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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

2002

2002 Schedule

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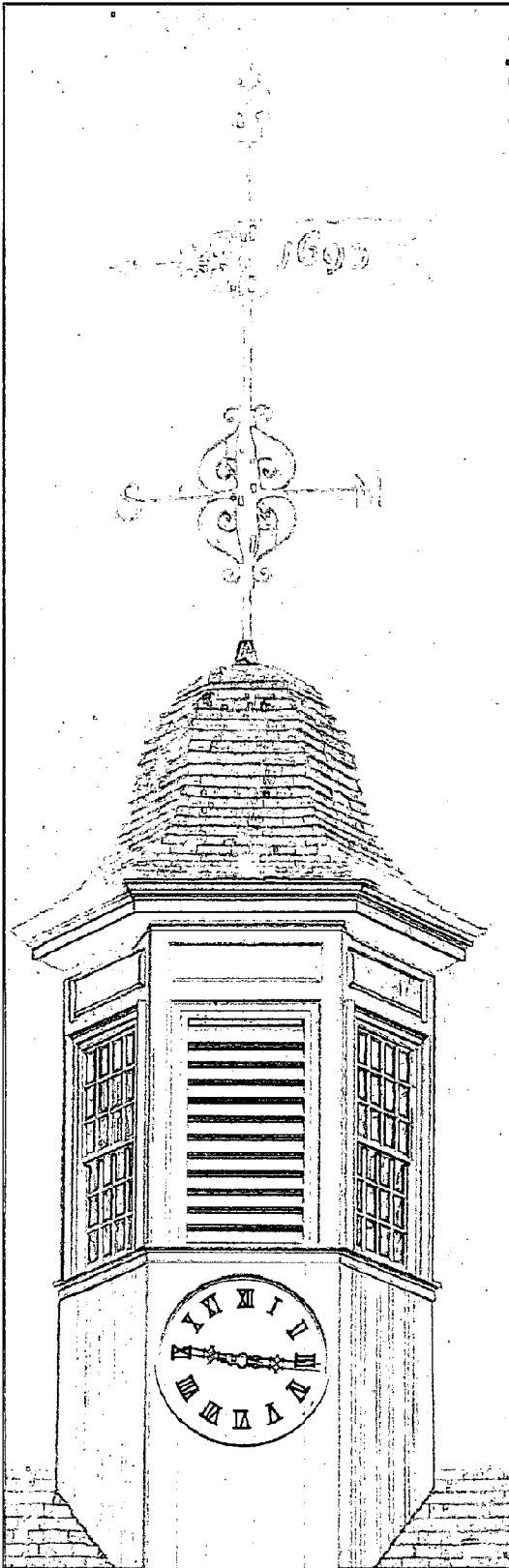
Forty-Eighth Annual

WILLIAM AND MARY TAX CONFERENCE

*A Program for Advisors to
Privately Held Businesses*

Thursday & Friday
November 21 & 22, 2002

KINGSMILL CONFERENCE CENTER
SCHOOL OF LAW AND SCHOOL OF BUSINESS
AT THE COLLEGE OF WILLIAM AND MARY
IN VIRGINIA



FORTY-EIGHTH WILLIAM AND MARY
TAX CONFERENCE

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Thursday, November 21, 2002	
9:00 a.m. – 10:00 a.m. <i>Choice of Entity for the Privately Held Business</i>	
“Choosing a Business Entity for the 21 st Century”	4
<i>Samuel P. Starr</i>	
<i>L. Michael Gracik, Jr.</i>	
<i>Thomas P. Rohman, moderator</i>	
10:15 a.m. – 11:15 a.m. <i>Special Tax Problems with Pass Through Entities</i>	
“Selected Partnership Tax Issues”	5
<i>Paul H. Wilner</i>	
<i>L. Michael Gracik, Jr.</i>	
<i>Thomas P. Rohman, moderator</i>	

- 11:15 a.m. – 12:15 p.m. ***Exit Strategies for Owners of Privately Held Businesses***
- “Exit Strategies for Owners of Privately Held Businesses” 6
- R. Marshall Merriman, Jr.*
Arthur E. Cirulnick
Paul H. Wilner
Thomas P. Rohman, moderator
- 1:45 p.m. – 2:45 p.m. ***Life Insurance and Related Estate Planning for the Privately Held Business***
- “Uses of Life Insurance for the Closely-Held Business” 7
- Mary Anne Mancini*
Farhad Aghdami
Dee Ann Remo, moderator
- 3:00 p.m. – 4:00 p.m. ***Employee Benefits Issues in Purchase and Sale of Privately Held Businesses***
- “Employee Benefits Issues in Purchase and Sale of Privately Held Businesses” 8
- Andrea O’Brien*
Louis A. Mezzullo
Michael L. Layman, moderator
- 4:00 p.m. – 5:00 p.m. ***At Last: The Final Minimum Distribution Rules***
- “Final Minimum Distribution Rules” 9
- Louis A. Mezzullo*
Andrea O’Brien
Michael L. Layman, moderator

2002 William and Mary Tax Conference
Schedule of Events

<u>Time</u>	<u>Activity/Topic</u>	<u>Location</u>
<i>Thursday Morning, November 21, 2002</i>		
7:45 a.m. – 8:45 a.m.	Registration & Coffee	Lobby
8:45 a.m. – 9:00 a.m.	Introductory Remarks	James River Grand Ballroom
9:00 a.m. – 10:00 a.m.	Choice of Entity for the Privately Held Business	James River Grand Ballroom
10:00 a.m. – 10:15 a.m.	Coffee Break	
10:15 a.m. – 11:15 a.m.	Special Tax Problems with Pass Through Entities	James River Grand Ballroom
11:15 a.m. – 12:15 p.m.	Exit Strategies for Owners of Privately Held Businesses	James River Grand Ballroom
12:30 p.m. – 1:30 p.m.	Hot Topics Box Lunch on Income Tax Topics	James River Grand Ballroom

Thursday Afternoon, November 21, 2002

1:45 p.m. – 2:45 p.m.	Life Insurance and Related Estate Planning for the Privately Held Business	James River Grand Ballroom
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2:45 p.m. – 3:00 p.m.	Break	
3:00 p.m. – 4:00 p.m.	Employee Benefits Issues in Purchase and Sale of Privately Held Businesses	James River Grand Ballroom
4:00 p.m. – 5:00 p.m.	At Last: The Final Minimum Distribution Rules	James River Grand Ballroom
5:00 p.m. – 6:00 p.m.	Reception – Cash Bar	Ballroom Wing

Friday Morning, November 22, 2002

7:30 a.m. – 8:00 a.m.	Registration & Coffee	Ballroom Wing
8:00 a.m. – 10:00 a.m.	Lawyer Marketing: An Ethics Guide	Tazewell Room
8:00 a.m. – 10:00 a.m.	Strategic Planning for the Closely Held Business – Where to Go Beyond Bank Debt and Internal Growth	James River Grand Ballroom
10:00 a.m. – 10:15 a.m.	Coffee Break	
10:15 a.m. – 12:15 p.m.	Recent Developments in Federal Income Tax	James River Grand Ballroom
12:30 p.m. – 1:30 p.m.	Hot Topics Box Lunch on Estate Planning Topics	James River Grand Ballroom

Friday Afternoon, November 22, 2002

1:45 p.m. – 4:00 p.m.	Buy-Sell Agreements and Nontax Issues in Planning for Business Succession	James River Grand Ballroom
2:45 p.m. – 3:00 p.m.	Break	