

The Florida Bar Continuing Legal Education Committee
and Tax Section present

**Intermediate
and
Advanced**



THE FLORIDA BAR

**Live
webcast
available!**

2016 Annual Wealth Protection Seminars

Thursday - April 14, 2016

Essential Updates and

Wealth Protection Building Blocks

Intermediate Level - Course No. 2211R

Special price for new lawyers!

Registrants can attend speaker's dinner!

Friday - April 15, 2016

A Deep Dive into Wealth Protection/Tax and

Advanced Planning

Advanced Level - Course No. 2053R



Hyatt Regency Downtown Miami
400 S.E. Second Avenue, Miami 33131
305-358-1234

www.miamiregency.hyatt.com

DAY 1

ESSENTIAL UPDATES & WEALTH PROTECTION BUILDING BLOCKS

Course# 2211

8:15 a.m. – 8:30 a.m.

Introduction and Orientation

Denis Kleinfeld, Miami

8:30 a.m. – 10:15 a.m.

The Importance of Having a Vibrant Asset Protection Practice

What We Are Going to Accomplish Today – Asset Protection In A Powerful Nutshell – A Concentrated Overview and Checklist

Denis Kleinfeld, Miami

10:15 a.m. – 10:30 a.m. **Networking Break**

10:30 a.m. – 12:00 p.m.

Civil and Criminal Exposures Lawyers Could Face and How to Avoid Them

Denis Kleinfeld, Miami

Engel's Angles on Avoiding Contempt Issues, and Recent Experience

Barry Engel, Denver, CO

Ethics of Recommending Protective Structures

Recent Florida Bar Action Reviewed

Denis Kleinfeld, Miami

Alan S. Gassman, Clearwater

(Qualifies for 2.0 "hold on to your seat" ethics hours)

12:00 p.m. – 1:00 p.m.

Lunch (Included with registration)

What to Know About What the Underlying Investments and Assets Are, and How They Impact Structuring-Good as Gold, and Other Unique Investment Assets and Strategies

Michael Blank, Andbanc Advisory LLC, Miami

1:00 p.m. – 2:45 p.m.

Update on Florida and Federal Asset Protection, Tax and Bankruptcy Cases

Understanding the Impact of The Uniform Voidable Transactions Act

Consideration of Pertinent Hypotheticals Under Present and Expected Voidable Transfers Laws

Arthur C. Neiwirth, Ft. Lauderdale

Michael C. Markham, Tampa

Howard Fisher, Beverly Hills, CA

Alan Gassman, Clearwater

2:45 p.m. – 3:00 p.m. **Networking Break**

3:00 p.m. – 4:30 p.m.

Nobody Sues the Lawyer When the Client Has Plenty of Cash to Cover Losses and Taxes – Understanding Why Insurance is Critical to Successfully Preserve Financial Survival

Denis Kleinfeld, Miami

Building a Perpetual Nest Egg Protected From Creditors With Life Insurance and Annuities – Products, Costs, and Anticipated Rates of Return and Safety

Joe Eppy, The Eppy Group

Jerry Hesch's Guide to Tax Planning with Deferral and Avoidance Using INSURANCE AND ANNUITY Planning Structures

Professor Jerry Hesch, Miami

4:30 p.m. – 5:00 p.m.

Insuring Against The Risk of Marriage Failure – The Importance of Pre-Nuptials and Post-Nuptials in an Uncertain World

Alex Fisher, Beverly Hills, CA

5:00 p.m. – 6:00 p.m.

Show and Tell During Interactive Break Out Session and Cocktail Hour-Drinks on the Bar, so Don't Go Far!

6:15 p.m. – 7:30 p.m.

Dinner with speakers. Dinner Costs Not Included for Non-Speakers

7:30 p.m. – 9:30 p.m.

Evening Workshop, Accelerating Your Practice; Upgrading Clients: Building Passion and Enjoying What You Do

Participants will discuss goals, improving professional services, creative problem solving and team and intellectual growth with experienced practitioners and speakers in small breakout groups. Expect to be very happily surprised. Guests are welcome for this evening workshop.

CLE CREDITS : #2211

CLE FUNDAMENTALS PROGRAM

(Maximum Credit: 12.0 hours)

General: 12.0 hours

Ethics: 2.0 hours

Certification Credits

Tax: 12.0 hours

TAX LAW SECTION

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Terry L. Hill, Director, Programs Division

TO REGISTER



ON-LINE:

www.floridabar.org/CLE



MAIL:

Completed form with check



FAX:

Completed form to 850/561-9413

DAY 2

A DEEP DIVE INTO WEALTH PROTECTION/TAX AND ADVANCED PLANNING Course# 2053

8:00 a.m. – 8:20 a.m.

Registration

8:20 a.m. – 8:30 a.m.

Welcome and Introductions

8:30 a.m. – 9:00 a.m.

