

NEW!

National Law Foundation
www.nlfcle.com

DOWNLOAD
entire BOOK at
www.nlfcle.com

104-Page Course Book, Audio Tapes, Audio CDs, DVD and VHS Tape
of Live 2.5-Hour May 6, 2005 Presentation

EDWARD C. HALBACH, Jr., ESQUIRE

TIPS FOR AVOIDING RECURRING DEFICIENCIES IN DRAFTING WILLS AND TRUSTS

EXCELLENT!

“Very useful words of wisdom from one of the great statesmen of our profession. Excellent as always.”

Why YOU Should Purchase

This **2.5-hour May 6, 2005** presentation gives you valuable suggestions and warnings about typical drafting issues in wills and trusts, including 15 useful FORM clauses.

Edward C. Halbach, Jr., Esquire, a leading expert, provides you with:

- ▶ descriptions of recurring drafting errors
- ▶ suggestions about how to correct them
- ▶ 15 useful FORM clauses!

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

ORDER YOUR 104-PAGE COURSE BOOK,
▶▶ **AUDIO TAPES, AUDIO CDS, DVD or** ◀◀
VHS VIDEO TAPE TODAY!

EDWARD C. HALBACH, Jr., ESQ. joined the Boalt Hall, University of California - Berkeley faculty in 1959 and served as dean from 1966 to 1975. He is currently Walter Perry Johnson Professor of Law, Emeritus. He serves as the reporter for the American Law Institute's Restatement Third of the Law of Trusts project (three volumes published to date).

Mr. Halbach received the 1981 Award for Excellence from the National College of Probate Judges and has served as president of the International Academy of Estate and Trust Law, as the director of the Probate and Trust Division of the ABA, and as chair of the ABA's Real Property, Probate and Trust Law Section.

This course is accredited for self-study CLE credit in these states when Tapes/CDs/DVD + Course Book are purchased:

- | | | |
|----------------|----------------|----------------|
| • CA - 2.5 GEN | • GA - 2.5 GEN | • NY - 3 GEN |
| • CO - 3 GEN | • NV - 2.5 GEN | • TX - 2.5 GEN |
| • FL - 3 GEN | • NM - 3 GEN | • WA - 2.5 GEN |

Visit our website, www.nlfcle.com, for information on CLE requirements in these states and a full list of other courses available for CLE credit

TOPICS

- ✓ Marital Trusts
 - do not require all income to be paid
 - FORM clause provided
- ✓ Simple Survival Requirements
 - common errors
 - future interests
 - FORM clause provided
- ✓ Drafting Class Gifts
 - matters of definition
 - use of “heirs”
 - FORM clauses provided
- ✓ Drafting Trust Provisions
 - discretionary distributions
 - “other resources” considerations
 - “double standard” distribution discretion
 - extended discretion
 - family trust with broad sprinkling authority
 - FORM clauses provided
- ✓ 15 FORM clauses

Entire Book
With 15 FORM Clauses
on CD-ROM!



ADVANCED SUBJECT MATTER

PLEASE NOTE: This program contains advanced material from a high-level expert. It is recommended for practitioners who are very knowledgeable about drafting wills and trusts.

COMPLETE TABLE OF CONTENTS

To see the complete **Table of Contents** for this course book, or that of any other Estates, Gifts, Trusts or Tax topic we offer, go to www.nlfcle.com and click on the **Estates, Gifts, Trusts & Tax Materials** link on the home page. Click on the blue **Table of Contents** link under the title of the topic you wish to review. To return to the **Estate, Gifts, Trusts and Tax Materials** main page, click the “Back” key on your browser.

104-Page Course Book: Each audio tape, audio CD, DVD and VHS video tape order comes with a **FREE** course book. Alternatively, you may order **just the course book**. Spiral-bound for convenient use, it is **104 pages long** and **loaded with Mr. Halbach's valuable tips, ideas and FORM clauses**.

2.5-Hour Audio Tapes / Audio CDs / DVD / VHS Tape: These recordings of the entire program can be used at home or office. Audio tapes and CDs are **great for studying while traveling**. The DVD and VHS tape are in color and **perfect for group or individual viewing**.

IN A HURRY?

Place your order **TODAY** with your VISA, MasterCard or American Express card by **calling 302/656-4757**, by **faxing 302/655-6363** **OR** by visiting our website, **www.nlfcl.com**



Recordings of Live Program: The audio tapes, audio CDs, DVD and video tape are the unedited recordings of the full 2.5-hour live presentation by Mr. Halbach on **May 6, 2005** at our Great Western Tax & Estate Planning Conference in Las Vegas, Nevada.

