

31ST ANNUAL
RPTe



NATIONAL CLE CONFERENCE



Be Revolutionized!

May 9 – 10, 2019 | Westin Copley Place | Boston, MA



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



Message from the Section Chair:

Please join me on May 9-10, 2019 as we return to the Westin Copley Square hotel in Boston for the Section's 31st National CLE Conference (previously known as the Spring Symposia).

Come hear some of the nation's leading experts discuss the latest developments in real estate and trust and estate law as you capture a year's worth of CLE credits.

Network with attorneys and other professionals from across the country at multiple receptions, in addition to the Thursday working lunch, hosted by our Section's many groups, and our division lunches on Friday.

Take in panoramic views of New England at our Thursday night reception and dinner at the Top of the Hub.

And take time to take in the sights of one of America's greatest cities.

I look forward to seeing you in Boston in May.



David English

David English

2018 – 2019 Chair of the ABA Section of Real Property, Trust & Estate Law
W.F. Fratcher Professor of Law, University of Missouri
Columbia, MO

Boston

NETWORKING EVENTS AND MEETING HIGHLIGHTS

WEDNESDAY, MAY 8, 2019

1 - 5 PM

Pre-Conference CLE Program: Disability and Medicaid Planning – What Can You Do on Your Own and When Do You Need to See a Specialist

Cost: \$25; pre-registration required

The population is aging and individuals are concerned about whether they or their parents will need to qualify for some type of government benefits and whether these benefits can be acquired without having to spend all the individual's resources. Special Needs Planning is often looked at with an eye towards a disabled child, but planning with the aging parent of a child with a disability is a growing issue. This three-part program is designed to provide useful information to the community at large including local bar associations, pro bono, legal aid, law schools, and attorneys who may not specialize in this practice area. Read more about the three hour-long individual session descriptions online.

5:30 - 6:30 PM

WELCOME RECEPTION

Welcome back to The Hub, The City on a Hill, The Cradle of Liberty, Beantown...Boston! All attendees are invited to attend this complimentary reception to help kick off the 31st Annual RPTE National CLE Conference.

THURSDAY, MAY 9, 2019

7 AM - 5 PM

HOSPITALITY AREA

Continental breakfast in the morning and refreshments during scheduled breaks will be available for all meeting registrants. Be sure to stop by our sponsor's booths which will be open all day.

12:15 - 1:30 PM

GROUP AND COMMITTEE BOX LUNCHES

Cost: \$30

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.

4:30 - 5 PM

FIRST-TIME ATTENDEE RECEPTION

We invite all first-time attendees of the National CLE Conference to meet and mingle with RPTE leadership for a short complimentary reception.

5 - 6 PM

SPONSOR RECEPTION

Join us for complimentary cocktails as we thank our 2019 conference sponsors for their generous support. For a complete list of our sponsors, see the last page of this brochure.

7 - 10 PM

CONFERENCE RECEPTION

Cost: \$50/attendee; \$100/guest

Location: Top of the Hub, Prudential Center (transportation on own)

Attendees and their guests are invited to attend this annual reception, held on the 52nd floor of the Prudential Center with spectacular views of Boston. Heavy hors d'oeuvres and cocktails.

Sponsored by: **Practical Law**

FRIDAY, MAY 10, 2019

7 AM - 5 PM

HOSPITALITY AREA

Continental breakfast in the morning and refreshments during scheduled breaks will be available for all meeting registrants. Be sure to stop by our sponsor's booths which will be open all day.

11:45 AM - 12:15 PM: LUNCH

12:15 - 1:15 PM: CLE PRESENTATION

TRUST & ESTATE DIVISION LUNCHEON: Bright Thoughts from the Luminaries Panel

Cost: \$50

The speakers will provide guidance on conundrums, opportunities, risks, and surprises they find most interesting for estate planning in 2019. In addition, the panel will address a curated selection of audience questions submitted in advance via the event app. Plated lunch to be served.

Sponsored by:



11:45 AM - 12:15 PM: LUNCH

12:15 - 1:15 PM: CLE PRESENTATION

REAL PROPERTY DIVISION LUNCHEON: Weathering the Storm: "Resilient Boston Harbor" and the Past, Present, and Future of Resiliency in Boston Harbor and Coastal Development in the City of Boston

Cost: \$50

In October 2018, Mayor Martin J. Walsh introduced his plan to ensure Boston is ready for the next big storm. The plan, entitled "Resilient Boston Harbor," is an attempt to set forth strategies to enable the City of Boston and neighboring coastal municipalities to fend off rising seas and to enable better access to Boston's 47-mile shoreline. "Resilient Boston Harbor" is just the latest in a long line of resiliency policy in the City of Boston. This panel will take a closer look at "Resilient Boston Harbor" and past resiliency efforts impacting Boston Harbor and coastal development in the City of Boston and other affected municipalities. Plated lunch to be served.

Sponsored by:



Boston

SCHEDULE AT-A-GLANCE

WEDNESDAY, MAY 8

1 - 5 PM	Conference Registration
1 - 5 PM	Pre-Conference CLE Program: Disability and Medicaid Planning – What Can You Do on Your Own and When Do You Need to See a Specialist (Pre-registration required)
5:30 - 6:30 PM	Welcome Reception (complimentary)

THURSDAY, MAY 9

7 AM - 4:30 PM	Conference Registration and Sponsors Expo
7 - 8 AM	Attendee Breakfast Sponsored by: 
8 AM - 12 PM	CLE Programming
12:15 - 1:30 PM	Group Lunches (<i>ticketed event</i>)
1:45 - 4:30 PM	CLE Programming
4:30 - 5 PM	First-Time Attendee Reception (<i>complementary</i>)
5 - 6 PM	Reception with the Sponsors (<i>complimentary</i>)
7 - 10 PM	Conference Reception at Top of the Hub (<i>ticketed event</i>) Sponsored by: Practical Law

FRIDAY, MAY 10

7 AM - 3:45 PM	Conference Registration and Sponsors Expo
7 - 8 AM	Attendee Breakfast Sponsored by: 
8 - 11:30 AM	CLE Programming
11:45 AM - 1:15 PM	Trust & Estate Division Lunch and Program (<i>ticketed event; CLE credit</i>) Sponsored by: 
11:45 AM - 1:15 PM	Real Property Division Lunch and Program (<i>ticketed event; CLE credit</i>) Sponsored by: 
1:30 - 3:45 PM	CLE Programming

Boston

TRUST AND ESTATE SYMPOSIUM CLE PROGRAMS AT-A-GLANCE

WEDNESDAY, MAY 8

1 - 5 PM	Disability and Medicaid Planning – What Can You Do on Your Own and When Do You Need to See a Specialist
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THURSDAY, MAY 9

