

## Prepared for Alan S. Gassman

Steve Leimberg's Estate Planning Email Newsletter - Archive Message #2188

**Date:** 24-Jan-14  
**From:** Steve Leimberg's Estate Planning Newsletter  
**Subject:** **FLASH:** Marty Shenkman's Heckerling 2014 Nuggets

Over the course of many years, **LISI** has been delighted to provide members with **Marty Shenkman's** notes from the proceedings at the **Heckerling Institute on Estate Planning**. Heckerling, as it is affectionately known, is the nation's leading conference for estate planners, attorneys, trust officers, accountants, insurance advisors and wealth management professionals. 2014 was the 48th installment of Heckerling, and for those not fortunate enough to be in sunny Orlando, the meeting this year ran from Monday, January 13 through Friday, January 17.

This year, Marty decided to do something little different. Instead of producing daily notes of each day's proceedings, Marty put together a 50-page analysis containing his observations on the proceedings. Marty refers to his commentary as his "Heckerling 2014 Nuggets" and we'd think you'd agree with us when we say that they are in fact **gold**.

These materials have been published with specific permission from the **Heckerling Institute on Estate Planning**. **LISI** very much appreciates the courtesy!

Because of the length of Marty's commentary, **LISI** has made it available to members through the following link: [Marty Shenkman's Heckerling 2014 Nuggets](#)

**Martin M. Shenkman, CPA, MBA, PFS, AEP, JD** is an attorney in private practice in Paramus, New Jersey and New York City who concentrates on estate and closely held business planning, tax planning, and estate administration. He is the author of more than 40 books and 800 articles. In addition to authoring his amazing Heckerling notes for **LISI**, he is a co-author with **Jonathan Blattmachr** and **Robert Keebler** of 2012 Estate Planning: Tax Planning Steps to Take Now available through [amazon.com](#).

Marty is the Recipient of the 1994 Probate and Property Excellence in Writing

Award, the Alfred C. Clapp Award presented by the 2007 New Jersey Bar Association and the Institute for Continuing Legal Education; Worth Magazine's Top 100 Attorneys (2008); CPA Magazine Top 50 IRS Tax Practitioners, CPA Magazine, (April/May 2008). His article "Estate Planning for Clients with Parkinson's," received "Editors Choice Award." In 2008 from Practical Estate Planning Magazine his "Integrating Religious Considerations into Estate and Real Estate Planning," was awarded the 2008 "The Best Articles Published by the ABA," award; he was named to New Jersey Super Lawyers (2010-13); his book "Estate Planning for People with a Chronic Condition or Disability," was nominated for the 2009 Foreword Magazine Book of the Year Award; he was the 2012 recipient of the AICPA Sidney Kess Award for Excellence in Continuing Education; he was a 2012 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planning Counsels; and he was named Financial Planning Magazine 2012 Pro-Bono Financial Planner of the Year for his efforts on behalf of those living with chronic illness and disability. He sponsors a free website designed to help advisers better serve those living with chronic disease or disability [www.chronicillnessplanning.org](http://www.chronicillnessplanning.org).

**HOPE THIS HELPS YOU HELP OTHERS MAKE A *POSITIVE* DIFFERENCE!**

*Marty Shenkman*

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