CLE Credits for In-House or Self-Study: National Law Foundation is an accredited CLE provider in **California, Florida, Washington** and many other states. **The New York State Continuing Legal Education Board** has approved the National Law Foundation as an Accredited Provider of New York CLE for all live and recorded ("non-traditional format") courses produced since August 1, 1997. Attorneys licensed in New York State can earn CLE credit with all National Law Foundation courses for one year from the date of purchase. Purchase the tape, DVD or CD from this excellent program and **earn CLE Credits by Self-Study**. (Check with your CLE Commission.)

Valuable Book!

At least purchase this outstanding **104-page** book prepared by Mr. Halbach:

- ✓ **Practical, thorough** explanation of the relevant law
- ✓ **Major Headings Include:**
 - Simple Survival Requirements
 - Beneficiary And Fiduciary Powers
 - Drafting Class Gifts And Remainder Provisions
 - Marital Deduction Drafting
 - Special Problems Of Revocable Trusts
 - Fiduciary Selection And Authority
 - Other Matters



✓ **15 Useful FORM Clauses:**

- 1) Marital Bequest: Survivorship Alternatives
- 2) Special Share For Disclaimed Property
- 3) Generous "Double Standard" Discretion Over Distributions
- 4) Special Power To Terminate Son's or Daughter's Trust
- 5) Powers of Appointment - Short and Long Forms
- 6) Pour-Over To Inter Vivos Trust
- 7) Nomination and Authority of Trustees
- 8) Nomination and Authority of Executor
- 9) Trust Investment and P&I Provisions, to protect MD
- 10) Protective Provision For Beneficiary - Trustee
- 11) Transactions With Beneficiaries And Other Fiduciaries
- 12) Saving Clause: Rule Against Perpetuities
- 13) Important Definitional Provisions
- 14) Staggered Distribution of Child's/Grandchild's Trust
- 15) Flexibility In Dealing With Illustrative Variations in Shares, Classes or Conditions

ORDER FORM — 4 EASY WAYS TO ORDER:

1. Place your order on our website, **www.nlfcl.com**, with credit card charge (**VISA, MasterCard or American Express ONLY**), or
2. Complete and **mail brochure** with check or credit card to **National Law Foundation, P. O. Box 218, Montchanin, DE 19710**, or
3. **Telephone 302/656-4757** with credit card charge (**VISA, MasterCard or American Express ONLY**), or
4. **FAX this side of the brochure** with credit card charge (**VISA, MasterCard or American Express ONLY**), to **302/655-6363**

Entire Book with 15 Clauses on CD-ROM!

NAME OF ATTORNEY _____ TELEPHONE (day) _____

FIRM NAME _____ FAX _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____ (If purchasing for CLE, what state? _____)

Enclosed is my check to NATIONAL LAW FOUNDATION Charge my credit card (**VISA, MasterCard or AmEx ONLY**)

CREDIT CARD INFORMATION: Exact Name on Card _____

Card No. _____ Exp. Date _____

Price includes UPS GROUND shipping. For shipping via **expedited Federal Express** at additional charge, circle below.

CIRCLE: overnight or 2nd day **CHARGE Federal Express #** _____ **or my credit card.**

E-MAIL NOTICE: To receive update notifications of our seminars and self-study topics by e-mail, provide your e-mail address here: _____
(All customer information, including your e-mail address, is kept in strict confidence)

TIPS FOR AVOIDING RECURRING DEFICIENCIES / WILLS & TRUSTS

• **May 6, 2005** • **2.5 Hours** •

(215)

Save \$39 Off CD-ROM!

★ **Only \$40** if ordered **with** the Course Book **or** Audio Tape, Audio CDs, DVD or VHS Tape with Course Book set.

★ The CD-ROM contains the **ENTIRE BOOK** in both MS Word *and* WordPerfect file formats for PC.



- 2.5-Hour VHS Video Tape and 104-Page Course Book ***\$129**
- 2.5-Hour DVD and 104-Page Course Book ***\$129**
- 2.5-Hour Audio CDs and 104-Page Course Book ***\$109**
- 2.5-Hour Audio Tapes and 104-Page Course Book ***\$99**
- 104-Page Course Book **ONLY** **\$79**
- Book on CD-ROM **WITH BOOK/TAPE/CD PURCHASE** **\$40**
- Book on CD-ROM **ONLY** **\$79**

*May be used to earn Self-Study CLE credit. See box on other side for details.