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Conferences, Events, and Lectures

2004

2004 Schedule

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THE COLLEGE OF WILLIAM AND MARY

50TH

WILLIAM & MARY
TAX CONFERENCE

THURSDAY & FRIDAY
NOVEMBER 18 – NOVEMBER 19, 2004

MARSHALL-WYTHE
SCHOOL OF LAW
AT THE COLLEGE OF WILLIAM & MARY
IN VIRGINIA

FIFTIETH WILLIAM AND MARY
TAX CONFERENCE

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 Thursday, November 18, 2004	
9:00 a.m. – 10:30 a.m. <i>Business, Benefits and Tax Issues Involved in the Formation and Structuring of the Closely- Held Business</i>	5
<p style="text-align:center"><i>C. Wells Hall, III Allan G. Donn, moderator</i></p>	
10:45 a.m. – 12:15 p.m. <i>Business and Benefits Considerations when Getting the Business Started</i>	
“Executive Compensation Planning for the Privately-Held Businesses”	6
<p style="text-align:center"><i>Jeffrey R. Capwell James J. Wheaton Robert E. Lee, moderator</i></p>	

12:30 p.m. – 1:30 p.m. ***Hot Topics Lunch Session: Virginia Taxation***

“Recent Tax Developments in Virginia: 2003-2004”

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“What’s Hot in Virginia Taxation”

William L.S. Rowe

Craig D. Bell

1:45 p.m. – 3:15 p.m. ***Business and Finance Issues when Considering
the Traditional Sources of Financing and
Capitalization***

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Harry A. Turton, Jr.

Thomas H. Tullidge, Jr.

Thomas R. Frantz, moderator

3:30 p.m. – 5:00 p.m. ***Business and Finance Issues when
Contemplating Non-Traditional Sources of
Capitalization***

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R. Marshall Merriman

Gary D. LeClair

William M. Richardson, moderator

Friday, November 19, 2004

8:00 a.m. – 9:00 a.m. *Tax Advisor – Client Privileges and Circular 230 Revisions*

B. John Williams, Jr. 10
Stefan F. Tucker, moderator

9:00 a.m. – 10:00 a.m. *Family Limited Partnership Update*

Farhad Aghdami 11
Michael L. Layman, moderator

10:15 a.m. – 12:15p.m. *Exit Strategies and Techniques for the Business Owner*

“Capital Market Exits: Planning for Restricted and Control Securities” 12

Stephen L. Owen
George F. Albright, Jr.
W. Birch Douglass III, moderator

12:30 p.m. – 1:30 p.m. *Strategic Philanthropy: Developing a Family Philanthropy Legacy*

Samuel Davis, III 13
W. Birch Douglass, III, moderator

1:45 p.m. – 4:15 p.m. *Recent Developments in Federal Income Tax*

Ira B. Shepard 14

4:15 p.m. – 5:15 p.m. *Lawyer Marketing: An Ethics Guide*

Thomas E. Spahn

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