1998

1998 William & Mary Tax Conference Speakers

1998 WILLIAM AND MARY TAX CONFERENCE SPEAKERS

MARY ANN COHEN

Judge Cohen is the Chief Judge of the United States Tax Court. She received a B.S. degree from the University of California at Los Angeles and a J.D. degree from the University of Southern California School of Law.

Judge Cohen was appointed to the United States Tax Court in 1982 by President Reagan and reappointed in 1997 by President Clinton. She was elected as Chief Judge to serve a two-year term beginning June 1, 1996, and has been re-elected to serve a second two-year term as Chief Judge. Prior to her appointment to the Tax Court, she practiced law in Los Angeles as a member of Abbott & Cohen, a Professional Corporation, and predecessor firms. She has been active in the American Bar Association Section of Taxation and has participated throughout her career in numerous continuing legal education activities.

BRYAN P. COLLINS

Mr. Collins is a partner in Arthur Andersen's Office of Federal Tax Services, and is the Deputy Director of the firm's National Mergers and Acquisitions Group. He received his B.B.A. and J.D. degrees from the University of Texas, and his LL.M. in Taxation from New York University. Prior to joining Arthur Andersen, Mr. Collins was in private law practice; he also served from 1986-89 as Attorney-Advisor in the Office of the Tax Legislative Council, U.S. Treasury Department.

Mr. Collins' articles have appeared in a number of publications, including *Tax Notes*, the *Journal of Corporate Taxation,* the *Journal of S Corporation Taxation*, and the *Journal of Limited Liability Companies.* He is a certified public accountant and member of the Tax Sections of the ABA, the AICPA and the Texas State Bar Association. He is the currently the Chair of the S Corporation Committee of the Tax Section of the ABA, a member of the Advisory Board of the *Journal of S Corporation Taxation*, and the consolidated return columnist for the same journal.

JAMES V. DUTY

Mr. Duty is a partner in the Personal Financial Planning practice of KPMG Peat Marwick LLP in Richmond, Virginia. He received his B.S. degree in Finance and Management from the University of Virginia and his Masters in Taxation from the University of Arizona.

In addition to being a CPA, Mr. Duty is accredited as both a Certified Financial Planner (CFP) and a Personal Finance Specialist (PFS). He is active in numerous civic and charitable organizations and has presented estate planning and financial planning programs for the Virginia State Bar.

PETER L. FABER

Mr. Faber is a partner in McDermott, Will & Emery, where he chairs the firm's national State and Local Tax Practice Group. He specializes in tax planning and controversy work, including litigation at the federal, state and local levels. He received his A.B. from Swarthmore College with high honors and an LL.B., cum laude, from the Harvard Law School.

He has served as Chair of the American Bar Association Section of Taxation and is a member of the Section's Committee on State and Local Tax. Mr. Faber has testified before Congress on numerous occasions and has served as a consultant to Congressional committees on corporate tax matters. He is a Fellow and Regent of the American College of Tax Counsel and a member of the Tax Advisory Group of the American Law Institute.

Mr. Faber is former Chair of the New York State Bar Association Tax Section and as a member of the Governor's Council on Fiscal and Economic Priorities. He is Chairman of the New York Chamber of Commerce and Industry's Committee on Taxation and Public Revenue and serves on the Chamber of Commerce's Board of directors and Executive Committee. He is a member of the Advisory Committees of the New York State and New York City Tax Appeals Tribunals and the New York State Department of Taxation and Finance.

Mr. Faber has lectured and written extensively on state and local taxation.

KEITH T. FOGG

Mr. Fogg is the District Counsel for the Richmond Office of the Internal Revenue Service. Currently, he is serving as Acting Assistant Chief Counsel for General Litigation in the National Office in Washington, D.C. He received his undergraduate degree from The College of William and Mary, his J.D. degree from the University of Richmond, and his LL.M. from the William and Mary School of Law. Mr. Fogg has worked for the office of Chief Counsel for the IRS since his graduation from law school.

For the past seven years Mr. Fogg has taught at the Georgetown Law Center as an adjunct professor. He has also taught at the University of Richmond Law School, the William and Mary School of Law and Virginia Commonwealth University.

JAMES P. HOLDEN

Mr. Holden is a partner with Steptoe & Johnson in Washington, D.C. He received his B.S. degree from the University of Colorado and his J.D. degree from Georgetown University Law Center.

