

2013

2013 Tax Conference Forms

Repository Citation

"2013 Tax Conference Forms" (2013). *William & Mary Annual Tax Conference*. Paper 703.
<http://scholarship.law.wm.edu/tax/703>

Copyright c 2013 by the authors. This article is brought to you by the William & Mary Law School Scholarship Repository.
<http://scholarship.law.wm.edu/tax>

Summary of Meeting Times

WEDNESDAY, NOVEMBER 6

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Introduction to Partnership Taxation	2.00	2.40

THURSDAY NOVEMBER 7

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Federal Tax Update	1.50	1.80
Federal and State Due Diligence for M&A and Equity Investments LLCs	1.50	1.80
Virginia Hot Topics	1.00	1.20
Compensating Owners and Key Employees of Partnerships and LLCs	1.50	1.80
Recent Developments & Tax Planning for High Income Taxpayers	1.50	1.80
Introduction to M&A Taxation: S Corporations and Sections 226(e)	1.00	1.20

FRIDAY NOVEMBER 8

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Federal Tax Controversy	1.50	1.80
I Want Out - Tax Considerations in Exiting a Partnership	1.50	1.80
Keynote Address - Tax Reform in the 113th Congress: Insights and Analysis	1.00	1.20
Estate & Gift - Advising Clients After the 2012 Tax Act	1.50	1.80
Real Estate & Partnership Hot Topics	1.50	1.80

Totals	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Virginia CLE	17.00	
CPE		20.40

ACCREDITATION INFORMATION SHEET FOR LAWYERS

VIRGINIA ATTORNEYS

This program has been approved by the Virginia Mandatory Continuing Legal Education Board for 17 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 <https://member.vsb.org/vsbportal/>

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: MWBB001

Sponsor: William & Mary Law School

Course/Program Title: 59th Annual Tax Conference: Sophisticated Tax Planning in Turbulent Times

Live Interactive * CLE Credits (Ethics Credits): 17.0 (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

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 Fax: (804) 775-0544

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

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: MWBB001

Sponsor: William & Mary Law School

Course/Program Title: 59th Annual Tax Conference: Sophisticated Tax Planning in Turbulent Times

Live Interactive * CLE Credits (Ethics Credits): 17.0 (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

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 Fax: (804) 775-0544

[Office Use Only: Live]

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

ATTORNEY'S NAME: _____

BUSINESS ADDRESS: _____

SPONSOR: College of William & Mary
School of Law

PROGRAM TITLE: 59th William & Mary Tax Conference

DATES OF PROGRAM: November 6-9, 2013

LOCATION: Williamsburg, Virginia

CLE Credit: 17 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 20.40 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: 59th William & Mary Tax Conference

DATES OF PROGRAM: November 6-8, 2013

LOCATION: Williamsburg, Virginia

CPE Credit: 20.40 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.**

59th ANNUAL WILLIAM & MARY TAX CONFERENCE

November 6-8, 2013

EVALUATION QUESTIONNAIRE

Please answer the following questions to help us in planning future conferences. Leave this questionnaire at the registration desk before leaving this year's conference or mail it to: Tax Conference, William & Mary Law School, Post Office Box 8795, Williamsburg, VA 23187-8795. Thank you for your time.

Name: _____

(optional)

Profession: _____ Years in Practice: _____

Please indicate your overall impression of each topic and speaker with 5 being the highest rating:

		<u>Outstanding</u>				<u>Fair</u>
		5	4	3	2	1
Topic:	Introduction to Partnership Taxation	_____	_____	_____	_____	_____
Speakers:	Robert G. McElroy	_____	_____	_____	_____	_____
	Thomas P. Rohman	_____	_____	_____	_____	_____
Topic:	Federal Tax Update	_____	_____	_____	_____	_____
Speaker:	Stephen L. Owen	_____	_____	_____	_____	_____
Topic:	Federal and State Due Diligence for M&A and Equity Investments LLCs	_____	_____	_____	_____	_____
Speaker:	Jerald D. August	_____	_____	_____	_____	_____
Topic:	Lunch Session – Virginia Hot Topics	_____	_____	_____	_____	_____
Speakers:	Craig D. Bell	_____	_____	_____	_____	_____
	William L. S. Rowe	_____	_____	_____	_____	_____
Topic:	Compensating Owners and Key Employees of Partnerships and LLCs	_____	_____	_____	_____	_____
Speakers:	Elizabeth Drigotas	_____	_____	_____	_____	_____
	Steven R. Schneider	_____	_____	_____	_____	_____
Topic:	Recent Developments & Tax Planning for High Income Taxpayers	_____	_____	_____	_____	_____
Speakers:	Cameron N. Cosby	_____	_____	_____	_____	_____
	Brian J. O'Connor	_____	_____	_____	_____	_____
Topic:	Introduction to M&A Taxation – S Corporations and Section 336(e)	_____	_____	_____	_____	_____
Speakers:	Robert G. McElroy	_____	_____	_____	_____	_____
	William M. Richardson	_____	_____	_____	_____	_____

