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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

1999

1999 Schedule

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THE COLLEGE OF WILLIAM AND MARY



William & Mary
Tax Conference

FRIDAY & SATURDAY,
DECEMBER 3 & 4, 1999

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

FORTY-FIFTH WILLIAM AND MARY
TAX CONFERENCE

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Friday, December 3, 1999	
8:40 a.m. - 10:00 a.m. <i>Federal and State Audit Issues</i> <i>William L. S. Rowe</i> <i>D. French Slaughter, III</i>	5
10:15 a.m. - 12:15 p.m. <i>Planning for Distributions from</i> <i>Qualified Retirement Plans and IRAs</i>	
“Making Retirement Benefits Payable to Trusts” <i>Natalie B. Choate</i>	6
“Estate Planning for Retirement Benefits: Selected Case Studies” <i>Natalie B. Choate</i>	7
“Planning for Qualifies Retirement Plan Benefits and IRAs” <i>Louis A. Mezzullo</i>	8

1:45 p.m. - 5:00 p.m. ***Taxable and Tax-Free Acquisitions
And Separations***

- “Contingent Consideration and Contingent
Liabilities in Acquisitions - Outline,
Addendum, References” 9
Robert H. Wellen
- “Section 338(h)(10)” 10
Mark L. Yecies
- “Section 338(h)(10) & Appendix” 11
Mark J. Silverman
Jonathan J. Forrest
- “Use of Limited Liability Companies
In Corporate Transactions” 12
Mark J. Silverman
Lisa M. Zarlenga
- “Corporate Divisions Under Section 355” 13
Mark J. Silverman

Saturday, December 5, 1998

- 8:00 a.m. - 10:00 a.m. ***The Y2K Ethics Problem*** 14
- “New Ethics Rules for the New Millennium”
Dennis W. Dohnal
John Levy
- 8:00 a.m. - 9:00 a.m. ***Current Issues in Capitalization***
- “Capitalization in the Nineties” 15
Glenn R. Carrington

9:00 a.m. - 10:00 a.m.	<i>Financial Accounting and Reporting: FASB Update and Preview of Emerging Issues</i>	
	“Selected Current Developments in Financial Accounting and Reporting” <i>David W. LaRue</i>	16
10:15 a.m. - 11:45 p.m.	<i>Recent Developments in Income Taxation</i>	17
	<i>Ira B. Shepard</i>	
1:15 p.m. - 3:00 p.m.	<i>Planning with Limited Liability Companies, Including Tax and Non-Tax Considerations</i>	
	“Square Pegs in Round Holes: LLCs Under Other Statutes” <i>James B. Wheaton</i>	18
	“State Comparative Chart LLC and LLP Statutes” <i>James B. Wheaton</i>	19
3:00 p.m. - 4:00 p.m.	<i>Current Issues in Life Insurance Planning</i>	20
	<i>Lawrence Brody</i>	
4:00 p.m. - 5:00 p.m.	<i>Practical Problems Encountered in Federal Estate and Gift Tax Audits</i>	21
	<i>W. Birch Dougalss III Kirkland M. Kelley</i>	

**MARK
YOUR
2000
CALENDAR**

Forty-Sixth William and Mary

Tax Conference

December 1 & 2, 2000

1999 William and Mary Tax Conference

Schedule of Events

<u>Time</u>	<u>Activity/Topic</u>	<u>Location</u>
<u>Friday Morning, December 3</u>		
7:30 a.m.	Coffee	Auditorium Foyer/ North Gallery
8:00 a.m.-9:00 a.m.	Registration	East Gallery
8:30 a.m.-8:40 a.m.	Introductory Remarks	Auditorium
8:40 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.	Planning for Distributions From QRPs and IRAs	Auditorium
12:15 p.m.-1:30 p.m.	Lunch and Speaker	Virginia Room
<u>Friday Afternoon, December 3</u>		
1:45 p.m.-5:00 p.m.	Taxable and Tax-Free Acquisitions and Separations	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

Time**Activity/Topic****Location****Saturday Morning, December 4**

7:30 a.m.	Coffee	Foyer/North Gallery
8:00 a.m.	Registration	East Gallery
8:00 a.m.-10:00 a.m.	The Y2K Ethics Problem	Tidewater Room
8:00 a.m.- 9:00 a.m.	Current Issues in Capitalization	Auditorium
9:00 a.m.-10:00 a.m.	Financial Accounting	Auditorium
10:00 a.m.-10:15 a.m.	Coffee Break	Foyer/North Gallery
10:15 a.m.-11:45 p.m.	Current Developments	Auditorium
11:45 p.m.- 1:15 p.m.	Lunch - On Your Own	

Saturday Afternoon, December 4

1:15 p.m.-3:00 p.m.	Limited Liability Companies	Auditorium
3:00 p.m.-4:00 p.m.	Life Insurance Planning	Auditorium
4:00 p.m.-5:00 p.m.	Federal Estate and Gift Tax Audits	Auditorium