



# NEW YORK STATE BAR ASSOCIATION TRUSTS AND ESTATES LAW SECTION



## Spring Meeting 2019

Trusts: Who and What Should You Trust?

NAPLES, FLORIDA | May 16 - 19, 2019

**Ritz-Carlton Beach Resort**  
280 Vanderbilt Beach Road

[www.nysba.org/TRUSSP19](http://www.nysba.org/TRUSSP19)



### **Trusts and Estates Law Section Chair**

Robert M. Harper, Esq., Farrell Fritz, P.C., Uniondale

### **Program Chairs**

Angelo M. Grasso, Esq., Greenfield Stein & Senior LLP, New York City

Brian P. Corrigan, Esq., Farrell Fritz, P.C., New York City

### **Sponsorship Chair**

Darcy M. Katris, Esq., Morrison Cohen LLP, New York City

**UP TO 9.0 MCLE CREDITS:** Regular Programming offers 8.0 transitional credits - 2.5 in Skills, 4.5 in Areas of Professional Practice and 1.0 in Ethics for all attorneys, both experienced and newly admitted. Attendance at the optional Breakfast with the Surrogates Panel offers an additional 1.0 in Skills for all attorneys.

## **Important Information**

### **DISCOUNTS AND SCHOLARSHIPS**

New York State Bar Association members and non-members may receive financial aid to attend this program. Under this policy, anyone who requires financial aid may apply in writing, not later than ten working days prior to the start of the program, explaining the basis of the hardship, and if approved, can receive a discount or scholarship, depending on the circumstance. For more details, please contact: Catheryn Teeter at [cteeter@nysba.org](mailto:cteeter@nysba.org)

### **SPECIAL DISCOUNTS**

The Trusts & Estates Law Section has approved a policy which allows for a 50% discount on the registration fees for all Trusts & Estates Law Section members who practice in the public sector or as Court personnel. This discount is not automatic and must be requested in writing as stated above under Discounts and Scholarships. Where applicable, members of the Judiciary may also register and pay the reduced guest registration fee.

**First Time Attendees** can register at a discounted registration fee. Rates are indicated on registration form. To qualify for the First Time Attendee rate you must be a Trusts and Estates Section member who has never attended a Trusts and Estates Section Spring or Fall destination meeting.

### **ACCOMMODATIONS FOR PERSONS WITH DISABILITIES**

NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Catheryn Teeter at least 10 working days prior to the meeting start date at 518-487-5573 or [cteeter@nysba.org](mailto:cteeter@nysba.org)



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# SCHEDULE OF EVENTS

## Thursday, May 16

11:00 a.m. – 6:00 p.m.

12:00 – 2:00 p.m.

2:00 – 5:00 p.m.

6:00 – 7:30 p.m.

Specialty Cocktail Silver Sponsor:

Reception Sponsor:

7:30 p.m.

**Registration** – Ballroom Foyer

**Executive Officers' Meeting** – Coquina Sands

**Executive Committee Meeting** – Estuary

**Welcome Cocktail Reception** – North Beach

Unwind in your resort wear and sandals on the beautiful white sand beach at the water's edge.

**BELLER SMITH**

**FIRST REPUBLIC PRIVATE WEALTH MANAGEMENT**

**Dinner on Your Own**

## Friday, May 17

7:45 a.m. – 12:45 p.m.

8:00 – 8:50 a.m.

8:00 – 9:00 a.m.

8:55 a.m. – 12:45 p.m.

Audio Visual Silver Sponsor:

8:55 – 9:10 a.m.

**Registration** – Ballroom Foyer

**Committee Breakfast Meetings** – Port Royal

**Continental Breakfast and Exhibitors** – Ballroom Foyer

Open to all registered attendees including spouses and guests. Grab a bite and visit with our exhibitors. Coffee will be available throughout the morning.

