GEORGIA FEDERAL TAX CONFERENCE

Presented by the GFTC, Inc.

June 8-9, 2017

Cobb Galleria Centre, Atlanta, Ga.

Event Codes: 13075, LS13075

gftc
Georgia Federal Tax Conference

The Georgia Society of CPAs

2017 GEORGIA FEDERAL TAX CONFERENCE

June 8-9, 2017 | Cobb Galleria Centre, Atlanta, Georgia

Event Code: 13075 (Both days); 13076 (Thursday only); 13077 (Friday only)

Credit: 16 hours CPE credit | 12.3 hours CLE credit at $5 per hour (applied for)
16 hours CLU credit (applied for) | 16 hours CFP® credit (applied for)

The Georgia Federal Tax Conference is designed for experienced tax professionals and features up-to-date changes in tax law and the latest from Washington, D.C. in anticipation of future developments.

The conference focuses on one specific area of knowledge each day. Day one will discuss trending topics related to estate planning. Day two will delve into income tax issues.

EXHIBITORS:

Bloomberg BNA
KBKG
Nease, Lagana, Eden & Culley
PREF, LLC

LIVE STREAM ATTENDANCE

Event Code: LS13075, LS13076, LS13077

14.8 hours of CPE, CFP®, CLU credit | 12.3 hours of CLE credit

All sessions for this conference are available to live stream. For more information or to register, visit olc.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

THURSDAY, JUNE 8 - ESTATE PLANNING

7 - 8 a.m.
Registration/Continental Breakfast

8 - 8:05 a.m.
Welcome and Announcements

8:05 - 10:05 a.m.
A - Recent Wealth Transfer Developments
Sam Donaldson, J.D., LL.M., Georgia State University, College of Law, Atlanta, Ga.
This informative and entertaining recap will cover the important cases, rulings, regulations, and legislation from the past 12 months related to federal income, estate, and gift taxes.

10:05 - 10:20 a.m.
Networking Break

10:20 - 11:10 a.m.
B - Prospects for Estate Tax Changes Five Months into the Trump Administration
Ronald D. Aucutt, Esq.,
McGuireWoods LLP, Tysons Corner, Va.
Discuss whether there will there be tax reform; if the estate tax will be repealed; whether the consistent basis rules will ever make any sense; what is happening with valuation discounts; and other changes that affect estate planning.

11:20 a.m. - 12:10 p.m.
C - Estate Planning for Private Equity and Hedge Fund Principals
Christine R. W. Quigley, Esq.,
Schiff Hardin, Chicago, Ill.
Focus on the challenges and opportunities unique to wealth transfer planning for principals of private equity, hedge, venture capital and other private investment funds, including an in-depth discussion of the application of Code Section 2701 and carried interest planning alternatives.

12:10 - 1:30 p.m.
Lunch
Sponsored by Synovus Family Asset Management
D - Economic and Market Outlook
Daniel Morgan,
Synovus Trust Company, Atlanta, Ga.
The Federal Reserve's decision to raise the "Fed Funds" Rate could place the current muted economic recovery at risk. What will be the long-term impact of these policies? How long will it take Trump's proposed growth stimulators to actually lead to a stronger economy? How does the mushrooming Federal Deficit impact future growth?

1:35 - 2:25 p.m.
E - Using Trusts as Beneficiaries of Retirement Benefits
James Narron,
Narron, O'Hale & Whittington, P.A.,
Smithfield, N.C.
Special situations and special beneficiaries, from blended families to minors to special needs children and spendthrifts, require special solutions. Explore trusts as solutions and shall address tax issues, fixing mistakes, economic considerations, and more.

2:25 - 2:40 p.m.
Networking Break

2:40 - 3:30 p.m.
F - Walking Thru Form 706
Terri E. Lawson, CPA CDFA,
Frazier & Deeter LLC, Atlanta, Ga.
Jeremy Ware, Esq.,
Arnall Golden Gregory, Atlanta, Ga.
Walk through Form 706, the basics, things to look for, common mistakes and other topics with a focus on Schedules M and R for the marital deduction and GST implications. Also review a completed Form 706 and the new Form 8971.

3:40 - 4:30 p.m.
G - Modifying Obsolete Estate Planning Techniques
John J. Scroggin, J.D., LL.M, AEP,
Scroggin & Company, PC, Roswell, Ga.
Tax and estate planning laws and strategies continue to evolve. Client facts change in unexpected ways. Mistakes are inadvertently made in a client's planning. Discuss ways to modify existing techniques that no longer make sense and discuss how to plan flexibility into new estate planning strategies.

FRIDAY, JUNE 9 - INCOME TAX

7 - 8 a.m.
Registration/Continental Breakfast

8 - 10 a.m.
H - What's New: 2016 Federal Income Tax Update
Christine P. Engle, CPA,
Regier Carr & Monroe, LLP, CPAs,
Tucson, Ariz.
Take a lively look at federal legislative and regulatory changes as well as court decisions affecting 2016 returns. Also touch on various issues affecting the environment of tax practice as a result of these changes.

10 - 10:15 a.m.
Networking Break

10:15 - 11:05 a.m.
I - America's Largest Tax Break: The R&D Tax Credit
Sponsored by alliantgroup
Kevin Corley, CPA,
alliantgroup, LLP, Houston, Texas
Review the latest updates to powerful tax credits, incentives and deductions for American business owners. Walk through the Research and Development (R&D) Tax Credit and why it applies to your clients, how they can qualify for these credits and the latest changes to the tax code from the IRS.

