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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

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2003

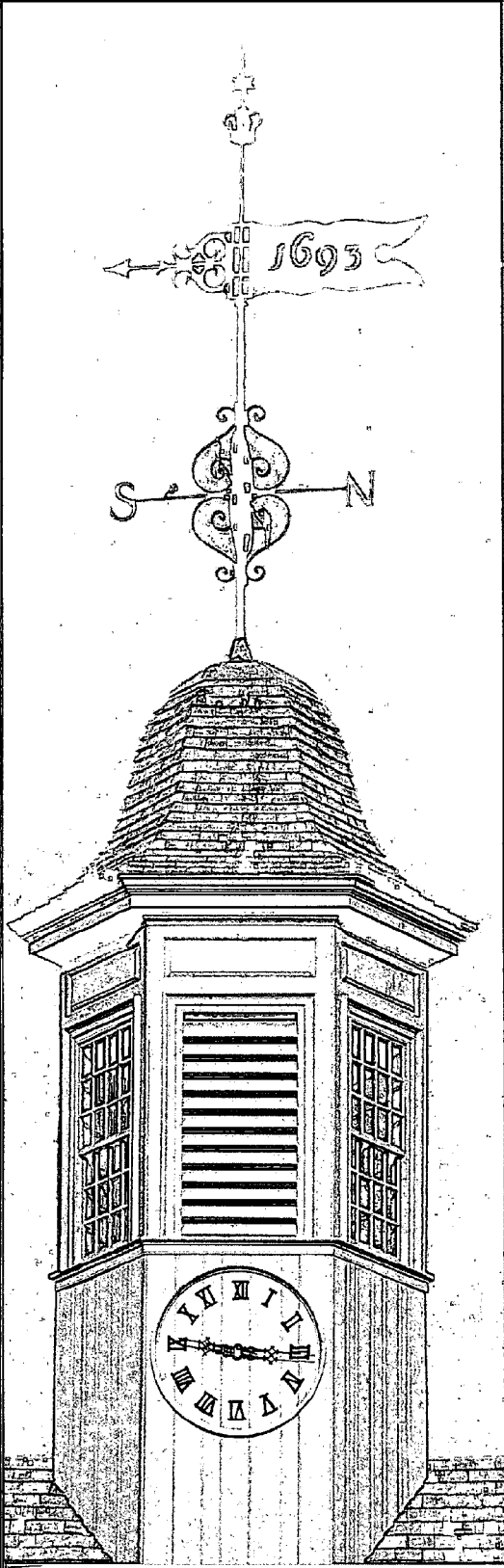
## 2003 Schedule

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WILLIAM  
& MARY

*Forty-Ninth Annual*

WILLIAM AND MARY TAX CONFERENCE

*Guiding Privately Held Businesses  
and Their Owners in a Difficult  
and Uncertain Economy*

*A Program for Advisors  
to Privately Held Businesses*

Thursday & Friday  
November 20 & 21, 2003

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

**FORTY-NINTH WILLIAM AND MARY**  
**TAX CONFERENCE**

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 <b>Thursday, November 20, 2003</b>	
9:00 a.m. – 10:30 a.m. <i>Selected Buyer and Seller Issues When Contemplating M&amp;A Transactions</i>	
“Selected Buyer and Seller Issues When Contemplating M7A Transactions in an Uncertain Economy”	5
 <i>William M. Richardson</i> <i>Robert G. McElroy</i> <i>Thomas R. Frantz, moderator</i>	
10:45 a.m. – 12:15 p.m. <i>Maintaining Flexibility in Transactional Planning</i>	
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“Analyzing the Noncompensatory Partnership Option Proposed Regulations”	
 <i>Thomas P. Rohman</i> <i>Dennis A. Diersen</i> <i>Allen G. Donn, moderator</i>	



**Friday, November 21, 2003**

8:00 a.m. – 10:00 a.m.     ***Income, Gift and Estate Tax Smart Ways to Save for College: Section 529 Plans, ESAs & More***

“Income, Gift and Estate Tax Smart Ways to Save for College: Section 529 Plans, ESAs & More ”     10

*James W.C. Canup*  
*Diana F. Cantor*  
*Anne B. Shumadine, moderator*

10:15 a.m. – 12:15 p.m.     ***Recent Developments in Federal Income Tax***

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*Ira B. Shepard*  
*Mary Ann Cohen*

12:30 p.m. – 1:30p.m.     ***Hot Topics Lunch Session: Estate Planning Topics***

*W. Birch Douglass III*     12  
*Dee Ann Remo*  
*Michael L. Layman*

1:45 p.m. – 2:45 p.m.     ***Practical Issues When Appraising Privately Held Businesses***

“Practical Issues When Appraising Privately Held Businesses”     13

“International Valuation Guidance Note No. 6”

*Robert F. Mizell*  
*Craig D. Bell*

3:00 p.m. – 4:00 p.m.     ***Using Charitable Contribution Planning  
Opportunities with Family Business Succession  
Planning***

“Using Charitable Contribution Planning Opportunities with  
Family Business Succession Planning”

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*J. William Gray, Jr.*

*Howard J. Busbee, moderator*