Mr. Holden has served as Chair of the American Bar Association Section of Taxation (1989-90), Chair of the Advisory Group to the Commissioner of the IRS (1992-93), and Chair of the Commissioner's Review Panel on IRS Integrity Controls (1989-90). He is a Trustee of the American

Tax Policy Institute, a Regent of the American College of Tax Counsel, and a member of the American Law Institute.

Mr. Holden was formerly an adjunct professor at the Georgetown University Law Center and has co-authored *Ethical Problems in Federal Tax Practice*, with Bernard Wolfman, and *Standards of Tax Practice*, with Bernard Wolfman and Kenneth Harris. He is a frequent lecturer at tax conferences.

PAULA M. JUNGHANS

Ms. Junghans is the Deputy Assistant Attorney General for Criminal Matters on the Tax Division of the United State Department of Justice. She graduated from the College of Notre Dame of Maryland and earned a law degree from the University of Maryland School of Law. Prior to her appointment in October, 1998, she was engaged in the private practice of law in Baltimore and handled a broad range of criminal and civil tax matters.

Ms. Junghans was Chair of the Civil and Criminal Tax Penalties Committee of the American Bar Association Section of Taxation from 1995 through 1997, and President of the Maryland Criminal Defense Attorneys Association in 1997-1998. She is a Fellow of the American College of Tax Counsel, the American Bar Foundation, and the Maryland Bar Foundation, and she has served on the Attorney Grievance Commission and Judicial Nominating Commission.

Ms. Junghans is co-author of *Federal Tax Litigation*, and is a frequent speaker on tax controversy and white collar criminal matters.

ROBERT E. LEE

Mr. Lee is a member of the law firm of Mezzullo and McCandlish in Richmond, Virginia. He received a B.S., *summa cum laude,* from St. Joseph's University and an LL.B. from Harvard Law School. Mr. Lee is an adjunct professor in the Master of Taxation Program at Virginia Commonwealth University.

Mr. Lee is the former Chair of the Board of Governors of the Taxation Section of the Virginia State Bar. He is a member of the Board of Editors of the *Virginia Tax Reporter*, a Fellow in the American College of Tax Counsel and the American College of Trust and Estate Counsel, and a member of the Board of Directors of the Community Tax Law Project.

A frequent lecturer on tax matters, Mr. Lee has participated in such programs as the University of Richmond Estate Planning Conference, the Virginia Law Foundation, the Virginia Commonwealth University/Virginia Society of Certified Public Accountants Tax Conference, and programs sponsored by the American Medical Association, the Medical College of Virginia and the Cambridge Institute.

CARLYN S. MCCAFFREY

Carlyn McCaffrey is a partner in the New York law firm of Weil, Gotshal & Manges LLP. She received her LL.B. and her LL.M. from New York University School of Law where she serves as an adjunct professor.

Mrs. McCaffrey is a member of the Board of Editors of both *Fair Share* and *Matrimonial Strategist*. She is a Fellow of the American College of Trust and Estate Counsel and the American College of Tax Counsel and a member of the International Academy of Trust and Estate Counsel. In addition, Mrs. McCaffrey is a member of the Advisory Board of Tax Analysts, and a member of the Advisory Committee of the University of Miami's Heckerling Institute on Estate Planning. She chairs the Generation-Skipping Transfer Tax Committee of the Real Property Probate and Trust Section of the American Bar Association and the International Estate Planning Committee of the American College of Trust and Estate Counsel and co-chairs the Estates and Trusts Committee of the Tax Section of the New York State Bar Association.

She has written extensively on tax and trust and estate law issues and is co-author of *Structuring the Tax Consequences of Marriage and Marriage and Divorce.*

LOUIS A. MEZZULLO

Mr. Mezzullo is a member of the law firm of Mezzullo and McCandlish in Richmond, Virginia. He received his B.A. and M.A. degrees from the University of Maryland, and his J.D. from the University of Richmond. Mr. Mezzullo is an adjunct professor at the University of Richmond School of Law. Mr. Mezzullo is a Fellow and Regent of the American College of Tax Counsel. He is active in the Virginia Bar Association, having served as Chair of the Taxation Section. He is a member of the Council and is current Chair of the Business Planning Subcommittee of the Estate and Gift Taxes Committee of the American Bar Association Section of Taxation; he is a member of the Council of the ABA Real Property Section, and he is active in numerous additional organizations. He is a member of the Advisory Council of the William and Mary Tax Conference.

