



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.

**NORTH CAROLINA
BAR ASSOCIATION**

seeking liberty + justice

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

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*Credit cards only. **Please make checks payable to the NCBA.

LIVE PROGRAM TUITION

REGISTRANT TYPE	EARLY BIRD TUITION Received one week prior to program date.	REGULAR TUITION Received less than one week prior to program date.
North Carolina, South Carolina and/or Georgia Attorney	\$615 <input type="checkbox"/> Live	\$685 <input type="checkbox"/> Live
Full-time LANC Attorney (NCBA Member)	These categories do not qualify for Early Bird tuition.	\$465 <input type="checkbox"/> Live
1st Year Licensed in NC (NCBA Member)		\$198 <input type="checkbox"/> Live
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<input type="checkbox"/> Judge (NCBA Member) <input type="checkbox"/> Clerk of Court (NCBA Member) <input type="checkbox"/> Law Professor (NCBA Member)	These categories do not qualify for Early Bird tuition or include any MCLE fees.	\$75 <input type="checkbox"/> Live
<input type="checkbox"/> Law Student Division Member <input type="checkbox"/> Paralegal Division Student Member		\$25 <input type="checkbox"/> Live

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.

739TSW-B

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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**

Sunday, May 27, 2018, 8:00–11:45a

8:00a **Continental Breakfast**

8:30 **Charitable Trusts and Secondary Solutions for CRT Clients**
John C. Sawyer and Evan D. Unzelman

10:00 **Break**

10:15 **Panel on New and Pending Federal Tax Legislation**
Brandon Dembowskiak and Rick Graves

11:45 **Adjourn**

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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

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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 GolfResort 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



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.

NCBA

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Tax Law



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