17th Annual North Carolina/South Carolina/Georgia Tax Section Workshops

LIVE
Friday–Sunday, May 25–27, 2018
Kiawah Island Golf Resort, Kiawah Island, SC

CLE CREDIT: 9.0 Hours

VIDEO REPLAYS, UPDATES & REGISTRATION
www.tinyurl.com/CLE739TSW

Planned by the NCBA Tax Section, South Carolina Bar Tax Section and Georgia Bar Tax Section

SUMMARY: This program provides comprehensive instruction for the ever-changing tax controversy and tax planning practice. Sessions with expert speakers include:

- Top Tax Controversy Issues
- Charitable Trust Planning
- Partnership Audit Rules Update
- Domicile and State Tax Review
- 2018 Tax Reform Update
- Litigating Conservation Easements

The North Carolina Bar Association is accredited by the North Carolina State Bar as a provider of continuing legal education.
17th Annual North Carolina/South Carolina/Georgia Tax Section Workshops
#739TSW | Friday–Sunday, May 25–27, 2018

FOUR WAYS TO REGISTER
ONLINE* www.ncbar.org/CLE • PHONE* 800.228.3402 • FAX* 919.677.1774
MAIL* Attn: Accounting–NCBA, P.O. Box 3688, Cary, NC 27519-3688
*Credit cards only.  **Please make checks payable to the NCBA.

LIVE PROGRAM TUITION

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VIDEO REPLAYS | This program is available as a Video Replay. Video Replays of an NCBA CLE may not include all breakout sessions or tracks presented at the original Live program. To see the Video Replay schedule for this program, visit www.tinyurl.com/CLE739TSW.

REGISTRANT INFORMATION | Please print clearly.

Print Full Name: ____________________________________________
Firm/Organization Name: _______________________________________
Address: ____________________________________________________
City, State and ZIP: __________________________________________
Daytime Phone Number: _________________________________________
Email Address: _______________________________________________
NC State Bar No. (Required for MCLE Credit): ______________________

PAYMENT | Registration is processed only after payment is received. Please print clearly.

☐ Enclosed is a check, payable to NCBA.  ☐ Please charge my credit card.
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BECOME A CLE EVENT SPONSOR for one of our award-winning CLE programs.

Contact Jennifer Shapiro, Sponsorship Coordinator, at 919.677.0561 or CLESponsorship@ncbar.org for complete information.
Program Agenda

Friday, May 25, 2018, 8:00a–12:00p

8:00a  Registration and Continental Breakfast
8:25   Welcome and Introductions
8:30   So Your Client Wants to Move to Florida: Strategies for Changing Legal Residency for State Income Tax Purposes
       Richard C. Litwin
9:30   Break
9:45   Top Ten Tax Controversy Tips
       David D. Aughtry
10:45  Break
       Sponsored by Bessemer Trust
11:00  Taxpayer Advocate Panel
       Glenn Thomas
12:00p Adjourn

6:30   Reception at Governors Club Room

Saturday, May 26, 2018, 8:00a–12:30p

8:00a  Continental Breakfast
8:30   Partnership Audit Rules
       Kristin Balding Gutting
9:30   Break
9:45   North Carolina Sales Tax Update
       Eric Wayne
10:45  Break
       Sponsored by Monarch Private Capital
11:00  Litigating Conservation Easements
       Vivian D. Hoard
12:00p NCBA Tax Section Annual Meeting
       Keith A. Wood, Carruthers & Roth, PA, Greensboro,
       2017–2018 Section Chair, Presiding
12:30  Adjourn
Registrations are limited by space, and may include a live video broadcast overflow room.

TRANSFERS
Registrants may transfer from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program without penalty within three business days after the program date.

CANCELLATIONS
Cancellations must be received by 9:00 a.m. the third business day prior to the program to qualify for a refund (less $75 administrative fee). Those not attending will receive the digital program materials in full consideration of tuition paid.

