AMERICAN BAR ASSOCIATION
SECTION OF REAL PROPERTY, TRUST AND ESTATE LAW

24th Annual
Spring CLE Symposia

WASHINGTON, DC MAY 2-3, 2013



2013

The Inside Track/The Inside Tract

SECTION OF REAL PROPERTY | TRUST & ESTATE LAW
Your Source for Success

ABA

24th Annual Spring CLE Symposia



I hope that you will join me at the 24th Annual Spring CLE Symposia sponsored by the ABA Section of Real Property, Trust and Estate Law in Washington, D.C. on May 2-3, 2013. This year's Symposia will offer an insider's view of the latest planning techniques and developments in both estate planning and real property. Our speakers will include not only the nation's leading practitioners and professionals, but also a wide variety of Washington, D.C. insiders including judges, officials from United States government agencies, and U.S. Senate staff from both sides of the aisle who will share their insights on both recent developments and future trends. The Symposia will also offer valuable networking opportunities with attorneys from across the country, including working lunches hosted by our substantive committees. Finally, we have planned a variety of social events for your enjoyment during your visit to our nation's capital, highlighted by a private reception on Thursday evening at the National Portrait Gallery.

I look forward to seeing you in Washington, D.C. in May!

Tina Portuondo
Chair, ABA Section of Real Property, Trust and Estate Law



Networking Events and Meeting Highlights

WEDNESDAY, MAY 1

5–6 p.m.
First-Time Attendees Reception
New to RPTE? Wondering how to start making connections? In this fabulous city brimming with "insiders," grab a cocktail and join us at a welcoming reception for new members and first-time attendees. Certain to be a delightful mixture of professionals!

THURSDAY, MAY 2

7 a.m.–5 p.m.
Hospitality Area
Continental breakfast in the morning and refreshments during scheduled breaks will be available for all meeting registrants.

11:30 a.m.–1:15 p.m.
Group and Committee Luncheon
Cost: $25
Attendees are encouraged to grab a box lunch and participate in RPTE group and committee discussions. This is an excellent opportunity to gather with a smaller group of attendees with common practice interests. All interested attendees are welcome to join in these topic-based discussions.

5–6 p.m.
Reception with the Sponsors
Join us for cocktails as we thank our 2013 Symposia sponsors for their generous support. For a complete list of our sponsors, see the inside back cover of this brochure.

7–10 p.m.
Symposia Reception
The National Portrait Gallery–Cost: $25
The National Portrait Gallery tells the history of America through individuals who have shaped its multifaceted culture. Through the visual arts, performing arts and new media, the Portrait Gallery represents poets and presidents, visionaries and villains, actors and activists whose lives tell the American story.
Transportation on own

Sponsored by:

WILMINGTON TRUST

FRIDAY, MAY 3

7 a.m.–4 p.m.
Hospitality Area
Continental breakfast in the morning and refreshments during scheduled breaks will be available for all meeting registrants.

11:30 a.m.–1 p.m.
Real Property Division Luncheon and Program Cost: $50
The Wharf–Enjoy an "insider's view" of the highly anticipated redevelopment project on DC's southwest waterfront, featuring the project developer, Monty Hoffman of PN Hoffman. This mixed-use project, which is designed to transform an under-utilized yet highly-valuable section of the District into a world-class destination, required an Act of Congress to create developable air rights and will feature its own co-generation power plant.

Speaker
- Monty Hoffman, PN Hoffman, Washington, DC

11:30 a.m.–12 p.m.
Trust and Estate Division Luncheon
Cost: $50

12–1 p.m.
Trust and Estate Division Hot Topics CLE
After two years of living on predictions, in 2013 our hot topics are both behind us and ahead of us. As we adapt our practices to deal with recent and future changes in transfer tax laws, we are mindful as well of the aftermath of and opportunities generated by 2012 transactions. We, and our clients, will be dealing with the effect of 2012 gifts for years to come, from reporting and administration to modification. With one eye on Congress and with recourse to the courts, we will remember 2012—and 2013—as eventful years with far reaching consequences.

Moderator:
- Steve R. Akers, Bessemer Trust, Dallas, TX

Speakers:
- Mark Prater, Chief Tax Counsel, Senate Finance Committee, Washington, DC
- Tiffany P. Smith, Tax Counsel, United States Senate Committee on Finance, Washington, DC
- Russell Sullivan, Staff Director, Senate Finance Committee, Washington, DC

Sponsored by:

BESSEMER TRUST

Schedule At-A-Glance

WEDNESDAY, MAY 1

1–5 p.m.	Registration
5–6 p.m.	First-Time Attendees Reception

THURSDAY, MAY 2

7 a.m.–5 p.m.	Registration/Hospitality/Sponsors Area
7–8 a.m.	Attendee Breakfast
8–9 a.m.	Guest Breakfast
8–11:30 a.m.	CLE Programming
11:30 a.m.–1:15 p.m.	Groups & Committees Box Luncheon (Ticketed Event)
1:30–4:45 p.m.	CLE Programming
5–6 p.m.	Reception with the Sponsors (Complimentary)
7–10 p.m.	Symposia Reception at The National Portrait Gallery (Ticketed Event)

FRIDAY, MAY 3

7 a.m.–4 p.m.	Registration/Hospitality/Sponsors Area
7–8 a.m.	Attendee Breakfast
8–9 a.m.	Guest Breakfast
8–11:30 a.m.	CLE Programming
11:30 a.m.–1 p.m.	Division Luncheons (Ticketed Events)
1:30–4:15 p.m.	CLE Programming

Trust and Estate Symposium Programs at-a-Glance

THURSDAY, MAY 2

8–9:30 a.m.	**Business Planning Group: Part I** Business Planning Hot Topics	**Employee Benefit Plans and Other Compensation Arrangements Group** What the Wind Blew In: Coping with Health Care Reform–2013 and Beyond
9:45–11:15 a.m.	**Business Planning Group: Part II** Our Clients in the Spotlight: The New IRS High Wealth Industry Group	**Charitable Planning and Organizations Group** **Part I** "Inside" Donor Intent: Does It Matter Anymore? **Part II** The "Inside" Word from Washington
1:30–3 p.m.	**Income and Transfer Tax Planning Group** Hot Topics and New Developments	**Non-Tax Estate Planning Considerations Group** Non-Tax Potpourri
3:15–4:45 p.m.	**Elder Law, Disability Planning and Bioethics Group** Current Issues Affecting Special Needs Trusts: Important Updates	**Litigation, Ethics and Malpractice Group** Ethics and Estate Litigation: Keep on Track and Out of Trouble

FRIDAY, MAY 3

8–9 a.m.	Pension Plans, Limited Partnerships & REITs: Is One of These Things Not Like the Others?	Staying Out of Court: Better Mediation in Trust and Estate Disputes	Thy Will be Done (by Will or by Deed): Discrimination in Real Property, Trust and Estate Law
9:15–10:15 a.m.	Snowbirds Fleeing State Taxing Authorities: Becoming a Resident of Another State for Estate Tax Benefits	Government is Everywhere: Special Issues in Business Succession Planning	
10:30–11:30 a.m.	Is Your Spouse a Trust Beneficiary? State Law Holds the Key for Same Sex Spouses	From Treasury Insiders: What Estate Planners Need to Know About the Guidance and Rule-Making Process	Conflicts: Have the Rules Changed?
12–1 p.m.	Trust and Estate Division Hot Topics CLE		
1:30–2:45 p.m.	It Is What It Is, But What Is It? Insights on Tax Laws in 2013	Got Good Governance? The Inside Track on Reorganizing Family Philanthropy	
3–4:15 p.m.	Care and Feeding of 2012 Estate Plans	Avoiding Implosion: Tips from the IRS, Litigators, and Planners on Administration Estate Planning Techniques	