A Brief Review of Important Nuts and Bolts of Asset Protection Planning and What We Are Going to Cover Today

Alan Gassman, Clearwater

9:00 a.m. – 10:45 a.m.

Domestic Asset Protection Trust Planning Opportunities and Strategies. Jurisdictional Choices and Characteristics. What You Haven't Thought Of and Didn't Learn in Kindergarten

Jonathan Gopman, Naples

10:45 a.m. – 11:00 a.m. **Networking Break**

11:00 a.m. – 12:00 p.m.

Foreign Asset Protection Trust Planning Opportunities, and Jurisdictional Choices and Characteristics What Is Happening and What Can Be Done How to Recognize When Offshore Works Best, and When it Doesn't

Denis Kleinfeld, Miami

Barry Engel, Denver, CO

12:00 p.m. – 1:00 p.m.

Lunch (Included in Registration)

The Lawrence Case and US v Grant, a Study in Contrasts

Ronald Neiwirth, Gordon & Rees, Miami

1:00 p.m. – 2:45 p.m.

Alan Gassman's Guide to How to Put Together Interactive Asset Protection Plans That Work - Something Old, Something New, Something Borrowed, In Fact Quite A Few

Alan Gassman, Clearwater

2:45 p.m. – 3:00 p.m.

Networking Break

3:00 p.m. – 5:00 p.m.

Crucial Conversations - You May Hear It Here First: The Ten Most Common Asset Protection Myths and Mistakes - And How to Avoid Them

Howard Fisher, Beverly Hills, CA

Alex Fisher, Beverly Hills, CA

Reveal The 6 Keys to Effective Wealth Protection Planning

Denis Kleinfeld, Miami

Alan Gassman, Clearwater

Stump the Panel - All Remaining Questions to be Answered

WEBCAST REGISTRATION

To Register Go to:

<http://tinyurl.com/FloridaBarCLE2211R>

<http://tinyurl.com/FloridaBarCLE2053R>

Section Members.....\$320.00 ea.

Section Members.....\$230.00 ea.

Non Members.....\$380.00 ea.

Non Members.....\$290.00 ea.

Please call 877-880-1335 for assistance with webcast registration



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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CLE CREDITS: #2053

CLE ADVANCED PROGRAM

(Maximum Credit: 9.5 hours)

General: 9.5 hours

Ethics: 1.0 hours

Certification Credits

Tax: 9.5 hours

REFUND POLICY

A \$25 service fee applies to all requests for refunds. Requests must be in writing and postmarked no later than two business days following the live course presentation or receipt of product. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. Registrants who do not notify The Florida Bar by 5:00 p.m., 4/7/16 that they will be unable to attend the seminar, will have an additional \$55.00 retained. Persons attending under the policy of fee waivers will be required to pay \$55.00

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Register me for the Asset Protection Seminars

ONE LOCATION: 400 SOUTH EAST SECOND AVE. 33131, MIAMI, FL (APRIL 14-15, 2016)

TO REGISTER OR ORDER COURSE BOOKS, AUDIO CD, OR DVD BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department, 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.**

In Person Attendance (Please check one)

REGISTRATION FEE: #2211R 4-14-16

Essential Updates

- Member of the Tax Section: \$220.00
- Non-section member: \$280.00
- Full-time law college faculty or full-time law student: \$118.00
(Includes attorneys practicing less than three years.)
- Persons attending under the policy of fee waivers: \$55.00

REGISTRATION FEE: #2053R 4-15-16

A Deep Dive into Wealth

- Member of the Tax Section: \$230.00
- Non-section member: \$290.00
- Full-time law college faculty or full-time law student: \$173.00
- Persons attending under the policy of fee waivers: \$55.00

METHOD OF PAYMENT (CHECK ONE):

- Check enclosed made payable to The Florida Bar
- Credit Card (Fax to 850/561-9413.)

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Enclosed is my separate check in the amount of \$60 to join the Tax Law Section. Membership expires June 30, 2016.

COURSE BOOK – AUDIO CD – ON-LINE – PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 04/15/16. TO ORDER COURSE BOOKS OR AUDIO CD or DVD, fill out the order form above, including a street address for delivery. Please add sales tax.**

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida.

COURSE #	COURSE BOOK	AUDIO-Section Member <small>(include electronic course materials)</small>	AUDIO CD-NON-Section <small>(include electronic course materials)</small>	DVD-Section Member	DVD-NON-Section
2211	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$220 plus tax	<input type="checkbox"/> \$280 plus tax	<input type="checkbox"/> \$330 plus tax	<input type="checkbox"/> \$390 plus tax
2053	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$230 plus tax	<input type="checkbox"/> \$290 plus tax	<input type="checkbox"/> \$340 plus tax	<input type="checkbox"/> \$400 plus tax

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