**MCLE General Session** – Ritz-Carlton Ballroom

**CITI PRIVATE BANK**

**NYSBA Welcome**  
**Michael Miller, Esq.**  
President

**Program Introductions**  
**Angelo M. Grasso, Esq.**  
Program Co-Chair

**Trusts and Estates Law Section Welcome**  
**Robert M. Harper, Esq.**  
Section Chair

**Sponsor Acknowledgments**  
**Darcy M. Katris, Esq.**  
Sponsorship Chair

9:10 – 10:00 a.m.

**Doing Well by Doing Good: Fiduciary Investing with Purpose**

Can fiduciaries earn high returns on investment, while also achieving positive social results? We will examine the legal rules applicable to fiduciaries making investment decisions and the advent of socially responsible investments.

Panelists:

**Natalia Murphy, Esq.**  
Head of Trust and Wealth Planning  
for North America  
Citi Private Bank  
New York City

**Raymond Joseph**  
Global Head of Portfolio Solutions  
Citi Investment Management  
Citi Private Bank  
Stamford, CT

10:00 – 10:50 a.m.

**Minimizing Trustee Risk**

Although trustees are not guarantors of trust performance, trustees' actions can expose them to litigation and, ultimately, liability. This presentation will concern strategies that trustees can employ in order to minimize the risk that they have to surcharges for their administration of trusts, including but not limited to the tension that exists between trust beneficiaries, the tools that are available to trustees in catering to those interests, and drafting strategies that provide protection to trustees. This session will prove to be invaluable to attorneys who advise trustees with respect to the administration of trusts and counsel who defend trustees in litigation concerning such administration.

Speaker:

**Elisa Shevlin Rizzo, Esq.**  
Northern Trust  
New York City

10:50 – 11:05 a.m.

**Refreshment Break with Exhibitors** – Ballroom Foyer



# SCHEDULE OF EVENTS

11:05 – 11:55 a.m.

## **Using Trusts to Resolve Litigation**

Disputes involving trusts present unique challenges, including sensitive family dynamics, high financial stakes, and complex procedural, legal, and tax issues. Trust law has evolved to offer various options for resolving disputes and preserving the purpose of the trust and the grantor's intent. Aside from strictly legal considerations, however, it is important for attorneys to draft flexible trust instruments, trustees to stay current with the needs of beneficiaries, and to act promptly when altered circumstances necessitate a modification to the trust. Topics to be explored include decanting, trust situs, trust protectors, and both drafting and procedural considerations.

Speaker:

**Hon. Acea M. Mosey**

Erie County Surrogate's Court  
Buffalo

11:55 a.m. – 12:45 p.m.

## **Florida Trust Considerations for the New York Practitioner**

With no state income or estate tax, and with warmer temperatures during the cold winter months, Florida has always been an attractive destination for New Yorkers, and it is common for a New York practitioner to encounter an existing Florida trust or a client who wants to establish one. This presentation will flag some of the unique features of Florida trust law that differ from New York trust law, from annual accounting requirements to the impact of homestead laws on trusts. The presentation will also include drafting tips and suggest methods for anticipating and tackling hot button issues.

Panelists:

**Amy B. Beller, Esq.**

Beller Smith  
Boca Raton, FL

**Michael S. Schwartz, Esq.**

Curtis, Mallet-Prevost, Colt & Mosle LLP  
New York City

## **Afternoon At Your Leisure – See Activities Pages 9 & 10**

2:00 – 4:00 p.m.

### **Doubles Tennis Tournament** – Tennis Center

Har-Tru® clay courts; court shoes required. Preregistration required. Must be 18 or older. \$60.00 per person.

Tennis Chair:

**Julie Min Chayet, Esq.**, U.S. Trust, Bank of America Private Wealth Management, Weston, CT

6:00 – 9:00 p.m.

### **Reception And Dinner** – Center Court

Enjoy sweeping views of the Gulf of Mexico from this stunning location. Music by David Bach Quartet. Children's Dinner in Plaza III.