THURSDAY, MAY 2

8–9:30 a.m.	**Real Estate Financing Group** You Want WHAT Opinions from Us? A Look at the Real Estate Finance Opinion Report of 2012	**Land Use and Environment Group** **Part I** The Evolving World of Confiscatory Takings: Understanding the Path, as it is Not Necessarily a Straight One **Part II** The Inside Scoop on the FTC Green Guides: Everything You Need to Know (and More)
9:45–11:15 a.m.	**Leasing Group** Government Leasing, Here and Abroad	**Special Investors and Investment Structure Group** REITs for Real Estate Lawyers
1:30–3 p.m.	**Residential, Multi-Family & Special Use Group** Impact of the Mortgage Crisis on Communities: Use of Eminent Domain to Take Properties	**Practice Management Group** Your Client Called You What? Maintaining Professionalism in Client Communications and Using the Latest Office Technology to Compete
3:15–4:45 p.m.	**Hospitality, Timesharing and Common Interest Developments Group** How to "ACT" Appropriately and Stay on Track: Accessible Design Requirements Under the Americans with Disabilities Act and the Fair Housing Act	**Commercial Real Estate Transactions Group** New AIA Sustainable Project Documents: The Effect on Acquistion, Design, Construction and Sustainable Projects

FRIDAY, MAY 3

8 - 9 a.m.	Pension Plans, Limited Partnerships & REITs: Is One of These Things Not Like the Others?	Thy Will be Done (by Will or by Deed): Discrimination in Real Property, Trust and Estate Law	Dealing With the Big Girls: Negotiating Leases with Strong Retail Tenants
9:15–10:15 a.m.	Law Professors' Panel: Recent Developments		What's the Big Deal?! Issues in Negotiating Large Office Leases
10:30–11:30 a.m.	Solar Panel Siting Negotiations: Leasing and Land Use Issues and Special Considerations for Government Property		Conflicts: Have the Rules Changed?
1:30–2:45 p.m.	Fannie Mae and Freddie Mac Loan Originations in the New World Order		NEPA at 42: Modernizing, Updating and Reinvigorating a Middle Aged Statute
3–4:15 p.m.	New HUD Initiatives Designed to Help Finance Affordable Housing		Bridging the Gap: My Loan is Due, Now What Do I Do?

Trust and Estate Symposium

The inside track can be a secret to success in all endeavors especially in the practice of law. As we venture into the American Taxpayer Relief Act of 2012 and new economic challenges, access to key policy makers and those who influence our laws is a valuable touchstone for our clients' success. The theme of this year's Symposium, "The Inside Track/The Inside Tract," is a nod to the importance of access to and dialogue with those who make, administer, litigate, adjudicate, and enforce our laws. This year's Symposium highlights the impact that government, whether big or small, state or federal, can have on the advice we will give and the decisions our clients will make. Join us to hear from key decision-makers, policy-makers, and law-interpreters as we continue the race that did not end with a jump off of the fiscal cliff. As Will Rogers once said, "Even if you're on the right track, you'll get run over if you just sit there."

THURSDAY, MAY 2

8–9:30 a.m.

Business Planning Group: Part I

Hot Topics (8–8:30 a.m.)

This program will discuss recent legislative and case law developments of significance to estate planning and administration for business owners.

The Pitfalls of Using Business Interests in Charitable Planning (8:30 – 9:30 a.m.)

Closely-held business interests present serious challenges in the context of charitable gift planning. The variation in the business forms and the rules that apply make it difficult to balance the issues of ownership, taxation, transferability, marketability, liquidity, and ability to produce income. This program will explore:

- Considerations in the transfer of closely-held business interests to private foundations;
- Public charities and the ongoing ownership of the interests by those entities; and
- The significant problems which arise with lifetime transfers to private foundations.

Group and Program Chair:

- Hugh F. Drake, Brown Hay & Stephens LLP, Springfield, IL

Speakers:

- Dana M. Foley, Arnold & Porter LLP, Washington, DC
- Tye J. Klooster, Katten Muchin Rosenman LLP, Oak Brook, IL
- Daniel McCarthy, The Blum Firm, Fort Worth, TX
- David M. Naples, Leonard Street and Deinard, Mankato, MN
- Robert Nemzin, Butzel Long, Bloomfield Hills, MI
- Karen Sandler Steinert, Fredrikson & Byron PA, Minneapolis, MN

8–9:30 a.m.

Employee Benefit Plans and Other Compensation Arrangements Group

What the Wind Blew In: Coping with Health Care Reform–2013 and Beyond

This program, led by ERISA practitioners and agency representatives, will provide an up-to-date analysis of the status of health care reform and will address:

- Guidance for employers, health providers, insurers, and individuals;
- Emphasis on guidance including with respect to retirement and disability planning; and
- The impact of the election, regulatory guidance, state decisions regarding Medicaid and exchanges, and other new developments.

Group and Program Chair:

- Robert A. Miller, Calfee, Halter & Griswold, LLP, Cleveland, OH

Speakers:

- Elizabeth Y. Leight, Society of Professional Benefit Administrators, Chevy Chase, MD
- Cynthia Marcotte Stamer, Cynthia Marcotte Stamer PC, Plano, TX

9:45–11:15 a.m.

Business Planning Group

Our Clients in the Spotlight: The New IRS High Wealth Industry Group

Learn why the IRS Commissioner considers the Global High Wealth Industry Group to be a "game-changing" move for the IRS. This program will cover:

- The risks facing taxpayers who are selected for audit by this group;
- The different procedures followed in these types of audits; and
- Proactive steps clients and their advisors can take now to minimize the damage caused by a future audit.

Group Chair:

- Hugh F. Drake, Brown Hay & Stephens LLP, Springfield, IL

Program Chair:

- Jenny L. Johnson, Holland & Knight LLP, Chicago, IL

Speakers:

- James C. Fee, IRS Office of Chief Counsel, Washington, DC
- Tamera L. Ripperda, Director, Global High Wealth Industry, Large Business and International Division, Internal Revenue Service, Washington, DC

9:45–11:15 a.m.

Charitable Planning and Organizations Group

Part I: "Inside" Donor Intent: Does It Matter Anymore?

This panel will examine issues related to donor intent, including:

- Restrictions placed by donors on gifts to charity;
- Analysis of the evolving law of who has standing to sue a charity for alleged violations of donor restrictions; and
- Discussion of lawsuits filed against charities such as Princeton University, Tulane, Barnes Foundation, Vanderbilt University, and Fisk University, and the more recently filed cases against Los Angeles Veterans Administration and the Johns Hopkins University alleging violations of donor restrictions on previous gifts of property.

