

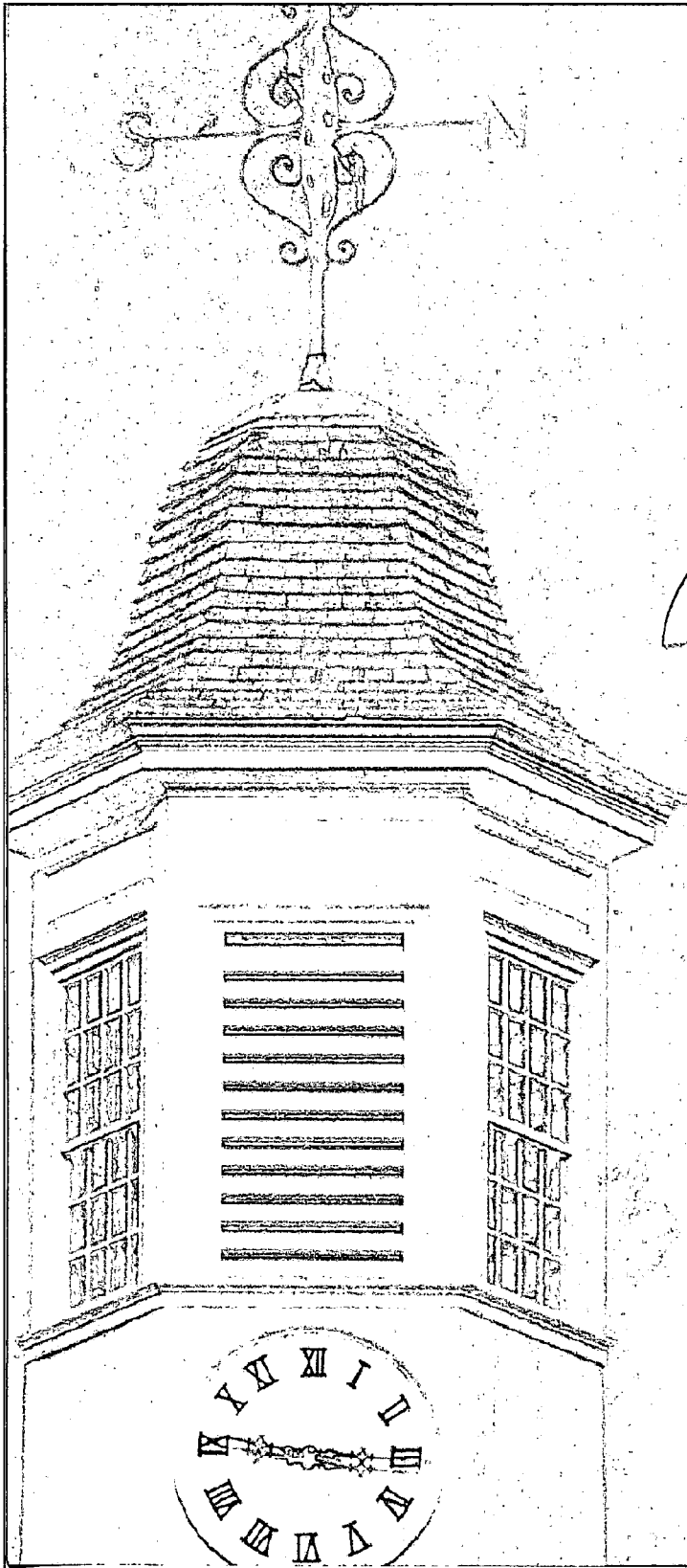
2001

## 2001 Schedule

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47<sup>th</sup>

WILLIAM  
& MARY

Tax

Conference

Friday & Saturday

November 30<sup>th</sup> &

December 1<sup>st</sup>, 2001

*Marshall-Wythe*  
SCHOOL OF LAW

AT THE COLLEGE OF WILLIAM AND MARY

IN VIRGINIA

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

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<b>Friday, November 30, 2001</b>	
8:45 a.m. - 10:00 a.m. <i>Tax Audit Issues and Changes in Virginia Law of Interest to Tax Practitioners</i>	
“Recent Tax Developments in Virginia” <i>William L. S. Rowe</i>	5
“Current Developments in Multistate Taxation” <i>D. French Slaughter, III</i>	6
10:15 a.m. – 12:15 p.m. <i>Tax Controversies</i>	
“Representing the Failing Company Where the IRS is Knocking on the Door” <i>Craig C. Bell, moderator</i> <i>T. Keith Fogg</i> <i>George C. Gretes</i> <i>Nina E. Olson</i>	7



1:45 p.m. – 2:45 p.m.     ***Employee Benefits for the Closely Held Business***

“Employee Benefits for the Closely Held Business”     13  
*Lisa C. Germano*

3:00 p.m. – 5:00 p.m.     ***What’s Hot in Estate Planning***

“Practical Estate Planning and Drafting After the Tax Act of  
2001”     14  
*John B. O’Grady*

“The Effect of Volatility on Wealth Transfer Strategies in  
Light of the 2001 Tax Act”     15  
*David J. Wilfert*

“A Dozen Things Not to Assume in Gift Planning”     16  
*W. Birch Douglass, III*

# **PLEASE NOTE:**

## **The 48<sup>th</sup> Annual William and Mary Tax Conference 2002 will be held at Kingsmill Resort**

### **KINGSMILL RESORT, WILLIAMSBURG, VIRGINIA OVERVIEW**

Located near historic Williamsburg, Virginia on the banks of the scenic James River, Kingsmill offers award-winning golf, tennis, spacious accommodations, Spa and Sports Club, and full-service conference facilities in a luxury resort environment. It is owned and operated by Busch Properties, Inc., one of the Anheuser-Busch Companies.

