2019 Schedule
WILLIAM & MARY LAW SCHOOL

ALSO SPONSORED BY

TAXATION SECTION
OF THE
VIRGINIA STATE BAR

McGUIRE WOODS
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TOPIC AND MATERIALS

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SPEAKER BIOGRAPHIES

Wednesday, November 6, 2019
William & Mary Law School, 613 South Henry Street

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

THOMAS P. ROHMAN
JON G. NEAL

Fundamental of Partnership Taxation (handout at presentation)

Thursday, November 7, 2019
Kingsmill Resort, Williamsburg, VA

8:00-8:20 A.M.
REGISTRATION & CONTINENTAL BREAKFAST

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

CRAIG D. BELL

8:30-9:45 A.M.
ENORMOUS CHANGES IN STATE TAXATION: A MULTISTATE SURVEY OF TCJA CONFORMITY AND THE CONSEQUENCES OF THE WAYFAIR DECISION

STEVEN WLODYCHAK
DAMON DESUE
CRAIG D. BELL, MODERATOR

Enormous Changes in State Taxation: A Multistate Survey of TCJA Conformity and the Consequences of the Wayfair Decision (PowerPoint)

Current state and local income and sales/use tax developments
TOPIC AND MATERIALS

9:45-10:00 A.M. - NETWORKING BREAK

10:00-11:30 A.M.
NAVIGATING SECTION 199A – A PRACTICAL VIEW

JAMES B. SOWELL
STEPHEN J. GIORDANO
MARK C. VAN DEUSEN, MODERATOR

Navigating Section 199A – A Practical View (PowerPoint) 3

11:30 A.M.-11:45 A.M.
NETWORKING BREAK AND LUNCH PICKUP

11:45 A.M.-12:45 P.M. - LUNCH SESSION
RECENT DEVELOPMENTS IN VIRGINIA TAXATION THROUGH THE EYES OF A SALT PRACTITIONER

CRAIG D. BELL

Recent Developments in Virginia Taxation Through the Eyes of a SALT Practitioner 4

12:45-1:00 P.M.
NETWORKING BREAK

1:00-2:45 P.M.
PRACTICAL ISSUES IN STRUCTURING MERGERS AND ACQUISITIONS AFTER TAX REFORM

SHANE C. HOFFMAN
ALAN S. KADEN
CAMERON N. COSBY, MODERATOR

Practical Issues in Structuring M&A After Tax Reform (PowerPoint) 5

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

3:00-4:15 P.M.
**OPPORTUNITY ZONES FROM BOTH ENDS OF THE POOL**

**STEVEN M. SHARKEY**  
**STEVEN M. FRIEDMAN**  
**STEPHEN L. OWEN, MODERATOR**

Opportunity Zones from Both Ends of the Pool (PowerPoint)

4:15-5:30 P.M.  
**TOP 10 MISTAKES AND OVERSIGHTS IN REVIEWING, DRAFTING, AND UNDERSTANDING OPERATING/PARTNERSHIP AGREEMENTS**

**STEVEN R. SCHNEIDER**  
**STEPHEN M. SHARKEY**  
**BRIAN J. O’CONNOR**  
**STEVEN M. FRIEDMAN, MODERATOR**

Top 10 Mistakes and Oversights in Reviewing, Drafting and Understanding Operating/Partnership Agreements (PowerPoint)

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Friday, November 8, 2019  
Kingsmill Resort, Williamsburg, VA

8:00-8:30 A.M.  
**REGISTRATION AND CONTINENTAL BREAKFAST**

8:30-10:00 A.M.  
**NAVIGATING LOSS PLANNING RULES AND LIMITATIONS (BASIS, SECTIONS 465, 469, 461(L), 172 AND 163(J))**

**STEVEN R. SCHNEIDER**  
**BRIAN J. O’CONNOR**  
**EDIE E. WISS, MODERATOR**

At a Loss (Again): Navigating Loss Planning Rules and Limitations (PowerPoint)

10:00-10:15 A.M.  
**NETWORKING BREAK**
TOPIC AND MATERIALS

10:15-11:45 A.M.
PHILANTHROPY: IMPACT OF TAXES AND OTHER FACTORS ON CHARITABLE GIVING

MICHELE A.W. MCKINNON
STEPHEN L. OWEN, MODERATOR

Philanthropy: Impact of Taxes and Other Factors on Charitable Giving

11:45 A.M.-NOON
REFRESHMENT BREAK AND LUNCH PICK-UP

12:10 P.M.-1:15 P.M. - LUNCH SESSION
TAX ADMINISTRATION IN THE 21ST CENTURY

NINA E. OLSON
ELIZABETH J. ATKINSON, MODERATOR

INTRODUCTION: The National Taxpayer Advocate’s Remarks on the Role of Trust and Taxpayer Advocate Service in Fostering Tax Compliance

1:15-1:30 P.M.
NETWORKING BREAK

1:30-3:00 P.M.
LIKE-KIND EXCHANGES AND DEPRECIATION DEDUCTIONS AFTER TAX REFORM

ROBERT D. SCHACHAT
STEPHEN L. OWEN, MODERATOR

Like-Kind Exchanges and Depreciation Deductions After Tax Reform (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)