18th Annual North Carolina/South Carolina/Georgia Tax Section Workshops

LIVE
Friday–Sunday, May 24–26, 2019
Kiawah Island Golf Resort
1 Sanctuary Beach Drive
Kiawah Island, SC

TOTAL CLE CREDIT
9.0 HOURS

Ethics/Professional Responsibility
1.0 HOUR

REGISTER TODAY!
Save 10% if registration is received by May 3, 2019.
www.tinyurl.com/CLE822TSW

Program includes the 2019 NCBA Tax Section Annual Meeting
Available Formats

LIVE
VIDEO REPLAYS
ON DEMAND

Program Summary

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

- Section 199A planning
- Accounting evidence in tax cases
- Taxation of partnerships
- Criminal tax
- Ethics
- NC Taxpayer Advocate updates

What People Are Saying...

“I learned a lot and I appreciate the materials that I can refer to at a later date.”

“[I am taking away] a better knowledge of the new tax law.”

“A well-organized and well-presented CLE.”

— Attendees, 17th Annual North Carolina/South Carolina/Georgia Tax Section Workshops
AGENDA

FRIDAY, May 24, 2019 | 8:00 a.m. – 12:00 p.m.
8:00  Registration and Continental Breakfast
8:25  Welcome and Introductions
8:30  Business and Trust Planning with the 199A Final Regulation | Mills
9:30  Break
9:45  Pro Bono Representation of Low-Income Taxpayers* | James
10:45 Break
11:00 Taxpayer Advocate Panel | Mara, Nebel and Shaffor
12:00 Adjourn

SATURDAY, May 25, 2019 | 8:00 a.m. – 12:00 p.m.
8:00  Continental Breakfast
8:30  Partnership Audit Rules | Beard
9:30  Break
9:45  Criminal Tax Panel | Downing, Finley and Thornton
12:00 Adjourn
12:00 NCBA Tax Section Annual Meeting
      Robert L. Mendenhall, Holland & Knight LLP, Charlotte, 2018-2019 Section Chair, presiding

SUNDAY, May 26, 2019 | 8:00 – 11:30 a.m.
8:00  Continental Breakfast
8:30  Use and Presentation of Accounting Evidence in Tax Cases | Elliott
9:30  Break
9:45  State Taxes Post-Wayfair | Wayne
11:00 Forced Combinations | Hollander and Reed
11:45 Adjourn

* Indicates portion providing Ethics/Professional Responsibility credit

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 highest quality.
PROGRAM DETAILS

SPEAKERS

- Robert A. Beard, King & Spalding, Atlanta, GA
- Kevin M. Downing, Law Offices of Kevin Downing, Washington, DC
- W. Curtis Elliott Jr., Culp Elliott & Carpenter PLLC, Charlotte
- Caryn D. Finley, U.S. Attorney’s Office, Western District of North Carolina, Charlotte
- Reed J. Hollander, Nelson Mullins Riley & Scarborough LLP, Raleigh
- Matthew T. James, North Carolina Central University, Durham
- Shane D. Mara, Local Taxpayer Advocate, Charlotte
- William L. Mills IV, Culp Elliott & Carpenter PLLC, Charlotte
- Christopher R. Nebel, Taxpayer Advocate Service, Greensboro
- Erica R. Shaffor, Case Advocacy, Greensboro
- Justin A. Thornton, Law Offices of Justin Thornton, Washington, DC
- John C. Von Lehe, Nelson Mullins Riley & Scarborough LLP, Charleston, SC
- Eric K. Wayne, EY, Raleigh

HOTEL INFORMATION

Contact hotel directly for reservations at the special NCBA room rate. Rates and rooms are based on availability and may sell out.

Kiawah Island Resort
1 Sanctuary Beach Drive | Kiawah Island

- **Nightly rates:**
  - $247 | One-bedroom scenic villa
  - $269 | Two-bedroom scenic villa
  - $315 | Three-bedroom scenic villa
  - $425 | Two-bedroom oceanview villas
- **Reservations:** 800.654.2924
- **Group code:** 15816
- **Cutoff date:** May 2, 2019

PLANNERS

- Julian A. Fortuna, Taylor English Duma LLP, Atlanta, GA
- Robert J. Gallagher, Webb & Coyle PLLC, Aberdeen
- Kevin T. May, Graves May PLLC, Wilmington
- W. Verne McGough Jr., Merline & Meacham PA, Greenville, SC

FRIDAY EVENING RECEPTION

Kiawah Island Resort
Osprey Point Clubhouse
6:30–7:30 p.m.
Sponsored by Forensic Strategies Solutions, LLC

SPECIAL ACCOMMODATIONS

NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, contact us at least one (1) week prior to the program start date.

CLE AND PUBLICATION SCHOLARSHIPS

Full and partial scholarships are available for attorneys experiencing a financial hardship of any kind. Apply at www.ncbar.org/cle/scholarship
**STEP 1: Tell us who you are.** (Please print clearly.)

Print Full Name: ________________________________________________________________

Address: _______________________________________________________________________

City, State and ZIP: __________________________________________________________________

Daytime Phone Number: __________________________________________________________________

Email Address: ________________________________________________________________

NC State Bar No. (Required for MCLE Credit): _____________________________

**STEP 2: Select your tuition rate.** (Register early and save 10%. Payment must be received three (3) weeks prior to program date to qualify for the early rate.)

NC, SC and/or GA Attorney  ☐ $740 /  ☐ $665 Early

CLE Premier Pass:  ☐ $0

**STEP 3: Select your learning format.**

☐ Live (822TSW)  ☐ Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit www.tinyurl.com/CLE822TSW and indicate your choice below.

Location: ______________________________ Date: _________ Code: __________

**STEP 4: Complete your payment information.**

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

☐ Enclosed is a check, payable to NCBA.  ☐ Please charge my credit card.

Card Number: ____________________________________________ Exp. Date: _________

Total Amount: _________ Signature: ____________________________

Discounts may be available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.
REGISTRATION: All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. CHANGES TO EXISTING REGISTRATIONS: Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a $75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at askcle@ncbar.org or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Missing any portion of a program results in loss of receipt of MCLE credit for the program. MISCELLANEOUS: The NCBA reserves the right to cancel or reschedule programs at any time. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee’s image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.