8:30 – 9:45 a.m. **Recent Developments in Successions and Donations**
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. **And the Winner Is...**
**Trusts Versus Usufructs: What’s Best for Louisiana Testators Today**
Robert L. Perez, Perez, McDaniel & Faust, L.L.P., Metairie, LA

11:00 a.m. – Noon **Interstate Estate Planning:**
**When Trusts Cross State Lines – Hidden Land Mines**
Mark S. Stein, Lowe Stein Hoffman Allweiss & Hauver LLP, New Orleans, LA

Noon – 1:00 p.m. Lunch (included)

1:00 – 2:00 p.m. **What Estate Planners Need to Know:**
**Current Developments in Qualified Retirement Plans**
Jane E. Armstrong, Phelps Dunbar LLP, New Orleans, LA

2:00 – 2:15 p.m. Break

2:15 – 3:15 p.m. **New Ideas for Estate Planners:**
**Counseling Charitably Inclined Clients**
Lawrence M. Lehmann, Lehmann, Norman & Marcus, PC, New Orleans, LA

3:15 – 4:15 p.m. **Ethical Issues in Representing Fiduciaries**
Richard C. Stanley and Michelle West
Stanley, Reuter, Ross, Thornton & Alford, LLC, New Orleans, LA

**General Information**
Date: November 16, 2012
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
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 9; $340 after November 9
REGISTRATION
- **On-line registration** [http://www.law.tulane.edu/cle](http://www.law.tulane.edu/cle)
- $298 through November 9 ($340 after November 9)
  A government/not-for-profit/academic fee of $175 through November 9 ($200 after November 9) 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 on the registration.
  - Additional course material is available for $75. Material will be shipped after the program is completed.
  - We accept checks, cash, VISA and MasterCard.
  - If you require special services or have special needs, contact CLE.

CANCELLATION AND REFUND
- We offer a full refund, less a $50 cancellation fee, through Friday, **November 9**.
- We ask that all cancellations be made in writing via fax (504-866-1583) or e-mail to: patsmith@tulane.edu by November 9.

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
- 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, fax 504-866-1583. On the internet you can find us at [www.law.tulane.edu/cle](http://www.law.tulane.edu/cle)

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Our faculty 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.
21ST ESTATE PLANNING INSTITUTE
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REGISTRATION FORM

☐ $298 (THROUGH NOVEMBER 9)  ☐ $340 (AFTER NOVEMBER 9)

☐ I WILL ATTEND LUNCH (INCLUDED)

Mr./Ms. ________________________________ NAME ON BADGE: _________________________

FIRM: __________________________________________________________

ADDRESS: ________________________________________________________

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PHONE: _____ - _______ Fax: _____ - _______ E-MAIL: _________________________

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

_____________________________________________________________________

MAIL REGISTRATION FORM AND CHECK TO:
TULANE CLE, 6329 FRERET STREET, NEW ORLEANS, LA  70118
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ALL REGISTRATIONS PAID VIA CREDIT CARD MUST REGISTER VIA THE SECURE ON-LINE REGISTRATION SITE AT: www.law.tulane.edu/cle
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 21st 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:

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