THE VENDORS (from the Exhibit Hall)
Reporters: Craig Dreyer and Michelle Mieras

This report lists the various vendors in alphabetical order to make it easier for our readers to find the vendors they are most interested in. The views expressed here are by necessity those of the reporters and not those of the vendors. Due to time limitations, not all the vendors were visited and interviewed. For a complete list of all of the vendors, see Report Introduction Part 1 that was sent out on December 29, 2013.

American Association of Attorney-Certified Public Accountants (AAA-CPA):
AAA-CPA is celebrating their 50th anniversary in 2014. They specialize in protecting the rights of professionals who have qualified to practice as both an attorney and a CPA. They are the only provider of dual liability insurance, and provide educational opportunities that will simultaneously meet CLE and CPE requirements. In addition to meetings and weekly newsletters, AAA-CPA members have access to a listserv that allows them to brainstorm and cross-ref with other dually-licensed practitioners that understand their language.

Memberships cost $125 for the first year, and $250 per year thereafter. Affiliate memberships are also available for those with JD-LLM and JD-CFP qualifications, at $147.50 and then $295 per year. Student and educator memberships are also available. Go to <http://www.attorney-cpa.com> or contact them at <info@attorney-cpa.com> for more information or to take advantage of the 50% discount for the first year membership.

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

The ABA booth reported fairly standard traffic, although they were swarmed after Stephanie Loomis-Price mentioned that an Adequate Disclosure Checklist was available at the booth. This checklist is available online, as is their same-sex marriage paper. Go to <http://www.ambar.org/RPTE> to retrieve these. As usual, the ABA-RPTE booth featured various publications, and they were offering a free book with any new ABA or RPTE section membership. New this month is “A Guide to International Estate Planning,” Leigh-Alexandra Basho, Editor. For more information, go to the website above or contact Amelia Stone at amelia.stone@americanbar.org.

Amicus Creative Media LLC

Need a great website but don’t want it to be a lifetime project? Amicus Creative Media has the solution for you. Amicus specializes in website development and marketing exclusively for law firms. Founded by an estate planning attorney, its products are developed from the estate planning practitioner’s perspective. They can efficiently build you a custom website complete
with search engine optimization and built-in features like seminar schedulers and management tools. Every website includes e-newsletter capabilities. For up to a week following Heckerling, practitioners who engage Amicus for website development can receive a free mobile version of their website (a $750 value) to optimize mobile access for clients and potential clients. For $200 initial set-up and $99 per month, attorneys can also subscribe to Insight in Motion, which provides content for newsletters. Attorneys can use this to select up to three articles of their own choosing per month for their e-newsletter, or the busy practitioner can have the newsletter content determined automatically for them. The content is written by attorneys, for attorneys.

In addition, Amicus offers Legal Vault, where attorneys can store documents on the cloud and give secure, HIPAA-compliant access to their clients. For only $350, an attorney can set up Legal Vault and then sell their clients one, three, five or seven year subscriptions. Clients can have direct access to their information and are able to provide access to others of their choosing, such as accountants, financial advisors, agents, and significant family members. They also have the ability to permit a hospital to retrieve medical powers of attorney and advance directive directly and at any hour in order to provide emergency care.


Appraisers & Planners, Inc. (a Silver Sponsor)

Appraisers & Planners, Inc. is one of the largest and oldest firms that works exclusively with estates and trusts. Their appraisals are formatted and geared toward the ultimate readership of an IRS agent. They work closely with the IRS to accomplish settlements when needed. Visit their website at <http://www.appraisersandplanners.com>www.appraisersandplanners.com or contact James Levy, Chairman, at jimlevy@appraiser-plan.com.

Appraisers Association of America

Celebrating its 65th year, the Appraisers Association of America ensures that all of its members uphold Uniform Standards of Professional Appraisal Practice, adding credibility to the personal property appraisals performed by its members. Contact AAA at 212-889-5404 ext. 11, or visit their website at <http://www.appraisersassociation.org>www.appraisersassociation.org where you can find a database of their members and appraisal specialties.

