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Live 3.3-Hour May 28, 2009 Presentation
LOUIS A. MEZZULLO, ESQ.

THE MOBILE CLIENT

TERRIFIC!

“Terrific program. I have many clients who live in more than one state so this was very, very helpful to me.”

Why YOU Should Purchase

Any attorney who does estate planning for *clients who are moving*, or *have moved*, from one state to another state or *have multiple state residences* will want to purchase this excellent 3.3-hour May 28, 2009 program by Louis A. Mezzullo, Esquire. He covers the many estate planning issues which arise with such *mobile clients*, including domicile issues, community versus common law property and much more.

Mr. Mezzullo – an outstanding speaker and author – gives you:

- ▶ *dangers to avoid*
- ▶ *useful tips*
- ▶ a *valuable, concise explanation* of this important topic

This detailed “*how-to*” practitioner-oriented program gives you the *knowledge you need* to properly advise your clients.

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LOUIS A. MEZZULLO, a partner in the Rancho Santa Fe, CA office of Luce Forward, is an excellent speaker and a *nationally-recognized expert* on estate planning, taxation, and employee benefits. He was an Adjunct Professor of Law at the University of Richmond Law School from 1978 to 2006, where he taught courses in those subjects and was on the faculty of the University of Miami School of Law Graduate Program in Estate Planning from 2004 until 2007. He is listed in *Who's Who in American Law*, *Who's Who in Emerging Leaders* and *Who's Who in America* (Marquis Who's Who Publishers) and in *The Best Lawyers in America* (for tax, employee benefits and trust and estates) (Woodward/White Publishers). Mr. Mezzullo received his J.D. from University of Richmond Law School, and a B.A. and M.A. from University of Maryland.

TOPICS

- ✓ Introduction
 - differences between common law and community property
 - the issues relating to moving between these two types of jurisdictions
 - property co-ownership, family protection statutes, need for a Will
- ✓ Domicile Issues
 - factors indicating domicile
 - documents needed to effectuate domicile change
- ✓ Multistate Issues Of Testate And Intestate Succession
 - requirements for disposition by Will
 - surviving spousal rights
 - tax apportionment
 - class gifts, lapses, close order of death, rules against perpetuities
- ✓ Property Co-ownership
- ✓ Community Property Issues
 - definitions, general rules, management and classification
 - income, pension benefits, UDCPRDA, transfer taxes
- ✓ Special Situations And Planning Techniques
 - premarital and postmarital agreements
 - widow's election, UGMA, use of trusts

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3.3-Hour Audio CDs/DVDs: These recordings of the entire program can be used at home or office. Audio CDs are **great for studying while traveling.** The DVDs are in color and **perfect for group or individual viewing.**

Recordings of Live Program: The audio CDs and DVDs are the unedited recordings of the full 3.3-hour presentation by Mr. Mezzullo on **May 28, 2009.**

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Valuable Book!

At least purchase the outstanding, comprehensive course book Mr. Mezzullo has prepared:



- ✓ **172 Pages**
- ✓ **Major Headings Are:**
 - **Introduction**
 - **Conflicts of Law**
 - **Domicile Issues for the Mobile Client**
 - **Multistate Issues of Testate and Intestate Succession**
 - **Probate Process**
 - **Co-Ownership of Property**
 - **Community Property in Relation to the Mobile Client**
 - **Special Situations and Planning Techniques**
 - **Planning for the Move to and Arrival in a Community Property Jurisdiction**
 - **Planning for the Move to and Arrival in a Common Law Property Jurisdiction**

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• **May 28, 2009** • **3.3 Hours** •

(338)

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