Wednesday, November 9, 2016
Thursday, November 10, 2016
Friday, November 11, 2016

Sheraton Hotel
New Orleans, Louisiana

- Hear nationally recognized tax and estate planning legal practitioners, law professors and accountants present in-depth reviews of new tax statutes, regulations and court decisions
- Discuss the latest tax issues that impact your practice now and in the future
- This year’s luncheon presentation will discuss the current tax developments happening in Louisiana.
- Earn over 18 hours of CLE/CPE eligible credit, including Ethics and Professionalism
- Enjoy the sights, sounds and spirit of one of the world’s most exciting and interesting cities
### Wednesday, November 9

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker</th>
<th>Institution/Location</th>
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<tbody>
<tr>
<td>8:00 - 8:30</td>
<td>Registration</td>
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<tr>
<td>8:30 - 9:45</td>
<td>Recent Developments in the Taxation of Corporations and Shareholders</td>
<td>Bruce McGovern, Professor</td>
<td>South Texas College of Law, Houston, TX</td>
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<td>9:45 - 10:00</td>
<td>Break</td>
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<tr>
<td>10:00 - 11:00</td>
<td>Hot Topics in SALT: Louisiana State and Local Tax Update and More!</td>
<td>Jaye Calhoun</td>
<td>McGlinchey Stafford, New Orleans, LA</td>
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<td>11:00 - 12:00</td>
<td>S Corporation Merger &amp; Acquisition Issues</td>
<td>Stephen Looney, Dean, Mead, Egerton, Bloodworth, Capouano &amp; Bozarth, P.A., Orlando, FL</td>
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<td>12:00 - 1:30</td>
<td>Lunch – On your own</td>
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<td>1:30 - 2:30</td>
<td>Large Business &amp; International Division Reorganizes Again: What to Expect in New IRS Audits</td>
<td>Victoria Sherlock, KPMG, Houston, TX</td>
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<td>2:30 - 3:30</td>
<td>Troubled Debt Restructurings: Debtor-Side Tax Issues</td>
<td>David Garlock, Ernst &amp; Young LLP, Washington DC</td>
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<td>3:30 – 3:45</td>
<td>Break</td>
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<td>3:45 – 4:45</td>
<td>Professionalism—What’s So Unprofessional About Tax Attorneys Using Social Media to Attract Attention and Clients</td>
<td>Michael Rubin, McGlinchey Stafford, Baton Rouge, LA</td>
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### Thursday, November 10

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<td>8:30 - 9:45</td>
<td>Recent Developments in the Taxation of Individuals and Partnerships</td>
<td>Bruce McGovern, Professor</td>
<td>South Texas College of Law, Houston, TX</td>
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<td>9:45 - 10:00</td>
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<tr>
<td>10:00 - 11:00</td>
<td>New Partnership Audit Rules: Impact on M&amp;A Deals</td>
<td>Steven Kuntz, Robert Philippott</td>
<td>Jones Walker, New Orleans, LA</td>
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<tr>
<td>11:00 - 12:00</td>
<td>New Markets Tax Credits and Historic Tax Credits – The Nuts and Bolts</td>
<td>Jonathan Katz</td>
<td>Jones Walker, New Orleans, LA</td>
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<td>Lunch Presentation</td>
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<td>1:30 - 2:30</td>
<td>Partnerships and Section 1031 Exchanges</td>
<td>Terry Cuff</td>
<td>Loeb &amp; Loeb LLP, Los Angeles, CA</td>
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<td>2:30 - 3:30</td>
<td>Tax Exempt Organizations Update</td>
<td>Virginia Gross</td>
<td>Polsinelli, Kansas City, MO</td>
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<td>Ethics—Beyond Zealous Advocacy: The Ethical and Criminal Problems of Being Too Helpful to Clients</td>
<td>Scott Schumacher</td>
<td>University of Washington School of Law, Seattle, WA</td>
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Friday, November 11

8:00 - 8:30 Registration

8:30 - 9:45 Recent Developments Affecting Estate Planning
Stanley Johansson
University of Texas at Austin, Austin, TX

9:45 - 10:00 Break

10:00 - 11:00 Post Mortem Planning-It’s Not Too Late to Plan: A Review of Income, Gift and Estate Tax Planning Issues and Strategies
Steve Akers
Bessemer Trust, Dallas TX

11:00 - 12:00 Tax Planning Issues for Nontraditional Couples and Divorce
Kim Kamin
Gresham Partners LLC, Chicago, IL

12:00 - 1:30 Lunch

1:30 - 2:30 Valuation Discounts Severely Curtailed: What’s All the Hoopla About?
David Pratt
Proskauer, Boca Raton, FL

2:30 - 3:30 Legal Issues in Art Authentication
Cynda Ottaway
Crowe & Dunlevy, Oklahoma City, OK
Leslie Wright
Bonhams, Los Angeles, CA

3:30 - 3:45 Break

3:45 - 4:45 Lifetime QTIPs: Why Should They Be Ubiquitous in Estate Planning?
Richard Franklin
McArthur Franklin PLLC, Washington D.C.

