

2017

2017 Tax Conference Forms

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Summary of Meeting Times

WEDNESDAY, NOVEMBER 8

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Fundamentals of Partnership Taxation	2.00	2.40

THURSDAY, NOVEMBER 9

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Qualified and Nonqualified Deferred Compensation Plans in Small Businesses: Creative Uses and Problem Solving	1.50	1.80
Impact of Tax Reform on Partnerships/Recent Changes to Rules Governing Disguised Sale and Debt Allocations	1.50	1.80
Virginia Hot Topics	1.08	1.30
Don't Discount Discounts: Valuation of Closely Held Businesses in a Changing Regulatory Environment	1.50	1.80
Partnership Character Planning Before and After the Audit	1.50	1.80
Corporate Tax Developments: Tax Reform and Beyond	1.50	1.80

FRIDAY, NOVEMBER 10

Topic	Maximum 60- Minute Hours	Maximum 50- Minute Hours
Resolving Identity Theft Issues	1.67	2.00
Tax Reform: Technical Summary	1.75	2.10
Politics of Tax Reform	1.00	1.20
Like-Kind Exchanges and Avoiding Dealer Status	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: 63rd William & Mary Tax Conference

DATES OF PROGRAM: November 8-10, 2017

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: MWFF001

Sponsor: William & Mary Law School

Course/Program Title: Tax Planning in an Era of Uncertainty 63rd Annual William & Mary

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: 63rd William & Mary Tax Conference

DATES OF PROGRAM: November 8-10, 2017

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.**

63rd ANNUAL WILLIAM & MARY TAX CONFERENCE

November 8-10, 2017

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: Fundamentals of Partnership Taxation					
Speakers: Robert G. McElroy	_____	_____	_____	_____	_____
William M. Richardson	_____	_____	_____	_____	_____
Topic: Qualified and Nonqualified Deferred Compensation Plans in Small Businesses: Creative Uses and Problem Solving	_____	_____	_____	_____	_____
Speakers: Robert Q. Johnson	_____	_____	_____	_____	_____
Richard C. Mapp, III	_____	_____	_____	_____	_____
John M. Peterson	_____	_____	_____	_____	_____
Topic: Impact of Tax Reform on Partnerships/ Recent Changes to Rules Governing Disguised Sale and Debt Allocations	_____	_____	_____	_____	_____
Speakers: Andrea M. Whiteway	_____	_____	_____	_____	_____
Maximilian Pakaluk	_____	_____	_____	_____	_____
Topic: Lunch Session – Virginia Hot Topics	_____	_____	_____	_____	_____
Speakers: Craig D. Bell	_____	_____	_____	_____	_____
William L. S. Rowe	_____	_____	_____	_____	_____
Topic: Don't Discount Discounts: Valuation of Closely Held Businesses in a Changing Regulatory Environment	_____	_____	_____	_____	_____
Speakers: Michael H. Barker	_____	_____	_____	_____	_____
William I. Sanderson	_____	_____	_____	_____	_____
Topic: Partnership Character Planning Before and After the Audit	_____	_____	_____	_____	_____
Speakers: Brian J. O'Connor	_____	_____	_____	_____	_____
Steven R. Schneider	_____	_____	_____	_____	_____

(over)

		<u>Outstanding</u>				<u>Fair</u>
		5	4	3	2	1
Topic:	Corporate Tax Developments: Tax Reform and Beyond					
Speakers:	Cameron Arterton					
	Lisa M. Zarlenga					
Topic:	Resolving Identity Theft Issues					
Speakers:	T. Keith Fogg					
	The Honorable Diana L. Leyden					
Topic:	Tax Reform: Technical Summary					
Speaker:	Evan M. Migdail					
Topic:	Lunch Session: Politics of Tax Reform					
Speaker:	Evan M. Migdail					
Topic:	Like-Kind Exchanges and Avoiding Dealer Status					
Speaker:	Robert D. Schachat					
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?