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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

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2011

## 2011 Accreditation Information Sheets

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## Summary of Meeting Times for Thursday and Friday Sessions

Please note that CLE and CPE forms for the Wednesday session were distributed separately.

### THURSDAY NOV 10

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Representing Clients in Audits and Controversies in Today's Tax Enforcement Environment	1.50	1.80
Compensating Employees and Employee-Owners, and Avoiding Problems with Payroll Tax and Executive Compensation Audits	1.50	1.80
Virginia Hot Topics	1.00	1.20
Real Estate Partnership and LLC Divorces – Breaking Up Is Not Always So Hard To Do	1.50	1.80
S Corporation Divorces – Breaking Up Is Hard To Do	1.50	1.80
Introduction to M&A Tax: S Corporation	1.00	1.20

### FRIDAY NOV 11

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Going Big: Update on States Seeking to Expand Tax Jurisdiction, Tax Base and Enforcement	1.50	1.80
Overview of Tax Accounting Methods and Uncertain Tax Positions	1.50	1.80
The Road Ahead: Deficit Reduction and Tax Reform	This 1-hour session does not qualify for Virginia CLE	1.20
The 2010 Tax Act's Impact on Estate Planning and Administration: Making Sense out of the Confusion	1.50	1.80
Federal Tax Update	1.50	1.80

Totals	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Virginia CLE	14.00	
CPE		18.00

## ACCREDITATION INFORMATION SHEET FOR LAWYERS

### VIRGINIA ATTORNEYS

This program has been approved by the Virginia Mandatory Continuing Legal Education Board for 14 credit hours. A copy of the Certification of Attendance (Form 2) is included in this section. Please fill out the form and return it to the Registration Desk at the end of the Conference. We will forward the forms to the Virginia State Bar.

### ATTORNEYS FROM OTHER STATES

If your state requires Continuing Legal Education credits, you may complete the Certificate of Attendance form provided in this notebook and submit it to your State Bar. If you wish to have the Tax Conference mail it for you, please attach the correct mailing address to your completed form and return it to the Registration Desk at the end of the Conference. Please be advised that any required sponsor fee will be the responsibility of the attendee.

# Virginia MCLE Board

## CERTIFICATION OF ATTENDANCE (FORM 2)

MCLE requirement pursuant to Paragraph 17, of Section IV, Part Six, Rules of the Supreme Court of Virginia and the MCLE Board Regulations.

### INSTRUCTIONS

**Certify Your Attendance Online at [www.vsb.org/vsb.portal/](http://www.vsb.org/vsb.portal/)**

Complete this Certification. Retain for two years.

MCLE Compliance Deadline - October 31. MCLE Reporting Deadline - December 15.

A \$100 fee will be assessed for failure to comply with either deadline.

Member Name: \_\_\_\_\_ VSB Member Number: \_\_\_\_\_  
Address: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_  
\_\_\_\_\_ E-mail Address: \_\_\_\_\_  
\_\_\_\_\_ City State Zip

Course ID Number: MWZ003

Sponsor: William & Mary Law School

Course/Program Title: 57th Annual Tax Conference Big Time Tax Planning for Smaller Businesses

Live Interactive \* CLE Credits (Ethics Credits): 14.0 (0.0)

Date Completed: \_\_\_\_\_ Location: \_\_\_\_\_

#### By my signature below I certify

- I attended a total of \_\_\_\_\_ (hrs/mins) of approved CLE, of which (\_\_\_\_\_) (hrs/mins) were in approved Ethics.  
Credit is awarded for actual time in attendance (0.5 hr. minimum) rounded to the nearest half hour. (Example: 1hr 15min = 1.5hr)  
 The sessions I am claiming had written instructional materials to cover the subject.  
 I participated in this program in a setting physically suitable to the course.  
 I was given the opportunity to participate in discussions with other attendees and/or the presenter.  
 I understand I may not receive credit for any course/segment which is not materially different in substance than a course/segment for which credit has been previously given during the same completion period or the completion period immediately prior.  
 I understand that a materially false statement shall be subject to appropriate disciplinary action.

\* NOTE: A maximum of 8.0 hours from pre-recorded courses may be applied to meet your yearly MCLE requirement. Minimum of 4.0 hours from live interactive courses required.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

**Questions?** Contact the MCLE Department at (804) 775-0577 or E-mail questions to [mcle@vsb.org](mailto:mcle@vsb.org)

If not certified online, this form may be mailed or faxed (fax disabled Nov 2-Dec 31)

Virginia MCLE Board

Virginia State Bar

707 East Main Street, 15th Floor

Richmond, VA 23219-2800

Web site: [www.vsb.org](http://www.vsb.org) Fax: (804) 775-0544

[Office Use Only: Live]

# Virginia MCLE Board

## CERTIFICATION OF TEACHING (FORM 3)

MCLE requirement pursuant to Paragraph 17, of Section IV, Part Six, Rules of the Supreme Court of Virginia and the MCLE Board Regulations.

