



**EIGHTEENTH ANNUAL TULANE
ESTATE PLANNING INSTITUTE**

November 20, 2009

Westin Canal Place Hotel

New Orleans, Louisiana

18

Program Schedule

Friday, November 20

- 8:30 - 9:45 **Recent Developments in Successions, Donations and Trusts**
Joseph W. Mengis
Perry, Atkinson, Balhoff, Mengis & Burns, LLC, Baton Rouge, LA
- 9:45 - 10:00 Break
- 10:00 - 11:00 **Practical Drafting: What Not to Do in Drafting Trusts**
Carole Cukell Neff
Sessions, Fishman & Nathan, LLP, New Orleans, LA
- 11:00 - Noon **Practical Planning For Non-Probate Assets: Life Insurance, Annuities and Retirement Plans**
Jane E. Armstrong
Phelps Dunbar, LLP, New Orleans, LA
Edward F. Martin
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, LLP, New Orleans, LA
- 12:00 - 1:00 LUNCH (included)
- 1:00 - 2:00 **Incorporating Practical Philanthropy into the Estate Plan**
Thomas B. Lemann
Liskow & Lewis, New Orleans, LA
Lizbeth A. Turner, Director of Planned Gifts
Tulane University, New Orleans, LA
Mary C. Hester
Taylor, Porter, Brooks & Phillips, LLP, Baton Rouge, LA
- 2:00 - 2:15 Break
- 2:15 - 3:15 **Practical Estate Freezes in a Low Interest Rate Environment**
Miriam W. Henry
Jones, Walker, Waechter, Poitevent, Carrère & Denègre, LLP, New Orleans, LA
Vanessa Brown Claiborne, CPA
Chaffe & Associates, Inc., New Orleans, LA
- 3:15 - 4:15 **ETHICS: Who is Your Client and Other Practical Ethical Issues in Estate Planning**
David Bruce Spizer, Attorney at Law, New Orleans, LA

General Information

Date:	November 20, 2009
Registration:	8:00 a.m.
Time:	8:30 a.m. - 4:15 p.m.
Location:	Westin Canal Place Hotel, 100 Rue Iberville St., 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 13; \$340 after November 13

General Information

Registration

On-line registration

www.law.tulane.edu/cle

- \$298 through November 13 (\$340 after November 13)
A government/not-for-profit/academic fee of \$150 through November 13 (\$170 after November 13) 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 off 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 13**.
- We ask that all cancellations be made in writing via fax (504-866-1583) or e-mail (patsmith@tulane.edu) by November 13.

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 Rue Iberville St., New Orleans, LA
- You are responsible for your own hotel reservations. For reservations at The Westin Hotel call, 504-524-8200.

ABOUT TULANE CLE

- Tulane CLE is committed to offering distinctive learning opportunities while providing superior service and satisfaction.
- For assistance call 504-865-5900 or 800-569-5272, fax 504-866-1583 or 800-924-8349. On the Internet you can find us at www.law.tulane.edu/cle

A NOTE OF APPRECIATION

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.

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 18th 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

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Warren A. Goldstein, Esq., Attorney at Law, New Orleans, LA

Quintin T. Hardtner, III, Esq., Lemle & Kelleher, LLP, Shreveport, LA

Thomas B. Lemann, Esq., Liskow & Lewis, New Orleans, LA

Honorable F. A. Little, Jr., United States District Court, Western District of Louisiana, Alexandria, LA

Edward F. Martin, Esq., Jones, Walker, Waechter, Poitevent, Carrere & Denegre, LLP, New Orleans, LA

Joel A. Mendler, Esq., Sirote & Permutt, Birmingham, AL

Max Nathan, Jr., Esq., Sessions, Fishman & Nathan, LLP, New Orleans, LA

Carole C. Neff, Esq., Sessions, Fishman & Nathan, 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

D. Ryan Sartor, Jr., Esq., Snellings, Breard, Sartor, Inabnett & Trascher, LLP, Monroe, LA

Ann Schumacher, Director of Continuing Legal Education, 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

Honorable Jacques Loeb Wiener, Jr., United States Fifth Circuit Court of Appeals, New Orleans, LA



Calendar of Tulane CLE Programs

Fall 2010

October

28-30

58th Tulane Tax Institute
Westin Canal Place

November

20

18th Estate Planning Institute
Westin Canal Place Hotel

December

10-11

A Tulane Maritime Law Smorgasbord
Wyndham Riverfront Hotel

29 - 30

**CLE by the Hour:
Recent Developments & Updates**
Tulane Law School

Spring 2010

JANUARY

28 -29

Law and Sexuality
Tulane Law School

March

18 -19

INTERNATIONAL AND COMPARATIVE LAW
Tulane Law School

APRIL

9 - 10

Environmental Law Summit 2010
Tulane Law School

15 - 16

22nd Tulane Corporate Law Institute
Roosevelt Waldorf-Astoria

MAY

11 - 14

**American Bankruptcy Institute:
Litigation Skills Workshop**
Tulane Law School

20-22

36th Sports Lawyers Conference
Phoenix, AZ

20 - 22

28th Multistate Labor and Employment Law Seminar
St. Pete Beach, FL

To register for the above Tulane CLE programs online, visit our online registration page at www.law.tulane.edu/cle. Schedule subject to change after printing date.

18th Estate Planning Institute

November 20, 2009 • Westin Canal Place Hotel • New Orleans, LA

\$298 (THROUGH NOVEMBER 13)

\$340 (AFTER NOVEMBER 13)

I WILL ATTEND LUNCH (INCLUDED)

MR./MS. _____ NAME ON BADGE: _____

FIRM: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE: _____ - _____ FAX: _____ - _____ E-MAIL: _____

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

TO REGISTER BY FAX **504-866-1583** WITH A VISA OR MASTERCARD **ONLY** COMPLETE THE FOLLOWING:

CARD NUMBER _____ EXP. DATE _____

SIGNATURE _____

MAIL REGISTRATION FORM AND CHECK TO: TULANE CLE, 7016 ZIMPLE STREET, NEW ORLEANS, LA 70118 OR
FAX TO: 504-866-1583 OR 1-800-924-8349.

FOR OFFICE USE ONLY:						
Amt. _____	Date _____	Coupon Amt. _____	Check No. _____	CC Auth. _____	Input _____	
By _____	Canceled _____	Refund Ordered _____	Refund Sent _____	Check No. _____		