



THE
FLORIDA
BAR
CLE

The Florida Bar Continuing Legal Education Committee and the
Tax Section present

Annual Wealth Protection 2009

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

One Location: May 22, 2009

The Diplomat Country Club & Spa • 501 Diplomat Parkway

Hallandale Beach (Fort Lauderdale), FL 33009 • (888) 627-7218

Course No. 0760R

Lawyers and other professionals are being called upon to devote more of their technical expertise and life experience in helping clients achieve safety and security in a volatile economy and turbulent litigation system. This program will focus on asset protection issues which all lawyers and other professionals need to know to properly and ethically advise their clients.

8:30 a.m. — 9:00 a.m.

Late Registration

9:00 a.m. — 10:30 a.m.

How a Planner Goes About Effectively Protecting Business and Investment Assets

Alan S. Gassman, Esq., Gassman, Bates and Associates, P.A., Clearwater, FL

10:30 a.m. — 10:40 a.m.

Break

10:40 a.m. — 11:30 a.m.

Being Careful Out There: Areas of Civil Liability Exposure for the Asset Protection Planner

Barry S. Engel, Esq., Engel & Reiman P.C., Denver, CO

11:30 a.m. — 12:20 p.m.

When Things Go Wrong: What the Asset Protection Lawyer Needs to Know About Foreclosures, Guarantee Liability, Bank Negotiations, and Other Clash Points

Arthur C. Neiwirth, Esq., Rothstein, Rosenfeldt & Alder, Fort Lauderdale, FL

12:20 p.m. — 1:10 p.m.

Lunch (Included in registration fee)

1:10 p.m. — 2:00 p.m.

When Offshore Planning Comes Home to Florida: The Lessons of UBS and Other Juicy Matters

Howard S. Fisher, Esq., The Law Offices of Howard S. Fisher, LLP, Beverly Hills, CA

2:00 p.m. — 2:50 p.m.

Best Practices and the Client Relationship: Selection, Interview, Fee Agreements and Investigations Success Begins with a Solid Foundation

Richard J. Alan Cahan, Esq., Becker & Poliakoff, Coral Gables, FL

2:50 p.m. — 3:00 p.m.

Break

3:00 p.m. — 4:00 p.m.

The Nuts and Bolts of Domestic Asset Protection Trusts

Denis A. Kleinfeld, Esq., Rothstein, Rosenfeldt & Adler, Fort Lauderdale, FL

4:00 p.m. — 5:00 p.m.

Your Client Has Exposure and So Do You - Asset Protection Hidden Danger: Making Sure the Asset Protection Structure is in Compliance with the IRS

Carl H. Linder, Esq., Rothstein, Rosenfeldt & Adler, Fort Lauderdale, FL

TAX SECTION

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CLE CREDITS

CLER PROGRAM

(Max. Credit: 8.0 hours)

General: 8.0 hours

Ethics: 1.0 hour

CERTIFICATION PROGRAM

(Max. Credit: 6.0 hours)

Tax Law: 6.0 hours

Wills, Trusts & Estates: 6.0 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

REFUND POLICY: Requests for refund or credit toward the purchase of the CD / audio or course books for 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. Registrants who do not notify The Florida Bar by 5:00 p.m., May 15, 2009 that they will be unable to attend the seminar, will have an additional \$45 retained. Persons attending under the policy of fee waivers will be required to pay \$45.

HOW TO
REGISTER



ON-LINE:

www.floridabar.org/CLE



MAIL:

Completed form w/check



FAX: 850/561-5816

Form w/credit card info.

HOTEL RESERVATIONS: A block of rooms has been reserved at the The Diplomat Country Club & Spa, at the rate of \$249 single/double occupancy. To make reservations, call the The Diplomat Country Club & Spa directly at (888) 627-7218. Reservations must be made by 4/30/2009 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

Register me for the "Annual Wealth Protection 2009" Seminar

ONE LOCATION: (318) THE DIPLOMAT COUNTRY CLUB & SPA, HALLANDALE BEACH (MAY 22, 2009)

TO REGISTER OR ORDER AUDIO CD 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.**

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REGISTRATION FEE (CHECK ONE):

CDS: Course No. 0760R

- Member of the Tax Section: \$235
- Non-section member: \$260
- Full-time law college faculty or full-time law student: \$152.50
- Persons attending under the policy of fee waivers: \$45
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.) Fee Waivers are only applicable for in-person attendees.

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Private taping of this program is not permitted. **Delivery time is 4 to 6 weeks after 05/22/09. TO ORDER AUDIO CD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax to the price of tapes or books. Tax exempt entities must pay the non-section member price.**

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