2017 Schedule
ALSO SPONSORED BY

TAXATION SECTION
OF THE
VIRGINIA STATE BAR

McGUIREWOODS
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TOPIC AND MATERIALS

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Wednesday, November 8, 2017
William & Mary Law School, 613 South Henry Street

5:00-7:00 P.M.
FUNDAMENTALS OF PARTNERSHIP TAXATION

ROBERT G. MCELROY
WILLIAM M. RICHARDSON

Materials to be passed out on Wednesday evening

Thursday, November 9, 2017
Kingsmill Resort, Williamsburg, VA

8:00-8:20 A.M.
REGISTRATION & COFFEE

8:20-8:30 A.M.
INTRODUCTORY REMARKS

MARK C. VAN DEUSEN

8:30-10:00 A.M.
QUALIFIED AND NONQUALIFIED DEFERRED COMPENSATION PLANS IN SMALL BUSINESSES: CREATIVE USES AND PROBLEM SOLVING

ROBERT Q. JOHNSON
RICHARD C. MAPP, III
JOHN M. PETERSON

Qualified and Nonqualified Deferred Compensation Plans in Small Businesses: 1
Creative Uses and Problem Solving (Outline)

Qualified and Nonqualified Deferred Compensation Plans in Small Businesses: 2
Creative Uses and Problem Solving (PowerPoint)
TOPIC AND MATERIALS

10:00-10:15 A.M.
NETWORKING BREAK

10:15-11:45 A.M.
IMPACT OF TAX REFORM ON PARTNERSHIPS/RECENT CHANGES TO RULES GOVERNING DISGUISED SALE AND DEBT ALLOCATIONS

ANDREA M. WHITENAY
MAXIMILIAN PAKALUK
MARK C. VANDUSEN, MODERATOR

Recent Changes to Rules Governing Disguised Sale and Debt Allocations (Outline) 3
Impact of Tax Reform on Partnerships/Recent Changes to Rules Governing Disguised Sale and Debt Allocations (PowerPoint) 4

11:45-11:55 A.M.
LUNCHEON BREAK

11:55 A.M.-1:00 P.M. – LUNCH SESSION
VIRGINIA HOT TOPICS

CRAIG D. BELL
WILLIAM L.S. ROWE

Recent Tax Developments in Virginia Taxation 5

1:00-1:15 P.M.
NETWORKING BREAK

1:15-2:45 P.M.
DON’T DISCOUNT DISCOUNTS: VALUATION OF CLOSELY HELD BUSINESSES IN A CHANGING REGULATORY ENVIRONMENT

MICHAEL H. BARKER
WILLIAM I. SANDERSON
THOMAS R. FRANTZ, MODERATOR

Don’t Discount Discounts: Valuation of Closely Held Businesses in a Changing Regulatory Environment 6

2:45-3:00 P.M.
NETWORKING BREAK
TOPIC AND MATERIALS

3:00-4:15 P.M.
PARTNERSHIP CHARACTER PLANNING BEFORE AND AFTER THE AUDIT

BRIAN J. O'CONNOR
STEVEN R. SCHNEIDER
MARK C. VAN DEUSEN, MODERATOR

Partnership Character Planning Before and After the Audit (PowerPoint) 7

4:15-4:30 P.M.
NETWORKING BREAK

4:30-6:00 P.M.
CORPORATE TAX DEVELOPMENTS: TAX REFORM AND BEYOND

CAMERON ARTERTON
LISA M. ZARLENGA
WILLIAM M. RICHARDSON, MODERATOR

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Friday, November 10, 2017
Kingsmill Resort, Williamsburg, VA

8:00-8:20 A.M.
REFRESHMENT BREAK

8:20-10:00 A.M.
RESOLVING IDENTITITY THEFT ISSUES

T. KEITH FOGG
THE HONORABLE DIANA L. LEYDEN
CRAIG D. BELL, MODERATOR

Resolving Identity Theft Issues (Outline) 9
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10:00-10:15 A.M.
REFRESHMENT BREAK
**TOPIC AND MATERIALS**

**10:15 A.M. – 12:00 P.M.**

**TAX REFORM: TECHNICAL SUMMARY**

**Evan M. Migdail**
Tax Reform: Technical Summary Outline

**NOON-12:15 P.M.**

**NETWORKING BREAK**

**12:15 P.M.-1:15 P.M.**

**LUNCH SESSION: POLITICS OF TAX REFORM**

**Evan M. Migdail**
Politics of Tax Reform: Outline

**1:15-1:30 P.M.**

**NETWORKING BREAK**

**1:30-3:00 P.M.**

**LIKE-KIND EXCHANGES AND AVOIDING DEALER STATUS**

**Robert D. Schachat**
**Stephen L. Owen, Moderator**

Like-Kind Exchanges and Avoiding Dealer Status (PowerPoint)

**3:00-3:15 P.M.**

**NETWORKING BREAK**

**3:15-4:45 P.M.**

**FEDERAL TAX UPDATE**

**Stephen L. Owen**

Federal Tax Update (PowerPoint)