8 - 9:15 AM	Non-Tax Estate Planning Considerations Group: Secrecy, Security and Your Annual Non-Tax Hot Topics	Litigation, Ethics and Malpractice Group: Another Boston Tea Party? Navigating Family Law Issues in Trust and Estate Litigation
9:30 - 10:45 AM	Employee Plans and Executive Compensation Arrangements Group: Everything We Wish Law Firms Knew About Their Own Employee Benefits Plans LAW PRACTICE MANAGEMENT	Charitable Planning and Organizations Group: When and How to Terminate, Consolidate or Reorganize a Private Foundation
11 AM - 12:15 PM	Business Planning Group: The New Normal in Entity Planning: A Practical Application of the Most Impactful Legislation and Judicial Rulings in Recent Memory	Elder Law and Special Needs Planning Group: Alternatives to Guardianships and Conservatorships
1:45 - 3 PM	Income and Transfer Tax Planning Group: Recent Developments and Hot Topics in Income and Transfer Tax – Part I	Practice Group: Affordable Technology for the RPTE Lawyer: Champagne Technology on a Beer Budget LAW PRACTICE MANAGEMENT
3:15 - 4:30 PM	Income and Transfer Tax Planning Group: Recent Developments and Hot Topics in Income and Transfer Tax – Part II: An Update on State Income Taxation of Trusts and Universal Life Insurance	Joint Legal Education and Uniform Laws Group: The Uniform Fiduciary Income and Principal Act: Trust Law Finally Catches Up with Trust Practice

FRIDAY, MAY 10

8 - 9 AM	The Perilous Pot Trust: Balancing Families, Flexibility and Fiduciary Duties	JOINT DIVISION Opportunity Zones (Part I): Maximizing Impact - Issues and Perspectives on How to Structure a Deal
9:15 - 10:15 AM	Brilliant Estate Planning You No Longer Need? Unwinding the Plan Due to Death, Divorce or Desire	JOINT DIVISION Opportunity Zones (Part II): Maximizing Return - Tax Benefits and Planning Opportunities
10:30 - 11:30 AM	The Qualified Business Income Deduction for Real Estate Investors and Professionals	Drafting and Defending Asset Protection Trusts and Related Strategies
11:45 AM - 1:15 PM	Trust and Estate Division CLE Program and Lunch (ticketed event) – Bright Thoughts from the Luminaries Panel	
1:30 - 2:30 PM	JOINT DIVISION The Future of Law - Technology Disruption and Business Challenges (Elimination of Bias CLE Credit)	JOINT DIVISION The Role of Outside Council in Promoting Law Firm Diversity (Elimination of Bias CLE Credit)
2:45 - 3:45 PM	JOINT DIVISION Leveraging Technology to Supercharge Your Law Practice (Law Practice Management CLE Credit)	JOINT DIVISION Why Every Attorney Should be Concerned About Cybersecurity and Available Cyber Insurance (Ethics CLE Credit)

Boston

REAL PROPERTY SYMPOSIUM CLE PROGRAMS AT-A-GLANCE

WEDNESDAY, MAY 8

1 - 5 PM	Disability and Medicaid Planning – What Can You Do on Your Own and When Do You Need to See a Specialist
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THURSDAY, MAY 9

8 - 9:15 AM	Economic Growth Through Zoning Reform: A Tale of Two Cities	REAdy to Draft and Amend REA Documents? Pointers for Drafting and Amending REA Documents in Connection with the Development or Redevelopment of a Project
9:30 - 10:45 AM	What Every Real Estate Attorney Needs to Know About Surveys and Working with Surveyors	Uniform Commercial Code Opinions in Real Estate Finance Transactions: The UCC Opinions Report
11 AM - 12:15 PM	Ethical Considerations When Using Appraisers in Transactions and Litigation (Ethics CLE Credit)	The Recent Amendments to the Delaware LLC Act and Its Impact on Real Estate Transactions
1:45 - 3 PM	Hotels as the Purchase of Real Estate: The Fallacy	Healthcare Regulation Issues with Medical Office Leases - When to Call In the Experts
3:15 - 4:30 PM	Real News about Fake Insurance and Other Trends in Property Loss, Construction and Leasing	Legal Opinions in Commercial Real Estate Transactions

FRIDAY, MAY 10

8 - 9 AM	JOINT DIVISION Opportunity Zones (Part I): Maximizing Impact - Issues and Perspectives on How to Structure a Deal	The Coming Retail Apocalypse: Fact or Fiction?	Railroad Rights of Way Issues in the Face of High-Speed Rail
9:15 - 10:15 AM	JOINT DIVISION Opportunity Zones (Part II): Maximizing Return - Tax Benefits and Planning Opportunities	Factors Landlords and Landowners Should Consider While Leasing in Shared Economies	
10:30 - 11:30 AM	Conveyancing and Notarization in the Electronic Age	Professors' Corner: Hot Real Property Topics	
11:45 AM - 1:15 PM	Real Property Division Lunch and CLE Program (ticketed event) - Weathering the Storm: "Resilient Boston Harbor" and the past, present, and future of resiliency in Boston Harbor and Coastal Development in the City of Boston Sponsored by:  OLD REPUBLIC SITE MANAGEMENT SERVICES <small>MEMBER OF THE OLD REPUBLIC TITLE INSURANCE GROUP</small>		
1:30 - 2:30 AM	JOINT DIVISION The Future of Law - Generational Shifts, Technology Disruption and Business Challenges (Elimination of Bias CLE Credit)	JOINT DIVISION The Role of Outside Council in Promoting Law Firm Diversity (Elimination of Bias CLE Credit)	
2:45 - 3:45 PM	JOINT DIVISION Leveraging Technology to Supercharge Your Law Practice (Law Practice Management CLE Credit)	JOINT DIVISION Why Every Attorney Should be Concerned About Cybersecurity and Available Cyber Insurance (Ethics CLE Credit)	

Boston

TRUST & ESTATE PROGRAMS

THURSDAY, MAY 9, 2019

THURSDAY, MAY 9, 2019

8 - 9:15 AM

NON-TAX ESTATE PLANNING CONSIDERATIONS GROUP

Secrecy, Security, and Your Annual Non-Tax Hot Topics

This program will provide an update on recent non-tax cases, a discussion of planning issues involving cyber security for attorneys and clients, and an overview of the treatment of silent trusts throughout the country.

Program Co-Chair: Carole M. Bass, *Moses & Singer LLP*, New York, NY

Program Co-Chair and Moderator: Paulina Mejia, *Fiduciary Trust Company International*, New York, NY

Speakers: Andrea L. D'Ambra, *Norton Rose Fulbright US LLP*, New York, NY, Daniel F. Hayward, *Gordon, Fournaris & Mammarella, P.A.*, Wilmington, DE, Renee E. Salley, *The Salley Firm, LLC*, Atlanta, GA, Lee-ford Tritt, *University of Florida Levin College of Law*, Gainesville, FL, and Kalimah Z. White, *TD Wealth*, Wilmington, DE

8 - 9:15 AM

LITIGATION, ETHICS AND MALPRACTICE GROUP

Another Boston Tea Party? Navigating Family Law Issues in Trust and Estate Litigation

This program will address issues that arise at the intersection of family law and trust and estate law. Specifically, what steps can be taken to protect family wealth if a trust beneficiary divorces. The program will focus on the following considerations:

- Drafting and negotiating prenuptial and postnuptial agreements
- Creating and administering trusts to protect family wealth from the claims of spouses and former spouses
- Litigation and procedural issues that arise when spouses assert claims against an estate or trust

Program Chair and Speaker: Anthony R. La Ratta, *Archer & Greiner, P.C.*, Haddonfield, NJ

Moderator: Crystal M. Patterson, *Gulfstream Commercial Services, LLC*, Owensboro, KY

Speakers: Robert C. Barton, *Holland & Knight LLP*, Los Angeles, CA and Robin Drey Maher, *Levin Schreder & Carey, Ltd*, Chicago, IL