Part II: The "Inside" Word from Washington

Three distinguished representatives from the federal government and the charitable sector will, respectively, share their insights regarding:

- Latest legislative developments affecting charitable planners and their clients;
- Immediate and long-term impact of recent administrative developments at the IRS Exempt Organizations group; and
- Critical issues facing charities and their donors in the current tax environment.

Group and Program Chair:

- Ramsay H. Slugg, US Trust, Fort Worth, TX

Co-Moderators:

- Stephanie B. Casteel, Wallace Morrison & Casteel LLP, Atlanta, GA
- Joseph P. Tylutki, McDonald's Corporation, Oak Brook, IL

Speakers:

- Sharon Light, Senior Technical Advisor, Office of the Director, Exempt Organizations, IRS, Washington, DC
- Geoff Plague, Director of Government Relations and Acting VP for Public Policy, Independent Sector, Washington, DC
- Mark Prater, Chief Tax Counsel, Senate Finance Committee, Washington, DC

1:30–3 p.m.

Income and Transfer Tax Planning Group

Hot Topics and New Developments

This program will discuss significant recent legislative and case law developments affecting income and transfer tax planning including:

- New developments from the U.S. Treasury Department;
- Anticipated guidance on Section 2801 gifts or bequests from a covered expatriate;
- New Schedule PC to Form 706;
- Supreme Court granting certiorari in the DOMA cases;
- The Tax Court and Courts of Appeals limiting the use of the substance over form doctrine in the Midco transferee liability cases and the potential impact of those holdings in other contexts;
- ATRA 2012 making qualified severances premanent; and
- Application of the 3.8% Medicare Tax to fiduciary entities.

Group and Program Chair:

- Leigh-Alexandra Basha, Holland & Knight LLP, McLean, VA

Speakers:

- Catherine V. Hughes, U.S. Department of Treasury, Washington, DC
- Scott A. Bowman, Proskauer Rose LLP, Boca Raton, FL
- Amy E. Heller, McDermott Will & Emery, New York, NY
- Samuel A. Hercules, Ernst & Young LLP, New York, NY
- Jenny L. Johnson, Holland & Knight LLP, Chicago, IL
- George D. Karibjanian, Proskauer Rose LLP, Boca Raton, FL
- Ryan Walsh, Hamilton Thies & Lorch LLP, Chicago, IL

1:30–3 p.m.

Non-Tax Estate Planning Considerations Group

Non-Tax Potpourri

This program will explore many of the odds and ends that can make all the difference between staying on track or veering off of a dangerous curve. Topics to be covered will include:

- Non-tax "hot topics" in recent cases in the trusts and estates field;
- Uniform Trust Code, recent updates and proposals currently under consideration;
- Best practices for using social media, such as Twitter, Facebook and LinkedIn, to build our practices; and
- Tips on how to best attract clients.

Group and Program Chair:

- Mary P. O'Reilly, Meltzer Lippe Goldstein & Breitstone LLP, Mineola, NY

Speakers:

- Mark I. Cohen, Cohen & Burnett PC, McLean, VA
- Allison Kelly, Brown Brothers Harriman & Co., New York, NY
- Javier R. Tapia, U.S. Trust, Dallas, TX
- Lee-Ford Tritt, University of Florida, Gainesville, FL

3:15–4:45 p.m.

Elder Law, Disability Planning and Bioethics Group

Current Issues Affecting Special Needs Trusts: Important Updates

A panel of leading practitioners in the special needs trust area, including a representative from the Social Security Administration, will discuss:

- Recent changes and clarifications by the Social Security Administration in its POMS regulations are "excluded resources" for purposes of SSI and Medicaid eligibility of persons with disabilities;
- How new regulations affect third-party special needs trusts and the self-settled variety;
- Continuing attempts by Social Security and the Center for Medicare and Medicaid Services, as well as state Medicaid agencies, to determine "sole benefit" as it relates to special needs trusts; and
- Drafting suggestions and practical solutions for problems experienced as older special needs trusts are being reevaluated by government agencies.

Group Chair:

- Kristine Knaplund, Pepperdine University School of Law, Malibu, CA

Program Chair and Moderator:

- Katherine Barr, Sirote & Permutt PC, Birmingham, AL

Speakers:

- David M. English, University of Missouri Columbia Law School, Columbia, MO
- Bernard A. Krooks, Littman Krooks LLP, New York, NY
- Mary O'Byrne, Frank Frank & Scherr, Lutherville, MD
- Patricia F. Sitchler, Schoenbaum Curphy & Scanlan PC, San Antonio, TX

3:15–4:45 p.m.

Litigation, Ethics and Malpractice Group

Ethics and Estate Litigation: Keep on Track and Out of Trouble

The collision between ethics and estate litigation will be examined by a panel of experts. The program will chart hot issues and national trends, including:

- Conflicts of interest;
- Attorney-client privilege;
- Role (and potential liability) of court-appointed attorneys;
- Duties of drafting attorneys;
- Counsel fees; and
- Unauthorized practice of law.

Group and Program Chair:

- Matthew P. Matiasevich, Evans Latham & Campisi, San Francisco, CA

Moderator and Speaker:

- Steven K. Mignogna, Archer and Greiner PC, Haddonfield , NJ

Speakers:

- Daniel S. Ebner, Prather Ebner LLP, Chicago, IL
- Thomas E. Spahn, McGuireWoods LLP, Mc Lean, VA
- Jessica A. Uzcategui, Sacks Glazier Franklin & Lodise LLP, Los Angeles, CA

FRIDAY, MAY 3

8–9 a.m.

Pension Plans, Limited Partnerships & REITs: Is One of These Things Not Like the Others?

Pension plans continue to be active investors in limited partnerships, REIT and similar investment funds. This program will explore considerations arising in connection with such pension plan investments, both from the perspective of the investment funds and the pension plan fiduciaries. Topics will include:

- Tax planning to avoid or address "unrelated business taxable income" for pension plans and IRAs investing in leveraged real estate deals;
- Steps to prevent fund assets from being treated as plan assets and generating prohibited transaction and fiduciary duty concerns for investment fund managers; and
- Fiduciary issues generally involved in pension plan or IRA investments in such funds.

Program Chair:

- Robert A. Miller, Calfee Halter & Griswold LLP, Cleveland, OH

Speakers:

- Michael Hirschfeld, Dechert LLP, New York, NY
- Luis F. Moreno, Haynes and Boone LLP, Mexico City, Mexico

8–9 a.m.

Staying Out of Court: Better Mediation in Trust and Estate Disputes

Mediating in the trust and estate context can be a dangerous proposition to the attorney facing a whirlwind of difficult legal and procedural issues and a conference room full of rancorous parties. Learn the best techniques for:

- Preparing for intra-family mediation;
- Advocacy during the mediation; and
- Avoiding traps and mistakes.

Program Chair:

- Matthew P. Matiasevich, Evans Latham & Campisi, San Francisco, CA

Speakers:

- Lela P. Love, Benjamin Cardozo School of Law, New York, NY
- John T. Rogers Jr., Seyfarth Shaw LLP, Los Angeles, CA
- Robert D. Steele, Wolf Haldenstein Adler Freeman & Herz LLP, New York, NY

8–9 a.m.

