

2015

## 2015 Tax Conference Forms

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## Summary of Meeting Times

### WEDNESDAY, NOVEMBER 11

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Hot Topics in Partnership and Real Estate Taxation	2.00	2.40

### THURSDAY, NOVEMBER 12

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Planning Closely-Held Business Succession	1.50	1.80
Employee Benefits in Acquisitions	1.50	1.80
Virginia Hot Topics	1.25	1.50
Multi-State Tax Planning	1.50	1.80
Special Family and Lifestyle Tax Issues	1.25	1.50
Getting Up to Speed on Partnership Basis Adjustments	1.25	1.50

### FRIDAY, NOVEMBER 13

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Traps All Tax Practitioners Should Know and Avoid	1.50	1.80
Corporate Tax Update	1.50	1.80
The Administration's Tax Reform Targets	1.00	1.20
International Tax Planning for the U.S. Pass Through Entity	1.25	1.50
Dealing with Installment Sales 35 Years after the Installment Sales Revision Act of 1980	1.25	1.50
Federal Tax Update	1.25	1.50

Totals	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Virginia CLE	18.00	
CPE		21.60

## ACCREDITATION INFORMATION SHEET FOR LAWYERS

### VIRGINIA ATTORNEYS

This program has been approved by the Virginia Mandatory Continuing Legal Education (MCLE) Board for 18.00 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.

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

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

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

\_\_\_\_\_

\_\_\_\_\_

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

**PROGRAM TITLE:** 61<sup>st</sup> William & Mary Tax Conference

**DATES OF PROGRAM:** November 11-13, 2015

**LOCATION:** Williamsburg, Virginia

**CLE Credit:** 18.00 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.**

# 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](http://www.vsb.org) see Member Login**

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: MWDD001

Sponsor: William & Mary Law School

Course/Program Title: 61st Annual William & Mary Tax Conference

Live Interactive \* CLE Credits (Ethics Credits): 16.0 (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

If not certified online, this form may be mailed

Virginia MCLE Board

Virginia State Bar

1111 East Main Street, Suite 700

Richmond, VA 23219-0026

Web site: [www.vsb.org](http://www.vsb.org)

[Office Use Only: Live]

## **ACCREDITATION INFORMATION SHEET FOR ACCOUNTANTS**

### **VIRGINIA CERTIFIED PUBLIC ACCOUNTANTS**

This program provides 21.60 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.

**CERTIFICATE OF ATTENDANCE  
FOR ACCOUNTANTS  
WILLIAM & MARY TAX CONFERENCE**

**(Please PRINT)**

**ACCOUNTANT'S NAME:** \_\_\_\_\_

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

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

**PROGRAM TITLE:** 61<sup>st</sup> William & Mary Tax Conference

**DATES OF PROGRAM:** November 11-13, 2015

**LOCATION:** Williamsburg, Virginia

**CPE Credit:** 21.60 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.**

# 61<sup>st</sup> ANNUAL WILLIAM & MARY TAX CONFERENCE

November 11-13, 2015

## 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: Hot Topics in Partnership and Real Estate Taxation (and more)	_____	_____	_____	_____	_____
Speakers: Stephen L. Owen	_____	_____	_____	_____	_____
Stefan F. Tucker	_____	_____	_____	_____	_____
Topic: Planning Closely-Held Business Succession	_____	_____	_____	_____	_____
Speaker: Stefan F. Tucker	_____	_____	_____	_____	_____
Topic: Employee Benefits in Acquisitions	_____	_____	_____	_____	_____
Speaker: Paul M. Hamburger	_____	_____	_____	_____	_____
Topic: Lunch Session – Virginia Hot Topics	_____	_____	_____	_____	_____
Speakers: Craig D. Bell	_____	_____	_____	_____	_____
William L. S. Rowe	_____	_____	_____	_____	_____
Topic: Multi-State Tax Planning	_____	_____	_____	_____	_____
Speakers: Duane W. Dobson	_____	_____	_____	_____	_____
French Slaughter	_____	_____	_____	_____	_____
Topic: Special Family and Lifestyle Tax Issues	_____	_____	_____	_____	_____
Speaker: Helena S. Mock	_____	_____	_____	_____	_____
Topic: Getting Up to Speed on Partnership Basis Adjustments	_____	_____	_____	_____	_____
Speaker: James B. Sowell	_____	_____	_____	_____	_____

(over)



		<u>Outstanding</u>				<u>Fair</u>
		5	4	3	2	1
Topic:	Traps All Tax Practitioners Should Know and Avoid	_____	_____	_____	_____	_____
Speakers:	Craig D. Bell	_____	_____	_____	_____	_____
	Karen L. Hawkins	_____	_____	_____	_____	_____
	Christopher S. Rizek	_____	_____	_____	_____	_____
Topic:	Corporate Tax Update	_____	_____	_____	_____	_____
Speakers:	Lisa M. Zarlenga	_____	_____	_____	_____	_____
	Andrew F. Gordon	_____	_____	_____	_____	_____
Topic:	Lunch Session – The Administration’s Tax Reform Targets	_____	_____	_____	_____	_____
Speakers:	Lisa M. Zarlenga	_____	_____	_____	_____	_____
	Stephen L. Owen	_____	_____	_____	_____	_____
Topic:	International Tax Planning for the U.S. Pass Through Entity	_____	_____	_____	_____	_____
Speaker:	Seth Green	_____	_____	_____	_____	_____
Topic:	Dealing with Installment Sales 35 Years after the Installment Sales Revision Act of 1980	_____	_____	_____	_____	_____
Speaker:	Robert D. Schachat	_____	_____	_____	_____	_____
Topic:	Federal Tax Update	_____	_____	_____	_____	_____
Topic:	Stephen L. Owen	_____	_____	_____	_____	_____

1. Please provide additional comments regarding this year’s program, including the usefulness of panel presentations.
  
2. Suggestions for future topics and/or speakers for the William & Mary Tax Conference.
  
3. May we have your e-mail address to add to a LISTSERVE for future conference information? Please print legibly \_\_\_\_\_
  
4. How did you hear about the Conference?