9:30 - 10:45 AM

LAW PRACTICE MANAGEMENT

EMPLOYEE PLANS AND EXECUTIVE COMPENSATION ARRANGEMENTS GROUP

Everything We Wish Law Firms Knew About Their Own Employee Benefit Plans

Law firms face unique issues in designing and operating benefit plans and policies for lawyers and staff. Small firms and solo practitioners face additional issues. This program will give an overview of a variety of issues of special concern to law firms and lawyers, as well as common errors law firms make. Panelists will address:

- “Non-standard” investments, such as real estate or non-traded interests in business organizations
- Maximizing retirement benefits for higher paid individuals
- Loan repayments by departing partners
- Distinguishing law firm employees from independent contractors
- Understanding long-term disability plans and health plans (e.g. mental health, health savings plans, wellness plans)

Program Chair and Speaker: Karen K. Suhre, *Karen K. Suhre Attorney at Law*, Dallas, TX

Moderator: John R. Paliga, *McChesney & Dale, P.C.*, Bethesda, MD

Speakers: Krisa Benskin, *Baker Botts LLP*, Houston, TX and José M. Jara, *CKR Law LLP*, New York, NY

9:30 - 10:45 AM

CHARITABLE PLANNING AND ORGANIZATIONS GROUP

When and How to Terminate, Consolidate, or Reorganize a Private Foundation

There are many circumstances when a family may no longer want to continue its private foundation, or when it may no longer be a going concern. This program will provide pointers for families in those situations, including the following:

- Options for families who want to continue their charitable gifts without the hassle of managing a foundation
- State and federal requirements for carrying out a termination, and the results of termination
- How to reorganize a private foundation into another charitable vehicle or consolidate a private foundation with another private foundation

Program Co-Chair: Toni Ann Kruse, *McDermott Will & Emery LLP*, New York, NY

Program Co-Chair, Moderator and Speaker: Jessica A. Cohan, *The Bowden Spratt Law Firm, P.C.*, Atlanta, GA

Speakers: Victoria Pambianco Ose, *McDermott Will & Emery LLP*, Chicago, IL, Michelle J. Hong, *Brown Brothers Harriman & Co.*, Philadelphia, PA, and Neil T. Kawashima, *McDermott Will & Emery LLP*, Chicago, IL

Boston

TRUST & ESTATE PROGRAMS

THURSDAY, MAY 9, 2019

11 AM – 12:15 PM

BUSINESS PLANNING GROUP

The New Normal in Entity Planning: A Practical Application of the Most Impactful Legislation and Judicial Rulings in Recent Memory

Legal developments since 2017 have fundamentally changed estate and business succession planning for closely held entities. The 2017 Tax Act, the *Lender* case, and new partnership audit guidelines substantially rewrote the income tax rules. At the same time, *Powell* and *Cahill* carry important lessons for structuring transfers of such entities. This program will:

- Bring together these and other recent developments in entity planning, analyzing the overlaps, but also providing a road map for effective planning in this new environment
- Address the unique aspects associated with operating businesses, real estate entities, and investment entities (which may range from the small “mom and pop” business to the single-family office)
- Review practical trade-offs when selecting an entity type and transferring ownership interests
- Discuss efficient use of profits interests in the family office context
- Reconcile income and estate tax aspects of recent court cases in investment entity planning

Program Chair, Moderator and Speaker: Christine R. W. Quigley, *Schiff Hardin LLP*, Chicago, IL

Speakers: Jessica R. Diaz, *Sherman & Howard L.L.C.*, Denver, CO and Ryan A. Walsh, *Hamilton Thies & Lorch LLP*, Chicago, IL

11 AM – 12:15 PM

ELDER LAW AND SPECIAL NEEDS PLANNING GROUP

Alternatives to Guardianships and Conservatorships

Guardianship issues may arise in any estate planning representation and can result in removal of an individual's right to make choices about his or her life. Most states have mandated that less restrictive alternatives to guardianships be considered before a guardianship is imposed. This presentation will discuss the following:

- Guardians and conservators, along with their alternatives
- Supported decision-making
- Advance care planning and the ABA Commission on Law and Aging's new “Counseling Guide for Lawyers”
- When a specialist attorney is needed

Program Chair and Moderator: Heidi M. Brown, *Osterhout & McKinney, P.A.*, Fort Myers, FL

Speakers: Alicia N. Graves, *Law Offices of Alicia N. Graves*, Cleveland, OH, Danielle R. Kincaid, *Ozarks Elder Law*, Ozark, MO, and Charles Sabatino, *ABA Commission on Law and Aging*, Washington, DC

1:45 – 3 PM

INCOME AND TRANSFER TAX PLANNING GROUP

Recent Developments and Hot Topics in Income and Transfer Tax – Part I

This program will highlight:

- Recent income tax and transfer tax developments of interest for clients at all levels of wealth
- Practical tips on how these developments affect your clients

Program Co-Chair: Rana H. Salti, *Kinship Trust Company LLC*, Chicago, IL

Program Co-Chair and Moderator: Stephen Liss, *UBS Financial Services Inc.*, New York, NY

Program Co-Chair and Speaker: Philip Hayes, *Bessemer Trust*, San Francisco, CA,

Speakers: Keri D. Brown, *Baker Botts LLP*, Houston, TX, Richard L. Harris, *Richard L. Harris LLC*, Clifton, NY, Carl L. King, *Culp Elliott & Carpenter, PLLC*, Charlotte, NC, Raj A. Malviya, *Miller Johnson*, Grand Rapids, MI, Wendy Olson, *TPG Financial*, Franklin, TN, and Marya P. Robben, *Gray Plant Mooty*, Minneapolis, MN, and Ryan A. Walsh, *Hamilton Thies & Lorch LLP*, Chicago, IL

3:15 – 4:30 PM

INCOME AND TRANSFER TAX PLANNING GROUP

Recent Developments and Hot Topics in Income and Transfer Tax – Part II: An Update on State Income Taxation of Trusts and Universal Life Insurance

Panelists will first discuss recent cases that are reshaping how and when states can impose income tax on trusts, including *McNeil*, *Complete AutoTransit*, *Wayfair*, *Kaestner*, and *Fielding*. In addition, they will review California's peculiar fiduciary income taxation regime, mostly through a discussion of the recent, and notorious, *Paula Trust* decision. Panelists will then turn their focus to universal life insurance, which has become one of the most popular ways to provide permanent insurance coverage. The panel will also explain:

- What is universal life insurance?
- What is the difference between guaranteed, variable, indexed, and general account universal life?
- When is each of these variations appropriate, and when should it be avoided?

