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1995 William & Mary Tax Conference Speakers

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FORTY-FIRST
WILLIAM AND MARY TAX CONFERENCE

Speaker Profiles

Robert I. Brauer

Mr. Brauer is the acting Director of Practice with the Internal Revenue Service; he is also Regional Director of Appeals in Philadelphia. He is a graduate of the University of Massachusetts and the Georgetown University Law Center. Prior to his present dual assignment, Mr. Brauer was the IRS District Director in Pittsburgh in 1991-92. He has also served with IRS as Assistant Commissioner for Employee Plans and Exempt Organizations and as Director of the IRS Tax Forms and Publications Division.

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.

Michael G. Frankel

Mr. Frankel is a partner with the accounting firm of Coopers & Lybrand, L.L.P., in Dallas, Texas. He received a B.S. from the University of Pennsylvania and a J.D. from the University of Virginia. He is Vice Chairman of the Committee on Partnerships of the Taxation Section of the American Bar Association, and is past Chair of the Section of Taxation of the State Bar of Texas. Mr. Frankel is the author of numerous articles appearing in journals including the Journal of Taxation, and the Journal of Partnership Taxation. He is a frequent speaker at tax conferences throughout the country including the NYU Institute on Federal Taxation and the Alabama Tax Institute.

Thomas P. Frantz

Mr. Frantz is a partner with the firm of Clark & Stant, in Virginia Beach, Virginia. He holds a B.A., J.D., and an LL.M. from the College of William and Mary, and he is also a CPA. He has contributed to numerous journals and spoken on a wide variety of tax and corporate law subjects. Mr. Frantz is a member of the American College of Tax Counsel, the American College of Trusts and Estates Counsel, and the American Academy of Hospital Attorneys.

L. Michael Gracik, Jr.

Mr. Gracik is a shareholder and member of the tax department of Keiter, Stephens, Hurst, Gary & Shreaves, P.C., in Richmond, Virginia, where his practice is devoted to providing a wide range of tax services to individuals and small business clients. He attended the University of Virginia where he earned a B.S. in Commerce, with distinction. He is a member of the AICPA Individual Taxation Committee, and a past member of the board of directors of the Virginia Society of CPA's (VSCPA). He represents the VSCPA as a member of the Planning Committee for the Annual Virginia Conference on Federal Taxation.

John B. Harper

Mr. Harper is Senior Manager in the State and Local Tax Practice of KPMG Peat Marwick LLP in Baltimore, Maryland. He holds a B.S. and an M.T.A. from the University of Alabama. Mr. Harper is a member of the American Institute of Certified Public Accountants and the Alabama Society of Certified Public Accountants. He has been a contributing author to The Tax Advisor and The Journal of State Taxation. Mr. Harper has taught courses in state taxation at George Mason 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 ABA 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 President 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.

Kenneth J. Kies

Mr. Kies is Chief of Staff of the Joint Committee on Taxation of the U.S. Congress. He earned a B.A. from Ohio University, a J.D. from the Ohio State University College of Law, and an LL.M. in Taxation from Georgetown University Law Center. Prior to his appointment as Chief of Staff, Mr. Kies was a partner in Baker & Hostetler's Washington, D.C. office. Before joining that firm in 1987, he was Chief Minority Tax Counsel on the Ways and Means Committee of the House of Representatives. Mr. Kies has spoken extensively on a wide range of tax subjects in the United States and abroad; Numerous articles authored by Mr. Kies have appeared in journals such as Tax Notes and Developments.

Lisa L. Landry

Ms. Landry practices with the law firm of LeClair, Ryan, Joynes, Epps & Framme in Richmond, Virginia. She received an undergraduate degree in accounting from the University of Southwest Louisiana and a J.D. from the University of Richmond. She is also a certified public accountant. Prior to joining LeClair, Ryan, Joynes, Epps & Framme, Ms. Landry practiced with McGuire, Woods, Battle & Boothe. She serves on the Partnership and Real Estate Committees of the Taxation Section of the American Bar Association.