Thy Will be Done (by Will or by Deed): Discrimination in Real Property, Trust and Estate Law

This panel will address will, trust and deed provisions that might not be enforceable on public policy grounds, including:

- Restrictions on religion, gender or gender preferences, or marriage to persons of different races;
- Legal enforceability of restrictive provisions in wills, trusts or deeds; and
- A philosophical discussion about the responsibility of lawyers when clients request weird or wacky provisions in legal documents, wills or deeds.

Program Chair:

- Patricia H. Char, K&L Gates LLP, Seattle, WA

Speakers:

- The Honorable Robert L. Wilkins, U.S. District Court for the District of Columbia
- James R. Carey, Levin & Shreder, Chicago, IL
- Professor Sheryll D. Cashin, Georgetown University Law Center, Washington, DC
- Scott Squillace, Squillace & Associates PC, Boston, MA

9:15–10:15 a.m.

Snowbirds Fleeing State Taxing Authorities: Becoming a Resident of Another State for Estate Tax Benefits

State estate tax laws vary from state to state and these variances provide an incentive for wealthy clients to relocate to a state with favorable estate tax laws. Facing budget deficits and tough economic conditions, many states are reluctant to lose tax revenue and make it difficult for taxpayers to officially become a resident of another jurisdiction. This program will:

- Discuss how various states with favorable tax laws determine tax residency and domicile for estate tax purposes;
- Outline the steps a client needs to take to relocate to such a jurisdiction effectively; and
- Address how clients can minimize the risk of challenge from their state of former residence.

Moderator and Program Chair:

- Karin C. Prangley, Krasnow Saunders LLP, Chicago, IL

Speakers:

- Tye J. Klooster, Katten Muchin Rosenman LLP, Chicago, IL
- Brandon A.S. Ross, Proskauer Rose, LLP
- Karen J. Tenenbaum, Karen J. Tenenbaum PC, Melville, NY

9:15–10:15 a.m.

Government is Everywhere: Special Issues in Business Succession Planning

Many tax and related issues exist for business owners contemplating whether to retire or transition all or part of a business to a new generation of leaders. This panel will discuss:

- Considerations in establishing an employee stock ownership plan as part of a business transition
- Ethical issues, exposure and risk management;
- Life insurance, pension, long-term care and other benefit and human resources considerations for key employees, particularly if they become disabled or die;
- Bankruptcy, asset protection planning and other risk management issues; and
- Special considerations for partnerships, S corporations and limited liability companies.

Program Chair and Moderator:

- Henry Talavera, Polsinelli Shughart PC, Dallas, TX

Speakers:

- Richard E. Barnes, BarnesLaw, LLC, Valdosta, GA
- Robert Gertner, Internal Revenue Service, Washington, DC
- Steven B. Gorin, Thompson Coburn LLP, St. Louis, MO
- Lisa A. Van Fleet, Bryan Cave LLP, St. Louis, MO

10:30–11:30 a.m.

Is Your Spouse a Trust Beneficiary? State Law Holds the Key for Same Sex Spouses

Trust and estate practitioners face unique challenges when working with same-sex couples. With rapidly changing laws, trust documents often fail to consider future LGBT beneficiaries. Trust administrators often find themselves asking several questions that this session will address:

- Does the governing law of the trust matter?
- Is the fact that the grantor created the trust before anyone began discussing same-sex relationships important?
- What if the couple is in a domestic partnership or civil union instead of being married?

In addition, the panel will discuss the various laws governing same-sex relationships, the effect that law and comity have on private estate planning documents, sample definitions that may avoid litigation or malpractice claims, and how trustees should address these issues.

Program Chair:

- Ray Prather, Prather Ebner LLP, Chicago, IL

Speakers:

- Daniel S. Ebner, Prather Ebner LLP, Chicago, IL
- Terrence M. Franklin, Sacks Glazier Franklin & Lodise LLP, Los Angeles, CA
- Stacy E. Singer, The Northern Trust Company, Chicago, IL

10:30–11:30 a.m.

Conflicts: Have the Rules Changed?

A review of the ethical issues and rules regarding:

- Joint representation of clients;
- Lawyers changing law firms; and
- Issue conflicts.

Program Chair and Speaker:

- Michael H. Rubin, McGlinchey Stafford PLLC, Baton Rouge, LA

10:30–11:30 a.m.

From Treasury Insiders: What Estate Planners Need to Know About the Guidance and Rule-Making Process

This program will explore, from a pragmatic, insider's point of view, how guidance is formulated within and between the Department of the Treasury and the IRS office of Chief Counsel. Topics include an overview of how a Treasury regulation is "born" and why one form of guidance (e.g. a regulation) is chosen versus another (e.g. a revenue ruling).

Program Chair:

- Stephanie Loomis-Price, Winstead PC, Houston, TX

Moderator:

- Benetta P. Jenson, JP Morgan Private Bank, Chicago, IL

Speakers:

- Catherine V. Hughes, US Department of Treasury, Washington, DC
- David H. Kirk, Office of Chief Counsel, Washington, DC

12–1 p.m.

Trust and Estate Division Hot Topics CLE

After two years of living on predictions, in 2013 our hot topics are both behind us and ahead of us. As we adapt our practices to deal with recent and future changes in transfer tax laws, we are mindful as well of the aftermath of and opportunities generated by 2012 transactions. We, and our clients, will be dealing with the effect of 2012 gifts for years to come, from reporting and administration to modification. With one eye on Congress and with recourse to the courts, we will remember 2012 and 2013 as eventful years with far-reaching consequences.

Moderator:

- Steve R. Akers, Bessemer Trust, Dallas, TX

Speakers:

- Mark Prater, Chief Tax Counsel, Senate Finance Committee, Washington, DC
- Tiffany P. Smith, Tax Counsel, United States Senate Committee on Finance, Washington, DC
- Russell Sullivan, Staff Director, Senate Finance Committee, Washington, DC

1:30–2:45 p.m.

It Is What It Is, But What Is It? Insights on Tax Laws in 2013

2012 was a banner year for estate planning transactions, but uncertainty surrounding future tax law has created significant challenges for advising clients for 2013 and beyond. This panel will discuss:

- The hanging issues from 2012;
- The American Taxpayer Relief Act of 2012 and developments in 2013; and
- Planning opportunities and pitfalls that remain as we set our sights on the future.

Program Chair:

- Leigh-Alexandra Basha, Holland & Knight LLP, Mc Lean, VA

Moderator:

- John F. Bergner, Winstead PC, Dallas, TX

Speakers

- Ronald D. Aucutt, McGuire Woods, McLean, VA
- Ellen K. Harrison, Pillsbury, Washington, DC
- Louis A. Mezzullo, McKenna Long & Aldridge LLP, Rancho Santa Fe, CA

1:30–2:45 p.m.

Got Good Governance? The Inside Track on Reorganizing Family Philanthropy

Studies show that entrepreneurs are the most charitably inclined individuals. Just as their family businesses must be recreated to pass successfully from one generation to the next, so must their family philanthropy. Many first–generation private foundations are now transferring to the next generation, which must face the issues of whether to:

- Keep the foundation intact;
- Split into multiple foundations to reflect the variations in charitable goals among next-generation members;
- Spend down and terminate;
- Convert to one or more alternative entities; or
- Select some other course of action.

Legal and governance issues will be explored in this presentation, as will the intra-family issues and dynamics of how best to carry on the family philanthropy.