Program Co-Chair: Rana H. Salti, *Kinship Trust Company LLC*, Chicago, IL

Program Co-Chair and Speaker: Philip J. Hayes, *Bessemer Trust*, San Francisco, CA

Program Co-Chair and Moderator: Stephen Liss, *UBS Financial Services Inc.*, New York, NY

Speakers: Richard L. Harris, *Richard L. Harris LLC*, Clifton, NY, Carl L. King, *Culp Elliott & Carpenter, PLLC*, Charlotte, NC, Raj A. Malviya, *Miller Johnson*, Grand Rapids, MI, Wendy Olson, *TPG Financial*, Franklin, TN, and Marya P. Robben, *Gray Plant Mooty*, Minneapolis, MN

Boston

TRUST & ESTATE PROGRAMS

THURSDAY, MAY 9 & FRIDAY, MAY 10

THURSDAY, MAY 9, 2019

1:45 - 3 PM PRACTICE GROUP

LAW PRACTICE MANAGEMENT

Affordable Technology for the RPTE Lawyer: Champagne Technology on a Beer Budget

Believe it or not, you can get great law firm technology on a tight budget. Whether you are ready to start a firm or overhaul your firm's existing technology, this program gives you a legal technology roadmap for real property and trust and estate lawyers with a focus on keeping the costs as low as possible. It will also cover the law firm technology hierarchy of needs to help you prioritize your purchases. From buying strategies, to computer configurations, to cloud services; from VOIP phone systems, to online faxing, to low-cost printing, you literally cannot afford to miss this seminar.

Program Chair: Mary E. Vandenack, *Vandenack Weaver LLC*, Omaha, NE

Speakers: Heidi Alexander, *Massachusetts Law Office Management Assistance Program*, Boston, MA and Barron Henley, *Affinity Consulting*, Columbus, OH

3:15 - 4:30 PM LEGAL EDUCATION AND UNIFORM LAWS GROUP

The Uniform Fiduciary Income and Principal Act: Trust Law Finally Catches Up with Trust Practice

The new Uniform Fiduciary Income and Principal Act (UFIPA) is ready for enactment by the states. Learn how UFIPA improves upon older Principal and Income Acts governing trust accounting with:

- Innovative unitrust conversion rules that are more flexible than any existing state statute
- A clear governing law provision to remove ambiguity
- Updated standards for discretionary adjustments between principal and income
- Expansion beyond trusts and estates to encompass other limited-term interests

Program Chair: Benjamin Orzeske, *Uniform Law Commission*, Chicago, IL

Moderator and Speaker: Turney P. Berry, *Wyatt Tarrant & Combs LLP*, Louisville, KY

Speakers: Ronald D. Aucutt, *McGuireWoods LLP*, Tysons, VA, William P. La Piana, *New York Law School*, New York, NY, and Susan D. Snyder, *The Northern Trust Company*, Chicago, IL

FRIDAY, MAY 10, 2019

8 - 9 AM

The Perilous Pot Trust: Balancing Families, Flexibility, and Fiduciary Duties

"Pot" trusts which allow a trustee to sprinkle and spray distributions among a class of beneficiaries from a single fund are often promoted as allowing a trustee to manage money in the same way that the grantor would manage money for the family. However, administering a pot trust is rarely straightforward. The trustee's ability to manage tricky family dynamics, competing interests, and different objectives is critical. This program will cover:

- Planning considerations, such as defining the class of beneficiaries, creation of a single pot versus a division along family lines, and the timing of a division or termination
- Administration issues, such as balancing divergent interests, risk tolerance, and investment objectives, communication with beneficiaries (or not), and managing (or ignoring) family dynamics

Program Chair and Speaker: Elisa Shevlin Rizzo, *The Northern Trust Company*, New York, NY

Moderator: Alex S. Tanouye, *The Northern Trust Company*, Washington, DC

Speakers: Laura Weintraub Beck, *Cummings & Lockwood LLC*, Greenwich, CT and Ryan A. Walsh, *Hamilton Thies & Lorch LLP*, Chicago, IL

8 - 9 AM

JOINT DIVISION

Opportunity Zones Part I: Maximizing Impact - Issues and Perspectives on How to Structure a Deal

This panel will focus on how Opportunity Zones work and analyze their benefits from a tax, economic development, lender, and Treasury Official's perspectives. The panel will include a presentation of actual case studies, a discussion of issues and solutions, as well as a look forward to the effect of additional regulations, revenue procedures, and program viability after December 31, 2026.

Program Co-Chair and Speaker: Philip R. Hirschfeld, *Cole Schotz PC*, New York, NY

Speakers: Jennifer M. Litwak, *Housing on Merit*, Boston, MA and F. Christopher Wooten, *Fishman Haygood LLP*, New Orleans, LA

Boston

TRUST & ESTATE PROGRAMS

FRIDAY, MAY 10

9:15 – 10:15 AM

JOINT DIVISION

Opportunity Zones Part II: Maximizing Return - Tax Benefits and Planning Opportunities

This panel will do a deep-dive review of the tax benefits and planning opportunities for investors. Tax and wealth transfer planning opportunities and challenges vary depending on whether the investor is an individual, a trust, or an entity. The discussion will address tax and non-tax considerations, as well as fiduciary duties when investing in Qualified Opportunity Funds. In addition, there will be a discussion with a Treasury Department Official and an opportunity for questions and answers.

Speakers: Michael Bernier, *Ernst & Young LLP*, Boston, MA, Joshua Caswell, *Howland Evangelista Kohlenberg Burnett LLP*, Providence, RI, and Benetta P. Jenson, *J.P. Morgan Private Bank*, Chicago, IL

9:15 - 10:15 AM

Brilliant Estate Planning You No Longer Need? Unwinding the Plan Due to Death, Divorce, or Desire

Estate planning that was brilliant at the time may nonetheless need to be revisited because of an unexpected change in financial or family circumstances, or a shift in focus to a step-up in income tax basis on death with the increased estate tax exemption. This presentation will discuss tips and traps for unwinding estate planning vehicles that are no longer needed or that are counterproductive to current goals. The panel will address:

- Unwinding vehicles such as FLPs, CRTs, QPRTs and QTIPs
- Releasing grantor trust powers
- Strategies for trusts to meet changing needs and objectives

Program Chair, Moderator and Speaker: Justin T. Miller, *BNY Mellon*, San Francisco, CA

Speakers: Emily A. Plocki, *Venable LLP*, Washington, DC, Cameron R. Seybolt, *Fredrikson & Byron, P.A.*, Minneapolis, MN, and David Scott Sloan, *Holland & Knight LLP*, Boston, MA

9:15 - 10:15 AM

Estate and Tax Planning for Intellectual Property Creatives and Entrepreneurs

This program will discuss tax and financial planning for the intellectual property of authors, music artists, visual artists, and other creatives (bloggers, start-ups, online course creators, etc.). This panel will provide attorneys with the tools to advise creative clients about estate and tax planning of their intellectual property. This program will discuss:

- Commonly missed opportunities when assisting creative clients with estate and tax planning
- Common issues that can arise in probating the estate of an artist or creative
- Preparing clients for the increased value of intellectual property after death
- Strategies for tax planning around self-employed benefits

Program Chair, Moderator and Speaker: Ramsay H. Slugg, *US Trust*, Ft. Worth, TX

Speakers: John R. Paliga, *McChesney & Dale, P.C.*, Bethesda, MD, Patrice N. Perkins, *Creative Genius Law*, Chicago, IL, and Art Steele, *Law Offices of Arnette Steele, PLLC*, McLean, VA

10:30 - 11:30 AM

The Qualified Business Income Deduction for Real Estate Investors and Professionals

This program will explore how the new Qualified Business Income deduction under 199A applies to real estate investors and professionals. Under the Tax Cuts and Jobs Act, many owners of sole proprietorships, partnerships, trusts, and S corporations may deduct 20% of their qualified business income (QBI).

