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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

2000

2000 Schedule

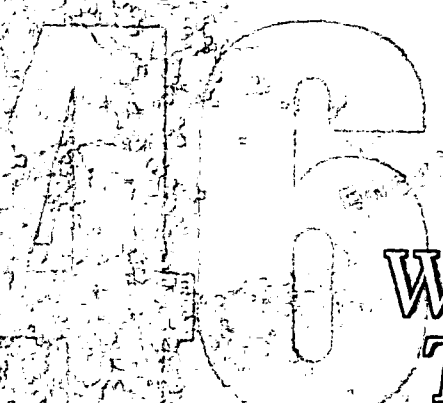
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THE COLLEGE OF WILLIAM AND MARY

multiple disciplines



William & Mary Tax Conference

FRIDAY & SATURDAY,
DECEMBER 1 & 2, 2000

income tax

corporate taxation

distributions
partnerships and

Marshall-Wythe
SCHOOL OF LAW
AT THE COLLEGE OF WILLIAM & MARY
IN VIRGINIA

tax
law of accounting

FORTY-SIXTH WILLIAM AND MARY
TAX CONFERENCE

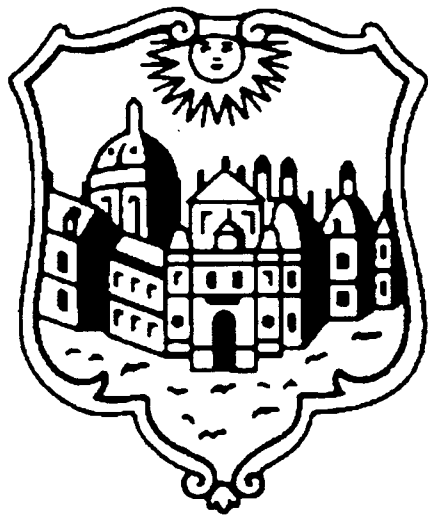
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CLE and CPE Forms	4
Friday, December 1, 2000	
8:30 a.m. - 10:00 a.m. <i>Tax Audit Issues, Unclaimed Property Developments and Changes in Virginia Law of Interest to Tax Practitioners</i>	
“Recent Tax Developments in Virginia” <i>William L. S. Rowe</i>	5
“State Challenges to Related Party Transactions” <i>D. French Slaughter, III</i>	6
“Who Spilled Coke on My Laptop?” <i>D. French Slaughter, III</i>	7
“Abandoned & Unclaimed Property: Legislative Update in Virginia” <i>Robert G. McElroy</i>	8

10:15 a.m. – 12:15 p.m.	<i>Valuations in the Business Setting</i>	
	“Valuations in the Business Setting”	9
	“Exhibits”	10
	<i>Harold G. Martin, Jr.</i> <i>Harry Schwarz</i> <i>Tom Rohman, moderator</i>	
12:15 p.m. – 1:30 p.m.	<i>Observations of a Tax Court Judge</i>	
	<i>The Honorable L. Paige Marvel, Luncheon Speaker</i>	
1:45 p.m. – 5:00 p.m.	<i>Surviving in a Multi-Disciplinary Practice World</i>	
	Combined Resources	11
	<i>Stefan F. Tucker</i> <i>Richard L. Upton</i> <i>Jeanne Liedtka</i>	
	“Enterprise Risk Management: Realizing Profit from Risk”	12
	<i>Raymond M. Slabaugh, III</i>	
Saturday, December 2, 2000		
8:30 a.m. – 9:30 a.m.	<i>Ethical Issues for Lawyers in a Multi-Disciplinary Practice World</i>	
	Combined Resources	13
	<i>Stefan F. Tucker</i>	
8:30 a.m. – 9:30 a.m.	<i>Planning for Distributions from Partnerships and LLCs</i>	
	“Taxation of Distributions: Distributions from Partnerships and Limited Liability Companies”	14
	<i>David W. LaRue</i>	

