The Probate Process From Start to Finish

Take all the steps necessary to successfully probate your client's estate!

Miami, Florida
December 10, 2007

Dania, Florida
December 11, 2007

West Palm Beach, Florida
December 12, 2007

Presented by Juan C. Antunez, Michael A. Dribin, Alex Espenkotter, Cheryl J. Handley, Jeffrey B. Kahn, Marian A. Lindquist, Holly M. O'Neill, Gerald W. Pierre, John M. Severson, Robert A. Stamen, Stephen A. Taylor and Shelly Wald

Continuing Education:

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IACET - 0.7

CPE for Accountants - 8.0

Financial Planners - 8.0

PACE - 8.0

See inside for details!

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Master the Step-by-Step Process for Successful Probate

Why You Need to Attend

So your client wants you to handle a probate case – do you know where to start? Do you know the proper procedures to use, as well as the law? At this seminar, our experienced faculty will give you detailed, step-by-step information to confidently and ably navigate the system. Gain the confidence you need to get a favorable outcome for your client when litigating in probate court. Enroll today!

- Implement a complete estate timetable in order to know what needs to be done - and when.
- Effectively guide the executor and the administrator through their various duties.
- Avoid problems arising from creditors' claims and insolvency with our powerful strategies.
- Know the secrets to confidently handling a spouse's elective share.
- Forestall disagreements between beneficiaries: adhere to the guidelines of precedence during intestacy.
- Get results for your client! Gain successful strategies for litigating in probate court.
- Follow thorough closing procedures so accounting is complete before distribution takes place.

Important Details

December 10 - MIAMI - Hyatt Regency Miami
400 S.E. Second Avenue, Miami FL 33131 305-358-1234

December 11 - DANIA - Sheraton Ft. Lauderdale Airport Hotel
1825 Griffin Road, Dania FL 33004 954-920-3500

December 12 - WEST PALM BEACH - Crowne Plaza Hotel West Palm Beach
1601 Belvedere Road, West Palm Beach FL 33406 561-689-6400

Time: Registration is from 8:00 – 8:30 a.m. The program will begin at 8:30 a.m. and end at 4:40 p.m. Complimentary snacks and refreshments are provided. Lunch is on your own.
Pre-Registration is encouraged.

Mail: Registration form on back of this brochure
Phone: (800) 930-6182
Fax: (715)835-1405
Online: www.nbi-sems.com

If you need to register at the door, you may wish to call us first to confirm availability and to receive information regarding schedule or location changes.
Tuition: $359 for the first registrant, $349 for each additional registrant — a savings of $10, $339 for new professionals — a savings of $20!*
*A new professional is anyone with three or less years of professional work experience.
Directions & Parking: To obtain directions and parking information, please contact the facility listed above.
FREE Reference Manual: *The Probate Process From Start to Finish* – Your learning doesn't end with the conclusion of the seminar presentation. With our comprehensive course manual, written specifically to accompany each program, you'll have all the information you need right at your fingertips. This manual, included with your tuition, allows you to take the seminar back to the office with you!
Audio Recordings: This seminar will be recorded in its entirety. If you can't attend, you can still obtain the benefits of the information provided by purchasing the manual and CD. See the registration form to order. If you wish to receive the cassette tape instead of the CD, please contact us at (800) 930-6182.
Cancellation: Has your schedule changed? Visit us on the web or call one of our Customer Service Representatives to learn more about your cancellation options.
Your Satisfaction is Our Guarantee. If you aren't satisfied with a seminar or training resource, call or write us and we'll make it right.

GERALD W. PIERRE is of counsel with the Miami firm of Akerman Senterfitt, Attorneys at Law, where his main areas of practice are private client services, trusts, estates and guardianship administration, and family and marital law. Mr. Pierre received his B.A. degree, in economics, from Harvard University and his J.D. degree from the University of Miami School of Law. He is admitted to practice in the U.S. District Court, Southern District of Florida. Mr. Pierre is a member of Business Network International, the South Miami Kendall Bar Association, the Dade County Bar Association and the American Bar Association. (Miami location)

JOHN M. SEVERSON is a partner in the West Palm Beach law firm of Burns & Severson P.A. Mr. Severson is a fellow of the American College of Trust and Estate Counsel and is board certified in wills, trusts and estates by The Florida Bar Board of Legal Specialization and Education. He has been practicing law for 26 years and has previously lectured for National Business Institute on estate administration matters. Mr. Severson is a member of The Florida Bar and the American Bar Association. He earned his B.A. degree from St. Olaf College and his J.D. degree, cum laude, from William Mitchell College of Law. (West Palm Beach location)