This program will also explore which real estate activities generate QBI, and which do not; how the rules applicable to pass through entities and multiple-tiered entities impact common real estate structures; when different businesses can be aggregated for purposes of calculating QBI; how tax basis of depreciable property can impact the QBI deduction; and other issues related to the computation of this new and important deduction.

Program Chair and Moderator: Stephen Liss, *UBS Financial Services Inc.*, New York, NY

Speakers: Daniel L. Gottfried, *Day Pitney LLP*, Hartford, CT and Belinda G. Schwartz, *Herrick Feinstein LLP*, New York, NY

10:30 - 11:30 AM

Drafting and Defending Asset Protection Trusts and Related Strategies

This program will provide a review of the current posture of the courts and state legislation on asset protection strategies, including a glance at the efficacy of incomplete gift non-grantor (“ING”) trusts in various jurisdictions. The panel includes a litigator, a drafting attorney, and a judge who will share their first-hand experiences and perspectives. Panelists will reveal their favored approaches to common asset protection strategies in light of tax reform and new compliance requirements - old and cold or redo and renew.

Program Chair and Co-Moderator: Katarinna McBride, *Harrison & Held LLP*, Chicago, IL

Co-Moderator: Cynthia D.M. Brown, *Commonwealth Trust Company*, Wilmington, DE

Speakers: Jonathan E. Gopman, *Akerman LLP*, Naples, FL and Thomas D. Myrick, *Moore & Van Allen PLLC*, Charlotte, NC

12:15 – 1:15 PM

Bright Thoughts from the Luminaries Panel

The speakers will provide guidance on conundrums, opportunities, risks, and surprises they find most interesting for estate planning in 2019. In addition, the panel will address a curated selection of audience questions submitted in advance via the event app.

Program Chair: Carole M. Bass, *Moses & Singer LLP*, New York, NY

Boston

TRUST & ESTATE PROGRAMS

FRIDAY, MAY 10

Moderator: Karen Sandler Steinert, *Fredrikson & Byron P.A.*, Minneapolis, MN

Speakers: Turney P. Berry, *Wyatt Tarrant & Combs LLP*, Louisville, KY, Paul S. Lee, *The Northern Trust Company*, New York, NY, and Lee-ford Tritt, *University of Florida Levin College of Law*, Gainesville, FL

1:30 - 2:30 PM

JOINT DIVISION

ELIMINATION OF BIAS CREDIT

The Future of Law – Technology Disruption and Business Challenges

The RPTe Futures Practice and Guidance Task Force has worked for the past few years to identify emerging trends in the practice of law. In this program, members of the Task Force will explain how these change agents will affect our practices and the steps attorneys and the ABA can take to prepare to meet these challenges. The discussion will include:

- Generation, gender, and diversity issues
- Competition from non-lawyers
- Demand for alternative fee arrangements
- Emerging technology and impact on legal services
- Unbundling of legal services
- Contract lawyers
- Changes in consumer buying trends
- Need for innovation in the face of a profession that has struggled with change in the past
- Evolving business models

Program Co-Chair and Moderator: Dennis M. Horn, *Holland & Knight LLP*, Washington, DC

Program Co-Chair and Speaker: Mary E. Vandenack, *Vandenack Williams LLC*, Omaha, NE

Speakers: Nancy Leary Haggerty, *Michael Best & Friedrich, LLP*, Milwaukee, WI, Ira Meislik, *Meislik & Meislik*, Montclair, NJ, Ryan A. Walsh, *Hamilton Thies & Lorch LLP*, Chicago, IL, and Beth A. Wood, *The Law Offices of Beth A. Wood, PLLC*, Charlotte, NC

1:30 - 2:30 PM

JOINT DIVISION

ELIMINATION OF BIAS CREDIT

The Role of Outside Counsel in Promoting Law Firm Diversity

Outside counsel can encourage diversity in law firms through the power of the purse. This program will discuss ways that in-house counsel can encourage their outside counsel to promote diversity, such as requiring participation of diverse lawyers in projects for the client. The panelists will also discuss some initiatives taken by general counsel on a national basis to promote law firm diversity.

Program Chair and Moderator: Jo Ann Engelhardt, *Bessemer Trust*, Palm Beach, FL

Speakers: Eric M. Mathis, *MAHLE Industries Incorporated*, Farmington Hills, MI, Crystal M. Patterson, *Gulfstream Commercial Services, LLC*, Owensboro, KY, Nikki Lewis Simon, *Greenberg Traurig LLP*, Miami, FL, and Minming Wu, *Lawrence Livermore National Laboratory*, San Francisco, CA

2:45 - 3:45 PM

JOINT DIVISION

ETHICS CREDIT

Why Every Attorney Should Be Concerned about Cybersecurity and Available Cyber Insurance

The ABA Model Rule of Professional Conduct Rule 1.6(c) requires a lawyer to make reasonable efforts to prevent the disclosure of confidential client information. The comments to Rule 1.6 require lawyers to act competently to safeguard client information and use reasonable safety precautions when transmitting a client communication, and the majority of states require attorneys to understand the benefits and risks of technology as it affects their practice. Although exact meanings of "reasonable efforts," "act competently" and "reasonable precautions" may be subject to debate, doing nothing certainly won't meet the standard. The panel will discuss, and provide practical information and tips, to help you understand the following issues:

- The nature of the threat environment in cyberspace
- How to set up effective practices in your office, and identify various tools you can use, to help you keep your confidential information confidential
- The various ethical rules you need to know, as well as actions and procedures you can implement, to help you comply with those ethical rules
- Cyber security insurance, what it is and what it isn't, and whether it might be appropriate for your practice

Program Chair and Moderator: Michael D. Goler, *Miller Goler Faeges Lapine LLP*, Cleveland, OH

Speaker: Barron K. Henley, *Affinity Consulting*, Columbus, OH

2:45 - 3:45 PM

JOINT DIVISION

LAW PRACTICE MANAGEMENT

Leveraging Technology to Supercharge Your Law Practice

This panel will provide guidance on leveraging the latest technology to streamline business functions, automating processes to reduce redundancies and save time, managing workload, and attracting and pleasing the modern client. Discussion topics will include:

- Cloud storage and software products for document drafting and settlement processes
- Business management and workflow solutions
- Invoice and accounts receivable solutions
- Marketing and networking solutions

Program Chair, Moderator, and Speaker: Sarah D. Cline, *Shulman Rogers*, Potomac, MD

Speakers: Karen Hulme Alegi, *Alegi Anderson, LLC*, Frederick, MD and Sahrma A. Stevenson, *S.A. Stevenson Law Offices, LLC*, Greenbelt, MD

THURSDAY, MAY 9, 2019

8 - 9:15 AM

Economic Growth Through Zoning Reform: A Tale of Two Cities

Across the country, municipalities are closely focusing on the land-use regulations that shape their neighborhoods. Many are replacing antiquated rules with ones that alleviate burdens on both applicants and cities and foster economic growth. Attendees will learn about the recent zoning reforms in Hartford and Philadelphia and the reforms' impact on property values and will hear from the leaders of each respective city discussing their challenges and successes.