Bloomberg BNA: (a Platinum Sponsor)

Now you can keep Portfolios in your pocket! BNA, acquired by Bloomberg a few years ago, has long been known for its tax Portfolios. A new Tax and
Accounting Center app for ipad and iphones is available for practitioners. The app, which is free to download but requires an existing Bloomberg BNA subscription with which to interact, keeps you up to date on tax news and also allows caching of Portfolios for off-line access. The app features the ability to mark-up and highlight the virtual Portfolios, easing the transition from paper to electronic Portfolios.

The Portfolios are ever-expanding, with several new state and federal issues being addressed. Bloomberg BNA hosted a breakfast with authors of two new Portfolios: Jeff Pennell, author of Portfolio 841, Spousal Elective Share, and Todd Angkatavanich and David Stein, authors of Portfolio 875, Wealth Planning with Hedge Fund and Private Equity Fund Interests.

Over the past year, Bloomberg BNA has transitioned from a resource to which practitioners turn for gray-area research on specific issues to a full-service provider for simple to complex issues. In September of 2013, Bloomberg BNA launched its Premier State Tax Library, a full-service solution for research and planning. Some of its features include state chart builders and a trust nexus evaluator to assist in determining the states in which tax liability may attach. The content in Estate Trust and Gift Navigator has been updated for extensive state and federal research. Discounts are available to conference attendees but vary based upon the resources needed. For more information, see the website at www.bna.com, or contact Conrad Heibel at cheibel@bna.com or 703-341-5965.

BNY Mellon Wealth Management (a Platinum Sponsor)

BNY Mellon Wealth Management has full-service wealth management offerings for a broad spectrum of clients, including individuals, family offices, foundations, and other professionals. They work closely with other advisors to further the client relationship and ensure comprehensive and well-executed planning. BNY Mellon offers extensive white papers on their website with current commentary on a variety of issues. Visit their website at www.bnymellonwealthmanagement.com or contact them at wealthmanagement@bnymellon.com for more information.

Borro

Borro specializes in lending funds against tangible luxury assets, such as art, jewelry and vehicles. Loans for up to $1 million can be done in as few as 24 hours. Rates begin at 1%, depending on the services. Borro also
advances funds while assets are being sold. Loans are made to estates and trust under the right circumstances. For more information, see <http://www.borro.com> www.borro.com.

Brentmark

Brentmark, one of the oldest exhibitors at Heckerling, now offers training webinars for their users. Brentmark’s annual software updates will come out toward the end of January/beginning of February. Their Retirement Plan Analyzer is a force in the world of IRAs, and Estate Planning Tools is exceptional estate planning presentation software. They recently began offering customized applications and web versions.

Brentmark is offering a 20% discount on all their software products through the end of February. Contact Nicole Maholtz at 800-694-7624 or <mailto:Nicole@brentmark.com>Nicole@brentmark.com for more information.

CBData Life Inventory Systems / CareBinders LLC

Be prepared for the unexpected by creating a life catalog with CB Data Life Inventory Systems and CareBinders LLC. They travel to the client’s home and pull together all of the client’s important personal, medical and financial information (passwords, medical records, home inventories, account information, list of advisors and contacts, wallet contents, etc.), then digitize it into one safe, secure place on the client’s computer, the client’s advisor’s computer, or the company’s computer. The information is not stored on the Internet due to security concerns, although online access is provide if the client wishes. Physical binders are available, as are encrypted flash drives or discs. They can also send the information electronically via a 250-bit encrypted date file. In addition to their full-scale service, they offer their software for download. 2014 Heckerling attendees may purchase the software only at a discounted price of $139. Visit them at <http://www.CBDataSystems.com>www.CBDataSystems.com.

Charitableplanning.com

Charitableplanning.com, the brain child of attorney Emanuel J. Kallina of Towson, MD, provides numerous unbundled services for charitable planning. It offers a daily digest giving up-to-date industry developments. It not only describes what’s new, it provides commentary explaining the significance. It also provides an extensive online library, linked to over one million public-domain documents. Its research services assist the practitioner to funnel his or her research on specific topics without overwhelming the user with information. Their industry-specific calculators for all aspects of charitable planning are
available. Finally, it offers a fantastic and handy handbook, which is a “charitable planning 101” type resource. A la carte and comprehensive yearly subscriptions are available are available at very reasonable rates. They also offer a free 7-day trial. Go to www.charitableplanning.com or contact them at 410-377-2170 for more information.

