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FLORIDA  
BAR  
CLE

The Florida Bar Continuing Legal Education Committee and  
The Real Property, Probate & Trust Law Section present

# It's Not Too Late – Year End Estate and Asset Planning Techniques Views from Washington DC and More

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live and Webcast Presentation: Friday, November 30, 2012

Tampa Airport Marriott • 4200 George J. Bean Parkway  
Tampa, FL 33607 • (813) 879-5151



Course No. 1509R

7:45 a.m. – 8:15 a.m. **Late Registration**

8:15 a.m. – 8:20 a.m.

## Opening Remarks

Charles (Chad) Callahan III, Tampa and Lester Law, Naples –  
Program Co-Chairs

8:20 a.m. – 9:10 a.m.

## Panel Discussion: The Latest Out of Washington – Where We Are and Where We Are Headed

Ronald Aucutt, Tysons Corner, VA; James Carlisle,  
Washington, DC; and Brian Sparks, Tampa

9:10 a.m. – 9:20 a.m. **Break**

9:20 a.m. – 10:00 a.m.

## Latest Cases, Laws, and Trends in Asset Protection Planning

Gideon Rothschild, New York, NY

10:00 a.m. – 10:40 a.m.

## Status of the Estate Tax and Planning for 2012 and 2013

Ron Aucutt, Tysons Corner, VA

10:40 a.m. – 10:50 a.m. **Break**

10:50 a.m. – 11:40 a.m.

## Panel Discussion: Domestic and Offshore Asset Protection Trusts: Challenges and Opportunities

Gideon Rothschild, New York, NY

Barry Nelson, Miami Beach

Chris Riser, Athens, GA

Rob Lancaster, Naples

11:40 a.m. – 12:20 p.m.

## Portability – Panacea? Pariah? or Placebo?

Richard Franklin, Washington, DC

12:20 p.m. – 1:30 p.m. **Lunch** (on your own)

1:30 p.m. – 2:00 p.m.

## Homestead and Creditors - What Works and What Doesn't

Charlie Nash, Melbourne

2:00 p.m. – 2:20 p.m.

## Top Ten Planning Tips for the Year-End – Income Tax Issues in Estate Planning

Lester Law, Naples

2:20 p.m. – 2:30 p.m. **Break**

2:30 p.m. – 3:00 p.m.

## Year-End Charitable Planning

Lou Nostro, Miami

3:00 p.m. – 3:35 p.m.

## Putting the "D'OH" in DOMA: Recent Judicial Challenges to DOMA and Other Same-Sex Planning Ideas and Pitfalls

George Karibjanian, Boca Raton

3:35 p.m. – 4:15 p.m.

## Asset Protection and Estate Planning – Why Not Have Both in the Best Jurisdictions

Barry Nelson, Miami Beach

4:15 p.m. – 4:20 p.m.

## Closing Remarks

Charles (Chad) Callahan III, Tampa and Lester Law, Naples –  
Program Co-Chairs

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ONE LOCATION: (049) TAMPA AIRPORT MARRIOTT, TAMPA, FL (FRIDAY, NOVEMBER 30, 2012)

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- ☐ **Live Webcast / Virtual Seminar\***  
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- ☐ Non-section member: \$275
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- ☐ \$285
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