTING AND EXECUTION OF SPECIAL NEEDS TRUSTS**  
Carole Cukell Neff, Sessions Fishman Nathan & Israel, LLC, New Orleans, LA

11:00 a.m. – Noon  **TAX DO’S AND DON’TS: ADVISING DIRECTORS AND OFFICERS OF TAX-EXEMPT CHARITIES**  
Robert L. Perez, Perez, McDaniel & Faust, LLP, New Orleans, LA

Noon – 1:00 p.m.  Lunch (included)

1:00 – 2:00 p.m.  **GUESS WHO’S GOING TO COURT? THE MOST COMMON CLAIMS IN CONTESTED SESSIONS**  
Laura E. Fine, Lehmann Norman & Marcus LC, New Orleans, LA

2:00 – 3:00 p.m.  **WHEN BUSINESS LIFE INSURANCE RESULTS IN INCOME OR COMPENSATION? DEPENDS UPON WHO OWNS THE POLICY**  
Donald O. Jansen, Senior Tax Counsel, Office of General Counsel, University of Texas, Austin, TX

3:00 – 3:15 p.m.  Break

3:15 – 4:15 p.m.  **ETHICS FOR ESTATES AND TRUSTS LAWYERS**  
Bruce Spizer, Bruce Spizer, A Professional Law Corporation, New Orleans, LA

**GENERAL INFORMATION**

Date:  November 21, 2014  
Registration:  8:00 a.m.  
Time:  8:30 a.m. – 4:15 p.m.  
Location:  Westin Canal Place Hotel, 100 Iberville Street, New Orleans, LA 70130  
Credit:  6.25 hours for Louisiana and other 60-minute states (includes 1.0 hour of ethics) and 7.5 hours (1.2 hour ethics) for 50-minute states  
Fee:  $298 through November 14; $340 after November 14
**REGISTRATION**
- **On-line registration** [http://www.law.tulane.edu/cle](http://www.law.tulane.edu/cle)
- $298 through November 14 ($340 after November 14)
  A government/not-for-profit/academic rate of $175 through November 14 ($200 after November 14) is available for full-time employees of a government or not-for-profit agency or academic institution
- Fee includes: course material, refreshment breaks and lunch
- Confirmation will be sent upon receipt of registration
- We cannot guarantee lunch if it is not checked upon registration
- Additional course material is available for $75. Material will be shipped after the program is completed
- We accept checks, cash, VISA and MasterCard only
- If you require special services or have special needs, contact the CLE office

**CANCELLATION AND REFUND**
- We offer a full refund, less a $50 cancellation fee, through **Friday, November 14**
- We ask that all cancellations be made in writing via fax (504-866-1583) or e-mail to mcle@tulane.edu by November 14

**CLE CREDIT**
- This program is recognized in Louisiana, a mandatory 60-minute CLE state
- Attorneys licensed in 60-minute states will receive a maximum of 6.25 CLE hours
- Attorneys licensed in 50-minute states will receive a maximum of 7.5 CLE hours
- 1.0/1.2 hour of Ethics is included
- Eligible for Taxation and Estate Planning Specialization credit

**PROGRAM LOCATION AND ACCOMMODATIONS**
- Westin Canal Place Hotel, 100 Iberville Street, New Orleans, LA
- You are responsible for your own hotel reservations. For reservations at the Westin, call 1-888-627-8180 or 504-566-7006

**ABOUT TULANE CLE**
- Tulane CLE is committed to offering distinctive learning opportunities while providing superior service and satisfaction
- For assistance call 504-865-5900, email mcle@tulane.edu or visit [www.law.tulane.edu/cle](http://www.law.tulane.edu/cle)

**A NOTE OF APPRECIATION**
Our speakers for this Institute are volunteers. Without their generous contributions of time, thought, planning and energy, Tulane would not be able to bring you superior learning opportunities. We thank them for their gifts.
REGISTRATION FORM

☐ $298 (THROUGH NOVEMBER 14)  ☐ $340 (AFTER NOVEMBER 14)

☐ I WILL ATTEND LUNCH (INCLUDED)

Mr./Ms. ___________________________ NAME ON BADGE: ______________________

FIRM: ________________________________________________________________

ADDRESS: ______________________________________________________________

CITY: _____________________________ STATE: _____ ZIP: ______________________

PHONE: ( ___ ) _______ - _____________ E-MAIL: _______________________________

BAR MEMBERSHIP STATE(s) AND BAR NUMBER(s):

______________________________________________________________________

MAIL REGISTRATION FORM AND CHECK PAYABLE TO:
TULANE CLE
200 BROADWAY, SUITE 203
NEW ORLEANS, LA  70118

ALL REGISTRATIONS PAID VIA CREDIT CARD MUST REGISTER USING THE SECURE ON-LINE REGISTRATION SITE: www.law.tulane.edu/cle
TULANE ESTATE PLANNING INSTITUTE

In 2002, Tulane Law School established the Tulane Estate Planning Institute to provide a permanent forum for the study of estate planning laws in Louisiana, the United States and other jurisdictions. As part of the Institute’s goal to provide a setting for the discussion of legal and tax issues pertinent to estate planning, the Institute sponsors Tulane Law School’s annual estate planning continuing legal education program, currently in its 23rd year. This annual program, now known as the Estate Planning Institute, recognizes Tulane Law School’s renewed commitment to providing the highest quality instruction on the most important and topical issues facing estate planning professionals.

Tulane Law School wishes to acknowledge the members of the Tulane Estate Planning Institute Advisory Board:

Kenneth A. Weiss, Esq., Chair, McGlinchey Stafford, PLLC, New Orleans, LA
Marguerite L. Adams, Esq., Liskow & Lewis, New Orleans, LA
Jane E. Armstrong, Esq., Phelps Dunbar, LLP, New Orleans, LA
Laura Junge Carman, Esq., Attorney at Law, New Orleans, LA
David F. Edwards, Esq., Jones Walker LLP, New Orleans, LA
Thomas B. Lemann, Esq., Liskow & Lewis, New Orleans, LA
Honorable F. A. Little, Jr., Chief Judge, Coushatta Tribal Court, Elton, LA and former United States District Court Judge, Western District of Louisiana, Alexandria, LA
Edward F. Martin, Esq., Jones Walker LLP, New Orleans, LA (retired)
Joel A. Mendler, Esq., Baldwin, Haspel Burke & Meyer, LLC, New Orleans, LA
Max Nathan, Jr., Esq., Sessions, Fishman, Nathan & Israel, LLP, New Orleans, LA
Carole C. Neff, Esq., Sessions, Fishman, Nathan & Israel, LLP, New Orleans, LA
Laura Walker Plunkett, Esq., Stone, Pigman, Walther, Wittman, LLP, New Orleans, LA
Professor Cynthia Samuel, Tulane University Law School, New Orleans, LA
Professor Ronald J. Scalise, Jr., Tulane University Law School, New Orleans, LA
David L. Sigler, Esq., David L. Sigler & Associates, LLC, Lake Charles, LA
David Bruce Spizer, Esq., Bruce Spizer, APLC, New Orleans, LA
Mark S. Stein, Esq., Lowe, Stein, Hoffman, Allweiss & Hauver, LLP, New Orleans, LA
Lizbeth A. Turner, Esq., Tulane University Planned Gifts, New Orleans, LA