



State Bar of Texas

Tax Law in a Day

CLE: 8 hrs/1.25 hr Ethics CPE: 9.6 hrs

Course No. 901371298

Friday, February 3, 2017

Cityplace Conference Center, 2711 N Haskell Ave., Dallas, Texas 75204

7:30 Registration

7:55 Announcements

8:00 Partnership Tax Law Basics and Current Developments

1 hr/.25 hr Ethics

Stephen A. Beck - Meadows, Collier, Reed, Cousins, Crouch & Ungerman, L.L.P.

Discussion of basic partnership rules and an overview of recent developments, including the new partnership audit rules, tax deadlines, and more.

9:00 Basic Federal Income Tax Consequences of Corporate Mergers and Acquisitions

.75 hr

Jeffry M. Blair - Hunton & Williams LLP

Detailed discussion of the complex rules and regulations relating to tax issues in connection with corporate acquisitions and mergers, including how to select the best option and strategies for avoiding unexpected tax consequences.

9:45 The Basics of Nonqualified Deferred Compensation and Equity Compensation

.75 hr

Henry Talavera and Meredith VanderWilt - Polsinelli PC

Discussion of tax issues relating to special types of compensation, including issues that arise under 409A and special concerns for non-profit organizations engaging in these programs in light of recently proposed IRS guidance.

10:30 Break

10:45 Tax and Estate Planning Following the Final Portability Regulations and ATRA

.75 hr/.25 hr Ethics

Matthew S. Beard - Meadows, Collier, Reed, Cousins, Crouch & Ungerman, L.L.P.

Explanation and overview of the current state of estate and gift tax rules, with a focus on portability of exemption amounts and a discussion of planning opportunities and implications under the new laws.

11:30 Charitable Organization Update

.75 hr

Terri Helge - Texas A&M University School of Law

Overview and update on changes to the tax law in connection with charitable organizations, including a review of Form 1023-EZ, gift substantiation requirements and recent cases, charitable rollovers for IRAs and much more.

12:15 Break/Lunch

12:30 Federal Income Tax Basics and Recent Developments

1 hr/.25 hr Ethics

Bruce A. McGovern - South Texas College of Law Houston

Overview of basic income tax laws and updates on recent developments in tax laws for individuals, corporations, partnerships, and tax-exempt organizations.

1:30 Oil and Gas Tax Law

.75 hr

Crawford Moorefield - Strasburger & Price, LLP

Introduction to basic oil and gas federal income taxation with guidance on how to avoid potential pitfalls and how to take advantage of planning opportunities.

2:15 Handling a Tax Controversy: Audits, Appeals, Litigation and Collections

.75 hr/.25 hr Ethics

Sara A. Giddings - Smith Rose Finley, P.C.

Basic discussion of how the Internal Revenue Service collects tax due, tools used to obtain relief from enforced collection by the IRS, including installment agreements and Offers in Compromise, collection due process and appeals, and trust fund recovery penalties.

3:00 Break

3:15 Unanticipated Pitfalls in Dealing with Texas Tax Law

.75 hr/.25 hr Ethics

Ira Lipstet - DuBois Bryant & Campbell

Discussion of lesser-known Texas tax law provisions relating to business transactions and how to avoid unanticipated adverse consequences.

4:00 International Tax Overview and Update

.75 hr

Ben Vesely - BDO

Overview of common international tax provisions of interest to US practitioners and insight into common issues that arise in international tax planning, along with a brief update on some notable recent developments.

4:45 Networking HappyHour

Please join fellow participants in a networking opportunity following the conference.



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PAYMENT BY CHECK: Make checks payable to: State Bar of Texas Tax Section

Name: _____

Bar Number: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

\$75.00 – Student*

\$149.00 – SBOT Tax Section Member*

\$199.00 – General Registration*

*Registration fee includes continental breakfast, gourmet lunch, afternoon snacks, happy hour, materials sent electronically in advance, and access to the conference center's wireless Internet.

To register online by credit card visit: <https://statebaroftexassections.redpodium.com/tax-law-in-a-day-2017>

Send registration to: State Bar of Texas

Attn: Tax Section

P.O. Box 12487

Austin, Texas 78711-2487

Feel free to contact the Course Directors with any questions:

Lora Davis (214) 396-8800 or lora@davisstephenson.com

Laurel Stephenson (214) 396-8800 or laurel@davisstephenson.com

ADDITIONAL INFORMATION

Event Location

Cityplace Conference Center
2711 N Haskell Ave.
Dallas, TX 75204
Room: Lakewood Ballroom

Parking

Parking is available at no charge at Cityplace Conference Center for guests attending the Tax Law in a Day. From North Central Expressway take the Haskell Exit East. Take the first right at Weldon Street and enter garage ramp #5. Park in garage C and take the elevator to Concourse level (C). Enter through the revolving door and take the lobby elevator to the Ground Level. Parking will be validated by your host. Under no circumstances should you park at Target; your car will be towed.

For those wishing to take mass transit, there is a DART light rail stop inside the building.

Accessibility Information

If you need any special arrangements made, please contact Lora Davis, lora@davisstephenson.com, or call (214) 396-8800 prior to January 30, 2017 to ensure your needs will be accommodated.

Refund Information

If you register and are unable to attend, full refunds will be provided for requests received on or before January 25, 2017. After that date, you will be e-mailed a copy of the course materials and no refund will be available.

To request a refund, please contact Sandra Carlson at the State Bar of Texas Section Accounting Department by phone at (512) 427-1408 or by email at sandra.carlson@texasbar.com.

Hotel Accommodations

Below is a list of hotels conveniently located within a 1.5 mile radius of Cityplace Conference Center.

Hotel ZaZa	2332 Leonard St	(214) 468-8399
Warwick- Melrose Hotel	3015 Oak Lawn Ave	(214) 521-5151
Dallas Marriott	650 N Pearl St	(214) 979-9000
Rosewood Mansion	2821 Turtle Creek Blvd	(214) 559-2100
Ritz-Carlton	2121 McKinney Ave	(214) 922-0200
Rosewood Crescent	400 Crescent Court	(214) 871-3200
Best Western - Cityplace	4150 N Central Expy	(214) 827-6080

We look forward to seeing you there!!!