Program Chair:

- Ramsay H. Slugg, U.S. Trust, Fort Worth, TX

Speakers:

- Michael V. Bourland, Bourland Wall & Wenzel PC, Fort Worth, TX
- Ruth M. Madrigal, U.S. Department of Treasury, Washington, DC

3–4:15 p.m.

Care and Feeding of 2012 Estate Plans

In 2012 there was a flurry of activity to prepare ILITs, IDGTs, FLPs, LLC's, GRATs, CLATs, SLATs, QTIPs, and QPRTs. If they were known by an acronym, our clients wanted them. They may even have funded 529 Plans, converted traditional IRAs to Roth IRAs, and forgiven debt. Additionally, they may have wanted to allocate unused GSTs exemption to non-GST exempt trusts. This panel will focus on what is necessary to preserve or abandon those planning ideas in 2013 (if possible). Using case studies to illustrate issues, this panel will cover:

- Disclaimers;
- QTIP elections;
- Formula provisions;
- Gift tax reporting;
- Valuation issues;
- Trustee obligations; and
- General 2013 planning with respect to 2012 estate planning techniques.

Program Chair and Moderator:

- Richard S. Franklin, McArthur Franklin PLLC, Washington, DC

Speakers:

- George D. Karibjanian, Proskauer Rose LLP, Boca Raton, FL
- Beth Shapiro Kaufman, Caplin & Drysdale, Washington, DC
- Lester B. Law, U.S. Trust, Naples, FL

3–4:15 p.m.

Avoiding Implosion: Tips from the IRS, Litigators, and Planners on Administration of Estate Planning Techniques

Estate planners often love to focus on the latest and greatest, cutting-edge planning technique and sometimes forget about the more mundane administrative aspects of a transaction. However, *post*-transaction administration and adherence to the formalities can make or break a transaction, and where these formalities have been overlooked, the consequences can be potentially disastrous. Transactions to be discussed and related issues will include:

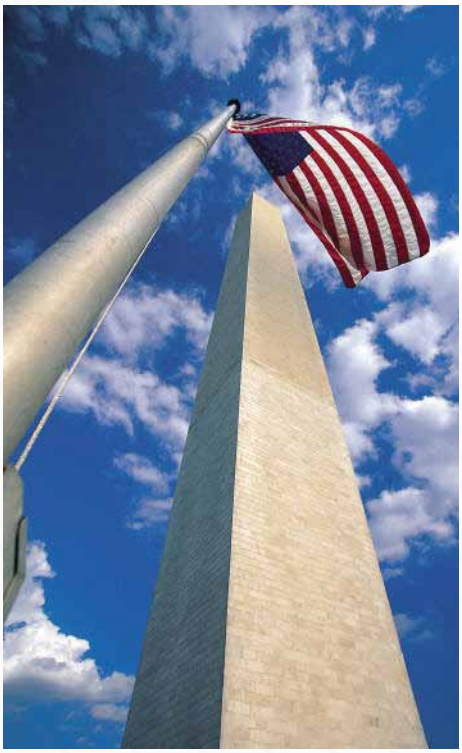
- GRATs;
- Sales to grantor trusts;
- Limited partnerships;
- Irrevocable Life Insurance Trusts;
- Buy-Sell Agreements (both from a funding and a Section 2703 perspective);
- A/B Trust Planning and proper asset titling;
- QPRTs; and
- Incomplete gift and retained interest issues.

Program Chair and Speaker:

- N. Todd Angkatavanich, Withers Bergman LLP, New Haven, CT

Speakers:

- Stephanie Loomis-Price, Winstead PC, Houston, TX
- Theresa L. Stylianou, Internal Revenue Service, New York, NY



Real Property Symposium

Now more than ever, access to timely information and to government decision-makers is key to success in the real estate industry. This year's Real Estate Symposium presents a wide range of cutting edge topics to provide real estate attorneys with insight into current developments and trends in government initiatives, regulations, and requirements and with guidance on how they are being interpreted and enforced in relation to real estate and related markets. Come to hear the latest news and advice from Washington insiders, regulatory authorities, and the top legal minds in the industry. Join us in our nation's capital to gain the tools and knowledge needed to bring your clients onto "the inside track" and to help them anticipate the next "inside tract."

THURSDAY, MAY 2

8–9:30 a.m.

Real Estate Financing Group

You Want WHAT Opinions from Us? A Look at the Real Estate Finance Opinion Report of 2012

The Real Estate Finance Opinion Report of 2012 was jointly prepared and approved by the ABA RPTE Legal Opinions in Real Estate Transactions Committee, and the comparable committees of the American College of Real Estate Lawyers (ACREL) and the American College of Mortgage Attorneys (ACMA). This presentation will:

- Examine the new Opinion Report, its Practitioner's Guide, and its Illustrative Opinion;
- Advise as to how these materials can be useful in the discussion of the role of customary practice with respect to rendering and receiving third party opinion letters; and
- Provide participants with an opportunity to consider the effect of the project in the emerging consensus about real property opinion practice.

Group Chair:

- Dianne S. Coscarelli, Thompson Hine LLP, Cleveland, OH

Program Chair and Moderator:

- Edward J. Levin, Gordon Feinblatt LLC, Baltimore, MD

Speakers:

- William B. Dunn, Clark Hill PLC, Grand Rapids, MI
- Kenneth P. Ezell, Jr., Baker Donelson Bearman Caldwell & Berkowitz PC, Nashville, TN
- Lydia C. Stefanowicz, Edwards Wildman Palmer LLP, Madison, NJ
- Robert A. Thompson, Sheppard Mullin Richter & Hampton LLP, San Francisco, CA

8–9:30 a.m.

Land Use and Environment Group

Part I: The Evolving World of Confiscatory Takings: Understanding the Path, as It Is Not Necessarily a Straight One

The legality of confiscatory takings continues to evolve. The U.S. Supreme Court granted certiorari in *Koontz v. St. Johns River Water Management District*, and two questions have been posed:

- Whether the government is liable for a taking when it required a property owner to make improvements to state-owned property in order to obtain a land use permit; and
- Whether the essential nexus and rough proportionality tests in *Nollan v. Cal. Coastal Commission* and *Dolan v. City of Tigard* apply to these circumstances.

Part II: The Inside Scoop on the FTC Green Guides: Everything You Need to Know (and More)

This program will examine the effect of the FTC's October 1, 2012 "Guides for the Use of Environmental Marketing Claims" on real property transactions and renewable energy credits, specifically:

- The marketing guidelines for "environmentally friendly" products;
- How the Green Guides allow for a business to enforce the Green Guides against other businesses under the FTC Act;
- How the Green Guides are directly applicable to claims made for renewable energy credits; and
- The impact on "green" construction and its related products, such as "green" concrete.

Group Chair:

- Darius W. Dynkowski, Ackerman Dynkowski & Ackerman, Bloomington Hills, MI

Program Chair

- Adam Silverman, Greenberg Traurig LLP, Philadelphia, PA

Speaker:

- Representative from FTC–Enforcement Division
- Kerri L. Basha, Greenberg Traurig LLP, Miami, FL
- J. Peter Byrne, Georgetown University Law Center, Washington, DC
- Michelle Desiderio, NAHB Research Center, Upper Marlboro, MD
- Hamilton H. Hackney III, Greenberg Traurig LLP, Boston, MA

9:45–11:15 a.m.

