

Florida Fellows Institute – Class V

Program 1	Description of Presentation	Speaker	Minutes
10:10 - 11:00	The Use of Trusts	Ronald D. Aucutt	50
11:00 - 11:50	Marital Deduction Planning	Linda Suzzanne Griffin	50
12:05 - 12:55	Business Planning	Daniel H. Markstein, III	50
2:10 - 3:00	International Estate Planning	Dina Kapur Sanna	50
3:00 - 3:50	Planning for Retirement Assets/SECURE Act	Robert K. Kirkland	50
4:05 - 4:55	Elder Law/Special Needs	Bernard A. Krooks	50
4:55 - 5:45	Asset Protection	Barry Nelson	50
	Total		350

Program 2	Description of Presentation	Speaker	Minutes
8:05 - 9:00	Advance Life Insurance Planning	David Pratt	55
9:00 - 9:50	Root and Wings: Structuring a Trust to Give Beneficiaries a Chance at Success (Despite Inheriting Money)	Amy Kanyuk	50
10:10 - 11:00	Homestead	Jeff Baskies	50
11:00 - 12:00	Charitable Planning	Brad Bedingfield	60
1:00 - 2:40	Strategic Estate Planning Opportunities	Diana Zeydel and Mark Parthemer	100
3:00-3:55	Planning for Business Owners & Trusts in Light of Changing Income Rates	Steve Gorin	55
	Total		370

Program 3	Description of Presentation	Speaker	Minutes
10:15 - 11:15	Florida Probate Code, or Why Probate Might Not Be So Bad After All	Charles Ian Nash	60
11:15 - 12:15	Discovery and Expert Witnesses	Amy B. Beller	60
1:15 - 2:00	Elective Share and Other Statutory Entitlements	Debra J. Boje	45
2:00 - 3:00	View from the Bench/Q&A	Honorable Judge Mark A. Speiser	60
3:15 - 4:15	Representing the Individual Trustee	Bruce Stone	60
4:15 - 5:15	Trust Modifications and Decanting	Brian M. Malec	60
5:15 - 6:00	Creditor Claims	Tami F. Conetta	45
	Total		375

Program 4	Description of Presentation	Speaker	Minutes
8:25 - 9:15	Jurisdiction, Service and Notice in Probate and Trust Proceedings	Rohan Kelley	50
9:15 - 10:05	Will and Trust Contests	Barry Spivey	50
10:20 - 11:10	Ethics and Malpractice Considerations for a Drafting Attorney *	William T. Hennessey	50
11:10 - 12:00	Homestead	Shane Kelley	50
1:15 - 2:05	"Disputes Are Best Solved in The Livingroom, Not The Courtroom: practical ideas for avoiding the long, expensive slog through the judicial process.",	Steven Hearn	50
2:20 - 3:10	Fiduciary Liability and More	Jack Falk	50
3:10 - 4:00	Drafting to Avoid Litigation	Angela Adams	50
	Total		350

Program 5	Description of Presentation	Speaker	Minutes
10:00 - 10:10	Florida Principal and Income Tax	Jean Coker	10
10:10 - 10:30	Gross Income and Tentative Taxable Income	Lester Law	20
10:30 - 10:40	Distributable Net Income	Jean Coker	10
10:40 - 11:05	Simple Trusts	Jean Coker	25
11:05 - 11:30	Complex Trusts and Estates	William Snyder	25
11:45 - 12:00	Bequests and IRC Section 663(a)	Lester Law	15
12:00 - 12:15	Distributions In-Kind/Kenan Issues	William Snyder	15
12:15 - 12:45	IRC Section 643(e)(3) and Sample Problems	William Snyder	30
2:00 - 2:20	Sample Form 1041	Lester Law	20
2:20 - 2:45	Income in Respect of a Descendant	Lester Law	25
2:45 - 4:05	Generation-Skipping Transfer Tax	Beth Shapiro Kaufman	80
4:20 - 6:00	Generation-Skipping Transfer Tax	Beth Shapiro Kaufman	100
	Total		375

Program 6	Description of Presentation	Speaker	Minutes
8:05 - 9:05	Estate and Gift Tax Returns	George Karibjanian	60
9:05 - 9:55	Estate Tax Apportionment	Trent Kiziah	50
10:10 - 11:00	Defending Reporting Positions	Stephanie Loomis-Price	50
11:00 - 11:50	Tax Court Procedures	Stephanie Loomis-Price	50
1:00 - 1:50	Practitioner's Obligations and Liabilities to the Tax System	Austin Bramwell	50
1:50 - 2:40	Beware the IRS When Negotiating a Settlement	Robert L. Lancaster	50
2:55 - 3:45	Challenges (and Opportunities) Facing the Practice of Trust and Estate Law	Elaine M. Bucher, Laird A. Lile, R. Lee McElroy	50
	Total		360

Course Total	2,180
General	2,130
Ethics *	50