Charles Schwab Bank (a Gold Sponsor)

Charles Schwab Bank offers a directed trustee solution and administrative trustee services with Delaware administrative situs. RIAs can custody their assets at Charles Schwab Bank, allowing RIAs to compete against larger institutional fiduciaries. For more information about the services Charles Schwab provides to advisors, visit schwabadvisorcenter.com/attorney.

Client Maintenance Academy

Client Maintenance Academy teaches attorneys how to develop their practices by creating their own customized client maintenance plans. Their next 2-day training session begins May 8, 2014. Six monthly group coaching calls following the training are also available. See their website at www.clientmaintenanceacademy.com for additional details.

CrummeyService.com, LLC

CrummeyService.com has a new license-based pricing model for their software, which provides trust companies, estate planning and administration law firms, and family offices with comprehensive Crummey notice services. Visit www.crummeyservice.com or, for a demonstration of all the new features and benefits, contact Marc Morrow, New Business Coordinator, at (888)648-ILIT (4548) or mmorrow@crummeyservice.com.

Empire Valuation Consultants LLC (a Sulver Sponsor)

Empire provides fixed-fee business valuation services throughout the nation. This is their 25th year in business, and their 20th year at Heckerling. See their website for additional information and to locate the appropriate contact person in your geographical area: www.empireval.com
EY (a Platinum Sponsor)

EY provides expertise to mid- to large-size bank trust departments and law firms. In the past year, EY expanded through its acquisition of OneSource Trust & Estate Administration – now Fiduciary/Trust Accounting Services (FTAS) – providing comprehensive fiduciary court accounting services. EY also has expanded its family business offerings and expertise, and can serve in the role of the traditional family office for both domestic and international families. EY’s cross-border tax advisory services are also growing. They continue to provide return preparation services and advise on trust-related tax issues.

See their website at <http://www.ey.com> www.ey.com, or contact Ken Novak at 312-879-3438 or <mailto:kenneth.novak1@ey.com>kenneth.novak1@ey.com.

ESOPMarketplace.com / FamilyBusinessMarketplace.com

ESOPMarketplace.com exhibited at Heckerling for the second year. This online resource provides access to the wide variety of services applicable to ESOPs from start to finish. The providers each specialize in their respective areas, ensuring that each need is expertly covered. Biographies of the service providers are available online. The website also provides educational materials on ESOPs, serving as a resource for estate and succession planning. Various tools are available for subscription. Visit <http://www.esopmarketplace.com> www.esopmarketplace.com or contact Jack Veale at <mailto:JackV@ESOPMarketplace.com>JackV@ESOPMarketplace.com for more information.

Evaluation Services Inc.

Evaluation Services Inc. has provided expert global stock and bond valuations and capital change reporting for almost 30 years. They have an updated version of Appraise.Windows. A new addition to their services is APPRAISE.Web, an exclusive web product providing date of death, alternate, gift tax and distribution valuations. Get an instant valuation online and email it to yourself using this pay-as-you-go service with no recurring fees. Visit their website at <http://www.appraisenj.com> www.appraisenj.com

Fidelity Charitable (a Silver Sponsor)

One of Fidelity Charitable’s specialties is working with advisors and their clients to facilitate complex asset donation. They employ formerly practicing estate planning attorneys to perform complex asset due diligence. Over the past year, Fidelity Charitable has grown their online video database, available at
Fidelity Charitable continues to grow their donor advised fund services, as more and more clients collapse private foundations that they find burdensome. Accounts can be easily established online. Fees on donor advised funds begin at 0.60% on the first $500,000, which lower fee tiers for higher balances. For more information, see www.fidelitycharitable.org.

FMV Opinions, Inc. (a Gold Sponsor)

FMV Opinions specializes in producing expert, defendable valuations of businesses, real estate and asset holding entities. They have the depth and expertise to defend their appraisals before the IRS or Tax Court. Their website, www.fmv.com provides up-to-date information and analysis of Tax Court cases. FMV also publishes the largest study of restricted stock transactions for minority/marketability discounts.

