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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

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1998

## 1998 Schedule

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**44<sup>th</sup>**

**William and Mary  
TAX CONFERENCE**

**Presented by**

**The College of  
William and Mary  
School of Law**

**and also sponsored by the  
Taxation Section of the  
Virginia Bar Association  
and the Taxation Section  
of the  
Virginia State Bar**

**Friday-Saturday,  
December 4-5, 1998  
at the  
Conference Center of the  
Williamsburg Lodge  
Williamsburg, Virginia**

# **FORTY-FOURTH WILLIAM AND MARY TAX CONFERENCE**

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| <b>Friday, December 4, 1998</b>  |            |
| 8:40 a.m. - 10:00 a.m. <i>Individual Tax Planning</i><br><i>James V. Duty</i>                  | 5          |
| Exhibit 1  | 6          |
| Exhibit 2  | 7          |
| Exhibit 3  | 8          |
| 10:15 a.m. - 12:15 p.m. <i>Planning for the Operation of</i><br><i>Pass-Through Entities</i>   |            |
| “Pass-Through Entity Update”<br><i>Richard B. Robinson</i>                                     | 9          |
| “S Corporations”<br><i>Bryan P. Collins</i>  | 10         |
| 1:45 p.m. - 2:45 p.m. <i>The Pitfall and Problems of the</i><br><i>Generation-Skipping Tax</i> | 11         |
| <i>John B. O’Grady</i>   |            |



3:00 p.m. - 4:00 p.m.      ***State Taxation of Mergers and Acquisitions***

“Impact of Sales and Use Taxes on Corporate Transactions” 17  
*Peter L. Faber*

“State and Local Income and Franchise Tax Aspects of Corporate Acquisitions” 18  
*Peter L. Faber*

4:00 p.m. - 5:00 p.m.      ***Valuation Issues in Family-Held Businesses***

“Valuation Issues in Intra-Family Transfers” 19  
*Louis A. Mezzullo*

**MARK  
YOUR  
1999  
CALENDAR**

*Forty-Fifth William and Mary*  
**Tax Conference**

**December 3 & 4, 1999**