Leasing Group

Government Leasing, Here and Abroad

Panelists will present a dynamic discussion about government leasing in the United States and abroad, and get a peek behind the curtain with respect to government leasing. The program will focus on issues involving:

- The federal government's real estate portfolio;
- The acquisition and development of U.S. embassy sites in other countries, as well as related housing for State Department employees;
- Negotiation of General Services Administration (GSA) leases on behalf of private landlords; and
- Policy issues underlying government leases and implications on sales of and leasing upon property with governmental tenants.

Group and Program Chair:

- Patrick T. Sharkey, Jackson Walker LLP, Houston, TX

Moderator:

- Ruth Schoenmeyer, McDonalds Corporation, Oak Brook, IL

Speakers:

- Dennis M. Horn, Holland & Knight LLP, Washington, DC
- Robert C. MacKichan, Jr., Holland & Knight LLP, Washington, DC
- Dorothy Robyn, Ph.D., General Services Administration, Washington, DC
- Katie Troutman, International Real Estate Acquisitions at US Department of State, Washington, DC

9:45–11:15 a.m.

Special Investors and Investment Structure Group

REITs for Real Estate Lawyers

This program is essential to stay on the right track when dealing with a real estate investment trust (REIT). Our panel will focus on the numerous organizational and operational requirements that must be met by REITs and commonly-encountered transactions involving REITs, including:

- REIT leasing requirements;
- Borrowing from REITs, including mezzanine loans;
- Lending to REITs;
- Hotel and health care structures for REITs;
- Joint ventures with REITs;
- Contribution of properties to REITs; and
- The use of private REITs in real estate funds.

Group Chair:

- Luis F. Moreno, Haynes and Boone LLP, Mexico City, Mexico

Program Chair:

- Christopher Roman, King & Spalding, New York, NY

Speakers:

- Julanne Allen, Attorney-Advisor, Internal Revenue Service, Office of Chief Counsel, Financial Institutions and Products Division, Washington, DC
- Peter Ritter, KPMG, San Francisco, CA

1:30–3 p.m.

Residential, Multi-Family and Special Use Group

Impact of the Mortgage Crisis on Communities: Use of Eminent Domain to Take Properties

The mortgage crisis has resulted in a dramatic increase in the number of vacant and blighted properties throughout the country. What are the governmental reactions to this growing problem? Is the use of eminent domain to revise existing financial contracts acceptable? Our panelists will address these questions and many others related to these very important and timely topics including:

- How local governments are employing and utilizing state police powers to take ownership of blighted properties and seize mortgages; and
- Federal Housing Finance Agency concerns regarding the use of eminent domain to restructure performing home loans and requested input from the public.

Group and Program Chair:

- Kellye C. Clarke, Keegan DeVol & Clarke PLC, Alexandria, VA

Speakers:

- Timnetra Burrus, Cook County Board of Review Commissioners, Chicago, IL
- Christina Jenkins, Middleberg Riddle Gianna, Dallas, TX
- James M. Milano, Weiner Brodsky Sidman KiderPC, Washington, DC

1:30–3 p.m.

Practice Management Group

Your Client Called You What? Maintaining Professionalism in Client Communications and Using the Latest Office Technology to Compete

Miscommunication with clients and opposing counsel, especially in a digital world, can have serious unintended consequences. The panel will explain:

- How to better manage your professional relationships in order to avoid unnecessary confrontation and misunderstandings;
- How small firms can harness the power of social media and legal blogs to compete with larger more established firms; and
- How improved communication and the latest technology can provide unique opportunities for growth and outreach that can be continuously expanded.

Group and Program Chair:

- Daniel J. Homick, HigherSchool, Raleigh, NC

Speakers:

- Maurice S. Pianko, Verismo Legal Solutions, Wayne, NJ
- Andrew Weiss, Raleigh, NC

3:15–4:45 p.m.

Hospitality, Timesharing and Common Interest Developments Group

How to "ACT" Appropriately and Stay on Track: Accessible Design Requirements Under the Americans with Disabilities Act and the Fair Housing Act

The ADA and the FHA impact numerous forms of real property ownership, including hotels, condominiums and fractionals/timeshares. Our panelists will discuss:

- The impact of the ADA and FHA accessibility design requirements;
- The key accessible design differences under FHA guidelines and ADA standards;
- The recent settlement in *United States of America v. Hilton Worldwide, Inc.* involving ADA compliance; and
- The intersection of FHA and ADA accessible design requirements and enforcement of the requirements by the Department of Justice.

Group and Program Chair:

- Daniel Q. Orvin, Womble Carlyle Sandridge & Rice, Charleston, SC

Moderator:

- Steven Mezer, Bush Ross PA, Tampa, FL

Speakers:

- Amy Bellman, Baker Hostetler, Denver, CO
- Barbara Elkin, Senior Attorney Advisor, Disability Rights Section, Department of Justice Civil Rights Division, Washington, DC
- Christopher B. Hanback, Holland & Knight LLP, Washington, DC
- Robert W. Lannan, Lannan Legal PLLC, Washington, DC

3:15–4:45 p.m.

Commercial Real Estate Transactions Group

New AIA Sustainable Project Documents: The Effect on Acquisition, Design, Construction and Sustainable Projects

The AIA has just released a new "Sustainable Project" series of documents, and this presentation will explore the impact of these documents in everyday practice, as the new documents will

- Effect design and construction documents themselves; and
- Have significant impacts on transactions.

Group Chair:

- Bernard B. Kolodner, Kleinbard Bell & Brecker LLP, Philadelphia, PA

Program Chair and Speaker:

- Louise C. Adamson, Perkins Coie LLP, San Francisco, CA

Speakers:

- Josh Balance, Associate Counsel, AIA, Washington, DC
- Alan S. Ritchie, Thompson Hine LLP, Cleveland, OH
- Richard J. Sobelsohn, LexisNexis, New York, NY

FRIDAY, MAY 3

8–9 a.m.

Thy Will be Done (by Will or by Deed): Discrimination in Real Property, Trust & Estate Law

This panel will address will, trust and deed provisions that might not be enforceable on public policy grounds, including:

- Restrictions on religion, gender or gender preferences, or marriages to persons of different races;
- Legal enforceability of restrictive provisions in wills or deeds; and
- A philosophical discussion about the responsibility of lawyers when clients request weird or wacky provisions in wills or deeds.

Program Chair:

- Patricia H. Char, K&L Gates LLP, Seattle, WA

Speakers:

- Honorable Robert L. Wilkins, US District Court for the District of Columbia, Washington, DC
- James R. Carey, Levin & Shreder, Chicago, IL
- Professor Sheryll D. Cashin, Georgetown University Law Center, Washington, DC
- Ray Prather, Prather Ebner LLP, Chicago, IL

8–9 a.m.

Pension Plans, Limited Partnerships, & REITs: Is One of These Things Not Like the Other?