Reception Silver Sponsor:

**NORTHERN TRUST**

Dinner Silver Sponsor:

**GRASSI & COMPANY**

Entertainment Silver Sponsor:

**RDM FINANCIAL GROUP AT HIGHTOWER**

Dinner Wine Sponsors:

**RDM FINANCIAL GROUP AT HIGHTOWER AND TRISTAR COURT REPORTING**

## **Saturday, May 18**

7:30 a.m. – 12:45 p.m.

### **Registration** – Ballroom Foyer

8:00 – 9:00 a.m.

### **Continental Breakfast and Exhibitors** – Ballroom Foyer

Open to all registered attendees including spouses and guests. Grab a bite and visit with our exhibitors. Coffee will be available throughout the morning.

8:00 – 8:50 a.m.

### **Optional Session: Breakfast with the Surrogates** – Port Royal **Successful Strategies for Securing the Removal of a Trustee**

Inherent tension exists between trust beneficiaries and the trustees who manage the assets in which the beneficiaries are interested, and, in some cases, the extent to which the beneficiaries have access to those assets. Our esteemed panel of current and former Surrogate's Court judges will address how best to successfully seek removal of trustees, and how to defend trustees in removal proceedings. Given the wonderful Surrogates who will be participating, this presentation promises to be an informative, entertaining discussion of successful strategies that can be employed in removal proceedings.

# SCHEDULE OF EVENTS

Panelists:	<b>Hon. John M. Czygier, Jr.</b> Former Surrogate Suffolk County Surrogate's Court Riverhead	<b>Hon. Peter J. Kelly</b> Queens County Surrogate's Court Jamaica
	<b>Hon. Stacy L. Pettit</b> Albany County Surrogate's Court Albany	<b>Hon. Margaret C. Reilly</b> Nassau County Surrogate's Court Mineola
9:00 a.m. – 12:45 p.m.	<b>MCLE General Session</b> – Ritz-Carlton Ballroom	
Audio Visual Silver Sponsor:	<b>CITI PRIVATE BANK</b>	
9:00 – 9:10 a.m.	Program Introductions <b>Brian P. Corrigan, Esq.</b> Program Co-Chair	Sponsor Acknowledgements <b>Darcy M. Katris, Esq.</b> Sponsorship Chair
9:10 – 10:00 a.m.	<b>Constitutional Considerations in the State Taxation of Trusts</b> This presentation will cover the constitutional considerations and practical implications of trust situs, with a focus on determining the tax situs of non-grantor trusts. These issues will be discussed both broadly and specifically as they relate to planning in New York, and will include case study examples relevant for the New York practitioner when trust planning under the relevant New York statutes.	
Speaker:	<b>Toni Ann Kruse, Esq.</b> McDermott Will & Emery New York City	
10:00 – 10:25 a.m.	<b>Trusts Go To Washington: North Carolina Dept. of Revenue v. Kaestner Family Trust</b> In January 2019, the United States Supreme Court granted North Carolina's petition for certiorari on the question of whether the Due Process Clause prohibits states from taxing trusts based on trust beneficiaries' in-state residency. This presentation will discuss the arguments made by all interested parties, the oral argument at the Supreme Court, and the potential consequences of the Supreme Court's decision.	
Speaker:	<b>Angelo M. Grasso, Esq.</b> Greenfield Stein & Senior, LLP New York City	
10:25 – 10:40 a.m.	<b>Refreshment Break with Exhibitors</b> – Ballroom Foyer	
10:40 – 11:55 a.m.	<b>The Anatomy of a Trust Contest</b> The panel of speakers will discuss the key differences between a trust contest and a will contest, including the governing law and what grounds may exist to bring a trust contest. Topics to be explored include subject-matter jurisdiction, pre-trial discovery, motion practice, evidentiary considerations, and the trial of a trust contest.	
Panelists:	<b>Hon. Vincent W. Versaci</b> Schenectady County Surrogate's Court Schenectady	
	<b>Gary B. Freidman, Esq.</b> Greenfield Stein & Senior, LLP New York City	<b>Frank T. Santoro, Esq.</b> Farrell Fritz, P.C. Uniondale
11:55 a.m. – 12:45 p.m.	<b>Avoiding Conflicts Among Trust Clients</b> (Ethics Credit) This presentation will discuss the various types of proceedings in which conflicts of interest most often arise in the Surrogate's Courts, including trust-related litigation, and will review the relevant New York Rules of Professional Conduct governing conflicts involving current clients (i.e., representation of multiple parties), former clients, and potential clients.	
Panelists:	<b>Hon. Theresa B. Whelan</b> Suffolk County Surrogate's Court Riverhead	<b>Eric W. Penzer, Esq.</b> Farrell Fritz, P.C. Uniondale