#### **ACCOMMODATIONS**

Kingsmill Resort offers guests luxury accommodations with 400 guest rooms and suites overlooking the James River, golf course or tennis courts, all within a short walk of the Resort Center, Spa and Sports Club. Kingsmill's one-, two- and three-bedroom suites feature complete kitchens, spacious living and dining areas, fireplaces, and outdoor decks.

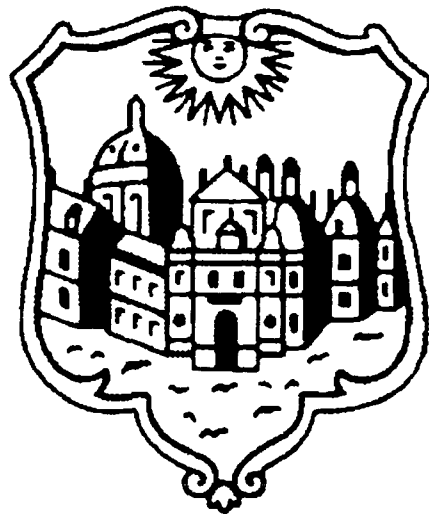
#### **CONFERENCE CENTER**

The Kingsmill Conference Center is a state-of-the-art facility within the Resort Center, created to accommodate meetings of 10 to 300 people. With the addition of the 6,000-square-foot James River Grand Ballroom in July 1996, Kingsmill is able to accommodate up to 450 people. Other facilities include nine spacious, sound-proof meeting rooms equipped with eight-hour chairs, adjustable lighting, individual climate control and complete audiovisual capabilities. The Burwell and Plantation Rooms can be combined into a 4,000-square-foot ballroom. Break-out spaces, lounges and reception areas round out the conference center. The on-site Kingsmill Audio-Visual Services has helped many groups design and produce collateral materials and presentation graphics and edit videotapes. Kingsmill Creative Events (Destination Marketing Company) will arrange ground transportation to and from the airport.

#### **INFORMATION**

Kingsmill Resort is located at 1010 Kingsmill Road, Williamsburg, Virginia, 23185. For reservations call (800) 832-5665 or (757) 253-1703. Fax: (757) 253-8237. [reservations@kingsmill.com](mailto:reservations@kingsmill.com)

**MARK YOUR  
2002  
CALENDAR**



**Forty-Eighth  
William & Mary**

**Tax Conference**

**December 6 & 7, 2002**

**2001 William and Mary Tax Conference**  
*Schedule of Events*

<u>Time</u>	<u>Activity/Topic</u>	<u>Location</u>
<b><i>Friday Morning, November 30, 2001</i></b>		
7:30 a.m. – 8:30 a.m.	Registration & Coffee	East Gallery  Auditorium Foyer/North Gallery
8:30 a.m. – 8:45 a.m.	Introductory Remarks	Auditorium
8:45 a.m. – 10:00 a.m.	Tax Audit Issues	Auditorium
10:00 a.m. – 10:15 a.m.	Coffee Break	Foyer/ North Gallery
10:15 a.m. – 12:15 p.m.	Tax Controversies	Auditorium
12:15 p.m. – 1:30 p.m.	Lunch and Speaker “ The Taxpayer Advocate Service: Current Issues ”	Virginia Room
<b><i>Friday Afternoon, November 30, 2001</i></b>		
1:45 p.m. – 5:00 p.m.	Life-Cycle of a Real Estate Transaction	Auditorium
2:45 p.m. – 3:00 p.m.	Break	Foyer/ North Gallery
5:00 p.m. – 6:00 p.m.	Reception – Cash Bar	Room BC



## ***Saturday Morning, December 1, 2001***

7:30 a.m. – 8:30 a.m.	Registration & Coffee	East Gallery Foyer/ North Gallery
7:30 a.m. – 8:30 a.m.	Information Services for the Small Office	Auditorium
8:30 a.m. – 10:00 a.m.	Ethical Issues for the Tax Practitioner	Auditorium
10:00 a.m. – 10:15 a.m.	Coffee Break	Foyer/ North Gallery
10:15 a.m. – 12:15 a.m.	Recent Developments in Federal Income Tax	Auditorium
12:15 p.m. – 1:45 p.m.	Lunch – On Your Own (Cash & Carry service will be available in the Virginia Room)	

## ***Saturday Afternoon, December 1, 2001***

1:45 p.m. – 2:45 p.m.	Employee Benefits for the Closely Held Business	Auditorium
2:45 p.m. – 3:00 p.m.	Break	Foyer/North Gallery
3:00 p.m. – 5:00 p.m.	What's Hot in Estate Planning	Auditorium