MCLE CREDIT
The North Carolina Bar Association is an accredited CLE sponsor under the MCLE Regulations promulgated by the NC State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the designated number of CLE hours. Each attorney must maintain a record of his/her attendance for the NC State Bar annual report. MCLE credit is reported by NCBA only if a NC State Bar number is provided. Your CLE tuition includes mandatory State Bar fees used to support the State Bar's Mandatory Continuing Legal Education program, the Chief Justice's Commission on Professionalism and the Chief Justice's Equal Access to Justice Commission. Your tuition also includes digital access to all program materials.

DIGITAL PROGRAM MATERIALS
You will receive a notification email when digital materials are available to download. To retrieve digital materials, log in and select “Your Course Materials” on the CLE website. All of the materials for this program will be available for download in advance of the program. VIDEO REPLAYS
To qualify for the Early Bird tuition, registration must be received one week prior to program date. NC State Bar rules require a minimum number of preregistered active State Bar members. NCBA reserves the right to cancel any video program prior to the program date if registrations do not meet the NC State Bar requirement. Some sites require additional registration or evaluation forms. Visit www.tinyurl.com/CLE739TSW to confirm video replay registration and program start times. CLE credit hours at Video Replays are subject to change. Video replay program attendees may purchase the printed manuscript at cost. Due to printing and shipping lead times we are unable to accommodate requests for print materials made fewer than seven (7) days prior to any video replay program.

PERSONS WITH DISABILITIES
We make every effort to ensure that our programs are held in facilities which are fully accessible to persons with disabilities. If you plan to attend our program and need special facilities or assistance relating to a disability, please contact the CLE Department at least one week prior to the date of the program.

INCLEMENT WEATHER
We make every effort to notify registrants when a program is canceled or delayed due to weather. If inclement weather is forecast, please check your local news listings or contact event venue. NCBA programs will follow the work schedule of the hosting institutions, to include delayed openings.

CLE SCHOLARSHIPS
A limited number of scholarships are available to members in financial need. Contact Membership Services at 1.800.662.7407 or email akemple@ncbar.org.

EVENT SPONSOR AND EXHIBITOR OPPORTUNITIES
Interested in meeting the attendees of this program? Become an exhibitor or sponsor! Contact Jennifer Shapiro at CLESponsorship@ncbar.org for detailed information about these opportunities and their benefits.

FOR MORE INFORMATION, VISIT WWW.NCBAR.ORG/CLE.
We extend our sincere gratitude to the NCBA Tax Section, South Carolina Bar Tax Section and Georgia Bar Tax Section as well as the planners and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.

Planners
- G.P. Diminich, Shumaker Loop & Kendrick LLP, Charleston, SC
- Julian A. Fortuna, Taylor English Duma LLP, Atlanta, GA
- Kevin T. May, Graves May, Wilmington, NC

Speakers
- David D. Aughtry, Chamberlain Hrdlicka White Williams & Aughtry LLP, Atlanta, GA
- Brandon Dembowiak, Ascendor Wealth PLLC, Wilmington, NC
- Kristin Balding Gutting, Smith Moore Leatherwood LLP, Charleston, SC
- Rick Graves, Graves May, Wilmington, NC
- Vivian D. Hoard, Taylor English Duma LLP, Atlanta, GA
- Richard C. Litwin, The Litwin Law Firm PC, Atlanta GA
- John C. Sawyer, Taylor English Duma LLP, Atlanta, GA
- Glenn Thomas, D.C. Local Taxpayer Advocate, Washington, DC
- Evan D. Unzelman, Sterling Foundation Management LLC, Reston, VA
- Eric Wayne, North Carolina Department of Revenue, Raleigh, NC

Sponsors (at time of printing)
SILVER SPONSORS
- Bessemer Trust
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Hotel Information
Contact hotel directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

Kiawah Island Golf Resort
One Sanctuary Beach Drive
Kiawah Island, SC 29455

Rates:
- $241 One Bedroom Scenic Villa
- $260 Two-Bedroom Scenic Villas
- $305 Three-Bedroom Scenic Villas
- $413 Two-Bedroom Ocean View Villas

Reservations: 800.654.2924
Group Code: 14141, and mention that you are with the North Carolina Bar Association
Cutoff Date: May 3, 2018
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