# SCHEDULE OF EVENTS

## Afternoon At Your Leisure – See Activities Pages 9 & 10

1:00 – 4:15 p.m.

### **Private Docent Led Tour Of The Revs Institute, 2500 Horseshoe Drive, Naples**

Founded in 2008 by Miles Collier whose father and uncle are credited with introducing sports car racing in the early 30's to the US. Includes Collier's extensive private collection and the collection of a family friend, Briggs Swift Cunningham. Bugattis, Ferraris – one of the best private collections of vintage automobiles in the World. Very limited tickets. Price includes transportation: \$50 per person. Preregistration required. Meet in lobby at 1:00 p.m. sharp to catch shuttle for museum.

1:30 – 5:30 p.m.

### **Golf At Tiburón Gold Course, 2620 Tiburón Drive**

Tiburón is home to the LPGA Tour's CME Group Tour Championship and the PGA TOUR's QBE Shootout and is consistently rated among the top 20 golf facilities in Florida by Golf Digest and GOLF Magazine. Designed by Greg Norman. \$205 per person. Fee includes: greens fees, golf cart and box lunch. Preregistration required. For golf club rentals, call (239) 593-2201.

Golf Chair:

**Magdalen Gaynor, Esq.,** Law Offices of Magdalen Gaynor, White Plains

7:00 p.m. – 10:00 p.m.

### **Cocktail Reception & Dinner At The Fairways At The Ritz-Carlton Golf Club, 2600 Tiburon Drive**

Shuttles will depart from Beach Club Lobby starting at 6:30 p.m.

Platinum Dinner Sponsor:

**FARRELL FRITZ P.C.**

Reception Sponsor:

**PHILLIPS AUCTION HOUSE**

Entertainment Sponsor:

**EMPIRE VALUATION**

## **Sunday, May 19**

7:00 – 10:00 a.m.

**Checkout**





## DINING

### ON-SITE AT THE BEACH CLUB

#### Gumbo Limbo

Catch the sunset with a cocktail in hand or linger over a leisurely dinner with an ocean view as you enjoy the best seafood-casual menu and view in Southwest Florida. Lunch available 11 a.m. – 5 p.m.; Dinner 5 p.m. – 8:30 p.m. daily.

#### Bites

A tapas-style restaurant featuring globally inspired small plate, cocktails, wine, and live music. Dinner available 5 p.m. – 10 p.m. daily. Bites also offers Afternoon Tea, a seasonal weekend experience including savory tea sandwiches and decadent desserts along with freshly baked scones with fruit preserves and Devonshire cream. Saturdays and Sundays 2 – 4 p.m. (239) 598-6644 to make reservations.

#### DUSK

Enjoy the sushi prepared by a world recognized sushi chef and take small plates outside onto the terrace where lounge sofas await overlooking the Gulf. Open nightly 5 p.m. – midnight; Dinner served until 10 p.m.

#### Terrazza

Designed to bring the beauty and breeze of the Gulf inside, this all-day restaurant features a dining room that opens to a spacious terrace. The menu focuses on Italian cuisine. Breakfast 7 a.m. – 11:30 a.m. daily; Lunch 11:30 a.m. – 3 p.m. Monday – Saturday; Brunch 11:30 a.m. – 3 p.m. Sundays; Dinner 5 p.m. – 10 p.m. nightly.

