

2016

2016 Tax Conference Forms

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Summary of Meeting Times

WEDNESDAY, NOVEMBER 9

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Partnership Taxation and Hot Topics in Partnership and Real Estate Taxation	2.00	2.40

THURSDAY, NOVEMBER 10

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Estate Planning for Closely Held Businesses	1.50	1.80
Planning for Real Estate Opportunities	1.50	1.80
Virginia Hot Topics	1.08	1.30
Structuring Compensation Arrangements for the Closely Held Business	1.50	1.80
Dealing with the New Partnership (and LLC) Audit Rules	1.25	1.50
Structuring (and Drafting) Joint Venture Agreements	1.50	1.80

FRIDAY, NOVEMBER 11

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Let My Trustees Go! Planning to Minimize or Avoid Virginia and Other State Income Taxes on Trusts	1.25	1.50
Current Choice of Entity Planning Including Disregarded Entities	1.08	1.30
Tax Status: Employee vs Independent Contractor and Employee vs Partner	1.08	1.30
Post-Election Tax Reform?	1.00	1.20
Planning the Purchase and Sale of LLC and S Corp Targets	1.50	1.80
Federal Tax Update	1.50	1.80

Totals	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Virginia CLE	18.00	
CPE		21.60



ACCREDITATION INFORMATION SHEET FOR LAWYERS

VIRGINIA ATTORNEYS

This program has been approved by the Virginia Mandatory Continuing Legal Education (MCLE) Board for 18.00 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.

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

ATTORNEY'S NAME: _____

BUSINESS ADDRESS: _____

SPONSOR: College of William & Mary
Law School

PROGRAM TITLE: 62nd William & Mary Tax Conference

DATES OF PROGRAM: November 9-11, 2016

LOCATION: Williamsburg, Virginia

CLE Credit: 18.00 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.**



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 www.vsb.org see Member Login

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: MWEE001

Sponsor: William & Mary Law School

Course/Program Title: 62nd Annual Tax Conference: Intelligent Tax Planning to Combat

Live Interactive * CLE Credits (Ethics Credits): 18.0 (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

If not certified online, this form may be mailed

Virginia MCLE Board
Virginia State Bar
1111 East Main Street, Suite 700
Richmond, VA 23219-0026
Web site: www.vsb.org

[Office Use Only: Live]

ACCREDITATION INFORMATION SHEET FOR ACCOUNTANTS

VIRGINIA CERTIFIED PUBLIC ACCOUNTANTS

This program provides 21.60 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.

**CERTIFICATE OF ATTENDANCE
FOR ACCOUNTANTS
WILLIAM & MARY TAX CONFERENCE**

(Please PRINT)

ACCOUNTANT'S NAME: _____

BUSINESS ADDRESS: _____

SPONSOR: College of William & Mary
Law School

PROGRAM TITLE: 62nd William & Mary Tax Conference

DATES OF PROGRAM: November 9-11, 2016

LOCATION: Williamsburg, Virginia

CPE Credit: 21.60 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.**

62nd ANNUAL WILLIAM & MARY TAX CONFERENCE

November 9-11, 2016

EVALUATION QUESTIONNAIRE

Please answer the following questions to help us in planning future conferences. Leave this questionnaire at the registration desk before leaving this year's conference or mail it to: Tax Conference, William & Mary Law School, Post Office Box 8795, Williamsburg, VA 23187-8795. Thank you for your time.

Name: _____
(optional)

Profession: _____ Years in Practice: _____

Please indicate your overall impression of each topic and speaker with 5 being the highest rating:

	<u>Outstanding</u>				<u>Fair</u>
	5	4	3	2	1
Topic: Partnership Taxation and Hot Topics in Partnership and Real Estate Taxation	_____	_____	_____	_____	_____
Speakers: Stephen L. Owen	_____	_____	_____	_____	_____
Stephen M. Sharkey	_____	_____	_____	_____	_____
Brian J. O'Connor	_____	_____	_____	_____	_____
Topic: Estate Planning for Closely Held Businesses	_____	_____	_____	_____	_____
Speaker: Douglas L. Siegler	_____	_____	_____	_____	_____
Topic: Real Estate Related Methods and Credits	_____	_____	_____	_____	_____
Speakers: Brandon C. Carlton	_____	_____	_____	_____	_____
Stephen M. Sharkey	_____	_____	_____	_____	_____
Topic: Lunch Session – Virginia Hot Topics	_____	_____	_____	_____	_____
Speakers: Craig D. Bell	_____	_____	_____	_____	_____
William L. S. Rowe	_____	_____	_____	_____	_____
Topic: Structuring Compensation Arrangements for the Closely Held Business	_____	_____	_____	_____	_____
Speaker: Elizabeth E. Drigotas	_____	_____	_____	_____	_____
Topic: Dealing with the New Partnership (and LLC) Audit Rules	_____	_____	_____	_____	_____
Speakers: Craig D. Bell	_____	_____	_____	_____	_____
Steven R. Schneider	_____	_____	_____	_____	_____

(over)

		<u>Outstanding</u>				<u>Fair</u>
		5	4	3	2	1
Topic:	Structuring (and Drafting) Joint Venture Agreements					
Speaker:	Brian J. O'Connor	_____	_____	_____	_____	_____
	Stephen R. Schneider	_____	_____	_____	_____	_____
Topic:	Let My Trustees Go! Planning to Minimize or Avoid Virginia and Other State Income Taxes on Trusts					
Speaker:	Richard W. Nenno	_____	_____	_____	_____	_____
Topic:	Choice of Business Entity					
Speaker:	C. Wells Hall, III	_____	_____	_____	_____	_____
Topic:	Employee vs Independent Contractor and Employee vs Partner					
Speaker:	Kurt L.P. Lawson	_____	_____	_____	_____	_____
Topic:	Lunch Session – Tax Reform in the New Administration					
Speaker:	Evan M. Migdail	_____	_____	_____	_____	_____
Topic:	Planning the Purchase and Sale of LLC and S Corp Targets					
Speakers:	Robert G. McElroy	_____	_____	_____	_____	_____
	William M. Richardson	_____	_____	_____	_____	_____
Topic:	Federal Tax Update					
Speaker:	Stephen L. Owen	_____	_____	_____	_____	_____

1. Please provide additional comments regarding this year's program, including the usefulness of panel presentations.

2. Suggestions for future topics and/or speakers for the William & Mary Tax Conference.

3. May we have your e-mail address to add to a LISTSERVE for future conference information?
Please print legibly _____

4. How did you hear about the Conference?