

**American Bar Association  
Section of Real Property, Trust and Estate Law**

**Leadership Reference Document  
2008-2009**

**Introduction**

Thank you for agreeing to participate in the leadership of the Section of Real Property, Trust and Estate Law. The vitality of our Section stems from the creativity and energy of our committees and our groups. Your commitment to this work is appreciated and we look forward to a very successful year.

**Section Structure**

Our Section is unique in that we are comprised of two divisions – Real Property and Trust and Estate. The Section is governed by a council that includes representatives from both divisions. There are a number of standing committees, special committees and task forces. In addition, the Section has numerous liaisons to other ABA entities and non-ABA organizations.

The divisions are divided into groups that house all the substantive committees. Some members of the Section's council are designated as supervisory council members (SCM's) and assigned to various groups to assist in their activities and organizational matters. Each group has a group chair and a group vice-chair who are devoted to establishing substantive links concerning the committees in each group, with the goal of orchestrating group-wide activities, including periodic group teleconference calls, CLE initiatives, and work product of interest to Section members having practices grounded in the substantive activities of each group's committees.

Group chairs and vice-chairs work with committee chairs and vice-chairs to help coordinate periodic group teleconference calls, group web sites, CLE and publication efforts involving the committees within the group, as well as comments on government submissions on topics covered by the group's committees. They also consult with the group chairs and vice-chairs of the other groups to facilitate cooperation on projects, CLE or other efforts that may overlap the work done by each group.

The committee chairs and vice-chairs of our more than 65 substantive committees play a vital role in the Section to harness the talent of committee members to create programs, activities, articles and publications. Committees are focused on specific areas of the law and provide Section members with forums for discussions of current legal issues while connecting Section members with colleagues pursuing similar interests.

## **Policies and Procedures**

The Section has produced a *Policies and Procedures Manual* for Section leaders to use as a reference tool in carrying out their responsibilities. The manual contains descriptions of the organization of the Section as well as information about various policies and procedures that you, as a Section leader, will find invaluable. This manual is available online at <http://www.abanet.org/rpte/resources/2007-2008PolicyManual.pdf>.

## **Group and Committee Communications**

**Web Page Development.** Communication and the dissemination of relevant information are important factors in the success of the Section. Over the past several years, we have made a determined effort to enhance the group web pages by adding appropriate, content rich information and material. The group vice-chair is responsible for organizing and overseeing the efforts to complete and enhance the group's web page. Committees are urged to take full advantage of their specific committee web pages and to work with group vice-chairs so that Section members can have access to timely, relevant information in the subject area encompassed by each group and all of its committees. Cynthia Dickmann, the Section's Marketing, Communications, and Membership Director is ready to assist in developing and maintaining the web pages and can be reached at 312.988.5540 or by e-mail at [dickmannc@staff.abanet.org](mailto:dickmannc@staff.abanet.org).

**Group Teleconferences.** Some groups have generated much interest and synergy by having periodic “dial-in” telephone conference calls of members of committees in the group who want to participate. The calls may include (1) brief presentations about current developments, (2) time to brainstorm planning issues that any participants want to discuss, and (3) a discussion of ongoing group projects. All groups are strongly encouraged to participate in this program as a special opportunity to create a discussion forum for attorneys across the nation who are interested in the substantive area of the group discussion.

Each group will determine its calendar for scheduling these periodic conference calls and coordinate with the Section office to arrange “dial-in” conference call service. In addition, some committees may also want to hold periodic conference calls.

## **Participation in Section Meetings**

There are a number of meetings scheduled throughout the bar year that Section leadership is expected to attend. These meetings provide an opportunity to meet personally with Section colleagues to discuss the business of the Section as well as group and committee programs and projects.

**Fall CLE Meeting.** The 6<sup>th</sup> Annual Joint Fall CLE Meeting with the ABA Section of Taxation will be held September 12-13, 2008 in San Francisco. This year the Trust and Estate Division will participate in offering a wide selection of CLE programs on topics of interest to Section

members. T & E groups will hold meetings that will include a business meeting and CLE in a roundtable or open forum. The Real Property Division will not meet during this meeting. T & E group chairs and vice chairs are expected to attend this meeting. Either the committee chair or vice-chair of each committee is expected to attend this meeting to ensure full representation of all T & E committees. The Section does not reimburse travel expenses for this meeting.

*For purposes of planning your travel, the meeting begins at 7:30 a.m. on Friday, September 12, and the last CLE meeting ends Saturday, September 13, at 5:30 p.m. There will be a T & E division leadership dinner Saturday evening. There are no meetings Sunday morning.*

**Fall Leadership Meeting and Orientation.** The Fall Leadership Meeting and Orientation will take place November 6-9, 2008 in Montreal, Quebec (**remember to bring your passport**; if you do not have a passport, or if your passport is not current, please take steps *immediately* to secure a valid passport. There may be a significant time delay in obtaining or updating a passport [www.travel.state.gov/passport](http://www.travel.state.gov/passport).)