Mr. Mezzullo has written or co-authored several books and articles on qualified retirement plans, estate planning. and limited liability companies. He is a frequent speaker at major tax and estate planning conferences throughout the country.

JOHN O'GRADY

Mr. O'Grady is a partner in the law firm of McGuire, Woods, Battle & Boothe, in Richmond, Virginia. He received his B.A. from the University of Michigan and his J.D. from the William and Mary School of Law, where he was a member of the Order of the Coif.

He has served on the Board of Governors and is a past Chair of the Virginia State Bar Trusts and Estates Section. He also is a member of the Legislative Committee for the Trusts and Estates Section of the Virginia Bar Association. In the past, Mr. O'Grady has taught both Estate Planning and Estate and Gift Taxation at Virginia Commonwealth University and has participated in numerous seminars around the country. Additionally, he has served as an adjunct professor at the William and Mary School of Law, teaching Estate Planning. Mr. O'Grady is a Fellow of the American College of Trust and Estate Counsel.

LINDY L. PAULL

Ms. Paull is Chief of Staff of the Joint Committee on Taxation of the U.S. Congress. She earned her undergraduate degree from Florida International University, her J.D. and LL.M. degrees from the University of Florida School of Law. Ms. Paull served on the Republican staff of the Committee on Finance of the U.S. Senate in a variety of capacities including Staff Director and Chief Counsel. Prior to working for the Committee on Finance, Ms. Paull was engaged in the private practice of law in Washington, D.C., and served as a Tax Court clerk.

Ms. Paull has taught as an adjunct professor at the Georgetown University Law Center.

RICHARD B. ROBINSON

Mr. Robinson is a shareholder in the law firm of Lentz, Evans and King P.C. in Denver. He earned his B.A. from Clark University, his J.D. at the University of Denver and his LL.M. in Taxation at New York University. Mr. Robinson is a Fellow of the American College of Tax Counsel and the American College of Trust and Estate Counsel. He is an adjunct professor in the Graduate Tax Program at the University of Denver and has lectured at CPE/CLE programs and federal tax institutes around the country.

Mr. Robinson has written numerous journal articles and is co-author of *Tax Planning for S Corporations* and *Federal Income Taxation of Corporations.*

WILLIAM L. S. ROWE

Mr. Rowe is a partner with the law firm of Hunton & Williams, in Richmond, Virginia. He received a B.A. from Washington and Lee University and a J.D. from the University of Virginia.

He has served as Chairman of the Virginia Bar Association Committee on Taxation, on the Board of Trustees of the Virginia State Bar Section of Taxation and as Special Counsel to the Taxation Committee of the Virginia Manufacturers Association. He is a member of the ABA Taxation Section and the Richmond Estate Planning Council, and a Fellow of the American College of Tax Counsel. He is a frequent author and lecturer on state tax matters. Mr. Rowe is a member of the Advisory Council of the William and Mary Tax Conference.

IRA B. SHEPARD

Mr. Shepard is a professor of law at the University of Houston Law Center. He received his undergraduate degree from Harvard College and his law degree from Harvard University, where he was an editor of the *Harvard Law Review*.

He practiced in New York City with the firm of Paul, Weiss, Rifkind, Wharton & Garrison from 1964 to 1971. Prior to joining the faculty at the University of Houston, Professor Shepard taught at the University of Georgia School of Law.

Professor Shepard has been the Special Advisor to the Southern Federal Tax Institute since 1974. He has chaired the Continuing Legal Education and Research Committee of the American Bar Association Taxation Section and the planning committee for the University of Texas Tax Conference, and has been president of the Wednesday Tax Forum. He regularly speaks at numerous tax institutes throughout the country.

D. FRENCH SLAUGHTER

Mr. Slaughter is a partner with the law firm of McGuire, Woods, Battle & Boothe in Charlottesville, Virginia. He received his B.A. and J.D. from the University of Virginia. Prior to joining McGuire, Woods, Mr. Slaughter served as a trial lawyer and Special Assistant to Assistant Attorney General Glenn Archer, Jr., head of the Tax Division.

He is on the faculty of the Colgate Darden Graduate School of Business Administration at the University of Virginia, has authored numerous articles, and is a frequent speaker on tax issues and policies. Mr. Slaughter is a member of the Tax Policy Committee of the Virginia State Chamber of Commerce, and is chair of the State Tax Practitioners' Roundtable of the Virginia Bar Association Taxation Section. He is a Fellow of the American College of Tax Counsel.