

8th Annual North Carolina/ South Carolina Tax Section Workshops



LIVE PROGRAM

Fri.–Sun., May 22–24

Kiawah Island Golf Resort
East Beach Conference Center
Kiawah Island, SC

NC MCLE Credit: 8.5 Hours, includes
1.0 Ethics/Professionalism

SC CLE Credit: This program has
been approved for 8.5 MCLE credit
hours including up to 2.0 LEPR hours
by the South Carolina Supreme Court
Commission on CLE and Specialization.
This program has also been approved
by the Commission for up to 8.5 hours
of Taxation Law specialty credit and up
to 3.0 hours of Estate Planning and
Probate Law specialty credit.
Not Available on Video Replay

Once again, the Tax Sections of the North Carolina Bar Association and South Carolina Bar convene at Kiawah Island for a weekend of CLE, fellowship, and all the golf and other recreational activities offered at Kiawah. We are pleased that our program is again being sponsored in partnership with the Tax Section of the American Bar Association. The program content for the Eighth Annual North Carolina/South Carolina Tax Section Workshops is designed for the seasoned tax and business lawyer or practitioner. This year, topics include:

- Tax and Non-Tax Aspects of Bankruptcies and Workouts
- A North Carolina Tax Update by North Carolina Secretary of Revenue Kenneth Lay
- A South Carolina Tax Update by SC Department of Revenue Director Ray Stevens
- Serving as Tax Counsel in Lawsuit Settlements and Judgments
- Ethics and Circular 230
- An IRS Case Law Update

As always, the Eighth Annual North Carolina/South Carolina Tax Section Workshops delivers top-notch speakers with practical advice and information you can use in your practice. Come join us for the opportunity to network, learn and play.

Sponsored by the North Carolina Bar Association Foundation and the South Carolina Bar Continuing Legal Education Division in cooperation with the Tax Section of the American Bar Association



The Fine Print

Registration

Registrations (including door registrations) are limited to available space, which may include a live video broadcast overflow room. Registrations received the week of the program or at the door cannot be guaranteed a book.

MCLE Credit

The NC Bar Association Foundation is an accredited CLE sponsor under the MCLE Regulations promulgated by the NC State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the designated number of CLE hours. This program likewise has been approved by the South Carolina Supreme Court Commission on CLE and Specialization. The NCBAF is also an accredited sponsor for MCLE in other states. It is the responsibility of each attorney to maintain a record of his/her attendance at CLE programs for the NC State Bar annual report and the South Carolina Supreme Court Commission on CLE and Specialization. MCLE credit is reported only if NC State Bar number and/or SC Bar number is provided.

NCBA CLE Passports

“Traditional” Passport holders exceeding the 30-hour limit for NCBA Members or the 15-hour limit for Paralegal Division Members will be charged \$75 per program. “Hybrid” Passport holders exceeding the 12-hour limit for live or video replays will also be charged \$75 per program.

Transfers

Registrants may transfer from a Live program, Video Replay or TeleSeminar without penalty within three working days after the program date. A registration may be transferred once. Registrants may not transfer to/from a CLE Webcast, a CLE Webinar, CLEonTheGo or a CyberCLE program unless they are “Virtual” or “Hybrid” Passport holders.

Cancellations

Cancellations must be received by 9 a.m. the third working day prior to the program to qualify for a refund (less \$25 admin. fee). Those not attending receive program materials (if included in tuition) in full consideration of tuition paid.

Inclement Weather

NCBAF makes every effort to contact registrants when a program is cancelled due to weather. If inclement weather is forecasted, but you have not heard from us, visit www.ncbar.org, call the Bar Center or contact the site location on your registration confirmation postcard. If the site is closed, the program may be rescheduled.

Agenda

Friday, May 22

8:30–9:00 a.m.

Registration and Continental Breakfast

9:00–10:00

Case Law Update • Young

An update on recent developments in tax litigation
Break

10:00–10:15

10:15–12:15 p.m.

Concurrent Breakout Sessions

North Carolina Department of Revenue Update

• *Avrette, Faires and Stephen*

An update of North Carolina state tax issues

South Carolina Department of Revenue Update

• *Stevens*

An update on South Carolina state tax issues

12:15–1:00

NC Tax Section Council Meeting

1:30–1:40

8 golfers Turtle Point \$192 (including green fees, range balls and cart)

Watch for sign-up form from NCBA Sections and Divisions

6:30

Watch your e-mail for specifics on a social event
Friday night

Saturday, May 23

8:00–8:30 a.m.

Continental Breakfast

8:30–10:15

Roundtable: Individual and Corporate Tax Aspects of Bankruptcy; Bankruptcy Law for Tax Lawyers

• *Germain, Pope and Sheehy*

As part of our continuing partnership with the American Bar Association Section of Taxation, three nationally-recognized speakers discuss tax and non-tax issues in bankruptcies and workouts. These topics promise to be especially relevant in these difficult economic times.

10:15–10:30

Break

Sponsored by 1031 Exchange Services/Southern Financial Services

10:30–12:15 p.m.

Continuation of Roundtable Discussion

12:15–12:30

NC Tax Section Annual Meeting

1:00–1:10

8 golfers Osprey Point \$192 [including green fees, range balls and cart]

Watch for sign up form

Sunday, May 24

8:30–9:00 a.m.

Continental Breakfast

9:00–10:00

Practical Tips to Serving as Tax Counsel in Lawsuit Settlements and Judgments • Mobley

Common issues relating to the federal income taxation of settlements and judgments benefit both tax lawyers and non-tax lawyers.

