

William & Mary Law School

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William & Mary Annual Tax Conference

Conferences, Events, and Lectures

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11-2019

### 2019 Tax Conference Forms

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## **ACCREDITATION INFORMATION SHEET FOR ACCOUNTANTS**

### **VIRGINIA CERTIFIED PUBLIC ACCOUNTANTS**

This program provides 21.00 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:** 65<sup>th</sup> William & Mary Tax Conference

**DATES OF PROGRAM:** November 6-8, 2019

**LOCATION:** Williamsburg, Virginia

**CPE Credit:** 21.00 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.**

## **ACCREDITATION INFORMATION SHEET FOR LAWYERS**

### **VIRGINIA ATTORNEYS**

This program has been approved by the Virginia Mandatory Continuing Legal Education (MCLE) Board for 17.50 credit hours. A copy of the Certification of Attendance (Form 2) will be at the Registration Desk. 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:** 65<sup>th</sup> William & Mary Tax Conference

**DATES OF PROGRAM:** November 6-8, 2019

**LOCATION:** Williamsburg, Virginia

**CLE Credit:** 17.50 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.**

# 65<sup>th</sup> ANNUAL WILLIAM & MARY TAX CONFERENCE

November 6-8, 2019

## 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: Thomas P. Rohman	_____	_____	_____	_____	_____
Jon G. Neal	_____	_____	_____	_____	_____
Topic: Enormous Changes in State Taxation: A Multistate Survey of TCJA Conformity and Consequences of the <i>Wayfair</i> Decision	_____	_____	_____	_____	_____
Speakers: Steven Wlodychak	_____	_____	_____	_____	_____
Damon DeSue	_____	_____	_____	_____	_____
Topic: Navigating Section 199A – A Practical View	_____	_____	_____	_____	_____
Speakers: James B. Sowell	_____	_____	_____	_____	_____
Stephen J. Giordano	_____	_____	_____	_____	_____
Topic: Lunch Session: Recent Developments in Virginia Taxation Through the Eyes of a SALT Practitioner	_____	_____	_____	_____	_____
Speaker: Craig D. Bell	_____	_____	_____	_____	_____
Topic: Practical Issues in Structuring Mergers and Acquisitions After Tax Reform	_____	_____	_____	_____	_____
Speakers: Shane C. Hoffman	_____	_____	_____	_____	_____
Alan S. Kaden	_____	_____	_____	_____	_____
Topic: Opportunity Zones From Both Ends of the Pool	_____	_____	_____	_____	_____
Speakers: Stephen M. Sharkey	_____	_____	_____	_____	_____
Steven M. Friedman	_____	_____	_____	_____	_____

(over)

		<u>Outstanding</u>				<u>Fair</u>
		5	4	3	2	1
Topic:	Top 10 Mistakes and Oversights in Reviewing, Drafting, and Understanding Operating/Partnership Agreements					
Speakers:	Steven R. Schneider	_____	_____	_____	_____	_____
	Stephen M. Sharkey	_____	_____	_____	_____	_____
	Brian J. O'Connor	_____	_____	_____	_____	_____
Topic:	Navigating Loss Planning Rules and Limitations (basis, sections 465, 469, 461(l), 172 and 163 (j))					
Speakers:	Steven R. Schneider	_____	_____	_____	_____	_____
	Brian J. O'Connor	_____	_____	_____	_____	_____
Topic:	Philanthropy: Impact of Taxes and Other Factors on Charitable Giving					
Speaker:	Michele A.W. McKinnon	_____	_____	_____	_____	_____
Topic:	Lunch Session: Tax Administration in the 21 <sup>st</sup> Century					
Speaker:	Nina E. Olson	_____	_____	_____	_____	_____
Topic:	Like-Kind Exchanges and Depreciation Deductions After Tax Reform					
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?