

Probate  
and  
Trust Law

Friday, October 12, 2007

Activity ID # TBA

Main Lounge  
Iowa Memorial Union  
University of Iowa  
Iowa City, Iowa

Sponsored by the

University of Iowa  
College of Law



# General Information

**Meeting Site:** The Probate CLE program will be held in the Main Lounge of the Iowa Memorial Union, on the University of Iowa campus, in Iowa City, on Friday, October 12, 2007. Go to [www.uiowa.edu/~maps](http://www.uiowa.edu/~maps) for maps of the campus, building locator, and parking.

**Registration:** The registration fee is \$190.00. This fee includes one copy of selected program materials, and the complimentary luncheon on Friday, October 12th. In order to guarantee that you will have materials, it is necessary to pre-register. You can go to [www.law.uiowa.edu/cle/register.php](http://www.law.uiowa.edu/cle/register.php) to register for the program or complete the attached form and return it.

**Cancellation Policy:** A full refund will be given if registration is canceled prior to the conference, by 8:00 am on the Wednesday before the program. No refunds will be made after that date and course materials will be sent to those registrants canceling after the refund deadline.

**Housing:** Indicate what hotel accommodations you need. Your request will be sent to the Iowa House. **NOTE: The Iowa House has a new policy regarding hotel reservations. After you have received your confirmation from the Iowa House, you will need to call the Iowa House directly at 319-335-3513, and provide them with a credit card number to guarantee your reservation.** You will pay the Iowa House directly for your stay.

**Football Tickets: Iowa plays Illinois** on Saturday, Oct. 13, 2007. You are limited to purchasing only two (2) tickets for the football game. **Note: Tickets are NON-refundable.**

**Parking:** There is a parking ramp directly east of the Iowa Memorial Union.

**Mandatory Continuing Legal Education:**

This program is an accredited program under the regulations of the Iowa Supreme Court Commission on Continuing Legal Education. It is planned that this program will provide a maximum of 6 hours of regular credit toward the mandatory continuing legal education requirements under the Iowa Rule, and 1 hour of ethics credit.

Individuals with disabilities are encouraged to attend all University of Iowa-sponsored events. If you are a person with a disability who requires an accommodation in order to participate in this program, please contact Carolyn Tappan in advance at 319-335-9089.

The University of Iowa prohibits discrimination in employment, educational programs, and activities on the basis of race, national origin, color, creed, religion, sex, age, disability, veteran status, sexual orientation, gender identity, or associational preference. The University also affirms its commitment to providing equal opportunities and equal access to University facilities. For additional information contact the Office of Equal Opportunity and Diversity, (319) 335-0705.

# PROBATE AND TRUST LAW

FRIDAY, OCTOBER 12, 2007

Main Lounge, Iowa Memorial Union, University of Iowa, Iowa City, Iowa

## 8:00 am Registration

### 8:30 Ethical Considerations in Estate and Business Planning

Marvin S. Berenstein [Berenstein Moore Berenstein Heffernan & Moeller, Sioux City]

### 9:30 Refreshment Break

### 9:45 Life Insurance Using Trusts and LLCs

Steven J. Roy [Nyemaster, Goode, West, Hansell & O'Brien, P.C., Des Moines]

### 10:45 Planning and Drafting Strategies for Premarital Agreements

Paul P. Morf [Simmons Perrine, Cedar Rapids]

### 11:45 Complimentary Luncheon

### 12:30 Issues of Confidential Relationships

Robert J. Cowie, Jr. [Miller Pearson Gloe Burns Beatty & Cowie, Decorah]

### 1:30 Refreshment Break

### 1:45 What Non-Florida Trusts and Estates Practitioners Need to Know about Florida Law

David A. Dettman [Lane & Waterman, Davenport]

### 2:45 Case Law and Legislative Update

Michel Nelson [Iowa Savings Bank, Carroll]

### 3:45 Adjourn

If you have any questions, call Carolyn Tappan, CLE Coordinator, at 319-335-9089, or e-mail her at [Carolyn-tappan@uiowa.edu](mailto:Carolyn-tappan@uiowa.edu). Fax: 319-335-9019. For more information you can go to <http://www.law.uiowa.edu/cle>.

**Note:** You can go to [www.law.uiowa.edu/cle/register.php](http://www.law.uiowa.edu/cle/register.php) to register for this program. You will still need to print out the registration form and return it in the mail with your payment to:

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Iowa Law School CLE  
University of Iowa College of Law  
Iowa City, IA 52242-1113

## REGISTRATION FORM

### PROBATE AND TRUST LAW

Friday, October 12, 2007

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

e-mail \_\_\_\_\_

I report to the following state bar associations: \_\_\_\_\_

### Registration Fee:

**\$190.00**

Illinois Football Tickets (\$50.00 ea.) [nonrefundable]  
# requested \_\_\_\_\_ [limit of two (2)] \_\_\_\_\_

Hotel Accommodations: Arrival on \_\_\_\_\_ for \_\_\_\_\_ nights

CD ROM (\$15.00) \_\_\_\_\_

I am unable to attend this program. Please send me the program materials for \$35.00. \_\_\_\_\_

Payment Method:  Check Enclosed [payable to "College of Law"]

VISA

Mastercard

Total Enclosed \_\_\_\_\_

Card # \_\_\_\_\_

Exp. \_\_\_\_\_

Signature \_\_\_\_\_