Program Chair: C. Scott Schwefel, *Shipman, Shaiken & Schwefel, LLC*, West Hartford, CT

Moderator: Karla Chaffe, *Robinson & Cole, LLC*, Boston, MA

Speakers: Sara C. Bronin, *University of Connecticut School of Law*, Hartford, CT, Alan Greenberger, *Drexel University College of Media Arts & Design*, Philadelphia, PA, and Gregory F. Servodidio, *Pullman Comley, LLC*, Hartford, CT

8 - 9:15 AM

REAdy to Draft and Amend REA Documents? Pointers for Drafting and Amending REA Documents in Connection with the Development or Redevelopment of a Project

This program will discuss how to draft REA documents for the initial development of a property, and how to amend them later for a redevelopment. The panelists will discuss the following:

- What should a property owner anticipate that its lenders, tenants and future buyers will require in an REA?
- Who must consent to REA amendments, and how does a declarant obtain consents promptly and inexpensively?
- Should a tenant leasing a small portion of a development burdened by an REA review the entire REA?
- Who is entitled to enforce an REA, and how does enforcement happen?

Program Chair, Moderator, and Speaker: Ruth Schoenmeyer, *White & Case LLP*, Chicago, IL

Speakers: Dean Alterman, *Alterman Law Group PC*, Portland, OR, David Camp, *Senn Visciano Canges P.C.*, Denver, CO, and Kathleen Dempsey Boyle, *Meltzer Purtill & Stelle LLC*, Chicago, IL

9:30 - 10:45 AM

What Every Real Estate Attorney Needs to Know about Surveys and Working with Surveyors

This program will cover the basic elements of a survey, as well as survey requirements and purposes. Attendees will learn how to efficiently and effectively work with a surveyor to address practical and title matters frequently encountered in the survey process, including:

- What is surveying and what does a surveyor do?
- What rules and requirements apply to surveys and surveyors?
- What is involved in preparing a survey and costs involved?
- Real life examples (aka horror stories)

Program Chair: Heather Johnston, *Sapphire Law Group*, Folsom, CA

Moderator: Ryan Christiansen, *Liskow & Lewis*, New Orleans, LA

Speakers: Joanne Crum, *Office of Joanne Crum*, Cobleskill, NY and Vincent Macaуда, *Millman National Land Services*, Canton, OH

9:30 - 10:45 AM

Uniform Commercial Code Opinions in Real Estate Finance Transactions: The UCC Opinions Report

The UCC Opinions Report program provides basic guidance for opinion practitioners in real estate finance transactions to consider in giving and reviewing opinion letters when there is a security interest in any or all of (1) personal property (non-real estate) collateral, (2) fixture real estate collateral and (3) non-fixture real estate collateral that is governed by the Uniform Commercial Code. Specific topics to be addressed include:

- General concepts of creation, attachment, perfection and priority
- Applying general concepts to real estate collateral and non-real estate collateral, including deposit accounts and investment property
- Choice of law issues
- Express or unstated assumptions and limitations

Program Chair: Daniel H. Devaney, *Cades Schutte LLP*, Honolulu, HI

Moderator and Speaker: William Dunn, *Clark Hill PLC*, Grand Rapids, MI

Speakers: R. Marshall Grodner, *McGlinchey Stafford PLLC*, Baton Rouge, LA, Lydia C. Stefanowicz, *Greenbaum Rowe Smith & Davis LLP*, Roseland, NJ, and Steven O. Weise, *Proskauer Rose LLP*, Los Angeles, CA

11 AM - 12:15 PM

ETHICS CREDIT

Ethical Considerations When Using Appraisers in Transactions and Litigation

Both attorneys and appraisers are professionals bound by ethical considerations. This program is designed to familiarize attendees with the ethical obligations of the legal representative when utilizing an appraiser's services in real estate transactions and real property related litigation. Topics include:

- Discussion of professional practice requirements for attorneys and an overview of the Rules of Professional Responsibility
- Discussion of professional practice requirements for appraisers and an overview of the Code of Professional Ethics of the Appraisal Institute
- Advocacy
- Reporting negative data

Program Chair: Bill Just, *Just Title, LLC*, New Orleans, LA

Moderator and Speaker: R. Marshall Grodner, *McGlinchey Stafford PLLC*, Baton Rouge, LA

Speakers: Paula Konikoff, *Paula Konikoff, Inc.*, Los Angeles, CA and C. Scott Schwefel, *Shipman, Shaiken & Schwefel, LLC*, West Hartford, CT

Boston

REAL PROPERTY PROGRAMS

THURSDAY, MAY 9

11 AM - 12:15 PM

The Recent Amendments to the Delaware LLC Act and its Impact on Real Estate Transactions

Recent amendments to the Delaware Limited Liability Company Act allow for the division of an LLC and the creation of a registered series, among other changes. These changes can have an impact on various real estate transactions. This program will discuss the changes and what lenders, borrowers, owner and investors should be aware of when a Delaware LLC is involved in a transaction.

Program Chair, Moderator, and Speaker: Joy Barrist, *Potter Anderson & Corroon LLP*, Wilmington, DE

Speaker: Matthew O'Toole, *Potter Anderson & Corroon LLP*, Wilmington, DE

1:45 - 3 PM

Hotels as the Purchase of Real Estate: The Fallacy

- What is the basic nature of legal relationships controlling management and franchise agreements
- Evaluation of the law regarding hotel management agreements
- How profitable is the hotel being purchased: the challenges of due diligence and subsequent asset management
- Subordination: non-disturbance and attornment agreements

Program Chair and Speaker: Tara Gorman, *Perkins Coie*, Washington, DC

Moderator: Steven Metzger, *Becker & Poliakoff*, Tampa, FL

Speaker: Cecelia Fanelli, *Eckert Seamans*, New York, NY

1:45 - 3 PM

Healthcare Regulation Issues with Medical Office Leases - When to Call in the Experts

This program will focus on certain healthcare issues or regulations that are problems in medical office leases. Often it is the real estate attorney who is in the best position to detect potential problems and knows when calling in the healthcare attorneys could prove to be crucial for the client. This program will focus on:

- Physician Self-Referral Law (Stark Law)
- Anti-Kickback Statute (AKS)
- Use issues, access, and other considerations

Program Chair, Moderator and Speaker: Katie Williams, *McDermott Will & Emery LLP*, Boston, MA

Speakers: Andrew Dick, *Hall, Render, Killiam, Heath & Lyman P.C.*, Indianapolis, IN and Sarah Kitchell, *McDermott Will & Emery LLP*, Boston, MA

3:15 - 4:30 PM

Real News about Fake Insurance and Other Trends in Property Loss, Construction and Leasing

Insurance policies and endorsements can legitimately give the appearance of insurance coverage where none exists. This program will describe how to spot "fake" insurance and what to do about it in:

- The construction context
- Property damage claims
- Leasing
- Litigating Third-Party Claims

Program Chair: Bill Just, *Just Title, LLC*, New Orleans, LA

Moderator: Nelse Miller, *Lewis Brisbois Bisgaard & Smith, LLP*, San Diego, CA

Speakers: Charles E. Comiskey, *RiskTech, Inc*, Houston, TX, Marie A. Moore, *Sher Garner Cahill Richter Klein & Hilbert, LLC*, New Orleans, LA, and Scott Pence, *Carlton Fields*, Tampa, FL

3:15 - 4:30 PM

Legal Opinions in Commercial and Real Estate Transactions

The Diversity and Inclusion Committee and Legal Opinions in Real Estate Transactions Committee, in partnership with the National Bar Association Real Estate Probate Law Section, will analyze the various parts of legal opinion letters that are typically given in commercial and real estate transactions. The program will include a discussion of:

- The purposes of legal opinion letters
- The due diligence required before legal opinion letters can be given
- The ethical considerations when giving legal opinion letters
- The general procedures for completion of legal opinion letters
- The legal implications and liabilities related to completing legal opinion letters

Program Chair and Moderator: Shenique Moss, *Wayne County Commission*, Detroit, MI

Speakers: Cheryl Kelly, *Thompson Coburn LLP*, St. Louis, MO, Lisa Love, *Love and Long LLP*, Newark, NJ, and Charles Menges, *McGuire Woods LLP*, Richmond, VA

FRIDAY, MAY 10, 2019

8 - 9 AM

The Coming Retail Apocalypse: Fact or Fiction?