11:15 a.m. - 12:05 p.m.
J - Roll Without Punches
Philip Gall, J.D., LL.M.,
Ernst and Young, New York, NY
Max Pakaluk, J.D.,
Ernst and Young, Washington, D.C.
Consider various tax issues arising in connection with dispositions of businesses when the existing owners of the target receive continuing equity interests in the acquirer, often referred to as rollover equity. Focus on rollover equity in partnerships and on structures used to ensure the receipt of the rollover equity on a tax-deferred basis.

12:05 - 1:25 p.m.
Lunch
Sponsored by Sterling Foundation Managment LLC
K - Cybersecurity: Avoid These Common Pitfalls
Brian Muia, CPA,
Jones and Kolb, CPAs, Atlanta, Ga.
Are you a victim of cybersecurity? If your answer is yes, what should you be doing to mitigate future risks? If your answer is no, statistics say you are wrong. Discuss real life threats and how to avoid the common cybersecurity pitfalls.

1:30 - 2:20 p.m.
L - International Tax Compliance, Enforcement, and Disputes: Pressing Issues in 2017 and Beyond
Hale E. Sheppard, J.D., LL.M.,
Chamberlain, Hrdlicka, White, Williams & Aughtry, Atlanta, Ga.
Nowadays, nearly all taxpayers have international aspects. The IRS receives more data than ever about foreign activities thanks to FATCA, e-filing of FBARs, Forms 8938, whistleblowers, the "Panama Papers," etc. This combination will trigger, in 2017 forward, more international enforcement than ever. Addresses pressing issues and solutions.

2:20 - 2:35 p.m.
Networking Break

2:35 - 3:25 p.m.
M - New Partnership and Audit Rules
Mark Mesler, J.D.,
Ernst & Young LLP, Atlanta, Ga.
Matthew Cooper, J.D.,
Ernst & Young LLP, Washington, D.C.
The Bipartisan Budget Act of 2015 (BBA) enacted new centralized partnership audit regime to replace the TEFRA and electing large partnership (ELP) partnership audit regimes. An unofficial draft of the proposed regulations were released to the public on Wednesday, January 18, 2017. Mr. Mesler and Mr. Cooper will provide an overview of the proposed regulations.

3:35 - 4:25 p.m.
N - Legal Residency and Changing Legal Residency for Georgia State Income Tax Purposes
Richard Litwin, Esq.,
The Litwin Law Firm, PC, Atlanta, Ga.
This session will (1) explain Georgia law on legal residency (domicile), (2) explain the obligations of a legal resident with regarding to reporting and paying income tax on 100 percent of his/her income, (3) present the steps required to change legal residency to another state or country, and (4) examine the presumption of continuing legal residence and other traps that unwary taxpayers face when trying to prove that he/she has broken ties with Georgia and established legal residency in another state or country.

REGISTRATION

Event Code: 13075

ONLINE registration available at http://bit.ly/GFTC17-GSCPA

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to: The Georgia Society of CPAs
Six Concourse Parkway, Suite 800
Atlanta, GA 30328

Name MI Last Member #

Company/Firm Name

Address

City State Zip

Phone Fax Email

Registration Confirmation: ❑ Mail ***OR*** ❑ Email

Check here if registration includes a change of address: ❑

PRICING INFORMATION

Select Course Number	Early Fee	Standard Fee	Live Stream Early Fee	Live Stream Standard Fee
Both Days - 13075	❑ $515 by 5/18	❑ $560 after 5/18	❑ $515 by 5/18	❑ $560 after 5/18
Thursday Only - 13076	❑ $350 by 5/18	❑ $380 after 5/18	❑ $350 by 5/18	❑ $380 after 5/18
Friday Only - 13077	❑ $350 by 5/19	❑ $380 after 5/19	❑ $350 by 5/19	❑ $380 after 5/19

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a $50 administration fee. Cancellations/Transfers made within three business days are subject to a $100 administration fee. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*

Turn Form Over for Payment Information

FIRM DISCOUNT INFORMATION

Firms registering three or more professionals for **BOTH DAYS** of the event are eligible for the following discounts. You must register all professionals at the same time to qualify, and you must mail, fax or call to register on or before May 18, 2017. Please attach a list of the professionals attending.

❑ 3-4 people (10% discount)	$464 per person (You save up to $204)
❑ 5-6 people (15% discount)	$438 per person (You save up to $462)
❑ 7 or more people (25% discount)	$386 per person (You save a minimum of $903)

PAYMENT INFORMATION

❑ Use Money on Account

❑ Check for $____________ made payable to The Georgia Society of CPAs

❑ Amount to charge credit card $____________ ❑ Personal Card *OR* ❑ Company Card

❑ Discover ❑ MasterCard ❑ AmEx ❑ Visa

Card Number ____________________ Expiration Date ____________________

Name as it appears on card ____________________

Signature ____________________

MATERIALS *Choose how you wish to receive conference materials*

❑ Download eMaterials — **No printed materials provided at the conference**

❑ Printed Materials — **Will receive printed materials at the conference**

Live Stream Attendees will receive eMaterials

ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

PHOTOGRAPHY

By attending this event, you are demonstrating your permission to allow your photo to be taken and published in GSCPA marketing, promotional and web materials.

HOTEL

Renaissance Waverly Hotel
2450 Galleria Parkway, Atlanta, Ga. 30339
Hotel phone number: 770-953-4500
Website: www.renaissancewaverly.com

A block of rooms has been reserved at the rate of $169 per night, June 7-9, 2017.
Be sure to mention The Georgia Society of CPAs when making your reservation.
Special rate available until: Wednesday, May 17, 2017
To make your reservation: Call 1-888-391-8724

FACILITY

Cobb Galleria Centre
2 Galleria Parkway SE, Atlanta, Ga. 30339
770-955-8000
Directions: http://cobbgalleria.com/attendees/the-destination/directions-parking

GEORGIA FEDERAL TAX CONFERENCE TRUSTEES

The Georgia Society of CPAs

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