ROBERT A. STAMEN is a shareholder in the Miami law firm of Packman, Neuwahl & Rosenberg, P.A. He concentrates his practice on estate planning, pension and profit sharing, individual income taxation and corporation law. Mr. Stamen is a certified public accountant in the state of Florida and a frequent lecturer on various matters relating to taxation. He is an instructor at Florida International University where he teaches graduate-level accounting courses on estate planning and deferred compensation. Mr. Stamen is co-author, with Malcolm H. Neuwahl, of *Taxation of Deferred Compensation,* which is used at seminars sponsored by the FICPA. He received his B.S.B.A. and J.D. degrees from the University of Florida. Mr. Stamen is a member of the Estate Planning Council of Dade County. (Miami location)

STEPHEN A. TAYLOR is an attorney in Miami, Florida where he practices in the areas of estate and tax planning, probate administration and litigation and elder law. In addition to being an attorney, Mr. Taylor is a Certified Financial Planner®. He received his B.B.A degree in accounting from Oglethorpe University and his J.D. degree from the University of Florida. Mr. Taylor is a member of the Dade County Bar Association and The Florida Bar (sections on Tax; Real Property and Probate and Trust Law). Mr. Taylor is currently working to become Florida Bar Board Certified in wills, trusts and estates and teaches courses on estate and retirement planning to Certified Financial Planner® seeking students. Mr. Taylor has lectured at numerous National Business Institute seminars concerning probate and tax issues. (Miami location)

SHELLY WALD is an attorney in the West Palm Beach office of Shutts & Bowen LLP. Ms. Wald is a member of the firm's Trust & Estates Practice Group who handles all types of estate planning and estate and trust administration. She is board certified in wills, trusts and estates by The Florida Bar Board of Legal Specialization and Education and has extensive experience representing high wealth clients using sophisticated estate planning techniques including irrevocable, insurance and charitable trusts, premarital agreements and residence agreements, family limited partnerships and limited liability companies and nonprofit corporations and foundations. Ms. Wald also administers estates, represents trustees and beneficiaries, prepares estate tax returns, gift tax returns and accountings. She is a member of The Florida Bar and the Palm Beach County Bar Association. Ms. Wald earned her B.A. degree from Vanderbilt University and her J.D. degree, cum laude, from the University of Miami.
(West Palm Beach location)

Why National Business Institute

Why should you trust National Business Institute for your continuing education needs? Simply put, NBI is the best! Since 1983 we have been the largest provider of legal and professional education in the nation. Having trained over 100,000 professionals, we know what you need, and we have the ability to help you obtain it. When you train with National Business Institute, you not only make an investment in your career, but you also make an investment in yourself.

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What You Will Learn

I. TAKING THE FIRST STEP: FILING AN ESTATE IN PROBATE COURT
8:30 - 9:15
A. Small Estate - What It Is and How to File
B. Regular Estate
C. The Estate Timetable - What You Need to Do
D. Proving the Will
E. Challenging the Will

II. UNDERSTANDING THE ROLE OF THE PERSONAL REPRESENTATIVE IN PROBATE
9:15 - 10:00
A. Duties of the Personal Representative
B. Misconduct and/or Removal
C. Compensation Guidelines
D. Special Administration Issues

III. MANAGING THE INVENTORY
10:15 - 11:00
A. Statutory Requirements and How They Affect Your Case
B. Notice to Creditors, Beneficiaries and State Agencies - What Is Required
C. Collecting, Maintaining and Managing Assets
D. Inventory Problems

IV. ADMINISTERING THE ESTATE EFFECTIVELY
11:00 - 11:45
A. How to Respond to Creditors' Claims
B. Insolvency
C. Managing the Estate Cash Responsibly
D. Disclaimers
E. Partial Distributions

V. MAINTAINING AN ETHICAL BALANCE IN PROBATE PRACTICE
12:45 - 1:35
A. Performing Competent Legal Services
B. Identifying the Client
C. Avoiding Conflicts of Interest
D. Distinguishing Between Privileged and Non-Privileged Communication
E. Establishing Reasonable Attorney's Fees