#### The Grill

A popular venue for sophisticated dining, the menu features dry-aged beef, fresh seafood, seasonal favorites and a collection of international award-winning wines. Dress code is casual elegance. Dinner 6 p.m. – 10 p.m. nightly. Reservations highly recommended.

#### The Poolside Café

Salads, sandwiches, fresh fruit and frozen cocktails are available at the café's sun-soaked tables, or lounge at the pool and let the service come to you. Lunch 11:30 a.m. – 3:30 p.m. daily; Bar is open 10 a.m. – 5:30 p.m. daily.

#### =H2O+

Dine on made-to-order salads, sandwiches, wraps, and organic fruit juices and smoothies indoors or al fresco. Spa guests may pre-order their meals alongside any service or package, upon check-in at Spa Reception. Open 10 a.m. – 3:30 p.m. daily.

#### Gourmet Shop

Offering home-made ice cream, cookies, chocolates and cakes. Early risers will enjoy a selection of gourmet coffees and breakfast pastries. Open 6:30 a.m. – 9 p.m. daily.

### OFF-SITE AT THE GOLF RESORT, 2600 TIBURON DRIVE

Complimentary shuttle service is offered between the Golf Resort and the Beach Club. Approximately a 10 minute ride.

#### Lemonia

Light-filled bistro offering a comfortable, intimate setting with buffet and a la carte breakfast menus. Open 7 a.m. – 11 a.m. daily. For general dining reservations, call (239) 598-6644.

#### Mezzo

Shared plates, handmade pastas, a robust wine list including regional specialties and a signature sangria create a Mediterranean ambience. Dinner served 6 p.m. – 9 p.m. Tuesday – Saturday. For general dining reservations, call (239) 598-6644.

#### Bella Vista Lounge

Enjoy a view of the 18th hole from inside or on the terrace with fire pits and Adirondack chairs. Lunch and Dinner menu offered 11:30 a.m. – 10:00 p.m. daily, with a late night menu offered 10 p.m. – 12 a.m. daily.

#### Poolside Grill

Bask under the Florida sun with a view overlooking the golf course and pool. The menu blends American and international cuisine and offers tropically inspired cocktails. Lunch served 11 a.m. – 4 p.m. daily; Beverage service available 11 a.m. – 6 p.m. daily.

#### Express (o)

Italian-style espressos and coffees, teas, pastries and to-go selections including sandwiches, wraps and salads, 6 a.m. – 7 p.m. daily.





# ON-SITE ACTIVITIES

## BEACH CLUB ON-SITE ACTIVITIES

### The Spa

Fresh from its 2018 facelift, the massive spa offers dozens of treatment rooms, a cafe, mineral pool, terrace, and large boutique. Reserve by Phone: please call (239) 514-6001. Hours of Operation: Spa Treatments & Salon, 9 a.m. - 7 p.m. daily. Spa Facilities: 7 a.m. - 7 p.m. daily.

### Beach Amenities

Private boardwalks meandering through a natural preserve of mangroves and palms provide guest's access to three miles of pristine beach and the Gulf of Mexico. Check in with the beach concierge for towels and seating beginning at 8 a.m., daily. Cabanas available.

### Naples Beach Water Sport Adventures

Located between the Ritz-Carlton and Cabana Dan's . Offering parasailing, waverunner rentals as well as stand-up paddle boards. Contact the Beach Hut at (239) 572-2953 for information and reservations. [www.marcoislandwatersports.com/naples-adventures/](http://www.marcoislandwatersports.com/naples-adventures/)

### Water Sports

Spend an afternoon on the water with a variety of beach activities offered. Local backwater fishing and offshore fishing tours are available. Or, spend the day sailing the blue waters of the Gulf of Mexico. Contact Leisure Reservations at (239) 514-6001 for additional information.