John M. Levy

Mr. Levy is Professor of Law and Director of Clinical Education at the College of William and Mary School of Law. He received a B.A. from New York University and a J.D. from Syracuse University, where he was an editor of the Syracuse Law Review. Prior to joining the William and Mary faculty in 1976, Professor Levy was Director of Neighborhood Legal Aid in Richmond. He has been a member of the board of directors of various public interest programs including the American Civil Liberties Union, the Center on Social Welfare Policy and the National Employment Law Project. Professor Levy is a member of the Virginia State Bar's Special Committee to Study the Code of Professional Responsibility.

John H. Milne

Mr. Milne is the Director of Tax and Benefit Planning at Virginia Asset Management in Richmond, Virginia. He received his B.A. from Virginia Polytechnic Institute and State University, his J.D. from the University of Richmond, and his LL.M. in Taxation from Georgetown University Law Center. He is past Chairman of the Taxation Section of the Virginia State Bar and currently serves as Chairman of the Taxation Section of the Virginia Bar Association. He has authored a number of professional articles and is co-author of Advising Small Business Clients. Mr. Milne also co-authored "The Accumulated Earnings Tax Analyzer," a software program used by the IRS, and the "CPlanner," a tax planning program for C corporations. Mr. Milne lectures frequently on various tax, insurance, and benefit related subjects.

Blake D. Rubin

Mr. Rubin is a partner in the law firm of Steptoe & Johnson in Washington, D.C. He received a B.A. from Haverford College, an M.B.A. from the Wharton School of Business, and a J.D. from the University of Pennsylvania. Between 1984 and 1978 Mr. Rubin served with the Office of Tax Legislative Counsel in the U.S. Department of Treasury. Mr. Rubin is Chair of the Real Estate Taxation Committee of the American Bar Association Section of Taxation, and the Chair of the Pass-Through Entities and Real Estate Committee of the District of Columbia Bar Association

Section of Taxation. He writes a column on real estate tax issues for the Journal of Taxation of Investments and is the author of more than 30 professional articles; He is also a frequent speaker on tax topics.

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. 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 ABA 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.

Bruce J. Temkin

Mr. Temkin is with the firm of Louis Kravitz and Associates in Encino, California. He is a member of the American Society of Pension Actuaries and is licensed as an Enrolled Actuary. Mr. Temkin is a frequent lecturer on retirement planning and has appeared at numerous tax institutes, including Notre Dame, USC and Tennessee, and ALI-ABA programs. He is on the Board of Directors of the Small Business Council of America.

Stefan F. Tucker

Mr. Tucker is a member of the law firm of Tucker, Flyer, & Lewis, P.C., in Washington, D.C. He received a B.B.A. from the University of Michigan School of Business Administration and a J.D. degree from the University of Michigan Law School. Prior to joining Tucker, Flyer, & Lewis in 1975, Mr. Tucker was a partner at Arent, Fox, Kintner, Plotkin & Kahn and an attorney/advisor to the U. S. Tax Court. He has taught as an adjunct professor at Georgetown University Law Center, and at the George Washington University National Law Center; he has authored numerous articles and several books, including Tax Planning for Real Estate Transactions. Mr. Tucker is presently the Vice-Chair/Committee Operations of the American Bar Association Section of Taxation, having previously served as a member of its Council and as Chair of its Committees on Real Estate and Continuing Education.

James J. Wheaton

Mr. Wheaton is a member of the law firm of Willcox and Savage in Norfolk, Virginia. He earned his B.S. at Wake Forest University

and his J.D. from the University of Virginia, where he was Executive Editor of the Virginia Law Review. Mr. Wheaton clerked for the Honorable J. Dickson Phillips, Jr., of the United States Court of Appeals for the Fourth Circuit from 1985-86. He is the author of Virginia Limited Liability Company Forms and Practice Manual; has published several journal articles; and is a frequent lecturer.