Pension plans continue to be active investors in limited partnerships, REITS and similar investment funds. This program will explore considerations arising in connection with such pension plan investments, both from the perspective of the investment funds and the pension plan fiduciaries. Topics will include:

- Tax planning to avoid or address "unrelated business taxable income" for pension plans and IRAs investing in leveraged real estate deals;
- Steps to prevent fund assets from being treated as plan assets and generating prohibited transaction and fiduciary duty concerns for investment fund managers; and
- Fiduciary issues generally involved in the decision of a pension plan or IRA to invest in such funds.

Program Chair:

- Robert A. Miller, Calfee Halter & Griswold LLP, Cleveland, OH

Speaker:

- Michael Hirschfeld, Dechert LLP, New York, NY
- Luis F. Moreno, Haynes and Boone LLP, Mexico City, Mexico

8–9 a.m.

Dealing With the Big Girls: Negotiating Leases with Strong Retail Tenants

This program will provide an assessment of retail leasing trends and predictions for the strength of retailers during the next few years. Our panel will provide practical approaches to provisions that strong retail tenants currently require, including:

- Prohibitions on similar uses in a development, including recent exclusivity legal decisions;
- Co-tenancy and continuous operation requirements;
- Landlord warranties, indemnities and remedies;
- Control of shopping center design and appearance, construction allowances and limitations on continuous operations; and
- Rights to assign.

Program Chair:

- Marie A. Moore, Sher Garner Cahill Richter Klein & Hilbert LLC, New Orleans, LA

Moderator:

- Markita Morris-Louis, Drinker Biddle, Philadelphia, PA

Speakers:

- Maureen L. McAvey, Initiatives Group for the Urban Land Institute (ULI), Washington, DC
- Ruth A. Schoenmeyer, McDonald's Corporation, Oak Brook, IL

9:15–10:15 a.m.

Law Professors' Panel: Recent Developments

Our real estate faculty experts will report on recent appellate cases relevant to your practice in a lively open forum setting. They will discuss topics including:

- Adverse possession;
- Estates and future interests and concurrent estates;
- Landlord-tenant issues;
- Easements, real covenants, and equitable servitudes;
- Conveyancing;
- Public land use controls; and
- Mortgages and foreclosure practices.

Program Chair and Moderator:

- Tanya Marsh, Wake Forest School of Law, Winston-Salem, NC

Speakers:

- Benjamin Barros, Widener University School Law Harrisburg, Harrisburg, PA
- John Lovett, Loyola University New Orleans College of Law, New Orleans, LA
- John V. Orth, University of North Carolina, Chapel Hill, NC

9:15–10:15 a.m.

What's the Big Deal?! Issues in Negotiating Large Office Leases

Negotiating large office leases often involves more than just dealing with the same old issues on a bigger scale. Issues tend to get negotiated more heavily on larger deals and these "big deal" issues and complications often increase exponentially as the square footage involved increases. This program will identify some of the more critical issues that may arise during the negotiation of a large office lease, and the panelists will provide drafting and negotiating tips to address these issues including:

- Security for performance (by both tenants and landlords);
- Construction obligations and timing;
- Tenant expansion and exit flexibility;
- Holdover;
- Building services; and
- Information technology and telecommunications.

Program Chair and Moderator:

- Scott Dibbs, Hill Ward Henderson, Tampa, FL

Speakers:

- Alan M. DiSciullo, Shearman & Sterling LLP, New York, NY
- Joel W. Heydenburk, Jackson Walker LLP, Fort Worth, TX

10:30–11:30 a.m.

Solar Panel Siting Negotiations: Leasing and Land Use Issues and Special Considerations for Government Property

State and federal incentives for solar panel projects continue to grow. While solar power remains marginally more expensive than conventional power, siting solar panel projects may now present more financial incentives as well as unique challenges to solar power providers. Our panel will explore critical dimensions of a solar panel siting project negotiation including:

- Siting rights agreements (lease, easement, or license) with solar energy system providers and critical clauses in these agreements;
- Environmental and land use requirements for solar panel projects; and
- How to overcome resistance for land use reasons.

Program Chair:

- Louise Claire Adamson, Perkins Coie LLP, San Francisco, CA

Speakers:

- Jack Fersko, Greenbaum Rowe Smith & Davis LLP, Westfield, NJ
- Minming Wu, Bay Area Rapid Transit District, Oakland, CA

10:30–11:30 a.m.

Conflicts: Have the Rules Changed?

A review of the ethical issues and rules regarding:

- Joint representation of clients;
- Lawyers changing law firms; and
- Issue conflicts.

Program Chair and Speaker:

- Michael H. Rubin, McGlinchey Stafford PLLC, Baton Rouge, LA

1:30–2:45 p.m.

Fannie Mae and Freddie Mac Loan Originations in the New World Order

Since being placed under conservatorship, there has been a significant rise in Freddie Mac's and Fannie Mae's securitized loan product. These loans (Freddie's Capital Markets Execution product and Fannie's Guaranteed Multifamily Structures and Mortgage Backed Securities products) now constitute the vast majority of the loans originated by Freddie Mac and Fannie Mae. This program will provide an overview of these products and their place in and impact on the CMBS market, and will address:

- Basic deal structure under the referenced products;
- Recent changes in the Freddie and Fannie form of multifamily loan documents;
- Scope of the borrower's and guarantor's personal liability under the new forms;
- Rights of the Borrower to transfer the mortgaged property or interests in the borrower;
- Counsel's ability, if any, to negotiate the new forms; and
- Other hot topics, including preferred equity.

Program Chairs:

- Dianne S. Coscarelli, Thompson Hine LLP, Cleveland, OH
- Kellye C. Clarke, Keegan DeVol & Clarke PLC, Alexandria, VA

Moderator:

- Anna A. Mahaney, Ballard Spahr LLP, Baltimore, MD

Speaker:

- Representatives from Fannie Mae/Freddie Mac

1:30–2:45 p.m.

NEPA at 42: Modernizing, Updating and Reinvigorating a Middle Aged Statute

In 2010, an effort began to "modernize and reinvigorate" the National Environmental Policy Act. A pilot project was launched seeking innovative approaches to completing environmental reviews more efficiently and effectively. Our panel will examine the status of these efforts, what the results portend for the future of environmental reviews, and discuss guidance documents issued over the last few years covering:

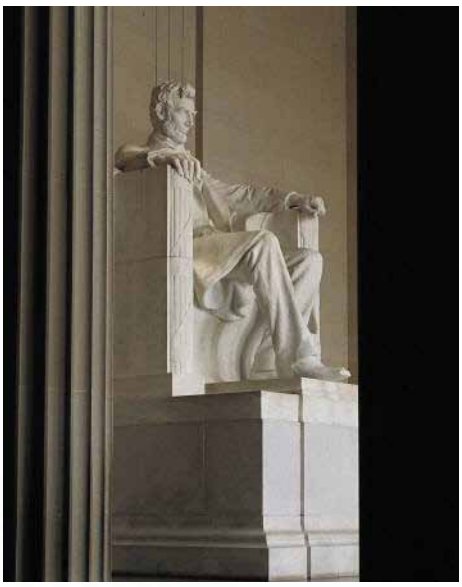
- NEPA efficiencies;
- Categorical exclusions;
- Mitigation;
- Monitoring; and
- Climate change.

Program Chair:

- Robert A. Stout Jr., Whiteman Osterman & Hanna LLP, Albany, NY

Speakers:

- Robert Dreher, Environment and Natural Resources Division, U.S. Department of Justice, Washington, DC



3–4:15 p.m.