9:45 a.m. – 11:45 a.m.	<i>Recent Developments in Federal Income Tax</i>	
	<i>Ira B. Shepherd</i>	15
	<i>The Honorable Mary Ann Cohen</i>	
Noon – 2:00 p.m.	<i>Ethics for Lawyers, Video Presentation</i>	
Noon – 1:00 p.m.	<i>Informal Roundtable Discussion of Tax Library Resources, Software, etc. for the Small to Medium Size Law or Accounting Firm</i>	
	<i>Michael Layman</i>	16
1:15 p.m. – 2:15 p.m.	<i>Practical Aspects of Asset Protection Trusts, Offshore Trusts, and Other Nontraditional Trusts</i>	
	“Wealth Preservation with Asset Protection Trusts”	17
	<i>Gideon Rothschild</i>	
2:25 p.m. – 3:05 p.m.	<i>Integrating Qualified Plan and IRA Distributions with Financial Planning</i>	
	“The Conflict Between Retirement Planning and Estate Planning: Integrated Qualified-Plan Distributions and Retirement Planning”	18
	<i>Bruce Temkin</i>	
3:05 p.m. – 5:15 p.m.	<i>Tax-wise Investing</i>	
	“Investing for After-tax Returns: An Overview”	19
	<i>Anne B. Shumadine, moderator</i>	
	<i>Mark Warden</i>	
	<i>Terry Banet</i>	
	<i>Bruce J. Temkin</i>	

**MARK YOUR
2001
CALENDAR**



**Forty-Seventh
William & Mary**

Tax Conference

November 30 & December 1, 2001

2000 William and Mary Tax Conference
Schedule of Events

<u>Time</u>	<u>Activity/Topic</u>	<u>Location</u>
<i>Friday Morning, December 1, 2000</i>		
7:30 a.m.	Coffee	Auditorium Foyer/North Gallery
8:00 a.m. – 8:30 a.m.	Registration	East Gallery
8:20 a.m. – 8:30 a.m.	Introductory Remarks	Auditorium
8:30 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.	Valuations in the Business Setting	Auditorium
12:15 p.m. – 1:30 p.m.	Lunch and Speaker “New Jurisdiction, New Issues, New Judge”	Virginia Room
<i>Friday Afternoon, December 1, 2000</i>		
1:45 p.m. – 5:00 p.m.	Surviving in a Multi-Disciplinary Practice World	Auditorium
2:45 p.m – 3:00 p.m.	Break	Foyer/ North Gallery
5:00 p.m. – 6:00 p.m.	Reception – Cash Bar	North Ballroom

Saturday Morning, December 2, 2000

7:30 a.m.	Coffee	Foyer/ North Gallery
8:00 a.m. – 8:30 a.m.	Registration	East Gallery
8:30 a.m. – 9:30 a.m.	Ethical Issues for Lawyers in a Multi-Disciplinary Practice World	Auditorium
8:30 a.m. – 9:30 a.m.	Planning for Distributions from Partnerships and LLCs	ABC Room
9:30 a.m. – 9:45 a.m.	Coffee Break	Foyer/ North Gallery
9:45 a.m. – 11:45 a.m.	Recent Developments in Federal Income Tax	Auditorium
11:45 p.m. – 1:15 p.m.	Lunch – On Your Own	

Saturday Afternoon, December 2, 2000

Noon – 2:00 p.m.	Ethics for Lawyers, Video Presentation	ABC Room
Noon – 1:00 p.m.	Roundtable Discussion of Tax Library Resources	Auditorium
1:15 p.m. – 2:15 p.m.	Wealth Preservation with Asset-Protection Trusts	Auditorium
2:25 p.m. – 3:05 p.m.	Integrating Qualified Plan and IRA Distributions with Financial Planning	Auditorium
3:05 p.m. – 5:15 p.m.	Tax-wise Investing	Auditorium