WealthManagement.com
Registered Rep. Trusts&Estates

Trusts&Estates
2012 Editorial Calendar

JANUARY

Special Report: A Look Back At 2011—And Ahead To 2012
Looks at the areas that *Trusts & Estates* covers:
- Estate Planning & Taxation
- Charitable Giving
- Insurance
- The Fiduciary Professions
- Investments
- Retirement Benefits
- Valuations
- International
- Elder Law

Special Feature: Which Situs Is Best?
An overview of the trust laws of various jurisdictions—and an assessment of which ones are best.

Also in this issue...
Special Supplement: Tax Law Year in Review By David Handler and the lawyers at Kirkland & Ellis LLP

Wealth Counsel/*Trusts & Estates* Annual Research Report

Show Distribution
- 46th Annual Heckerling Institute on Estate Planning
- The Sharpe Group
- Cannon Financial Institute

Ad Closing: December 6th
Materials Due: December 9th

FEBRUARY

Special Report: Review Of Reviews
A look at what's been written in the student-edited law reviews for the first half of 2011.

Special Report: Business Development
What strategies attorneys should be using to increase business, successfully work and communicate with their clients. Includes billing issues, and where estate planning is heading—what is valuable to clients in 2012 and going forward.

Also in this issue...
- Charitable Giving
- High-Net Worth Families & Family Offices
- Briefing: Tax Law Update, Philanthropy Column, Family Business Column, and Fiduciary Professions Column

Show Distribution
- The Sharpe Group

Ad Closing: January 6th
Materials Due: January 11th

MARCH

Special Report: Family Businesses
Our first special report on this topic from our new Family Businesses Committee, chaired by David Leibell, looks at various issues affecting family businesses.

Also in this issue...
- Estate Planning & Taxation
- The Fiduciary Professions
- Valuations
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Webinar: The $5 Million Exemption—What's An Estate Planner To Do?
Moderated by Bernie Krooks and Thomas D. Begley Jr.

Show Distribution
- ABA Wealth Management & Trust Conference
- Florida Bankers Marketing Conference
- The Sharpe Group
- The Opal Group's Trust, Tax & Estate Planning Forum
- BISA Annual Convention

Ad Closing: February 6th
Materials Due: February 9th

APRIL

Committee Report: Insurance

Also in this issue...
- Elder Law
- High-Net Worth Families and Family Offices
- Estate Planning & Taxation
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Show Distribution
- NAIBD Spring Symposium
- Tiburon CEO Summit
- Advisors in Philanthropy Conference
- The Sharpe Group

Ad Closing: March 6th
Materials Due: March 9th

MAY

Committee Report: The Fiduciary Professions

Also in this issue...
- Retirement Benefits
- Estate-Planning & Taxation
- Briefing: Tax Law Update, Philanthropy Column, Family Business Column, and Fiduciary Professions Column

Show Distribution
- AICPA Tax Strategies Conference
- AIFP Estate Planners Day
- ICSC RECon
- The Sharpe Group
- Cannon Financial Institute

Ad Closing: April 6th
Materials Due: April 11th

JUNE

Committee Report: Retirement Benefits

Also in this issue...
- Valuations
- Estate Planning & Taxation
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Webinar: Discounts For Lack Of Marketability
Moderated by Annika Reinermann.

Show Distribution
- MOKAN Annual Convention
- Pershing INSITE
- Morningstar Investment Conference
- Florida Bankers Association Annual Meeting
- The Sharpe Group

Ad Closing: May 7th
Materials Due: May 11th

WealthManagement.com
Registered Rep. Trusts&Estates

Trusts&Estates
2012 Editorial Calendar

JULY

Special Report: Elder Law

Also in this issue...
- Retirement Benefits
- Estate Planning & Taxation
- Charitable Giving
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Show Distribution
- AICPA Advanced Estate Planning Conference
- WealthCounsel 2012 Planning For The Generations Conference
- Cannon Financial Institute

Ad Closing: June 6th
Materials Due: June 11th

AUGUST

Committee Report: High-Net-Worth Families & Family Offices

Also in this issue...
- Insurance
- Estate-Planning & Taxation
- 100 Top RIAs
- Briefing: Tax Law Update, Philanthropy Column, Family Business Column, and Fiduciary Professions Column

Show Distribution
- Cannon Financial Institute
- Society of FSP Clinic for Advanced Professionals

Ad Closing: July 6th
Materials Due: July 12th

SEPTEMBER

Committee Report: Investments

Special Report: Estate Planning in the Digital Age

Also in this issue...
- Estate Planning & Taxation
- The Fiduciary Professions
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Webinar: Family Businesses
Moderated by David Leibell and Dan Daniels.

Show Distribution
- Florida Bankers Association Wealth Management Conference
- Southern Federal Tax Institute Annual Tax Planning Conference
- The Sharpe Group

Ad Closing: August 6th
Materials Due: August 10th

OCTOBER

Committee Report: Valuations

Annual Charitable Giving Supplement

Also in this issue...
- Estate Planning & Taxation
- High-Net Worth Families & Family Offices
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Show Distribution
- Tiburon CEO Summit
- Annual Southern California Tax & Estate Planning Forum
- Schwab IMPACT 2012
- The Sharpe Group

Bonus To Advertisers
Ad Recall Survey

Ad Closing: September 6th
Materials Due: September 10th

NOVEMBER

Special Report: International

Also in this issue...
- Estate Planning & Taxation
- Retirement Benefits
- Insurance
- Briefing: Tax Law Update, Philanthropy Column, Family Business Column, and Fiduciary Professions Column

Show Distribution
- Notre Dame Tax & Estate Planning Forum
- National Association of Estate Planners & Councils Annual Conference

Ad Closing: October 5th
Materials Due: October 12th

DECEMBER

Committee Report: Estate Planning & Taxation

Special Report: Preparing For 2013 Tax Law

Also in this issue:
- Charitable Giving
- Elder Law
- Briefing: Tax Law Update, Philanthropy Column and Family Business Column

Webinar: Trust Protectors
Moderated by Alexander Bove.

Ad Closing: November 6th
Materials Due: November 9th