### Outdoor Pools

Check in with the pool concierge for towels, seating and umbrellas beginning at 8 a.m. daily. Lots of nearby activities for kids including foosball and ping pong tables. Low-impact water aerobics classes are available in the Junior Olympic pool. Call the Fitness Center at (239) 514-6138 for information.

### Tennis Center

The Ritz-Carlton Tennis Center includes four state-of-the-art clay, hydro courts. Private or group lessons are available by appointment. Full-service pro shop is open daily from 8 a.m. to 5 p.m. and offers racquet rentals, ball machines, and match arrangements. Join other players for doubles round robin on Friday afternoon. Sign up on the registration form.

### Fitness Center

The fitness center is open 24 hours a day with guest room key and offers a wide variety of cardiovascular and strength-training options, as well as state-of-the-art equipment, classes and personal training. Classes in Pilates, Yoga & Meditation, Aquatics and more. Open 6 a.m. to 9 p.m. daily.

### VUE

This Virtual User Experience room is the ultimate entertainment lounge for teens and tweens, featuring the most popular virtual-reality games, an Alienware gaming station, and a home theatre environment to watch movies or HDTV. Staffed by experienced gamers, VUE provides the perfect setting for the ultimate social gaming experience with the latest in technology. Daily fee of \$15 for children ages 5 and older.

### Nature's Wonders – Kid's Club

Nature's Wonder is the supervised kids' club at the Beach Resort for those aged 5 through 12 years; programs run half and full day sessions. 11 aquariums with fish, mollusk, sharks, eels and more offer your budding marine biologist a chance to explore. In addition to hands-on interactive learning, kids can enjoy nature themed activities and crafts. Also offers Nature Visions Theater with National Geographic specials, Discover programs and Disney movies.

### Glassblowing

Design your own keepsake alongside Conrad Williams, a Dale Chihuly trained glass artist. The seasonal experience will be offered poolside at the beach resort, weather permitting, through May. Schedule subject to change.

### Naples Beach Adventures

Offering WaveRunner tours, parasailing, and paddle boarding. Contact the Beach Hut at (239) 572-2953 for information and reservations.

### Everglades Experience

Airboating and alligators, Oh My! Located one hour and fifteen minutes from the hotel. Call (239) 598-3300 and ask for the concierge for details.





## OFF-SITE ACTIVITIES

### OFF-SITE ACTIVITIES

**Artis-Naples/The Baker Museum**, 5833 Pelican Bay Boulevard, Naples, [www.artisnaples.org](http://www.artisnaples.org)

Artis-Naples compound is a destination for visual and performing Arts in South Florida. The campus includes two performance halls along with several other buildings/galleries and is home to the Baker Museum of Art. Although the museum itself is closed for renovations, there are several exhibitions onsite open to the public including The Four Seasons by Phillip Haas and Fashioning Art from Paper by Isabelle de Borchgrave. Visit <https://artisnaples.org/baker-museum/exhibitions> for more information.

**Naples Botanical Garden**, 4820 Bayshore Drive, Naples, [www.naplesgarden.org](http://www.naplesgarden.org)

One of the highest regarded gardens in the country. A 170-acre world-class garden paradise that features the plants and cultures of the tropics and subtropics between the latitudes of 26 degrees North and South. Fantastic gift shop and café. Butterfly garden and children's garden are exceptional.

**The Naples Zoo at Caribbean Gardens**, 1590 Goodlette-Frank Rd., Naples, [www.napleszoo.org](http://www.napleszoo.org)

A nationally accredited zoo and historic garden in Southwest Florida that features a full day of fun activities. Call (239) 262-5409 for more information.