Foundation Source

Foundation Source now offers online applications for Fast Track Pro, a service for the exclusive use of attorneys creating private non-operating foundations. Get peace of mind by having the experts at Foundation Source efficiently get a foundation up and running in as little as one week for $7,500. Their website, www.foundationsource.com, offers free resources for advisors, including best practices, white papers, and cause papers. Foundation Source also provides tax and compliance services for philanthropic activities and offers GrantSafe, their free pre-grant due diligence service ensuring the qualifications of charities to which their clients are considering making gifts. Visit their website, www.foundationsource.com, for more information about their services and a demonstration.

GayEstatePlanning.com / WhetherToWed.com

Attorney Scott Squillace exhibited at Heckerling for the first time this year, and appreciates the amazing support from the attendees. GayEstatePlanning.com provides a broad planning resource addressing numerous issues gay and lesbian couples face in their estate planning.

Scott is the author of Whether to Wed, which assists same-sex couples to
consider the various legal and tax implications of same-sex marriage. This newly-published book is available to Heckerling attendees at a discounted rate for a month following the conference. Scott recognizes the quickly changing landscape, and provides state-by-state updates to the book at whethertowed.com. Scott is available for speaking engagements with a minimum purchase of books. Please contact him at scott@squillace-law.com or 617-716-0300.

GEMS – Gillett Estate Management Suite

GEMS provides 706 and 709 return preparation and trust accounting software in one bundled package (but no Form 1041). Recent updates provide hanging Crummey power tracking and advice regarding the consequences of lapsing powers. An annual subscription for a single user is $1295 for the first year, and renewable after that for $650. An annual subscription for multiple users (unlimited number in the same geographical location) is $1995 and renews at $1000. GEMS is offering a 25% discount through the end of January. Contact them at sales@gillettpublishing.com.

IKOR Global

IKOR specializes in working with other advisors to manage care issues for seniors and the disabled. IKOR provides medical and financial advocacy, and focuses on supporting fiduciaries. They will also serve in such roles as guardian, conservator, medical and/or financial agent. IKOR serves 13 states in 24 locations, and will open their new Denver office next month. Visit their website at www.ikorglobal.com or contact Cynthia Gartman, President, at Cynthia.Gartman@ikorglobal.com.

Interactive Legal Suite

Interactive Legal Suite has three separate packages. Wealth Transfer Planning, Elder Law Planning and Essential Estate Planning. In the past year Wealth Transfer Planning has updated their documents to allow for same sex couples. They have added asset protection trusts for Virginia and Ohio, digital asset protection provisions, domestic partner trusts, and pet trusts to their documents. The full Wealth Transfer Planning package includes options such as an FLP, FLLC, and Grantor Trusts. Purchasing one license gives you access to multiple state versions in the Wealth Transfer Planning module. In addition to the full Wealth Transfer Planning option they have a simpler and more inexpensive version called Essential Planning.

They have an Elder Law Planning drafting system as well.
These document assembly systems provide documents for over 50 states and the District of Columbia. Pricing is available by contacting them and they have a Heckerling discount. Further information on Interactive Legal can be found at [www.interactivelegal.com](http://www.interactivelegal.com) or by calling (321) 252-0100.

**Intuitive Estate Planner**

Intuitive Estate Planner by Donald H. Kelley provides a picture of clients’ estate plans with various tax in depth and often complex calculations. It is one of the most sophisticated and comprehensive calculation illustration programs available in the estate planning area that allows you to compare among various planning techniques. It also comes with a customizable client slide show.

They offer packages with various levels of capability, and they are offering a Heckerling discount. For more information please go to Thomson West website at [www.west.thomson.com](http://www.west.thomson.com).

**Lackner Group 6 in 1 Estate and Trust Administration**

Lackner Group 6-in-1 as the name hints and with one entry of data, allows a user to produce a US Estate Tax Return, Inventory, U.S. Fiduciary Income Tax Return, State Fiduciary Income Tax Return, State Inheritance/Estate Tax, Account (Trustee’s and Executors) and Inventory. In addition the system can prepare Forms 709. It also supports probate forms for Pennsylvania and North Carolina. The program includes DecoupleCruncher in order to perform estate tax calculations in multiple states. They are offering a Heckerling discount. They also offer varying portions of the 6-1 system individually. You can obtain more information at [www.lacknergroup.com](http://www.lacknergroup.com) or call (800) 709-1041.