All group chairs and group vice-chairs are required to attend this meeting. At least one committee chair (or in lieu of a chair, a vice-chair) from each committee, is also required to attend this meeting (if a committee has co-chairs, both co-chairs are encouraged to attend.). ***This is a very important meeting, and it is vital to have all group chairs and vice-chairs and all committee chairs present as we coordinate plans for our activities in the upcoming year.*** This meeting will provide the first opportunity in the coming ABA bar year for committee chairs to meet with their respective supervisory council member, group chair and vice-chair to coordinate planning for future group and committee activities. Pursuant to our current policy, the Section will reimburse group chairs, group vice-chairs and members of Section standing committees for reasonable transportation costs to attend the meeting and provide a \$100 per day hotel allowance. Each committee chair or co-chair (or a committee vice-chair if the committee chair cannot attend), will also be reimbursed for reasonable transportation costs to attend the meeting and a \$100 per day hotel allowance. Committee vice-chairs are welcome to attend the meeting at their own travel and lodging expense. Expenses for committee vice-chairs are otherwise only reimbursable if the vice-chair is attending the conference because his or her committee chair cannot attend, and is subject to prior approval by the Section director.

*For purposes of planning your travel, there will be a Planning Committee meeting on Thursday, November 6 at 5:00 pm (only for those on the Planning Committee). Standing committee meetings will begin early Friday morning (November 7) and the sub-council meetings for each division will begin at 11:45 a.m. on Friday. The sessions for new leaders (if you have not been to the Fall Leadership Meeting previously) will begin at 11:45 a.m. on Friday, November 7. There will be group sessions for everyone beginning at 2:00 pm on Friday, November 7. The formal meetings will end after lunch on Saturday, November 7, but there will be fun activities in Montreal available Saturday afternoon and dinner at a special fun setting Saturday evening, ending late in the evening. We encourage everyone to stay for the dinner Saturday evening. The council will meet Sunday morning (November 9) and will finish no later than 10:00 a.m. (Other than the Planning Committee meeting on Thursday afternoon, all of the standing committee meetings, the sub-council meetings, and the council meeting are open to everyone who wants to attend.)*

**Spring Symposia.** The Section's 20<sup>th</sup> Annual Spring Symposia is scheduled for April 29 – May 3, 2009 in Washington, D.C. At least one committee chair (or in lieu thereof, a vice-chair) of each committee, and all group chairs and group vice-chairs will be required to attend this meeting. The groups will be holding group meetings (to include a group business meeting and CLE in a roundtable or open forum approach), in coordination with the Section's traditional stand-alone CLE committee programs. No one is reimbursed for travel expenses related to the Spring Symposia.

**Spring Leadership Meeting.** The Spring Leadership meeting will be held in conjunction with the Spring Symposia at which the Section council, sub-councils, standing committees, editorial boards and task forces will hold meetings. The Section will reimburse group chairs, group vice-chairs, editors, officers, council members and members of Section standing committees for reasonable transportation costs and a \$100 per diem hotel allowance for the Spring Symposium.

*For purposes of planning your travel, there will be a Planning Committee meeting on Wednesday, April 29 beginning at 4:00 p.m. (only for those on the Planning Committee). The CLE sessions begin at 7:00 a.m. on Thursday, April 30. There will be a Section reception Thursday evening for all symposium attendees. There are also CLE sessions on Friday, ending at 5:00 p.m. There will be standing committee meetings on Saturday, May 1, beginning at 7:00 a.m. Sub-council meetings for each division will be late Saturday morning, and the council meeting will be held during lunch on Saturday, ending by 2:30 p.m. There will be Section leadership dinners on Friday and Saturday evenings. There are no meetings Sunday morning. (Other than the Planning Committee meeting on Thursday afternoon, all of the standing committee meetings, the sub-council meetings, and the council meeting are open to everyone who wants to attend.).*

**2009 Annual Meeting.** The 2009 ABA Annual Meeting is July 30 – August 4, 2009 in Chicago. Council members and planning committee members are required to attend. The planning committee, sub-council and council meetings will be on Saturday, August 1, 2009. There is a possibility that the Real Property division may provide CLE activities at the 2009 Annual Meeting; that decision is still being considered. We will provide more information about the 2009 ABA Annual Meeting at a later time. The Section does not reimburse travel expenses for this meeting.

**ABA Section of Real Property, Trust and Estate Law  
Annual Section Meetings  
Invitation and Reimbursement Information  
2008-2009**

<b>Meeting</b>	<b>Date/Location</b>	<b>Invited</b>	<b>Expected to Attend</b>	<b>Reimbursed</b>
Fall Joint CLE Meeting	September 12-13 San Francisco	Tax Section Members RPTE Members with T&E areas of practice	T&E Division Group Chairs and Vice- Chairs and a Chair or Vice-Chair from each Committee	None
Fall Leadership Meeting	November 6-9 Montreal	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice-Chairs Substantive Committee Chairs Editors	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice-Chairs Substantive Committee Chairs Editors	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice- Chairs Substantive Committee Chairs (vice-chair if chair is unable to attend) Editors
ABA Midyear Meeting	February 11-17 Boston	RPTE Officers RPTE Liaisons to ABA Committees	RPTE Officers	RPTE Officers Liaisons per policy for reimbursing liaisons
Spring Symposia	April 29- May 3 Washington, DC	RPTE Section Members Local Lawyers with RPTE Areas of Practice	RPTE Leadership: Officers Council Group Chairs and Vice-Chairs Substantive Committee Chairs	None
Spring Leadership Meeting	May 3 Washington, DC	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice-Chairs Substantive Committee Chairs Editors	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice-Chairs Substantive Committee Chairs Editors	RPTE Leadership: Officers Council Standing Committee Chairs and Members Group Chairs and Vice- Chairs Substantive Committee Chairs Editors
ABA Annual Meeting	July 30- August 4 Chicago	RPTE Officers RPTE Council RPTE Planning Committee	RPTE Officers RPTE Council RPTE Planning Committee	None