A good deal of discussion centers on the coming "Retail Apocalypse" and how digital platforms will eliminate the great majority of retail-oriented real estate in the coming years. The effect of the digital economy on physical retail is much more nuanced, however, in that the retail landscape itself has changed. Evolving social factors such as a greater desire for experiences as opposed to physical goods, "showrooming," "omnichannelling" and other circumstances portend not a coming apocalypse but instead a fundamental change in the retail landscape, and of course, the law affecting it.

Program Chair: Manuel Farach, *McGlinchey Stafford, PLLC*, Ft. Lauderdale, FL

Speakers: Matt Epstein, *Goulston*, Boston, MA and Sarah Lemke, *New England Development*, Boston, MA

8 - 9 AM

Railroad Rights of Way Issues in the Face Of High Speed Rail

The creation of high speed rail lines presents issues and challenges for practitioners. During this program, panelists will discuss:

- Determining property interests of the railroad based on source of title in federal land grants, private land grants, and condemnation
- Determining property interests of the adjacent landowner and the railroad's bisection of property in common ownership
- Abandonment and reversion issues when the railroad no longer uses the line, including *Brandt v. United States*
- Implications for adjacent landowners with new high-speed rail such as railroad's ability to expropriate property, advice to landowners and reservation of rights in ROWs

Program Chair and Moderator: Joanne Darcy Crum, *Joanne Darcy Crum*, Cobleskill, NY

Speakers: Travis Beaton, *Sher Garner Cahill Richter Klein & Hilbert, LLC*, New Orleans, LA, Shenique Moss, *Wayne County Commission*, Detroit, MI, and Kely Quam, *Old Republic Title Insurance Company*, Minneapolis, MN

8 - 9 AM

JOINT DIVISION

Opportunity Zones Part I: Maximizing Impact - Issues and Perspectives on How to Structure a Deal

This panel will focus on how Opportunity Zones work and analyze their benefits from a tax, economic development, lender, and Treasury Official's perspectives. The panel will include a presentation of actual case studies, a discussion of issues and solutions, as well as a look forward to the effect of additional regulations, revenue procedures, and program viability after December 31, 2026.

Program Co-Chairs: Joshua Caswell, *Howland Evangelista Kohlenberg Burnett LLP*, Providence, RI and Cynthia Paine, *Katten Muchin Rosenman LLP*, Washington, D.C.

Speakers: Philip R. Hirschfeld, *Cole Schotz PC*, New York, NY, Jennifer M. Litwak, *Housing on Merit*, Boston, MA and F. Christopher Wootten, *Fishman Haygood LLP*, New Orleans, LA

9:15 - 10:15 AM

JOINT DIVISION

Opportunity Zones Part II: Maximizing Return - Tax Benefits and Planning Opportunities

This panel will do a deep-dive review of the tax benefits and planning opportunities for investors. Tax and wealth transfer planning opportunities and challenges vary depending on whether the investor is an individual, a trust, or an entity. The discussion will address tax and non-tax considerations, as well as fiduciary duties when investing in Qualified Opportunity Funds. In addition, there will be a discussion with a Treasury Department Official and an opportunity for questions and answers.

Program Co-Chair and Speaker: Joshua Caswell, *Howland Evangelista Kohlenberg Burnett LLP*, Providence, RI

Program Co-Chair: Cynthia Paine, *Katten Muchin Rosenman LLP*, Washington, D.C.

Speakers: Michael L. Bernier, *Ernst & Young, LLP*, and Benetta Jensen, *JP Morgan Private Bank*, Chicago, IL

9:15 - 10:15 AM

Factors Landlords and Landowners Should Consider While Leasing in Shared Economies

The Diversity and Inclusion Committee, in partnership with the National Bar Association Real Estate Probate Law Section, will explore the elements of shared economies (e.g., AirBnB, VRBO, Couchsurfing, WeWorks, etc.). This program will include a discussion of:

- The types of shared economies
- The general impact shared economies have had on landlords and landowners
- Provisions that landlords could incorporate into standard lease agreements to adjust to the rise in shared economies and other future technological trends
- Recent court decisions addressing provisions in homeowner association declarations that impact residential property owners

Program Chair and Moderator: Eric M. Mathis, *MAHLE Industries, Incorporated*, Farmington Hills, MI

Speakers: Erekka Campbell, *Polsinelli, LLP*, Dallas, TX and Christina Jenkins, *Middleberg Riddle Group*, Dallas, TX

Boston

REAL PROPERTY PROGRAMS

FRIDAY, MAY 10

10:30 - 11:30 AM

Conveyancing and Notarization in the Electronic Age

This program will explore recent developments in electronic real estate transactions, including e-signatures, electronic land records, electronic conveyances, and remote online or webcast notarization. Among other things, this panel will discuss key legislation involving electronic recording and remote notarization, including the Uniform Real Estate Electronic Recording Act (“URPERA”), the Uniform Electronic Transactions Act (“UETA”) and the Revised Uniform Law on Notarial Acts (“RULONA”).

Program Chair and Moderator: James C. Wine, *Nyemaster Goode*, Des Moines, IA

Speakers: Renée Alberty, *Nexsys Technologies*, Detroit, MI, Arthur R. Gaudio, *Western New England University School of Law*, Springfield, MA, and Tim Reiniger, *Reiniger LLC*, Cape Elizabeth, ME

10:30 - 11:30 AM

Professors' Corner: Hot Real Property Topics

Real estate faculty experts will discuss emerging legal issues and recent relevant court decisions. Topics may include:

- Landlord-tenant issues
- Mortgages and foreclosure practices
- Public land use controls
- Purchasing and selling real property

Program Chair, Moderator and Speaker: Tanya Marsh, *Wake Forest University School of Law*, Winston-Salem, NC

Speakers: Andrea J. Boyack, *Washburn University School of Law*, Topeka, KS and R. Wilson Freyermuth, *University of Missouri School of Law*, Columbia, MO

12:15 - 1:15 PM

Weathering the Storm: “Resilient Boston Harbor” and the Past, Present, and Future of Resiliency in Boston Harbor and Coastal Development in the City of Boston

In October 2018, Mayor Martin J. Walsh introduced his plan to ensure Boston is ready for the next big storm. The plan, entitled “Resilient Boston Harbor,” is an attempt to set forth strategies to enable the City of Boston and neighboring coastal municipalities to fend off rising seas and to enable better access to Boston’s 47-mile shoreline. “Resilient Boston Harbor” is just the latest in a long line of resiliency policy in the City of Boston. This panel will take a closer look at “Resilient Boston Harbor” and past resiliency efforts impacting Boston Harbor and coastal development in the City of Boston and other affected municipalities.