**Lawgic**

Lawgic is an estate planning drafting program which has specific drafting software for a large number of states as well as a state neutral version. They released a Colorado edition in the past year and have Arkansas, Massachusetts and Virginia in development.

This year Lawgic has added several new options in their drafting system. They have added a same sex couple option for drafting in all of their products as well as IRA provisions for their trusts. They have also added the option to use portability in their documents. In addition, they have made several interface improvements including a new tool called scratchpad that stores entered information to be used in later
places. They have also included an option to have the marital trust pour over to the spouse’s revocable trust, and a homestead trust overlay to enable an irrevocable trust to be used to avoid forced descent and devise of the Florida homestead.

Lawgic offers free training and support. Most state specific version can be purchased for $1,900 per year and pricing is available on their website. They also are providing a Heckerling discount. They also work with affiliates to offer additional services through Estate Works, Crummey Service and My Person Data Safe. More information can be found on the Lawgic website at www.lawgic.com or by calling (877) 252-9442.

My Personal Data Safe

My Personal Data Safe allows professionals to manage and share information with clients through the Internet. This system allows clients and/or advisors to store passwords, medical information, personal family information and upload copies of specific documents such as birth certificates, deeds, medications, stock, life insurance and much more. Clients can update family, medical, financial, legal and insurance information on line. Access can also be limited to certain portions for your advisers, physicians or family members.

They offer lawyers and individuals various packages depending on the volume. For more information go to the My Personal Data Safe website at www.mypersondatasafe.com or call 813-793-7148.

Northern Trust (a Silver Sponsor)

Northern Trust in addition to providing wealth management also provides information to professionals through their wealth advisor portal. Here you can sign up for newsletter and they even provide sample estate planning forms at no cost through this website. For more information please go to the Northern Trust Website at http://wealthadvisor.northerntrust.com.

ProSoft Legal

ProSoft Legal is a consulting firm that automates your office forms in a cost effective manner using HotDocs. ProSoft is a new company. They offer jumpstart kits for estate planning, elder law, probate, family law, business law, and commercial lending which can provide an implementation of a document assembly for a flat fee. The benefits of using ProSoft are that with these modules they can cost effectively build a document assembly system for your office. In addition, minor changes to documents can be
made by anyone somewhat familiar with HotDocs, without having to pay a consultant every time you want a minor change to your standard documents. In addition, due to their familiarity with estate planning documents, they can easily help you create your system without having to bring in a computer professional who is unfamiliar with the needs of a law office. In addition ProSoft is a licensed vendor of Hot Docs. For more information please visit <http://www.prosoftlegal.com/> www.prosoftlegal.com or call (321) 252-2110.

STEP

STEP stands for the Society of Trust and Estate Practitioners and is a worldwide professional association comprised of attorneys, accountants, trust officers, tax specialists, bankers and financial advisors. Their website is an online directory for its members. The organization provides education, training, representation and networking for its members. For more information visit their website at <http://www.step.org/>www.STEP.org.

TEdec

TEdec is a full featured Trust and Estate Accounting Software. One time data entry is available for court inventories and accountings, management reports. Estate tax and income tax returns are available through abridge to Lacerte Tax Software and new for this year is a bridge to CCH Prosystems fx for Forms 706 and 1041. They have online valuation tools built in. TEdec also allows you to outsource to them all your fiduciary accounting needs, where they can provide Data Entry, Court Inventories, Accountings, and Releases for you. They are compliant with official forms for NY, PA, NC, FL, CA, and the National Fiduciary Accounting Standards. They also offer webinar training. They offer multiple pricing models. Their most common fee structure is a $345 flat fee per year licensing fee, with an additional $65 per entity processing fee.

For more information please got to their website at www.tdec.com or call 800-345-2154.