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† Deceased

Tulane CLE Hardship Policy
Tuition assistance will be extended to those attorneys who are unemployed or employed in the public sector and who can establish financial hardship. Attorneys who meet the criteria will be granted a credit of up to 50% of the applicable course registration fee. Applications and resumes must be received no later than two weeks prior to the program to be eligible for consideration. For more information or an application please contact Tulane CLE.

Continuing Education Credits
This program is being presented in Louisiana, a mandatory CLE state, for a maximum of 18.75 hours of instruction, including 1 hour of ethics and 1 hour of professionalism. In addition, this program has been fully approved for both tax and estate planning and administration specialization CLE credit per the LBLS. Tulane CLE will assist attorneys with their credit reporting requirements. CPAs are responsible for their own credit reporting. To obtain continuing education credits, all registrants MUST complete and return the Certificate of Attendance and other required forms before leaving the seminar.
Tulane Tax Institute 
November 9 – 11, 2016

GENERAL INFORMATION

Registration & Fees
Online registration is available at: www.law.tulane.edu/tax. Register by October 14 and SAVE! Discounted Early Registration is $695 (3 days), $550 (2 days) and $300 (1 day). The Registration fee after September 25 is $750 (3 days), $600 (2 days) and $350 (1 day).
Registration includes refreshments each day, luncheon on Thursday and course materials on a flash drive. A government/academic discount is offered for government employees or full time faculty/staff of an academic institution. Please check the online registration site at www.law.tulane.edu/tax or call the Tulane CLE office at 504.865.5900 for more information. The online registration must be used to register if paying for your registration with a credit card. The Tax Institute accepts checks, cash, Visa or MasterCard ONLY. It is advisable to pre-register as space may be limited. Please select the lunch option if you plan to attend the Thursday luncheon presentation.

Course Materials
The extensive Institute course materials will be distributed at the seminar on a convenient flash drive. These materials will also be available for download before the conference to everyone registered for the Institute. An e-mail with a link for downloading the materials will be sent to all Tax Institute registrants 3-5 days before the conference. If you do not receive this e-mail by the Monday before the conference, please contact the CLE office. Hard copies of the full materials can be purchased for $150. To order a hard copy, please check the course material option on the registration form or order online. To guarantee receipt of a hard copy of the materials, orders must be received by October 21. Ordered hard copy materials will be distributed at the seminar.

Cancellations & Refunds
A full refund, less a $50 administrative fee, will be offered through November 2, 2016. Absolutely NO refunds will be made after October 14. Registrations may be transferred to another member of the same firm through October 14. Cancellations and transfers must be submitted in writing either via fax to 504.866.1583 or e-mail to mcle@tulane.edu no later than 5pm on October 14, 2016.

Hotel Reservations
The Institute Hotel is the Sheraton Hotel located at 500 Canal Street at the corner of Camp Street. A small block of rooms has been reserved at a special discount rate. This group rate will be available until October 10, 2016. To reserve your room call 1-866-716-8134 or 504-525-2500 and be sure to ask for the ‘Tulane Law School Tax Institute’ room block.

Registration Form

Tulane Tax Institute, November 9 – 11, 2016
Sheraton Hotel    New Orleans, LA

Early Bird Registration (through October 14, 2016)

☐ 3 Day Registration - $695
☐ 2 Day Registration - $550
☐ 1 Day Registration - $300

Regular Registration (after October 14, 2016)

☐ 3 Day Registration - $750
☐ 2 Day Registration - $600
☐ 1 Day Registration - $350

☐ I will attend the Luncheon on Thursday, November 10
☐ I wish to purchase a Hard Copy of Course Materials - $150

Mr./Ms.: ___________________________________________________
Name on Badge: ___________________________________________________
Firm: __________________________________________________________
Address: _______________________________________________________
City/State/Zip: __________________________________________________
Phone: _________________________________________________________
E-mail: _________________________________________________________

Bar Membership State(s) & Bar Number(s)
CPA Membership State(s) and CPA Number(s)

Make checks payable to: Tulane Tax Institute
Mail registration form and check to: Tulane Law School – CLE
200 Broadway, Ste. 203
New Orleans, LA  70118

All registrations paid with a credit card must register via the secure on-line registration site: www.law.tulane.edu/tax