Program Chair: Kyle R. Johnson, *Brown Rudnick LLP*, Hartford, CT

Speaker and Moderator: Greg Sampson, *Brown Rudnock LLP*, Boston, MA

Speakers: Jamie Fay, *Fort Point Associates*, Boston, MA, Jacqui Krum, *Wynn Resorts Development*, Everett, MA, Richard McGuinness, *City of Boston*, Boston, MA

1:30 - 2:30 PM

JOINT DIVISION

The Future of Law – Generational Shifts, Technology Disruption and Business Challenges

The RPTE Futures Practice and Guidance Task Force has worked for the past few years to identify emerging trends in the practice of law. In this program, members of the Task Force will explain how these change agents will affect our trust and estate and real estate practices, and the steps attorneys and the ABA can take to prepare to meet these challenges. The discussion will include:

- Generation, gender and diversity issues
- Competition from non-lawyers
- Demand for alternative fee arrangements
- Emerging technology and impact on legal services
- Unbundling of legal services
- Contract lawyers
- Changes in consumer buying trends
- Need for innovation in the face of a profession that has struggled with change in the past
- Evolving business models

Program Co-Chair and Moderator: Dennis Horn, *Holland & Knight*, Washington, DC

Program Co-Chair and Speaker: Mary Vandenack, *Vandenack Williams LLC*, Omaha, NE

Speakers: Nancy Haggerty, *Michael, Best & Friedrich*, Milwaukee, WI, Ira Meislik, *Meislik & Meislik*, Montclair, NJ, Ryan Walsh, *Hamilton Thies & Lorch*, Chicago, IL, and Beth A. Wood, *Law Offices of Beth A. Wood*, Charlotte, NC

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UPCOMING RPTE SECTION MEETINGS



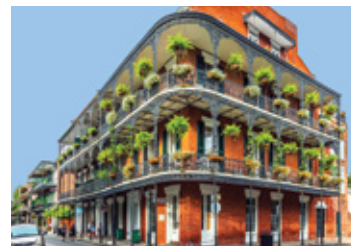
Skills Training for Estate Planners CLE Program

July 14-19 | Columbia, SC



Fall Leadership Conference

November 14-16 | San Juan, Puerto Rico



2020

32nd Annual RPTE National CLE Conference

May 13-16 | New Orleans, LA



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



REGISTRATION AND TRAVEL DETAILS

The registration fee includes access to all CLE programs and their written materials (posted on the meeting app), continental breakfasts on Thursday and Friday, refreshments during scheduled breaks, and a complementary reception with the sponsors. Only registered attendees may purchase tickets to special events.

RATES

ON-SITE RATES

General Attendee	\$650	\$700
ABA Member	\$625	\$675
RPTE Member	\$535 (MARCH 5 – MARCH 15) \$550 (MARCH 16 – APRIL 12) \$575 (APRIL 13 – APRIL 26)	\$625
Single Day Conference Admission	\$315	\$365
First Time Attendee	\$400	\$450
Speaker/Academic/Government Attendee	\$325	\$375
Law Student Attendee	\$25	\$75
First Time Attendee of a Minority Bar Association	No Charge	No Charge
Wednesday CLE program	\$25 – Pre-registration Required	No on-site registration

AS ALWAYS, CHILDREN UNDER 12 ARE FREE TO ATTEND ANY EVENTS RELATED TO THE NATIONAL CLE CONFERENCE.

Registering Online

Register online at ambar.org/rptenationalcle. Online registration closes Friday, April 26, 2019. Members will need an ABA ID number, located on your ABA membership card. 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 if you need help with the online registration system.

There are a limited number of scholarships available which range from a 25% to a 50% tuition discount. Scholarships will not cover hotel or transportation. Scholarship applications are due April 3, and will be announced the week of April 8, 2019. Complete the application here: https://americanbar.qualtrics.com/jfe/form/SV_ONcMmErYptB04YZ.

On-site registration will take place at the Westin Copley Place during the following hours:

Wednesday, May 8	1 – 5 PM
Thursday, May 9	7 AM – 4:30 PM
Friday, May 10	7 AM – 3:45 PM

Please note that if you are registering onsite, your registration fee will include an additional \$50 onsite fee as reflected above.

For more information regarding registration, please contact Frankie Angelone at 312-988-5346 or Frankie.Angelone@americanbar.org.

Boston

GENERAL INFORMATION

Cancellation Policy

Requests for refunds must be made in writing and emailed to Frankie Angelone by April 12, 2019. A \$75 administrative fee will be deducted from the refund. The Section will gladly accept substitute registrants for cancellations received after April 12, 2019; however, refunds will not be given after that date.

Program Materials

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

- **Mobile App:** A mobile meeting app with complete program information, including PDF's of written materials, will be available for download.
- **Web:** A link to the materials on the RPTE website will be available to registrants for downloading or printing.

All registered attendees will receive a link to program materials, information about the mobile app, and additional meeting information by email approximately one week prior to the meeting.

If you would like to purchase a flash drive of all meeting materials, this is available to all meeting attendees for an additional \$20. Flash drives may be purchased through the online registration system.

Hotel Reservations

All conference meetings and events will take place at the Westin Copley Place Hotel (10 Huntington Ave, Boston, MA 02116). A block of sleeping rooms has been reserved at the hotel from Wednesday, May 8, 2019, through Sunday, May 12, 2019, at a group rate of \$289 per night for a single or double room (plus taxes).

The group rates are guaranteed until the block is full or until 5 PM CST, Wednesday, April 10, 2019. Reservations received after 5 PM CST on April 10 will be based on availability. If you would like to make a reservation before or after the blocked dates, please call (617) 262-9600.

To Book Online

Visit: <https://www.marriott.com/event-reservations/reservation-link.mi?id=1544658289882&key=GRP&app=resvlink>

To Call In

Please call the hotel reservations at (617) 262-9600. When speaking to the agent, please reference "RPTE National CLE Conference" to make a reservation in the block.

Room sharing is available – see details and find contact information online.

Travel Discounts Information

Discounted fares and car rentals can be found at https://www.americanbar.org/membership/aba_advantage_discounts/. Airline discounts are available from Engencia, including ABA negotiated meeting discounts on American, United, Delta, and Virgin America Airlines. For assistance with reservations using the Engencia website, call 312-988-5890 or email travel.services@americanbar.org. Discounted car rentals are offered through Hertz, Dollar and Thrifty.

CLE Credit

The ABA directly applies for and ordinarily receives CLE credit for ABA programs in AK, AL, AR, AZ, CA, CO, CT, DE, GA, GU, HI, IA, IL, IN, KS, KY, LA, ME, MN, MS, MO, MP, MT, NH, NJ, NM, NV, NY, NC, ND, OH, OK, OR, PA, SC, TN, TX, UT, VT, VA, VI, WA, WI, and WV. These states sometimes do not approve a program for credit before the program occurs. This transitional program is approved for both newly admitted and experienced attorneys in NY. Attorneys may be eligible to receive CLE credit through reciprocity or attorney self-submission in other states. For more information about CLE accreditation in your state, visit Ambar.org/rptenationalcle or contact Frankie Angelone at Frankie.Angelone@americanbar.org or 312-988-5346.

Conference Attire

Business casual is recommended for conference attendees.