Thomson Reuters

Thomson Reuters drafting system Drafting Wills and Trust Agreements (originally developed by attorney Robert Wilkins) uses GhostFill to create and modify estate planning documents. It uses a straightforward interview process and provides a plain English explanation of each documents section for clients. They also provide flow charts to enable clients to better understand their estate plan. They also include some state specific language provisions for their documents.
Thomson Reuters also provides its common ProDoc software including the Lipmanâ€™s Wills and Trust library online through a Westlaw subscription. This software includes all the typical estate planning documents in the familiar ProDocs environment on the cloud.

Wolters Kluwer Law & Business

In addition to multiple other resources, Wolters Kluwer Law & Business provides CCH tax research through Intelliconnect, their online research platform. This platform has basic tax research as well as an available expert treatise library that is available for over 14 areas of taxation. Pricing is depends on the package purchased and is available by contacting a representative. They can be reached at <http://www.wolterskluwerlb.com/> or -800-638-8437.

TECH TIDBITS - A SUMMARY (from Reports Nos. 1 through 15)

Report #1


Thomson Reuters published its 15-page "Retrospective on Key Tax Developments in 2013" as part on its Checkpoint Newsstand Service on January 13, 2014..

Report #2

ZDNet Tech Today - US has a story in its January 10, 2014 Newsletter entitled "Why the Kindle Fire HDX is a far better Tablet that the iPad."

One very popular Trusts and Estates Blog is the Wills, Trusts & Estates Prof. Blog that is run by Professor Gerry W. Beyer, a Professor of Law at Texas Tech University in Lubbock, Texas and powered by Feedblitz, LLC. Subscription information can be obtained at http://www.feedblitz.com/f/f.fbz?Sub=8995. His January 13th issue included blogs on ten steps for legacy planning, the Fox & Mattson Blog, the US to recognize Utah same-sex marriages and four ways to protect your money and assets. Typically a daily blog contains 6 to 8 items.

Report #3
c/net Cheapskate Tech Deals News has an article in its January 10, 2014 issue entitled "The Death of Credit Cards" brought to you by The Motley Fool.

Micro Center Computer and Electronics now has an e-news update online catalog with a lot of great deals online in their January 2014 issue. They have 23 store locations nationwide, including in California, Colorado, Georgia, Illinois, Kansas, Massachusetts, Maryland, Michigan, Minnesota, Missouri, New Jersey, New York, Ohio, Pennsylvania, Texas and Virginia. In this day and age of dying computer supply stores, it is nice to see this one is surviving and growing.

Report #4

WealthCounsel is advertising via their public discussion list that they will be conducting a two-part webinar entitled "Top 25 Tax Planning Opportunities Post-ATRA" to be held from 1:00 to 3:00 PM ET on January 31st and February 7th. The cost is $275 for members and $375 for nonmembers. The presenter will be Robert S. Keebler, CPA.

PC World has just announced the HTC EVO 4G Freedom Pop mobile phone, the first 100% free mobile phone Service with unlimited talk and text. Sounds too good to be true. Check it out at www.pcworld.com.

Report #5

Don't forget the WealthCounsel Event "Putting Your Week in Orlando into Practice" that is taking place tonight off site. See our Preliminary Report for more details.

Kiplinger is offering its subscribers a special 10% off on all Nolo Books, Software and Legal Forms, including "Retire Happy," "IRAs, 401(k)s and Other Retirement Plans" and "Retire and Start Your Own Business". You need a special subscriber promo code in order to take advantage of this offer.

Report #6

c/net's Today on Cnet has an article in its January 13, 2014 issue entitled "The 100 Most Important Gadgets Now, Ranked."

c/net's Cnet Insider has an article in its January 13, 2014 issue entitled "Everything You Need to Know About CES 2014" this year's international Consumer Electronics Show in Las Vegas that showcased the latest and greatest in tech.