VI. DETERMINING IF SPOUSE'S ELECTIVE SHARE IS A REASONABLE OPTION
1:35 - 2:20
A. Homestead Allowance
B. How to Determine the Elective Share Estate
C. What Are Spousal Rights and Personalty?
D. Rights of Election
E. Step-by-Step Procedure
F. How to Satisfy the Elective Share

VII. UNCOVERING THE LAWS OF INTESTACY AND HOW THEY MAY APPLY
2:35 - 3:00

VIII. LITIGATING THE CASE IN PROBATE COURT
3:00 - 3:45
A. Explanation of Rules of Probate Procedure
B. Declaratory Judgment
C. How to Conduct Discovery
D. What to Do on Appeal

IX. PUTTING THE CASE TO REST: CLOSING THE ESTATE
3:45 - 4:40
A. Final Accounting
B. Distribution of Estate to Beneficiaries
C. Discharge of Fiduciary
D. Tax Returns - What Needs to Be Filed and When

* If needed, the above agenda may be changed to best accommodate all our attendees.

Who'll be there…

This **basic level seminar** will provide those who have limited probate experience with tips on successfully handling a probate case. This comprehensive seminar will benefit:

- Attorneys
- Paralegals
- Accountants
- Trust Officers
- Financial Planners

Credit Information

This seminar is a valuable opportunity to get the continuing education that's so crucial to keeping up to date in your profession. Not only was this program carefully designed to meet its educational objectives, but you can also take advantage of specific continuing education credits we've arranged with appropriate accrediting organizations:

Financial Planners - 8.0	This program has been accepted by the CFP Board and qualifies for 8.0 hours of CE credit for CFP Certificants. CFP™, CERTIFIED FINANCIAL PLANNER™ and CFP with flame logo are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.
CLE - 8.0	Approved by The Florida Bar for a maximum of 8.0 general hours of CLER credit including 1.0 hour of ethics. Course #6174 7.
	Approved for self-study credit.
CPE for Accountants - 8.0	National Business Institute is approved as a course provider by the Florida Board of Accountancy. Sponsor ID #0002159. This course is approved for 8.0 hours of technical business CPE credit for Florida CPAs. Course #0004112. Written proof of attendance will be supplied.
	NBI, Inc. has been reviewed and approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 1620 I Street, NW, Suite 615, Washington, DC 20006. NBI, Inc. DBA National Business Institute has awarded 0.7 CEUs to participants who successfully complete this program. (Provider #4558)
PACE - 8.0	This seminar qualifies for 8.0 PACE (Professional Achievement in Continuing Education) credit hours for CLU, CASL and/or ChFC.

Accountants: This is a basic level program. No advanced preparation or prerequisites are required.

The specific continuing education credit(s) listed above are for attending the live seminar. The credits may or may not apply for the audio version of this seminar. Please check with your credit board for details.

For additional questions regarding continuing education credits please contact us at (866) 240-1890.

Who Will Teach You

JUAN C. ANTÚNEZ is a partner at Stokes McMillan Maracini & Antúnez P.A. His practice areas cover estate planning and probate litigation. Mr. Antúnez also is the author of "The Florida Probate Litigation Blog" (www.flprobatelitigation.com). He has previously lectured for National Business Institute and other professional groups on areas related to his practice. Mr. Antúnez earned his B.A. degree in finance with honors from Florida International University, his J.D. degree from the New York University School of Law and an LL.M. degree in estate planning from the University of Miami School of Law. At N.Y.U., he was an articles editor for the *Annual Survey of American Law.* (Dania and West Palm Beach locations)

MICHAEL A. DRIBIN is a partner in the Miami office of Broad and Cassel where he practices in the areas of estate planning, trusts, and probate and trust litigation. Mr. Dribin has been practicing law for more than 30 years and is board certified in wills, trusts and estates by The Florida Bar Board of Legal Specialization and Education. He is a fellow of the American College of Trust and Estate Counsel and serves as a mentor in the University of Miami Estate Planning Program. Mr. Dribin speaks at various bar seminars on estate planning matters as well as probate and trust litigation. He is a past president of the Estate Planning Council of Miami and a member of the Probate and Guardianship Committee of The Dade County Bar Association. Mr. Dribin earned his B.A. degree from Northwestern University, his J.D. degree from Loyola University of Chicago, and his LL.M. degree in taxation from the University of Miami. (Miami location)