**Double Sunshine Sightseeing Cruise or Eco Tour**, 1200 Fifth Avenue South (US 41 E), Naples, [www.purenaples.com](http://www.purenaples.com)  
One and a half hour boat trip through Naples Bay and the Port Royal Mansion District. Several departures daily. Book by phone (239) 263-4949 or online. Also offering a three hour nature boat Eco Tour which includes shelling on Keewaydin Island, bird watching, and with luck, dolphin spotting - 9 a.m. and 1:00 p.m. on alternate days – check website for scheduled and to reserve. Departures from Tin City, downtown Naples.

**Mike Devlin Kayaking Eco Adventure Tour**, 13535 Vanderbilt Drive, Naples, <https://kayaktourswithmikdevlin.com>  
2 ½ hour paddle through the Cocohatchee River Park Launch site (3 miles from hotel) and travels through the wind and waves protected back waters of the tidal river through beautiful mangrove trails and tunnels. Be on the lookout for osprey, egrets, herons, dolphins and manatees No experience needed. Minimum age 6 years accompanied by an adult in a tandem kayak. Call (239) 450-2455 to book.

**Manatee Eco-Tour**, 525 Newport Dr., Port of Islands Marina, Naples, [www.see-manatees.com](http://www.see-manatees.com)

One and a half hour boat tour with possible sightings of manatees, everglades with fowl, alligators, dolphins and sharks.

### FARTHER AFIELD

**Thomas Edison and Henry Ford Winter Estates**, Fort Myers, [www.edisonfordwinterestates.org](http://www.edisonfordwinterestates.org)

Located in nearby Ft. Myers, are the adjacent estates of Thomas Edison and Henry Ford. Laboratories are totally intact. Tours available but not necessary (50 minute drive).

### Sanibel Island

An hour drive from Naples, this quaint and super low-key area has a shabby-chic vibe that visitors revel in. Check out the art galleries along Periwinkle Way, comb the beaches for seashells or just set up a picnic lunch at Bowman's Beach.

**South Everglades Airboat Eco-Tour**, Ochopee [www.wootenseverglades.com](http://www.wootenseverglades.com)

Explore the Florida Everglades on an authentic airboat.

**FOR ADDITIONAL INFORMATION ON THE NAPLES AREA, VISIT:  
WWW.PARADISECOAST.COM**





## THANK YOU TO OUR EXHIBITORS

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**Empire Valuation Consultants**  
**InterActive Legal**  
**Kravit Estate Appraisals**  
**MPI – Management Planning Inc.**  
**RDM Financial Group at High Tower**  
**Sigma Valuation Consulting Inc.**  
**Sterling Foundation Management**  
**Valbridge Property Advisors**  
**Willamette Management Associates**

## UPCOMING CLE PROGRAMS

### **Trusts & Estates Law Section and Elder Law Section Joint Fall Meeting**

Thursday and Friday, October 23 - 25, 2019 | The Gideon Putnam | Saratoga Springs  
Information: [www.nysba.org/TRUS](http://www.nysba.org/TRUS)

### **17th Annual Sophisticated Trusts & Estates Institute (CLE)**

Friday, November 8, 2019 | The Crowne Plaza Times Square | NYC

### **Trusts & Estates Law Section 2020 Annual Meeting**

Wednesday, January 29, 2020 | The New York Hilton Midtown | NYC

### **Trusts & Estates Law Section Spring 2020 Meeting**

Thursday - Sunday, April 29 - May 3, 2020 | Kimpton Hotel Van Zandt | Austin, TX  
Information: [www.nysba.org/TRUS](http://www.nysba.org/TRUS)

# INFORMATION

## HOTEL INFORMATION/RESERVATIONS:

### The Ritz-Carlton Beach Resort

280 Vanderbilt Beach Road, Naples, FL

Phone: (239) 598-3300

Book Your Lodging via the Hotel Reservation Link at: [www.nysba.org/TRUSSP19](http://www.nysba.org/TRUSSP19)

#### Hotel Rates:

\$339 Coastal View Queen Room plus local & state taxes. Limited Coastal Double/Double rooms available at additional cost. Rates include complimentary in-room wifi, shoe shine, newspapers, use of fitness center, in-room bottled water, coffee and tea and shuttle between Beach and Golf resort.

