**Beyond the Cutting Edge of Tradition**

 **Tomorrow’s Estate Planners and Administrators**

By

Vincent F. Lackner, Jr.

Estate Planning Council of Pittsburgh

Thursday, March 21, 2013, 12 noon

Duquesne Club

Pittsburgh, PA

**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