

## REGISTRATION FORM

### Registration Categories

- |   |          |
|---|----------|
| <input type="checkbox"/> BBA Member   | \$130.00 |
| <input type="checkbox"/> Non-Member   | \$170.00 |
| <input type="checkbox"/> BBA Member - Legal Services/<br>BBA Member - Government Lawyer | \$70.00  |
| <input type="checkbox"/> Law Student  | \$30.00  |

### Course materials format:

- Print version  
 Electronic (link to a PDF of materials will be e-mailed prior to seminar)

**I cannot attend.** Please send me the CLE Program Package, which includes written materials and an audio CD (Prices include 6.25% sales tax).

BBA Member  \$165.00  
Non-Member  \$195.00

### Payment Options

- Check made payable to the Boston Bar Association  
 MasterCard  Visa  AmEx  Discover  
 Invoice (Members only)

Credit Card #:

Exp. Date:

### Registration Information

Name:

Firm/Company:

Street:

City: State: Zip:

Phone:

E-mail:

### Register By

**Mail:** Boston Bar Association  
CLE 12940  
P.O. Box 845680  
Boston, MA 02284-5680

**Online:**  
[www.bostonbar.org/edu/cle](http://www.bostonbar.org/edu/cle)  
**Phone:** (617) 778-2020  
**Fax:** Credit card info. to  
(617) 523-0127 Attn CLE

## Trusts & Estates Year in Review 2013

### TIME & LOCATION

Thursday, June 20, 2013  
4:00 - 6:00 p.m.  
Reception to Follow

Boston Bar Association  
16 Beacon Street  
Boston, MA 02108

Questions and Directions:  
(617) 778-2020  
[cle@bostonbar.org](mailto:cle@bostonbar.org)

### IMPORTANT INFORMATION

#### Wi-Fi

*Connect to our complimentary wireless and access your electronic materials via your mobile device or laptop.*

#### CLE Credit

*Boston Bar Association Continuing Legal Education courses are approved for credit in California, Maine, New Hampshire, New York, Rhode Island & Vermont.*

#### Can't attend?

*If you have pre-registered for a program and cannot attend, the BBA will forward all seminar materials to you at the address indicated on your registration form.*

#### Refunds and Cancellations

*Refunds will be allowed for cancellation notices received at least 24 hours before the program.*

#### Accommodations/Assistance

*We strive to make our programs accessible to all attendees, including those with disabilities. Please contact the BBA in advance of the program for arrangements.*

#### Tuition Assistance

*If the cost of this seminar would preclude you from attending, contact us about tuition discounts.*

BBA Continuing Legal Education  
[www.bostonbar.org/edu/cle](http://www.bostonbar.org/edu/cle)

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**Boston Bar**  
ASSOCIATION

## ABOUT

An annual hit among estate planning practitioners, this seminar offers a rare opportunity to learn about the year's significant developments in Massachusetts and federal laws that affect your estate planning practice.

The panelists will cover Massachusetts legislative developments, and review significant tax and state law cases and regulations between June 2012 and June 2013. You cannot afford to miss this presentation!



## PANELISTS

**William K. Moran, Esq.**  
Bass, Doherty & Finks, P.C.

**Alison E. Lothes, Esq.**  
Sullivan & Worcester, LLP

**Caleb Sainsbury, Esq.**  
Pabian & Russell, LLC

**Nikki M. Oliveria, Esq.**  
Bass, Doherty & Finks, P.C.

**Kelly Aylward, Esq.**  
Bove & Langa, P.C.

**Jaclyn O'Leary, Esq.**  
Day Pitney, LLP

### Program Co-Chairs

**Andrew D. Rothstein, Esq.**  
Goulston & Storrs

**Allison McCarthy, Esq.**  
Riemer & Braunstein LLP

## AGENDA

1. Federal Tax Law updates
2. Legislative Updates
3. Massachusetts case law updates