New HUD Initiatives Designed to Help Finance Affordable Housing

Obtaining financing for affordable housing developments, especially existing multi-family rental properties in need of rehab and re-capitalization, can be very challenging. Our program will provide insight and details on new HUD programs available to the affordable housing industry.

- New HUD programs available to the affordable housing industry;
- Recent HUD programs and tools for deteriorating properties; and
- Effect of withdrawal or opting out of affordable housing programs.

Program Chairs:

- Jeffrey C. Adams, Arnall Golden Gregory LLP, Atlanta, GA
- Cynthia L. Paine, Reno & Cavanaugh PLLC, Washington, DC

Speakers:

- Althea Forrester, Associate General Counsel for Assisted Housing and Community Development, Washington, DC
- Millie Potts, Associate General Counsel for Insured Housing, Washington, DC
- Kathy Soroka, Special Assistant to the HUD General Counsel, Washington, DC
- George L. Weidenfeller, Reno & Cavanaugh PLLC, Washington, DC

3–4:15 p.m.

Bridging the Gap: My Loan is Due, Now What Do I Do?

At the end of 2012, there were over $50 billion in delinquent CMBS loans. In 2013, there will be over 4,000 loans totaling nearly $50 billion in additional CMBS loans coming due. Balloon maturity and default risk remain high as banks and life insurance companies have not demonstrated the appetite to refinance the totality of CMBS maturities. Underwriting requirements have tightened. Values remain depressed in many markets. What are the sources of capital to finance commercial real estate and what does it take to get them? Our panel will discuss:

- Equity financing options, such as mezzanine financing, TIC offerings, and private equity placements;
- Debt financing options, such as take-back and assumption of debt and non-traditional lenders–do the old rules apply?
- Tax credit financing–state and federal programs and requirements.

Program Chair:

- John P. McNearney, Husch Blackwell LLP, St. Louis, MO

Speakers:

- Wogan Bernard, Chaffe McCall LLP, New Orleans, LA
- William G. Rothschild, Sutherland Asbill & Brennan LLP, Atlanta, GA
- Kenneth M. Jacobson, Katten Muchin Rosenman LLP, Chicago, IL



Registration

Symposia Registration Fee

The registration fee includes access to all programs and meetings, one CD or flash drive with all CLE program materials, continental breakfast (both days), refreshments during scheduled breaks, and a reception with the sponsors.

Rates

General Attendee	$650	
ABA Member	$625	
RPTE Member	$535 (On or before by March 22, 2013)	$575 (After March 22, 2013)
One Day Symposia Admission	$315	
First Time Attendee	$400	
Academic/Government Attendee	$325	
Law Student Attendee	No Charge	
First Time Attendee of a Minority Bar Association	No Charge	
Program Materials Only	$95	

Ticketed Events

Thursday, May 2	Groups & Committees Luncheon	$25
Thursday, May 2	Symposia Reception Guest Ticket without Guest Fee	$25 $225
Friday, May 3	Trust and Estate Division Luncheon	$50
Friday, May 3	Real Property Division Luncheon	$50

A $125 fee will entitle your spouse/guest to attend the Symposia reception and two breakfasts. (Children under the age of 12 may attend these functions free of charge).

Registering Online

Register online at www.ambar.org/rptesymposia. Members will need your ABA ID number, located on your ABA membership card or on the mailing label above your name on this brochure. Non-ABA members may register online by creating a new customer account. You can also join the Section to take advantage of the discounted member rates. Please contact (800) 285-2221 for help with the online registration system.

On-site registration will take place at the Capital Hilton during the following hours:

Wednesday, May 1	1 – 5 p.m.
Thursday, May 2	7 a.m. – 5 p.m.
Friday, May 3	7 a.m. – 4 p.m.

PLEASE NOTE: On-site registration will include an additional $50 administrative fee. For additional information regarding registration, please contact Michael Kesler at (312) 988-5260.

Cancellation Policy

Requests for refunds must be made in writing and emailed to Michael.Kesler@americanbar.org by April 12, 2013. A $75 administrative fee will be deducted from the refund. The Section will gladly accept substitute registrants for cancellations received after April 12, 2013; however, refunds will not be given after that date.

General Information

Program Materials

Meeting materials will be available to paid registrants in the following formats:

1. **Mobile App:** A mobile meeting app with complete program information including written materials will be available for download.
2. **Web:** A link to the materials will be available to registrants on the RPTE website for downloading or printing.
3. **CD/Flash Drive:** Included in attendee's registration packet.
4. **Print kiosk:** Available on-site at the meeting.

All registered attendees will receive a link to program materials and additional meeting information by email approximately two weeks prior to the meeting.

In the event that you are unable to attend the Symposia, a CD or flash drive of the program materials is available for $95. CDs and flash drives may be purchased through the online registration system, www.ambar.org/rptesymposia, by choosing the "Materials Only" option.

Airline Information

The ABA offers discounted airfares on selected airlines. Contact Orbitz for Business, the ABA's official travel management company at (877) 222-4185 or visit the ABA travel website at www.americanbar.org.

Hotel Reservations

All Symposia meetings and events will take place at the Capital Hilton, 1001 16th Street NW, Washington, DC. A block of sleeping rooms has been reserved at the Capital Hilton from Wednesday, May 1, 2013 through Sunday, May 5, 2013 at a group rate of $294 per night for a single or double room. The group rates are guaranteed until the block is full or until 6 p.m. EST, Tuesday, April 2, 2013. Reservations received after 6 p.m. on April 2, 2013 will be based on availability. Be sure to mention that you are attending the ABA Section of Real Property, Trust and Estate Law Symposia when making your hotel reservations.

For reservations: 1-800-Hiltons

CLE Credit

Accreditation has been requested for this program from every state that has mandatory continuing legal education (MCLE) requirements for lawyers. Please be aware that each state has its own rules and regulations, including its own definition of CLE and manner of commuting CLE hours. Certificates of Attendance will be available at the conclusion of the program for both attendees and speakers.

Conference Attire

Business casual is recommended for Symposia attendees.

To Reach Us Through The Web

For more information on the Spring Symposia and to register online, log on to the RPTE web site at: www.ambar.org/rptesymposia.

Thank You

Thank you to the Division CLE Committees and a special thank you to the 2013 Spring CLE Symposia Education Planning Committee and Host Committee.

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2012 - 2013

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Group or Committee Participation–Get Involved!

Join one or more groups or committees covering the most important areas of trust and estate and real property practice.

- Collaborate with colleagues across the country on substantive conference calls, list serve discussions, and at ABA and Section meetings.
- Discover practical planning, drafting and business development strategies.
- Work on legislative issues for a particular law specialty on a national and/or state level.
- Get Published! Group and committee work provides much of the basis for the Section's high quality educational programs and content for the Section's publications.

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- **RPTE eReport**–A bi-monthly electronic publication featuring news articles, Section events and activities, and resources for young lawyers and law students.
- **Probate & Property**–The Section's bi-monthly flagship magazine providing lawyers with practical information on real property and trust and estate planning.
- **Real Property, Trust and Estate Law Journal**–Published 3x/year, the journal providing in-depth articles of interest to real property, and trust and estate law lawyers.

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