Among the items guests at the Beach Club may enjoy:

- Stunning views of the Gulf of Mexico
- An exclusive world-class spa featuring more than 30 treatment rooms that combine relaxation and body therapies with wellness and nutrition programs and a complimentary fitness center
- Eight innovative dining experiences: The Grill, Gumbo Limbo, DUSK, Terrazza, Poolside Café, Bites at the Lobby Lounge, The Gourmet Shop and the Spa's =H2O+
- Two heated outdoor pools; a free-form family pool with an interactive children's splash pool and an adults' only Junior Olympic relaxation pool with whirlpool
- Nature's Wonders, an interactive environmental children's program
- Vue, a sleek, modern high-tech entertainment lounge featuring the latest in video games
- Access to the Tiburón Golf Club, offering two 18-hole Greg Norman-designed championship golf courses, instruction and pro shop, located nearby at The Ritz-Carlton Golf Resort, Naples

## GETTING TO AND AROUND NAPLES:

### Flying to Naples

The closest airport is Southwest Florida International Airport (RSW), in Fort Myers, the region's largest airport, 40 minutes to the north of Naples via I-75. Fourteen airlines serve the airport offering non-stop flights to 44 destinations.

**Taxi:** MBA Airport Transportation: Official provider for RSW Airport transportation. Booth located outside baggage claim area - sedans, minivans, high capacity vans, and ADA accessible vans. Advance reservations not required for airport arrivals. Reservations required at least 24 hours in advance for return trips. Call 239-482-2777 to book or reserve online.

### Other Limousine, Taxi & Airport Shuttle Services:

- Ambassador Transportation: 239-204-0783
- Checker Cab/Metro Cab: 239-444-4444
- Classic Luxury Airport Transportation: 239-394-1888 or 800-553-8294
- Naples Airport Shuttles: 888-569-2227
- Naples Transportation: 800-592-0848 or book online at NTTEP Airport Shuttle
- Regent Transportation: 239-246-7121
- Taxi Time Airport Shuttle: 239-200-0000
- Uber Ft. Myers/Naples via the Uber App: Uber surge pricing is always in effect from the airport.

**Car Rentals: Onsite Rental Center** located on ground level of RSW parking garage. Exit baggage claim and cross street into rental facility.

**Offsite Car Rentals:** Shuttle pickup point is east end of parking garage lower level. Walk to end of parking garage and around side for shuttles. Phone to contact shuttles for offsite rentals is located in shelter at this pickup point. For rental options, visit [www.flylcpa.com/rentalcars/](http://www.flylcpa.com/rentalcars/)

## Getting Around the City

### Rental Cars, Taxis or Uber as noted above.

**The Naples Trolley** is a private trolley tour service operating in Naples. The Naples Trolley Tour is narrated, with a lot of information about local shopping and attractions. You can get on and off the trolley as many times as you wish with a one-day ticket. Operates 8:30 a.m. to 5:30 p.m., 7 Days a Week. \$27 per day if purchased online in advance – tickets are not refundable. Trolley tour does not take reservations and is on a first come first serve basis. The ticket(s) purchased are not a guaranteed reservation. [www.naplestrolleytours.com](http://www.naplestrolleytours.com)

**Naples Bay Water Shuttle** provides convenient and affordable transportation between the main waterfront locations on Naples Bay. Enjoy a scenic boat trip and have easy access between Naples Bay Resort, Bayfront Center, Tin City, Port O' Call Marina and the Boathouse restaurant and Naples City Dock area for just \$10 per day. Service may be suspended during bad weather. Groups larger than 6 not permitted. <http://naplesbaywatershuttle.com/> for operating hours and information.

Collier Area Public Transit operates various routes throughout Naples 7 days a week. View the bus route map at: [www.colliercountyfl.gov/home/showdocument?id=79732](http://www.colliercountyfl.gov/home/showdocument?id=79732)