**Beyond the Cutting Edge of Tradition**

**Tomorrow’s Estate Planners and Administrators**

By

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Duquesne Club

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**Three Big Ideas for the Future**

Design

Data Visualization

Expert Systems

**Estate and Gift Taxes: 2013 and beyond**

A visual, animated approach to key Form 706/709 concepts including:

Portability: The “Game Changer”

Deceased Spousal Unused Exclusion (DSUE)

Protective Claims

Delaware and Hawaii: How one form change costs each state $10m / year

**Technology: 2013 and beyond**

Big data, instant visualization of complex information, patterns, and correlations

Disruptive technology and the “innovator’s dilemma”

Charts, graphs, diagrams, drawings, models, animations, reconstruction, and simulations

Massive Open Online Course (MOOC): A new way to learn

PBA Probate and Solo Listservs: 15,000 posts from 2006 through 2013

Wiki: collaborative pooling of accumulated legal knowledge

Expert systems evolving toward artificial intelligence

Decomposing legal tasks, de-lawyering, multi-sourcing

Online triage and mediation

Flexible, open-minded, entrepreneurial

The enhanced practitioner

There’s no present like the future. Some tools to get us there.

Keynote

Prezi

After Effects

Smart Draw

Balsamiq

Omnigraffle

Tableau

Neota Logic

ThinkMap

Probate Wizard

GoToMeeting, GoToTraining, GoToWebinar

Adobe eLearning Suite

The long-term transition…

**From**: information technology

**To**: nanotechnology, robotics, genetics, and IT – all converging into one