TO:	Committee Chairs, Group Chairs and Vice-Chairs and Supervisory Council Members, Trust and Estate Division
FROM:	Aen Walker Webster and Stephanie Loomis-Price, 2008-2009 Division Subcommittee, Trust and Estate Division
CC:	Steve R. Akers Alan F. Rothschild Marc S. Bekerman Committee Vice-Chairs, Trust and Estate Division
DATE:	September 22, 2008
SUBJECT:	20th Annual Trust and Estate Symposium Washington, D.C., April 29, 2009-May 3, 2009

DEADLINE FOR PROGRAM PROPOSALS IS NOVEMBER 14, 2008

The Trust and Estate Division has begun planning continuing legal education programs for the 20th Annual Symposium, to be held in Washington, D.C., April 29, 2009-May 3, 2009. The format for the next Spring Symposium, while not yet final, is expected to include CLE programming for Thursday and Friday. As currently planned, Thursday will be devoted to six Group CLE programs, with most Groups meeting for a period of either 90 or 105 minutes and two Groups meeting for 180 minutes. **Please let us know your desired program length no later than October 17, 2008 so that we may let each Group know in advance what time block to plan to fill. The time blocks will be allocated on a first-come, first served basis.**

These time periods should permit the Groups to conduct Group-related business and to facilitate discussion among those in attendance in addition to presenting CLE topics. Although it will be up to each Group Chair to decide how to allocate the time set aside for that Group, we suggest that Group business follow the CLE presentation to allow for scheduling break-out sessions of the Group's Committees if that is desired.

For additional Group and/or Committee discussion, instead of the familiar early breakfast meetings the Friday lunch period has been reserved. Groups are encouraged to make their CLE programs as interactive as possible, encouraging discussion and other participation by those who attend. The lunch will be offered for a modest cost, with a significant subsidy from the Section and it will be necessary for those who wish to attend to pre-register for the lunch. **Please let us know by November 14 whether your Group**

will meet as a Group or will break out into Committee tables. Our space will not permit a separate room for each Group, but we will allocate the available space in a manner to reduce noise and confusion.

Please recall that all speakers are expected to register for the full meeting, paying the registration fee appropriate to the membership category of each speaker.

Each Group's CLE programming may take one of two recommended forms: Either a series of topics, with the time block divided among sequentially presented programs on topics of interest to the Group (and perhaps Division members outside the Group); or roundtable discussions, where the entire Group meets for a few minutes at the beginning of the time block and then breaks into several separate discussion sections to discuss different specific topics. Topics would be pre-assigned to discussion leaders for each section and, near the end of the session, one individual from each discussion section would address the entire assembled Group to summarize the discussions at that particular roundtable. These formats should offer an excellent opportunity to include young lawyers and new Group members as discussion leaders.

Regardless of the format you choose for your Group's CLE block, please communicate the substantive topics to be discussed at roundtables, or the programs to be presented sequentially, to the Trust and Estate Division CLE Subcommittee, along with appropriate descriptions to be included in the Symposium brochure no later than November 14, 2008. In addition, speakers or, if applicable, roundtable discussion leaders, will need to prepare written materials for inclusion among the Symposium materials (as well as to ensure that appropriate CLE credit will be available for these programs). We emphasize that Section members rank accredited CLE programs highly as a desired benefit from attending our meetings. Consequently, when planning your Group programs, please aim for the same level of quality in panel and materials as typically associated with Section CLE. Moreover, please adhere to the strict deadlines for submission of forms and materials, as these materials relate to accreditation and delivery of an excellent product to our members.

In addition to the Group CLE programs described above, Committee Chairs should propose stand-alone CLE programs having 90 minute duration for consideration for open time slots on Friday. These programs will be in the "traditional CLE" format. Committee Chairs should contact other Committee Chairs in the Division and their respective Group Chairs with proposals for stand-alone CLE programs, as well as suggestions for the Group CLE. Please remember that, as has been the case for the past several years, Group Chair approval of stand-alone CLE programs will be required in lieu of approval from the Group’s Supervisory Council Member. Nevertheless, the Group Supervisory Council Member should receive a copy of all proposals submitted to the Trust and Estate Division CLE Subcommittee. Because the time blocks for the stand-alone programs will be longer in 2009, there will be fewer programs. In addition, due to the late timing of this year’s fall leadership meeting, we will have to decide some stand-alone programs in advance. We will notify Group chairs of the Program speakers and their topics in advance of the fall leadership meeting in order to avoid overlap. We will consider Group proposals for stand-alone programs as we receive them. Final selection of the stand-alone CLE programs will be made by the Trust and Estate Division CLE Subcommittee, and we will notify program chairs of our decisions in early December of 2008.

We remind you that the Section is committed to expanding and diversifying our membership. As such, we encourage you to make every effort to invite minority speakers to participate as panelists on your program. The Section has established relationships with national minority bar associations and can assist you in locating qualified panelists for your program. Similarly, we encourage you to invite young lawyers to participate in your programs. The Section has a Young Lawyers Network, which may assist you in locating young lawyers who are interested in speaking opportunities on the topics planned for your programs.

Committee Chairs should discuss program proposals with their Committee members as soon as possible, and then contact their Group Chairs so that Group Chairs can finalize plans for the Group CLE and coordinate with the Committee Chairs to submit proposals for stand-alone traditional CLE programs. This year we will use an online process for Program Proposal submissions. These forms will be available for online at the end of this week and you will be notified once the link is active.

The Trust and Estate Division thanks you in advance for your continued support and participation, and for the anticipated timely submittal of your proposals. We look forward to a successful Spring Symposium in 2009! If you have questions on any of the above, feel free to contact Aen Webster at 202.452.7935 or Stephanie Loomis-Price at 713.229.1801.

Please remember that the deadline for program proposals and group program submissions is November 14, 2008.