



**THE
FLORIDA
BAR
CLE**

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

Charitable Giving as Part of the Family Income and Transfer Tax Plan

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live Presentation: February 2, 2007 • Tampa
Tampa Airport Marriott • 813-879-5151

Video Replays (9 locations): February 16 - March 15, 2007

Course No. 0417R

9:15 a.m. – 9:45 a.m. **Late Registration**

9:45 a.m. – 9:50 a.m.

Introduction and Program Goals

Michael W. Fisher, Jacksonville, Program Chair

9:50 a.m. – 10:00 a.m.

Purposes of The Florida Bar Foundation

Donald J. Hale, Orlando

10:00 a.m. – 10:50 a.m.

The Crossroads of Ethics and Federal Legislation

Andrew C. Schulz, Washington DC

10:50 a.m. – 11:35 a.m.

**A Foundation on Charitable Foundations: Private,
Community, and Supporting Foundations and the New
Florida Trust Code – Which, Why and How**

Louis Nostro, Jr., Miami

11:35 a.m. – 11:50 a.m. **Break**

11:50 a.m. – 12:35 p.m.

What's New to Know: Pension Protection Act of 2006

Jeffrey Baskies, Fort Lauderdale

Kristen M. Lynch, Boca Raton

12:35 p.m. – 1:45 p.m. (Lunch included for Tampa location only)

Tallahassee's Role in the Future of Charitable Giving

Sherry Magill, Jacksonville

1:45 p.m. – 2:35 p.m.

**Ethical Considerations for Lawyers and Other
Professionals Dealing with Not-For-Profit Organizations
and Donors**

Michael P. Stafford, Uniondale, New York

**Self-Dealing and Insider Transactions: Private
Foundation Operations**

Jerome L. Wolf, Boca Raton

2:35 p.m. – 3:05 p.m.

**Charitable Giving and the Do-Gooder Client's Estate
Plan: Psychological Approaches**

Bruce M. Stone, Coral Gables

3:05 p.m. – 3:15 p.m. **Break**

3:15 p.m. – 4:00 p.m.

**Charitable Giving as Part of the Estate Plan: Marketing
Means with Ends**

Richard R. Gans, Sarasota

4:00 p.m. – 4:30 p.m.

**The View from the Other Side of the Fence: Representing
the Charity in Planned Giving Matters**

Brian C. Sparks, Tampa

REAL PROPERTY, PROBATE AND TRUST LAW SECTION

Rohan Kelley, Fort Lauderdale — Chair
Melissa J. Murphy, Gainesville — Chair-elect
Lee A. Weintraub, Fort Lauderdale — CLE Coordinator

CLE COMMITTEE

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Brian Sparks, Tampa
Michael Stafford, Uniondale, New York
Bruce M. Stone, Coral Gables
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CLE CREDITS

CLER PROGRAM

(Max. Credit: 7.5 hours)

General: 7.5 hours

Ethics: 2.0 hours

CERTIFICATION PROGRAM

(Max. Credit: 5.5 hours)

Elder Law: 5.5 hours

Real Estate: 5.5 hours

Wills, Trusts & Estates: 5.5 hours


Seminar credit may be applied to satisfy both CLER and Board Certification requirements in the amounts specified above, not to exceed the maximum credit. Refer to Chapter 6, Rules Regulating The Florida Bar, for more information about the CLER and Certification Requirements.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News) you will be sent a Reporting Affidavit or a Notice of Compliance. The Reporting Affidavit must be returned by your CLER reporting date. The Notice of Compliance confirms your completion of the requirement according to Bar records and therefore does not need to be returned. You are encouraged to maintain records of your CLE hours.

How to register:

 **ON-LINE:** www.FLORIDABAR.org
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 **MAIL:**
 Completed form
 w/check.

 **FAX: 850/561-5816**
 Form with
 credit card information.

REFUND POLICY: Requests for refund or credit toward the purchase of the audio/CD/video or course books of this program **must be in writing and postmarked** no later than two business days following the course presentation. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. A \$25 service fee applies to refund requests. Tampa Registrants who do not notify The Florida Bar by 5:00 p.m., January 30, 2007, that they will be unable to attend the seminar, will have an additional \$25 retained. Persons attending the live Tampa location under the policy of fee waivers will be required to pay \$25.

Register me for the "Charitable Giving as Part of the Family Income and Transfer Tax Plan" Seminar

TO REGISTER OR ORDER AUDIO/CD/VIDEO OR COURSE BOOKS, BY MAIL, SEND THIS FORM TO: The Florida Bar, CLE Programs, 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831. **ON-SITE REGISTRATION, ADD \$25.00. On-site registration is by check only.**

Name _____ Florida Bar # _____
 Address _____
 City/State/Zip _____ Phone # _____

TLH: Course No. 0417R

LOCATIONS (CHECK ONE):

- Tampa** - February 2, 2007**
(049) Tampa Airport Marriott
- Fort Myers* - February 16, 2007**
(295) Clarion Hotel
- Jacksonville* - February 16, 2007**
(154) Omni Hotel
- Pensacola* - February 22, 2007**
(040) Escambia/Santa Rosa Bar Assn.
- Sarasota* - February 22, 2007**
(042) Hyatt Sarasota
- Miami* - March 1, 2007**
(024) Hyatt Regency Downtown
- St. Petersburg* - March 2, 2007**
(263) St. Petersburg Bar Association
- Orlando* - March 8, 2007**
(071) Ivanhoe Plaza Hotel
- Tallahassee* - March 8, 2007**
(054) The Florida Bar Annex
- West Palm Beach* - March 15, 2007**
(232) Palm Beach County Bar Assn.

** Videotaping *Video Replay

REGISTRATION FEE (CHECK ONE):

	<u>TAMPA</u>	<u>VIDEO REPLAY</u>
<input type="checkbox"/> Member of the Real Property, Probate & Trust Law Section:	\$200	\$175
<input type="checkbox"/> Non-section member:	\$225	\$200
<input type="checkbox"/> Full-time law college faculty or full-time law student:	\$125	\$100
<input type="checkbox"/> Persons attending under the policy of fee waivers:	\$25	\$0

Includes Supreme Court, DCA, Circuit and County Judges, Magistrates, Judges of Compensation Claims, Administrative Law Judges, and full-time legal aid attorneys if directly related to their client practice. (We reserve the right to verify employment.)

METHOD OF PAYMENT (CHECK ONE):

- Check enclosed made payable to The Florida Bar
- Credit Card (Advance registration only. Fax to 850/561-5816.)
 - MASTERCARD VISA Exp. Date: ____/____ (MO./YR.)

Signature: _____
 Name on Card: _____
 Card No. _____



Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

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Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If this order is to be purchased by a tax-exempt organization, the course book/tapes must be mailed to that organization and not to a person. Include tax-exempt number beside organization's name on the order form.

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