



The Florida Bar Continuing Legal Education Committee and the International Law Section present

International Income Tax and Estate Planning 2009

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

One Location: October 2, 2009

The Epic Hotel • 270 Biscayne Blvd. Way • Miami, FL 33131

305/424-5226 • www.epichotel.com

Course No. 0886R

8:00 a.m. – 8:25 a.m. **Late Registration**

8:25 a.m. – 8:30 a.m.

Opening Remarks

William H. Newton, III, Law Offices of William H. Newton, III, Miami

8:30 a.m. – 9:20 a.m.

Utilization of Estate Freezes – General Principles and New Developments

Jerome Hesch, Jerome Hesch, P.A., Miami

9:20 a.m. – 10:10 a.m.

Application of Estate Freeze Principles to Foreign Person

William H. Newton, III, Law Offices of William H. Newton, III, Miami

10:10 a.m. – 10:20 a.m. **Break**

10:20 a.m. – 11:10 a.m.

Use of the Portfolio Interest Exemption – Subtleties and Nuances Available for Use by the International Client

Seth Entin, Greenberg Traurig P.A., Miami

11:10 a.m. – 12:00 noon

International Tax Legislation – What's Next on the Horizon?

William B. Sherman, Holland & Knight LLP, Fort Lauderdale

1200 noon – 1:00 p.m. **Lunch (on your own)**

1:00 p.m. – 1:50 p.m.

Expatriation – The Revised Expatriation Provisions, New Form 8854 Revisions, Regulatory Guidance, etc.

*Williard Yates, IRS Counsel, Washington, DC
Lara Banjanin, IRS Counsel, Washington, DC
Margarita Muina, Margarita P. Muina P.A., Miami
Michael DeSiato, CPA & Director, CBIZ MHM, LLC, Boca Raton*

1:50 p.m. – 2:40 p.m.

Cross-Border Philanthropy

Frances Hill, Professor and Director of Graduate Tax Program, University of Miami, Miami

2:40 p.m. – 3:30 p.m.

Pre-and Post-Mortem International Tax and Estate Planning, Especially in Relation to Foreign Corporate Ownership Structures

Joel Karp, Joel J. Karp, P.A., Miami

3:30 p.m. – 3:40 p.m. **Break**

3:40 p.m. – 4:30 p.m.

Compliance in International Tax and Estate Planning Including Audit Strategies, Reporting, and Disclosure of Return Positions

Robert S. Blumenfeld, Esq., Weston

INTERNATIONAL LAW SECTION

Francisco Corrales, Weston — Chair
Edward M. Mullins, Miami — Chair-elect
Mark R. Weiner, Miami — CLE Chair

CLE COMMITTEE

Paul H. Chipok, Orlando, Chair
Terry L. Hill, Director, Programs Division

FACULTY & STEERING COMMITTEE

William H. Newton, III, Miami — Program Chair
Margarita Muina, Miami — Vice Chair
Lara Banjanin, Washington, DC
Michael DeSiato, Boca Raton
Robert S. Blumenfeld, Weston
Seth Entin, Miami
Jerome Hesch, Miami
Frances Hill, Miami
Joel Karp, Miami
William B. Sherman, Fort Lauderdale
Williard Yates, Washington, DC

CLE CREDITS

CLER PROGRAM

(Max. Credit: 8.0 hours)

General: 8.0 hours

Ethics: 1.0 hour

CERTIFICATION PROGRAM

(Max. Credit: 8.0 hours)

International Law: 8.0 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).

Register Now!

International Income Tax and Estate Planning 2009

**The Florida Bar
651 E. Jefferson Street
Tallahassee, FL 32399-2300**

PRSR-STD
U.S. POSTAGE
PAID
TALLAHASSEE, FL
Permit No. 43

TO REGISTER



ON-LINE:

www.floridabar.org/CLE



MAIL:

Completed form with check



FAX:

Completed form to 850/561-5816

REFUND POLICY: Requests for refund or credit toward the purchase of the audio CD 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.

Register me for the "International Income Tax and Estate Planning 2009" Seminar

ONE LOCATION: (330) THE EPIC HOTEL, MIAMI, FL 33131 (OCTOBER 2, 2009)

TO REGISTER OR ORDER AUDIO CD OR COURSE BOOKS 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.**

Name _____ Florida Bar # _____

Address _____

City/State/Zip _____ Phone # _____

ABF: Course No. 0886R

REGISTRATION FEE (CHECK ONE):

- Member of the International Law Section: \$195
- Non-section member: \$220
- Full-time law college faculty or full-time law student: \$110
- Persons attending under the policy of fee waivers: \$0

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.



Check here if you require special attention or services. Please attach a general description of your needs. We will contact you for further coordination.

METHOD OF PAYMENT (CHECK ONE):

- Check enclosed made payable to The Florida Bar
- Credit Card (Advance registration only. Fax to 850/561-5816.)
 - MASTERCARD VISA DISCOVER AMEX

Exp. Date: ____/____ (MO./YR.)

Signature: _____

Name on Card: _____ Billing Zip Code: _____

Card No. _____

COURSE BOOK — AUDIO CD — ON-LINE

Private taping of this program is not permitted. **Delivery time is 4 to 6 weeks after 10/09/09. 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 audio CD or books. Tax exempt entities must pay the non-section member price.**

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If this order is to be purchased by a tax-exempt organization, the course book/CD must be mailed to that organization and not to a person. Include tax-exempt number beside organization's name on the order form.

COURSE BOOK ONLY

Cost \$50 plus tax
(Certification/CLER credit is not awarded for the purchase of the course book only.)

TOTAL \$ _____

AUDIO CD

(includes course book)
\$195 plus tax (section member)
\$220 plus tax (non-section member)

TOTAL \$ _____

Related Florida Bar Publications can be found at <http://www.lexisnexis.com/flabar/>

