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The Florida Bar Continuing Legal Education Committee and  
the Tax Section present

# Annual Wealth Protection How a Lawyer Can Protect a Client's Wealth

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live Presentation and Webcast: Thursday, May 16, 2013

Hyatt Regency • 400 SE 2nd Avenue • Miami, FL 33131 • (305) 358-1234

Course No. 1461R



7:45 a.m. – 8:15 a.m. **Late Registration**

IF YOU HAVE ANY QUESTIONS FOR THE PRESENTERS,  
PLEASE GIVE THEM TO EITHER DENIS OR ALAN WHEN  
YOU ARRIVE SO THEY CAN BE ANSWERED DURING THE  
CONFERENCE.

8:15 a.m. – 8:30 a.m.

## **A Brief Introduction to The Art of Wealth Protection Planning®**

*Professor Denis Kleinfeld, Esq. and Alan Gassman, Esq.,  
Co-Chair*

8:30 a.m. – 9:20 a.m.

## **Using Estate Planning Techniques to Optimize Family Wealth Preservation**

*Alan S. Gassman, Esq., Gassman Law Associates, P.A.,  
Clearwater*

9:20 a.m. – 10:20 a.m.

## **Where Does Florida Law Stand on Fraudulent Transfers?**

*Jonathan B. Alper, Esq., Jonathan B. Alper, PLC, Lake Mary*

10:20 a.m. – 10:30 a.m. **Break**

10:30 a.m. – 11:30 a.m.

## **Introduction to Professional Privilege in Wealth Protection Cases—Civil v. Criminal; Tax v. Non-Tax; When to Claim the Fifth; How to Do It Right.**

*Mitchell Fuerst, Esq., Fuerst Ittleman David & Joseph PL, Miami*

11:30 a.m. – 12:30 p.m.

## **A Road Map of the Collection Process for the Asset Protection Planner**

*Arthur C. Neiwirth, Esq., Quintairos, Prieto, Wood & Boyer, P.A.,  
Fort Lauderdale*

12:30 p.m. – 1:00 p.m. **Lunch (included in registration)**

1:00 p.m. – 1:45 p.m.

## **The Intersection of the Florida Trust Code and Asset Protection Planning**

*Domenick Lioce, Esq., Naison, Yeager, Gerson, White & Lioce,  
P.A., West Palm Beach*

1:45 p.m. – 2:30 p.m.

## **Recent Asset Protection Case Decisions, Legislation, and Their Importance in Protection Planning**

*Michael C. Markham, Esq., Johnson, Pope, Bokar, Ruppel, &  
Burns, LLP, Tampa*

2:30 p.m. – 3:40 p.m.

## **Where to Situs a Trust—An Analysis of U.S. Asset Protection States**

*Professor Denis Kleinfeld, Esq., Of Counsel to Fuerst Ittleman  
David & Joseph, Miami*

3:40 p.m. – 3:50 p.m. **Break**

3:50 p.m. – 4:40 p.m.

## **Understanding the Key Tax and Compliance Requirements in Wealth Protection Structures**

*Charles R. Rubin, Esq., Gutter Chaves Josepher Rubin Forman  
Fleisher Miller P.A., Boca Raton*

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**Register me for the "Annual Wealth Protection How a Lawyer Can Protect a Client's Wealth" Seminar**

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☐ Enclosed is my separate check in the amount of \$50 to join the Tax Section. Membership expires June 30, 2014.

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**Annual Wealth Protection Seminar**

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