The National Institute for Domestic Partner Estate Planning
May 2-3, 2011

Monday, May 2

9:00 a.m.-10:00 a.m.	Introduction and General Planning concepts
10:00 a.m.-10:30 a.m.	Typical domestic partner goals
10:30 a.m.-11:00 a.m.	Folk remedies and their consequences
11:00 a.m.-11:30 a.m.	The gift tax in detail
11:30 a.m.-12:30 p.m.	Case Study Set Up
12:30 p.m.-2:30 p.m.	LUNCH
2:30 p.m.-3:00 p.m.	Partner AB-SECURE Trust
3:00 p.m.-3:30 p.m.	Typical Partner Allocations
3:30 p.m.-4:00 p.m.	Case Study on Allocations
4:00 p.m.-4:30 p.m.	Appointing Successor Trustees and Agents
4:30 p.m.-5:00 p.m.	Case Study on Appointments

Tuesday, May 3

8:00 a.m.-8:30 a.m.	The Domestic Partnership Property Agreement
8:30 a.m.-9:00 a.m.	Case Study on Apportionment in DP Property Agreement
9:00 a.m.-9:30 a.m.	Management of the Trust While Both Partners Alive
9:30 a.m.-10:00 a.m.	Case Study on Lifetime Trust Management
10:00 a.m.-10:30 a.m.	Apportionment of A, B, and SECURE Trust upon a partner’s death
11:30 a.m.-Noon.	Case Study on Apportionment upon first death
Noon-1:30 p.m.	Lunch
1:30 p.m.-2:00 p.m.	Management of the A, B, and SECURE Trusts
2:00 p.m.-2:30 p.m.	Case Study Management of the A, B, and SECURE Trusts
2:30 p.m.-3:00 p.m.	Allocations and distributions upon death of surviving partner
3:00 p.m.-3:30 p.m.	Case Study and Estate Tax Examples
3:30 p.m.-3:45 p.m.	Break
3:45 p.m.-4:15 p.m.	Exam
4:15 p.m.-4:30 p.m.	Estate Planning Seminars and Workshops
4:30 p.m.-4:45 p.m.	Finding New Clients
4:45 p.m.-5:00 p.m.	Tools Available
5:00 p.m.	Adjourn

NOTE: Times are approximate and scheduled for classes of 20. Smaller classes tend to finish earlier and more time is then available for discussions on marketing.