

2012

2012 Accreditation Information Sheets

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Summary of Meeting Times for Thursday and Friday Sessions

Please note that CLE and CPE forms for the Wednesday session were distributed separately.

THURSDAY NOV 8

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Partnership Tax Planning Without Falling into the Canal	1.50	1.80
Federal Tax Updates	1.50	1.80
Virginia Hot Topics	1.00	1.20
Back from the Abyss: Real Estate Tax Planning from the Bottom Up	1.50	1.80
Estate Planning Gets Mugged by Reality	1.50	1.80
Introduction to M&A Taxation: Traps for the Unwary When Acquiring an S Corporation	1.00	1.20

FRIDAY NOV 9

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Setting the Statue of Limitations in Home Concrete	1.50	1.80
Primer on U.S. Taxation of International Transactions	1.50	1.80
Tax Policy after the Election: Oxymoron or New Hope	1.00	1.20
Advanced Life Insurance: Planning Case Studies	1.50	1.80
Responsibilities in Tax Practice and Malpractice Risks	1.50	1.80

Totals	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Virginia CLE	15.00	
CPE		18.00

ACCREDITATION INFORMATION SHEET FOR LAWYERS

VIRGINIA ATTORNEYS

This program has been approved by the Virginia Mandatory Continuing Legal Education Board for 15 credit hours. A copy of the Certification of Attendance (Form 2) is included in this section. Please fill out the form and return it to the Registration Desk at the end of the Conference. We will forward the forms to the Virginia State Bar.

ATTORNEYS FROM OTHER STATES

If your state requires Continuing Legal Education credits, you may complete the Certificate of Attendance form provided in this notebook and submit it to your State Bar. If you wish to have the Tax Conference mail it for you, please attach the correct mailing address to your completed form and return it to the Registration Desk at the end of the Conference. Please be advised that any required sponsor fee will be the responsibility of the attendee.

Virginia MCLE Board

CERTIFICATION OF ATTENDANCE (FORM 2)

MCLE requirement pursuant to Paragraph 17, of Section IV, Part Six, Rules of the Supreme Court of Virginia and the MCLE Board Regulations.

INSTRUCTIONS

Certify Your Attendance Online at <https://member.vsb.org/vsbportal/>

Complete this Certification. Retain for two years.

MCLE Compliance Deadline - October 31. MCLE Reporting Deadline - December 15.

A \$100 fee will be assessed for failure to comply with either deadline.

Member Name: _____ VSB Member Number: _____
Address: _____ Daytime Phone: _____

E-mail Address: _____

City State Zip

Course ID Number: MWAA001

Sponsor: William & Mary Law School

Course/Program Title: 58th Annual Tax Conference: Planning for the Recovery

Live Interactive * CLE Credits (Ethics Credits): 15.0 (0.0)

Date Completed: _____ Location: _____

By my signature below I certify

- ____ I attended a total of _____ (hrs/mins) of approved CLE, of which (_____) (hrs/mins) were in approved Ethics.
____ Credit is awarded for actual time in attendance (0.5 hr. minimum) rounded to the nearest half hour. (Example: 1hr 15min = 1.5hr)
____ The sessions I am claiming had written instructional materials to cover the subject.
____ I participated in this program in a setting physically suitable to the course.
____ I was given the opportunity to participate in discussions with other attendees and/or the presenter.
____ I understand I may not receive credit for any course/segment which is not materially different in substance than a course/segment for which credit has been previously given during the same completion period or the completion period immediately prior.
____ I understand that a materially false statement shall be subject to appropriate disciplinary action.

* NOTE: A maximum of 8.0 hours from pre-recorded courses may be applied to meet your yearly MCLE requirement. Minimum of 4.0 hours from live interactive courses required.

Date

Signature

Questions? Contact the MCLE Department at (804) 775-0577 or E-mail questions to mcle@vsb.org

If not certified online, this form may be mailed or faxed (fax disabled Nov 2-Dec 31)

Virginia MCLE Board

Virginia State Bar

707 East Main Street, 15th Floor

Richmond, VA 23219-2800

Web site: www.vsb.org Fax: (804) 775-0544

[Office Use Only: Live]

Virginia MCLE Board

CERTIFICATION OF TEACHING (FORM 3)

MCLE requirement pursuant to Paragraph 17, of Section IV, Part Six, Rules of the Supreme Court of Virginia and the MCLE Board Regulations.