ALEX ESPENKOTTER is a partner in the Miami office of Bilzin Sumberg Baena Price & Axelrod LLP, where he concentrates his practice in the areas of estate planning, estate tax planning, asset protection planning, gift tax planning, generation-skipping transfer tax planning, charitable giving, retirement planning, and probate and trust administration. Additionally, he handles litigation arising from the creation and administration of wills, estates and trusts, probate litigation, and fiduciary litigation. Mr. Espenkotter is a frequent lecturer on topics ranging from asset protection to advanced estate planning and tax reduction techniques. He also has addressed charitable groups on the estate planning and tax benefits of charitable giving. Mr. Espenkotter is a member of the Broward County and American bar associations. He earned his B.A. degree from the University of Florida and his J.D. and LL.M. degrees in estate planning from the University of Miami School of Law. (Miami location)

CHERYL J. HANDLEY is a sole practitioner in Fort Lauderdale, Florida, practicing in the areas of estate planning, estate administration, guardianships and special needs trusts. She is a previous lecturer in her areas of practice and is admitted to practice law in Florida, Connecticut, Massachusetts and New Hampshire. Ms. Handley earned her B.A. degree from St. Mary's College and her J.D. degree from the University of Connecticut. She also earned a master's degree from the University of Louvian in Louvian, Belgium. Ms. Handley is a member of The Florida Bar, the Connecticut, the Massachusetts, and the New Hampshire bar associations, as well as the Broward County Bar Association and the Women Lawyers Association. (Dania and West Palm Beach locations)

JEFFREY B. KAHN is principal of the Law Office of Jeffrey B. Kahn, P.A., with offices in Coral Springs and Boynton Beach, Florida, where he practices in the areas of tax planning, tax controversies, estate planning, probate, guardianship and business transactions. Mr. Kahn is a board certified tax lawyer by the Florida Bar Board of Legal Specialization and Education. He is a certified public accountant and a former adjunct professor, School of Business, Nova Southeastern University and the School of Accounting, Florida International University. Mr. Kahn has spoken for various professional groups, including the Florida Institute of CPAs, on topics including tax matters, estate planning and business planning. He received his B.B.A. degree from the Florida International University School of Accounting and his J.D. degree and LL.M. degree in taxation from the University of Miami School of Law. Mr. Kahn is a member of The Florida Bar (member, Tax, Real Property, Probate and Trust, and Elder Law sections), the South Florida Tax Litigation Association, the American Association of Attorneys-CPAs, the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. (Dania location)

MARIAN A. LINDQUIST is a sole practitioner in Fort Lauderdale where she maintains a general civil practice that includes probate, estate planning, dissolution of marriage and small business law. Ms. Lindquist has been practicing law for 15 years and was named the Broward County Legal Aid Pro Bono Lawyer of the year for 2006. She has lectured before various groups on areas related to her practice, including an appearance as the keynote speaker before the Broward County Legal Secretaries Association on dissolution of marriage. Ms. Lindquist earned her B.A. degree from Florida Atlantic University and her J.D. degree from Nova Southeastern University. She is a member of The Florida Bar. (Dania locations)

HOLLY M. O'NEILL is a partner in the Boca Raton law firm of Miller & O'Neill, P.L., where she practices in the areas of estate and trust planning, probate, probate litigation, taxation, elder law, guardianship, charitable foundations and public charities. She has been in the field for 15 years and has been practicing law for a decade in these areas. Ms. O'Neill is licensed in Florida, Maryland and the District of Columbia and is a member of the South Palm Beach County Bar Association, the Palm Beach County Bar Association, The Florida Bar (member, sections on Elder Law, Real Property, Probate, Trust Law, Tax Law), the Maryland State Bar Association, Inc. (member, sections on Estate and Trust Law, Taxation, Elder Law), the District of Columbia Bar (member, sections on Estate, Trust and Probate Law, Taxation), the American Bar Association (member, Real Property, Probate and Trust Section) and the National Academy of Elder Law Attorneys. She earned her B.A. degree, cum laude, from the University of Maryland, her J.D. degree from The Catholic University of America, Columbus School of Law and her LL.M. degree in taxation from Georgetown University. (West Palm Beach location)

The Probate Process From Start to Finish

❑ **December 10 - MIAMI** ❑ **December 11 - DANIA**
❑ **December 12 - WEST PALM BEACH**

Tuition:

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40447

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