

InterActive Legal Editor-in-Chief, Jonathan G. Blattmachr and Elder Law & Special Needs Planning™ author Andrew H. Hook will present at the 43rd Annual Heckerling Institute in Orlando, FL on January 12-16, 2009.

On Thursday, January 15th, Mr. Hook will participate in a panel with Sebastian V. Grassi, Jr. and Barry A. Nelson. The title is *Meet the Joneses – A Potpourri of Estate Planning Issues for A Special Needs Family (Including Sample Trust Forms)*. Their case study will explore issues that a family with a special needs child faces when preparing an estate plan.

Mr. Blattmachr will lecture on Tuesday, January 13. His talk is entitled *Planning for the Unknown for 2010 and Beyond: Carryover Basis and No Estate Tax or a Revised Wealth Transfer Tax System*. He will also participate in a panel discussion on Friday, January 16th entitled *Ideas, Not Necessarily Invented Here: Best Practices for the Adventurous Estate Planner*. Along with S. Stacy and Ellen K. Harrison, he will discuss creative and practical ways to minimize tax on wealth transfers, including the “supercharged credit shelter trust” Section 2038 double basis step-up trusts, split-interest trusts, split purchases of residences, structuring FLPs to avoid Section 2036, and use of “purpose trusts.” In addition, the panelists will discuss some highlights of the 43rd Annual Heckerling Institute – the best of the best.

Mr. Blattmachr and Mr. Hook, along with Michael L. Graham, CEO of InterActive Legal, will be available at the company booth to answer questions, meet conference attendees, and to present short lectures on timely topics in estate planning. Please stop by and say hello.

The Heckerling Institute on Estate Planning is the nation’s leading conference for estate planning professionals. It is designed for sophisticated attorneys, trust officers, accountants, insurance advisors, and wealth management professionals who are familiar with the principles of estate planning.