### INSTRUCTIONS

#### E-mail this form to [mymcle@vsb.org](mailto:mymcle@vsb.org)

Complete this Certification to Include Both Teaching and Attendance hours. Retain copy for two years.

MCLE Compliance Deadline - October 31. MCLE Reporting Deadline - December 15.

A \$100 fee will be assessed for failure to comply with either deadline.

Member Name: \_\_\_\_\_ VSB Member Number: \_\_\_\_\_  
Address: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_  
\_\_\_\_\_ E-mail Address: \_\_\_\_\_  
\_\_\_\_\_ City State Zip

Course ID Number: MWZ003

Sponsor: William & Mary Law School

Course/Program Title: 57th Annual Tax Conference Big Time Tax Planning for Smaller Businesses

Live Interactive \* CLE Credits (Ethics Credits): 14.0 (0.0)

Date(s) of Teaching: \_\_\_\_\_ Location(s): \_\_\_\_\_

#### ONLY SESSIONS WITH WRITTEN INSTRUCTIONAL MATERIALS ARE APPROVABLE FOR CREDIT

- My teaching segment was \_\_\_\_\_ (hrs/mins) of CLE, of which (\_\_\_\_\_) (hrs/mins) were in Ethics.
- In addition, I attended *other* segments totaling \_\_\_\_\_ (hrs/mins) of CLE, of which (\_\_\_\_\_) (hrs/mins) were in Ethics.
- I spent \_\_\_\_\_ hours preparing for teaching my segment of the course.
- No more than four (4) hours of preparation credit may be claimed per one hour of instructional time in your presentation, and no more than eight (8) hours total for any one course. Total credit is awarded for actual time spent teaching, attendance and preparation rounded to the nearest half hour. (Example: 1hr 15min = 1.5hr)
- A materially false statement shall be subject to appropriate disciplinary action.

\* NOTE: A maximum of 8.0 hours from pre-recorded courses may be applied to meet your yearly MCLE requirement. Minimum of 4.0 hours from live interactive courses required.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

**Questions?** Contact the MCLE Department at (804) 775-0577 or E-mail questions to [mcle@vsb.org](mailto:mcle@vsb.org)

If not e-mailed, this form may be mailed or faxed (fax disabled Nov 2-Dec 31)

Virginia MCLE Board  
Virginia State Bar  
707 East Main Street, 15th Floor  
Richmond, VA 23219-2800  
Web site: [www.vsb.org](http://www.vsb.org) Fax: (804) 775-0544

**CERTIFICATE OF ATTENDANCE  
FOR NON VIRGINIA LAWYERS  
WILLIAM & MARY TAX CONFERENCE**

**ATTORNEY'S NAME:** \_\_\_\_\_

**BUSINESS ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**SPONSOR:** College of William & Mary  
School of Law  
School of Business

**PROGRAM TITLE:** Fifty-Seventh William & Mary Tax Conference

**DATES OF PROGRAM:** November 9-11, 2011

**LOCATION:** Williamsburg, Virginia

**CLE Credit:** 15 hours of instruction

I attended the full program.

I attended the following number of hours: \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**SUBMIT A COPY OF THIS FORM TO YOUR STATE BAR WHEN REPORTING  
YOUR ANNUAL CLE CREDITS.**

## **ACCREDITATION INFORMATION SHEET FOR ACCOUNTANTS**

### **VIRGINIA CERTIFIED PUBLIC ACCOUNTANTS**

This program provides 18 Continuing Professional Education (CPE) credit hours (based on 50 minute hours), none of which are ethics credits. An attendance form for Virginia accountants is available in this notebook. Please complete and return this form to the Registration Desk at the end of the Conference, and a Certificate of Participation will be issued and mailed to you at the address you provide.

### **ACCOUNTANTS FROM OTHER STATES**

A general attendance form for accountants is available in this program notebook. Please complete and return this form to the Registration Desk at the end of the conference, and a Certificate of Participation will be issued and mailed to you at the address you provide.

The William & Mary Tax Conference requires no prerequisites or advance preparation. The course is taught principally through panel discussions, at the intermediate level.

**GENERAL ATTENDANCE FORM  
FOR ACCOUNTANTS  
WILLIAM & MARY TAX CONFERENCE**

(Please PRINT)

NAME: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SPONSOR: College of William & Mary  
School of Law  
School of Business

PROGRAM TITLE: Fifty-Seventh William & Mary Tax Conference

DATES OF PROGRAM: November 9-11, 2011

LOCATION: Williamsburg, Virginia

CPE Credit: 18 hours (based on 50-minute hours)

I attended the full program.

I attended the following number of hours: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

**PLEASE COMPLETE THIS FORM AND RETURN IT TO THE REGISTRATION  
DESK AT THE END OF THE CONFERENCE. A CERTIFICATE OF  
PARTICIPATION WILL BE MAILED TO YOU AT THE ADDRESS YOU PROVIDE.**