

Tax Season



LOADING...

# 74th Annual Tax School

**Program dates start November 29. Register today!**

**6 CLE  
1 EPR**

# 74th Annual Tax School

Co-produced with the Taxation Law Section of the State Bar of Wisconsin

## Trending tax topics

Designed to keep you on top of recent developments in taxation law, the **74th Annual Tax School** is loaded with insights on current and upcoming tax trends. In addition to state and federal law updates, a slate of experienced practitioners will cover current issues in ethics and procedure and survey the international tax law landscape. Learn to spot potential pitfalls when planning charitable contributions of appreciated property and receive guidance from the Wisconsin Tax Appeals Commission on appellate practice and procedure.

## How you'll benefit:

- Get the latest updates on state, federal, and international tax law
- Hear insights directly from the Wisconsin Tax Appeals Commission
- Review the hottest IRS audit issues and anticipate coming audit trends
- Analyze recent case law and IRS activity on charitable contributions of property

## Who should attend:

- Taxation attorneys
- Business attorneys

**Register now!**

Anytime. Anywhere. CLE OnDemand.™

visit [wisbar.org/ondemand](http://wisbar.org/ondemand)

## Schedule

**8:00 AM Registration**

**8:30 AM Federal Tax Update**

*Patricia A. Hintz, Courtney A. Hollander*

**9:20 AM State Tax Update**

*Kristina E. Somers*

**10:10 AM Break**

**10:25 AM Hot Tax Practice Procedure and Ethics Issues**

- Circular 230 and beyond
- A summary of what's hot and what's not in the tax ethics and procedure areas
- An update on hot IRS audit issues

*Michael G. Goller*

**11:15 AM International Tax Update**

*Robert J. Misesy, Jr.*

**12:05 PM Lunch (on your own)**

**1:05 PM Charitable Contributions of Property**

- Significant income and estate tax benefits of charitable giving of appreciated property
- Substantiation, compliance, valuation, and timing issues that can upset taxpayer planning and objectives
- Contribution requirements
- Apparent increase of interest of taxing authorities to examine such gifts

*Robert B. Teuber*

**1:55 PM Wisconsin Tax Appeals Commission — Procedures and Practice**

- Summary of the process of appealing to the Commission
- Overview of procedures once an appeal is before the Commission
- Types of evidence and argument the Commission expects to see and hear

*Comm. Elizabeth Kessler, Comm. Jessica Roulette*

**2:45 PM Program Concludes**

*Following start time, schedule will vary slightly from above listed times*

## Faculty

### Presenters

**Patricia A. Hintz**

Quarles & Brady LLP, Milwaukee

**Courtney A. Hollander**

Quarles & Brady LLP, Milwaukee

**Michael G. Goller**

Reinhart Boerner Van Deuren, S.C.,  
Milwaukee

**Comm. Elizabeth Kessler**

Chairperson, Wisconsin Tax Appeals  
Commission, Madison

**Robert J. Misey, Jr.**

Reinhart Boerner Van Deuren, S.C.,  
Milwaukee

**Comm. Jessica L. Roulette**

Wisconsin Tax Appeals Commission,  
Madison

**Kristina E. Somers**

Reinhart Boerner Van Deuren, S.C.,  
Milwaukee

**Robert B. Teuber**

von Briesen & Roper, S.C.,  
Milwaukee

## Dates Location

### In-Person Seminar – Madison

Wednesday, November 29, 2023

**State Bar Center**

5302 Eastpark Blvd.

Madison, WI

(608) 257-3838

### Live Webcast

Wednesday, November 29, 2023

### Webcast Replay

Wednesday, December 6, 2023

Monday, December 11, 2023

Wednesday, December 20, 2023

Thursday, December 28, 2023

Tuesday, January 2, 2024

Saturday, January 6, 2024

Wednesday, January 10, 2024

Friday, January 19, 2024

Monday, January 22, 2024

## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **6 CLE credits including 1 Ethics and Professional Responsibility credit.**

## Registration

**ONLINE:** wisbar.org/seminars

**PHONE:** (800) 728-7788

**FAX:** (608) 257-5502

**MAIL:** State Bar PINNACLE Registrations

P.O. Box 7158

Madison, WI 53707-7158

### State Bar CLE/PINNACLE Passbook registrations

Passbook Certificates must be received by the State Bar at least one business day prior to the event. For in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

### Registration Cancellations

Please visit [wisbar.org/cancellations](http://wisbar.org/cancellations) for information on PINNACLE registration cancellation policies.

### Course materials for attendees

Course materials are provided in PDF format and are downloadable from *myStateBar* on wisbar.org up to two days prior to and 90 days after your seminar.

### COVID-19 safety information

Complete and current safety guidelines can be found at [wisbar.org/covidsafety](http://wisbar.org/covidsafety).

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## Book Bonus!

### Commercial and Consumer Transactions in Wisconsin

Seminar attendees **SAVE 15%** on *Commercial and Consumer Transactions in Wisconsin*.\* Get the Wisconsin legal perspective on domestic and international transactions in this comprehensive volume filled with practical guidance on tackling the challenges your business clients face.



\* Attendees will receive information to access the discount via email after attending the program. Discount applies to both print and digital Books UnBound® editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.

## Additional Learning Opportunities

### CLE OnDemand™

### 73rd Annual Tax School 2022

Assess the tax implications of Wisconsin's new business entity laws and learn how tax authorities analyze crypto and other virtual assets. Explore municipal and commercial property taxes and discover how the Wisconsin Department of Revenue assesses returns for pass-through entities. **7 CLE**

CLE OnDemand Seminar: #CA3325D; Member: \$269 | Nonmember: \$349

### The Generation-Skipping Transfer Tax 2023

Create more comprehensive estate plans for wealthier clients with generation-skipping transfers (GST). Review important GST terminology and core concepts and gain strategies for minimizing tax burdens on beneficiaries. **1 CLE**

CLE OnDemand Seminar: #CA3555D; Member: \$99 | Nonmember: \$149

### Books / Books UnBound®

### Marital Property Law & Practice in Wisconsin

From determining property ownership and filing for bankruptcy, to planning estates and giving advice on tax issues, *Marital Property* delivers the answers you need in an organized, time-saving manner. It includes helpful sample forms, documents, flowcharts, and tables to assist with property classification.

Print Book: #AK0067; 860+ pp.; 5th ed. 2018-19; Member: \$313 | Nonmember: \$390  
Books UnBound Subscription: #AE0067\_SUB; Member: \$309 | Nonmember: \$383

# 74th Annual Tax School

Priority Code: S 4 2 7 0 B

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#### IN-PERSON SEMINAR:

Weds., Nov. 29, 2023 –  
Madison

#### LIVE WEBCAST:

Weds., Nov. 29, 2023

#### WEBCAST REPLAYS:

Weds., Dec. 6, 2023  
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