



STATE BAR OF WISCONSIN
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70TH ANNUAL TAX SCHOOL

Program dates start December 6. Register today!

**7 CLE
1 EPR**

70TH ANNUAL TAX SCHOOL

***This program is endorsed by the Taxation Law Section
of the State Bar of Wisconsin***

Top tax training on multiple topics

It's commonly said that with age comes wisdom. At 70 years old, the *Annual Tax School* is well-known for offering wise counsel on the latest tax law implications. Respected attorneys will make sure you're up-to-speed on:

- The latest state and federal tax changes
- Current ethics rules and issues
- IRS audits
- Real estate tax incentive program updates
- Trust and estate income taxation rules

Plus, gain a better understanding of:

- Key tax aspects to consider when drafting operating agreements
- How to utilize opportunity zones

Who should attend:

- Taxation attorneys
- Business lawyers
- Estate planning & probate practitioners

How you'll benefit:

- Get the latest state and federal tax updates
- Earn an ethics credit and hear the latest IRS penalty issues
- Explore tax issues that arise when drafting operating agreements
- Improve communication with the IRS
- Learn how to use the latest real estate tax incentives
- Understand the rules of income taxation of trusts and estates

Register today!

Schedule

8:00 AM Registration

8:30 AM Federal Tax Update

Patricia A. Hintz

9:20 AM State Tax Update

Kristina E. Somers

10:10 AM Break

10:25 AM Hot Tax Practice Procedure and Ethics Issues

- Update on the office of professional responsibility
 - A discussion of current IRS audit issues
 - Hot IRS penalty issues
- Michael G. Goller*

11:15 AM Income Taxation of Trusts and Estates

- Summary of the rules of the income taxation of trusts and estates
 - Issues related to the Tax Cuts and Jobs Act
 - An overview of state income tax issues relating to *Kaestner v. North Carolina*
- Carl D. Holborn*

12:05 PM Lunch (on your own)

1:05 PM Tax Aspects of Drafting Operating Agreements

- Understanding the regulatory language contained in most operating agreements
 - Purpose and risks of deficit restoration obligations
 - Using target capital account versus layered allocation language
 - Common waterfall economic deals and related drafting techniques
- Sarah E. McNally, Douglas J. Patch*

1:55 PM Hot Topics in Real Estate Tax Incentives

- Opportunity Zones and how to use them
 - 1031 Exchange practice updates
 - Updates to other incentive programs
- Hal Karas, Rebecca H. Mitich*

2:45 PM Break

3:00 PM Responding to Inquiries, Notices, and Demands in Light of Recent IRS Trends

- Communications with the IRS in controversy and collection matters
 - Reviewing and responding to inquiries, notices, and demands
 - Consequences when responses are not made
- Courtney A. Hollander*

3:50 PM Program Concludes

Following start time, webcast replay schedule will vary slightly from above listed times.

Faculty

Program Chair

Daniel B. Geraghty
Husch Blackwell LLP
Milwaukee

Presenters

Michael G. Goller
Reinhart Boerner Van Deuren, S.C.
Milwaukee

Patricia A. Hintz
Quarles & Brady LLP
Milwaukee

Carl D. Holborn
O'Neil, Cannon, Hollman, DeJong &
Laing, S.C.
Milwaukee

Courtney A. Hollander
von Briesen & Roper, S.C.
Oshkosh

Hal Karas
Husch Blackwell LLP
Milwaukee

Sarah E. McNally
Godfrey & Kahn, S.C.
Milwaukee

Rebecca H. Mitich
Husch Blackwell LLP
Milwaukee

Douglas J. Patch
Godfrey & Kahn, S.C.
Milwaukee

Kristina E. Somers
Reinhart Boerner Van Deuren, S.C.
Milwaukee

Dates Location

Live Brookfield Seminar

Friday, December 6, 2019
Sheraton Milwaukee Brookfield
375 S. Moorland Rd.
Brookfield, WI
(262) 364-1100

Live Webcast

Friday, December 6, 2019

Webcast Replays

Tuesday, December 17, 2019
Monday, December 23, 2019
Saturday, December 28, 2019
Tuesday, December 31, 2019
Friday, January 10, 2020

Additional webcast replay dates
are available for this program.
Visit wisbar.org/seminars for
more information and to register.

Credits

This program has been submitted
to the Wisconsin Board of Bar
Examiners for up to **7 CLE credits**
including 1 Ethics and Professional
Responsibility credit.

*This program is
sponsored by:*

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Additional Learning Opportunities

Innocent Spouse Tax Relief: Myth or Reality? – 2019

Learn the three bases for relief from liability. Understand what facts and circumstances
are considered by the IRS. Receive the criteria for both separation of liability relief and
for equitable relief. Know how and when to request relief. **1 CLE**

CLE OnDemand Seminar: #CA2903D; **Member:** \$89 | **Nonmember:** \$139

Wisconsin's Real Estate Transfer Tax – 2019

Learn how to properly complete a Real Estate Transfer Return (RETR). Hear from
Wisconsin Department of Revenue experts. Know the top ten mistakes in completing
returns and steps to take to prevent making them. Understand pertinent exemptions
to avoid paying unnecessary tax or steep penalties. **1 CLE**

CLE OnDemand Seminar: #CA2916D; **Member:** \$89 | **Nonmember:** \$139

Income & Payroll Tax in International Services – 2019

Gain an understanding of taxation issues that Wisconsin companies face when sending an
employee to work overseas. Know the taxation issues facing foreign employment to avoid
problems and overpayment. Help your clients lower their tax compliance risk. **1 CLE**

CLE OnDemand Seminar: #CA2915D; **Member:** \$89 | **Nonmember:** \$139

Registration

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Registrations
P.O. Box 7158
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Registration Cancellations:

Please visit wisbar.org/cancellation_policy for information on PINNACLE registration cancellation policies.

Course materials for those attending the seminar:

Course materials are provided in PDF format and are downloadable from myStateBar on wisbar.org up to four days prior to and 90 days after your seminar. For live seminar attendees who prefer a printed format, please select the tuition option that includes printed materials for an additional \$20.

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STATE BAR OF WISCONSIN

70th Annual Tax School

Priority Code: S 3 7 6 6 T B

SEMINAR TUITION	LIVE SEMINAR: With PRINTED Course Materials	LIVE SEMINAR: With Downloadable (PDF) Course Materials	WEBCAST SEMINAR: With Downloadable (PDF) Course Materials
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$249	<input type="checkbox"/> \$229	<input type="checkbox"/> \$259
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<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> \$20 + 1 Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

Seminar Date/Location:

- ☐ **Live Seminar:** Friday, December 6, 2019 – Brookfield
- ☐ **Live Webcast:** Friday, December 6, 2019
- ☐ **Webcast Replay:** Tuesday, December 17, 2019
- ☐ **Webcast Replay:** Monday, December 23, 2019
- ☐ **Webcast Replay:** Saturday, December 28, 2019
- ☐ **Webcast Replay:** Tuesday, December 31, 2019
- ☐ **Webcast Replay:** Friday, January 10, 2020

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