INSTRUCTIONS

E-mail this form to mymcle@vsb.org

Complete this Certification to Include Both Teaching and Attendance hours. Retain copy for two years.

MCLE Compliance Deadline - October 31. MCLE Reporting Deadline - December 15.

A \$100 fee will be assessed for failure to comply with either deadline.

Member Name: _____ VSB Member Number: _____
Address: _____ Daytime Phone: _____
_____ E-mail Address: _____
_____ City State Zip

Course ID Number: MWAA001

Sponsor: William & Mary Law School

Course/Program Title: 58th Annual Tax Conference: Planning for the Recovery

Live Interactive * CLE Credits (Ethics Credits): 15.0 (0.0)

Date(s) of Teaching: _____ Location(s): _____

ONLY SESSIONS WITH WRITTEN INSTRUCTIONAL MATERIALS ARE APPROVABLE FOR CREDIT

- My teaching segment was _____ (hrs/mins) of CLE, of which (_____) (hrs/mins) were in Ethics.
- In addition, I attended *other* segments totaling _____ (hrs/mins) of CLE, of which (_____) (hrs/mins) were in Ethics.
- I spent _____ hours preparing for teaching my segment of the course.
- No more than four (4) hours of preparation credit may be claimed per one hour of instructional time in your presentation, and no more than eight (8) hours total for any one course. Total credit is awarded for actual time spent teaching, attendance and preparation rounded to the nearest half hour. (Example: 1hr 15min = 1.5hr)
- A materially false statement shall be subject to appropriate disciplinary action.

* NOTE: A maximum of 8.0 hours from pre-recorded courses may be applied to meet your yearly MCLE requirement. Minimum of 4.0 hours from live interactive courses required.

Date

Signature

Questions? Contact the MCLE Department at (804) 775-0577 or E-mail questions to mcle@vsb.org

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[Office Use Only: Live]

**CERTIFICATE OF ATTENDANCE
FOR NON VIRGINIA LAWYERS
WILLIAM & MARY TAX CONFERENCE**

ATTORNEY'S NAME: _____

BUSINESS ADDRESS: _____

SPONSOR: College of William & Mary
School of Law

PROGRAM TITLE: 58th William & Mary Tax Conference

DATES OF PROGRAM: November 7-9, 2012

LOCATION: Williamsburg, Virginia

CLE Credit: 17 hours of instruction

I attended the full program.

I attended the following number of hours: _____

SIGNATURE: _____

DATE: _____

**SUBMIT A COPY OF THIS FORM TO YOUR STATE BAR WHEN REPORTING
YOUR ANNUAL CLE CREDITS.**

ACCREDITATION INFORMATION SHEET FOR ACCOUNTANTS

VIRGINIA CERTIFIED PUBLIC ACCOUNTANTS

This program provides 18 Continuing Professional Education (CPE) credit hours (based on 50 minute hours), none of which are ethics credits. An attendance form for Virginia accountants is available in this notebook. Please complete and return this form to the Registration Desk at the end of the Conference, and a Certificate of Participation will be issued and mailed to you at the address you provide.

ACCOUNTANTS FROM OTHER STATES

A general attendance form for accountants is available in this program notebook. Please complete and return this form to the Registration Desk at the end of the conference, and a Certificate of Participation will be issued and mailed to you at the address you provide.

The William & Mary Tax Conference requires no prerequisites or advance preparation. The course is taught principally through panel discussions, at the intermediate level.

**GENERAL ATTENDANCE FORM
FOR ACCOUNTANTS
WILLIAM & MARY TAX CONFERENCE**

(Please PRINT)

NAME: _____

BUSINESS ADDRESS: _____

SPONSOR: College of William & Mary
School of Law
School of Business

PROGRAM TITLE: 58th William & Mary Tax Conference

DATES OF PROGRAM: November 7-9, 2012

LOCATION: Williamsburg, Virginia

CPE Credit: 18 hours (based on 50-minute hours)

I attended the full program.

I attended the following number of hours: _____

SIGNATURE: _____

DATE: _____

**PLEASE COMPLETE THIS FORM AND RETURN IT TO THE REGISTRATION
DESK AT THE END OF THE CONFERENCE. A CERTIFICATE OF
PARTICIPATION WILL BE MAILED TO YOU AT THE ADDRESS YOU PROVIDE.**