

NORTH CAROLINA BAR ASSOCIATION

seeking liberty + justice

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

REGISTER TODAY!

Save 10% if registration is received
by May 3, 2019.

www.tinyurl.com/CLE822TSW

9.0
HOURS

TOTAL CLE CREDIT

1.0
HOUR

Ethics/Professional
Responsibility

Program includes the
2019 NCBA Tax Section
Annual Meeting

AVAILABLE FORMATS



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

FRIDAY EVENING RECEPTION

Kiawah Island Resort
Osprey Point Clubhouse
6:30–7:30 p.m.

Sponsored by Forensic Strategies Solutions, LLC

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

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

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.

REGISTER TODAY!

Online: www.tinyurl.com/CLE822TSW | **By phone:** 800.228.3402

By mail: Attn: Accounting–NCBA, 8000 Weston Parkway, Cary, NC 27513

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.

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NCBA is an accredited CLE sponsor under the MCLE regulations promulgated by the North Carolina State Bar Board of Continuing Legal Education.

INTRODUCING...

premier pass

The 2018-2019 CLE Premier Pass is
an exclusive NCBA member benefit
providing unlimited CLE
including access to hundreds of
On Demand programs.

www.tinyurl.com/PremierPass

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. Except as provided herein, registrations, including On Demand registrations, cannot be cancelled, substituted or transferred once purchased. **NO SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such program changes 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.