Report #7

Technolawyer's January 14th Corporate Technorelease discusses the advantages of using the ProLaw office management software as a centralized
practice and financial management solution and may merit further exploration. [www.elite.com/prolaw](http://www.elite.com/prolaw)

Software Technology, Inc. offers a similar suite of firm management software programs that are built around their TABS III Time and Billing and Practice Master management modules, with a welcome focus on solo and small firm users. It too is worthy of checking out. [www.tabs3.com](http://www.tabs3.com)

Report #8

The 2014 Edition of Don Kelley's book entitled "The Electronic Practice," which can now be run on an iPad as well as a PC, is available for purchase from Wealth Management at [http://wealthmanagement.com/electronicpractice](http://wealthmanagement.com/electronicpractice)

Speaking of Don Kelley, he writes a monthly technology review column for Trusts and Estates Magazine. More information about those columns can be found at [http://wealthmanagement.com/author/donald-kelley](http://wealthmanagement.com/author/donald-kelley)

Want to see video highlights of this year’s Heckerling sessions? Then just go to [http://wealthmanagement.com/2014-heckerling-institute-estate-planning-hq](http://wealthmanagement.com/2014-heckerling-institute-estate-planning-hq)

Report #9

The Wills, Trusts and Estates Prof Blog (see Report # 2) has a record 10 new articles in its January 17th issue, including one on upcoming same-sex marriage cases, one on more Americans planning for their pets, and one on four tasks to complete before death.

The ABA Journal On-Line for January 17, 2014 includes among its top stories of the week one from Amicus Attorney entitled "Lawyers: Use Outdated Software At Your Own Risk" and one from Cloud9 entitled "Top & Reasons Why Law Firms are Moving to Cloud Servers."

Report #10

Financial Advisor Magazine's E-Newsletter for January 17, 2014 contains news items about "A Retirement Bob is Ticking" and (in deference to Colorado’s new marijuana laws) "Pot Shares Rally 21% to 1,700% as Speculators See Green." This issue also has items from several Blogs.

On Friday, January 31st, ALI-CLE is hosting a one hour CLE entitled "Disruptive Technologies and Their Impact on the Practice of Law" from 12:30 to 1:30 PM ET costing $199. The listed disruptive technologies are social media, electronic communications and online data exchanges. Should be interesting in light of Special Session 2-D above.
Report #11

FoolsWatchWeekly in its January 17th Top Story discusses "7 Hot Technology Trends in 2014."

ZDNet Must-Read News - US in its January 17th issue has a very informative Breaking News story entitled "Target's data breach: No, really. It gets even worse."

Report #12

LTN Law Technology News in their January 18th issue has interesting articles on "Five Questions Asked and Answered for LegalTech New York," a Q&A of e-discovery practices, and "YouTube Can Sell Your Legal Practice" on how to leverage it to do business development for your law practice.

Interactive Legal has announced their January Hot Topic Webinar entitled: Strategies for Funding a Policy into an ILIT: When a Simple Gift Won't Do the Trick" starring Jonathan Blattmachr and Teresa Bush. It is set to take place on Wednesday, January 29th, for one hour starting at 1:00 PM ET. The cost is $105. For more information, contact chernandez@interactivelegal.com.

Report #13


PC World Daily Downloads in its January 15th Edition has a review of Password Managers and notes that some are safer than others. In this day and age of planning for our client's virtual assets a program like this may be a must have.

Report #14

ZDNet Tech Today - US reports in its January 15th issue on "Google's Latest Chrome Release Tries to Replace the Windows Desktop".

The Progressive Accountant reports in its January 18th issue on "Technology 2014: Security a Bigger Worry Than Ever" and "How Many Monitors Are Enough."

Report #15

On February 13th ACTEC and ALI-CLE will be co-sponsoring a CLE called "For Estate Planners: Business Income Tax Issues 101" featuring as speakers
Steven B. Gorin, Ann B. Burns and Samuel A. Donaldson, all of whom are past presenters at Heckerling. The cost is $199 ($119 for ACTEC Fellows). For more information, contact https://www.ali-cle.org.

PC World Daily Downloads has an article in its January 16th issue entitled "Wondershare MobileTrans: Windows Utility Makes Phone Upgrades a lot Easier." A free demo version can be downloaded.

Private Wealth publishes a digital issue as a companion to its usual magazine. In its January 16th issue, its cover story is entitled "Millennial Investors Unite." There is also an estate planning feature article entitled "10-Step Legacy Planning" and a Wealth Protection feature article entitled "Weighing Divorce 'Options'."