

# What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida

*Practical advice from out-of-state practitioners*

## Why attend?

MCLE is pleased to welcome a distinguished panel of estate planning specialists from Connecticut, Maine, New Hampshire, Rhode Island, Vermont, and Florida in one session concentrating on the laws in those jurisdictions. This seminar addresses the de-coupled separate estate tax regimens in the other New England states and other important laws of each New England state apart from Massachusetts, and laws in Florida that bear on your snowbird (seasonal) residents of Florida and those who may want to adopt a Florida domicile. Knowledge of these jurisdictions is crucial for an estate planner here in Massachusetts who may have clients with real property located in those jurisdictions, and in the case of Florida, who may have clients who either winter there or who may be considering a change of domicile to the sunshine state. Further, let's face it, you may end up with a client domiciled in one of those states for whom you will be preparing estate plan documents for review and approval by local counsel in the subject jurisdiction and you want to have your initial drafts of estate plan documents close to mark in terms of their efficacy under local law.

### Special Reason To Attend—The Other Five (Other than Massachusetts) New England State Specific Jurisdictional Presentations

Each panelist focuses on the laws of his/her jurisdiction of expertise covering estate tax provisions with emphasis on those with specific impact on non-domiciliaries owning real property in the subject state, real estate provisions, estate related uniform laws adopted in the jurisdiction, and other aspects of the law of each state that bear on clients that are connected with these states.

### Second Special Reason To Attend—Important Florida Laws With Which You Need To Be Familiar

This seminar also addresses change of domicile procedures, the Florida homestead law, spousal rights under Florida law including elective share, execution requirements for Florida wills and trusts, and creditor protection techniques in Florida.

### A Third Special Reason To Attend—Familiarity with the Unlicensed Practice of Law Provisions in Each Jurisdiction

Each panelist touches on local provisions pertaining to the unlicensed practice of law.

## Agenda and written materials

- ▶ A State-Specific Presentation for
  - Connecticut
  - Maine
  - New Hampshire
  - Rhode Island
  - Vermont
  - Florida
- ▶ "Ask the Experts" Q&A Session

## FACULTY

Jon E. Steffensen, Esq., Chair  
*Steffensen, Herman & Doggett LLC, Boston*

Nicole D. Fitzgerald, Esq.  
*Holland & Knight LLP, Miami, FL*

Kurt E. Klebe, Esq.  
*Verrill Dana LLP, Portland, ME*

Mark A. Langan, Esq.  
*Dinse, Knapp & McAndrew, PC, Burlington, VT*

David T. Riedel, Esq.  
*Adler, Pollock & Sheehan, PC, Providence, RI*

Irving S. Schloss, Esq.  
*Murtha Cullina LLP, Madison, CT*

William V.A. Zorn, Esq.  
*McLane, Graf, Raulerson & Middleton, PA, Manchester, NH*

## WEBCAST—Live or later!

9:00 a.m. – 12:00 p.m.,  
Tuesday, May 25, 2010  
Program No. 2100396WBC  
Register at [www.mcle.org](http://www.mcle.org)

## BOSTON

9:00 a.m. – 12:00 p.m.,  
Tuesday, May 25, 2010  
MCLE Conference Center,  
10 Winter Place, via Winter Street  
Program No. 2100396P01

2.75 Substantive Credits

## TUITION includes written materials

- ▶ MCLE Sponsor Members . . . . . \$195
- ▶ New lawyers admitted to law practice after 2005, pending admittees and law students . . . . \$145
- ▶ All Others . . . . . \$225

## CAN'T ATTEND?



View the webcast—live or later, or download the mp3 recording at [www.mcle.org](http://www.mcle.org)

Available after June 1



Written materials  
▷ MCLE Sponsor Members . . . \$95  
▷ Nonmembers . . . . . \$105



Audio CD  
▷ MCLE Sponsor Members . . \$125  
▷ Nonmembers . . . . . \$135

Choose from 5 easy ways to register and order!

- ▶ **ONLINE** enter your credit card order at [www.mcle.org](http://www.mcle.org).
- ▶ **MAIL** this order form with payment to MCLE, Inc., Ten Winter Place, Boston, MA 02108-4751.
- ▶ **FAX** your credit card order 24 hours a day to 617-482-9498.
- ▶ **CALL IN** your credit card order to 800-966-6253, Monday – Friday, 8:30 a.m. – 5:30 p.m.
- ▶ **WALK UP** on the day of the program or **DROP IN** to MCLE’s bookstore, Monday – Friday, 8:30 a.m. – 5:30 p.m.

1 CUSTOMER INFORMATION

Year Admitted to MA Bar \_\_\_\_\_ Title (if any) \_\_\_\_\_ BBO# \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Firm/Agency \_\_\_\_\_

Street Address \_\_\_\_\_ Suite/Floor \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP+4 \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

2 ORDER DETAILS

Scholarships are available for attorneys with financial need who certify that they are unable to attend a seminar without financial aid by writing, faxing 617-482-9498 or e-mailing [scholarships@mcle.org](mailto:scholarships@mcle.org) at least two weeks before the program.

Not an MCLE Sponsor Member? Become one today and receive the MCLE Sponsor Member discounted prices on this order! . . . . . (\$35 for lawyers admitted after 2005; \$95 all others) . . . . . **MCLE SPONSOR MEMBER DUES** \$ \_\_\_\_\_

PROGRAMS

**WEBCAST PROGRAM:** What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida; 2100396WBC . . . . . Register at [www.mcle.org](http://www.mcle.org)

**IN-PERSON PROGRAM:** What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida; 2100396P01; Boston . . . . . \$ \_\_\_\_\_

**PROGRAMS SUBTOTAL . . . . .** \$ \_\_\_\_\_

PROGRAM MATERIALS & AUDIO CDs

**PROGRAM MATERIALS:** What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida; 2100396PMA . . . . . \$ \_\_\_\_\_

**AUDIO CD:** What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida; 2100396PCD . . . . . \$ \_\_\_\_\_

**Shipping & handling** \$ 7.50

**PROGRAM MATERIALS & AUDIO CDs SUBTOTAL . . . . .** \$ \_\_\_\_\_

3 PAYMENT METHOD

**GRAND TOTAL** \$ \_\_\_\_\_

Order confirmation? Enter your email address: \_\_\_\_\_

Check payable to MCLE enclosed               

Card number \_\_\_\_\_ Expiration date \_\_\_\_\_

Cardholder's name \_\_\_\_\_ Cardholder's signature \_\_\_\_\_

**M C L E**

Keep raising the bar.®

**P R O G R A M S**

**WEBCAST**  
9:00 a.m. – 12:00 p.m.  
Tuesday,  
May 25, 2010

**BOSTON**  
9:00 a.m. – 12:00 p.m.  
Tuesday,  
May 25, 2010

REGISTER...By mail, e-mail, phone, online, or at the door!

Practical advice from out-of-state practitioners

# What Every Estate Planner in Massachusetts Needs To Know About the Laws of the Other New England States & Florida

**BEST Practices.**  
**BEST Prices.**  
Exclusively for  
**NEW LAWYERS & SPONSOR MEMBERS!**