

SEMINAR

What Every Estate Planner Needs to Know About the Laws of Other New England States & Florida

Practical advice from practitioners in and outside the Commonwealth

MCLE is pleased to welcome a distinguished panel of estate planning specialists from Massachusetts, other New England states, and Florida in one program concentrating on the laws in those jurisdictions. This seminar addresses the estate tax regimens and important laws of each New England state and laws in Florida that bear on your seasonal residents of Florida as well as 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 spend winter there or who may be considering a change of domicile to the sunshine state.

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. Learn to prepare estate plan documents for review and approval by local counsel in the subject jurisdiction, and have your initial drafts of estate plan documents close to mark in terms of their efficacy under local law.

Agenda

- State-Specific Presentations for New England and Florida
- Important Laws of Florida, Change of Domicile Procedure, Execution Requirements for Florida Wills and Trusts
- Local Provisions Pertaining to the Unlicensed Practice of Law
- “Ask the Experts” Q&A Session

Faculty

Jon E. Steffensen, Esq., *McLane Middleton, Boston, MA*, Chair
Kurt E. Klebe, Esq., *Verrill Dana LLP, Portland, ME*
Mark A. Langan, Esq., *Dinse, Knapp & McAndrew, PC, Burlington, VT*
Leigh A. Newman, Esq., *Day Pitney LLP, West Hartford, CT*
Christopher Paul, Esq., *McLane Middleton, Manchester, NH*
David T. Riedel, Esq., *Adler, Pollock & Sheehan PC, Providence, RI*
Nichole D. Scott, Esq., *Holland & Knight LLP, Miami, FL*

Materials

The materials for this program include a faculty-prepared program book.



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Dates & Locations

BOSTON

Tuesday, March 6, 2018
9:00 am–12:00 noon

MCLE Conference Center,
10 Winter Place, via Winter Street
Program Number: 2180238P01

LIVE WEBCAST

Tuesday, March 6, 2018
9:00 am–12:00 noon

Register at www.mcle.org
Program Number: 2180238WBC

RECORDED WEBCAST

Tuesday, March 20, 2018
2:00 pm–5:00 pm

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Program Number: 2180238RBC

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 - 6-10 250
 - 11-25 500
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