10:00–10:15

Break

10:15–11:15

***Ethics Including Circular 230 • Graves**

Ethical issues inherent in a document all tax practitioners should be familiar with – IRS Circular 230

**Indicates portion providing Ethics/Professionalism credit.*

*Brought to you by the North Carolina Bar Association Foundation CLE
www.ncbar.org/CLE*

Planners

- *Eugene W. Chianelli Jr.*, Manning Fulton & Skinner PA, Raleigh, NC
- *W. Jackson Turner-Vaught*, Turner-Vaught Law Firm LLC, Myrtle Beach, SC

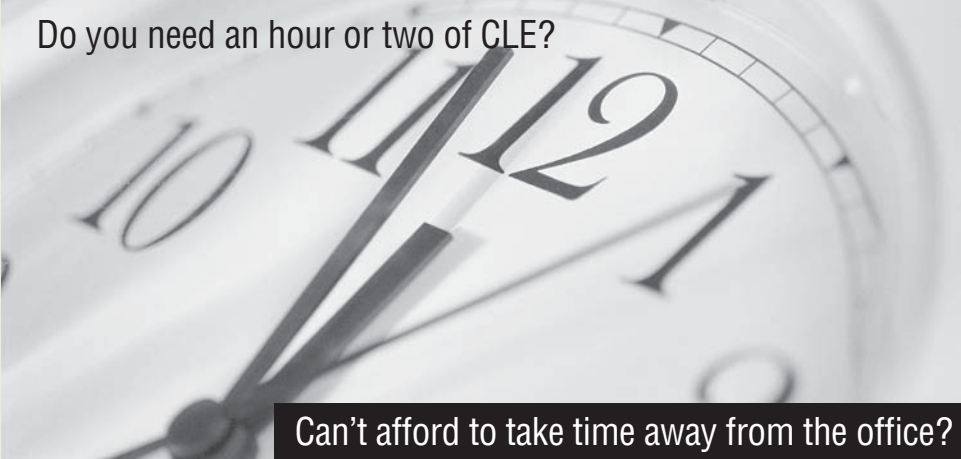
Speakers

- *Cynthia W. Avette*, Legislative Services, Raleigh, NC
- *Sabra J. Faires*, Senate President Pro Tem's Office, Raleigh, NC
- *Gregory Germain*, Associate Professor of Law, Syracuse University College of Law, Syracuse, NY
- *Rick Graves*, Webb & Graves PLLC, Wilmington, NC
- *Jared D. Mobley*, K&L Gates LLP, Charlotte, NC
- *William Robert Pope Jr.*, White & Reasor PLC, Nashville, TN
- *Frances D. Sheehy*, Law Offices of Frances D. Sheehy, Coconut Creek, FL
- *Roland Stephen*, Assistant Director for Policy and Research, Institute for Emerging Issues, North Carolina State University, Raleigh
- *Ray N. Stevens*, Director, South Carolina Department of Revenue, Columbia, SC
- *Craig Young*, Internal Revenue Service, Greensboro, NC

Sponsors

Sponsors at time of printing

1031 Exchange Services/Southern Financial Services – Saturday Morning Break
ComStock Advisors – Attendee Tote Bags



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CyberCLE:
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Hotel

Contact hotel directly for reservations & guest services • Rates based on availability • Occasionally room blocks fill before cutoff date • To guarantee your room at this special rate, contact the hotel today and mention you are with the NC Bar Association

Kiawah Island Golf Resort

One Sanctuary Beach Drive • Kiawah Island, SC

Rates: \$236 One Bedroom Scenic View Villa
\$259 Two Bedroom Scenic View Villa
\$324 Three Bedroom Scenic View Villa
\$422 Two Bedroom Ocean View Villa

\$12 service charge per villa, per night, applied to the above villa rate for unlimited local phone calls, credit card access calls, 800 number calls, in-room complimentary coffee and island-wide shuttle service including all transportation to all resort-owned golf courses.

Reservations: (800) 654-2924

Please mention group booking number 6640.

Cutoff Date: April 28

The NCBA CLE has obtained this special room rate by contracting a total meeting package at the Kiawah Island Resort. We must meet certain minimum hotel room requirements or face attrition and/or meeting room rental charges. To continue to provide reasonable CLE registration fees, we need your help. Please take advantage of this negotiated room rate.



For thousands of years, eagles, egrets and other natural residents of Kiawah have enjoyed its lush, semi-tropical environment, while remaining sheltered from the world. Today, Kiawah Island remains a haven for those who stay. However, the reasons for visiting have become more varied. From 10 miles of romantic, unspoiled beach to 30 miles of paved, biking trails. From kayaking and canoeing adventures to alligator and birding walks. From oceanfront fine dining to riverside oyster roasts.

Then there's the golf — spectacular golf. Five championship courses, including the world-famous Ocean Course, host of the 1991 Ryder Cup Matches, the 1997 & 2003 World Cup of Golf, the 2007 Senior PGA Championship and the 2012 PGA Championship.

This is Kiawah Island, where nearby Charleston's influences abound. The choices are plentiful and the people are polite to a fault. Kiawah's friendly character is derived from the gracious Charleston lifestyle, in which Southern Hospitality is never the exception and every meal is a celebration of tastes. The island's proximity to such a charming and desired destination is not only convenient. It's also unique. The transportation is seamless; the resort experience unlike any other.

Note: In order to take advantage of the amenities at the Kiawah Island Resort, you must book your accommodations through the NC Bar Association room block.

Print Full Name _____
 Firm/Agency Name _____
 Street Address _____
 PO Box _____
 City/State/Zip _____
 Daytime Phone/Daytime Fax _____
 E-mail Address _____
 for MCLE Credit list both:
 NC State Bar No. _____ NCBA No. _____
 SC Bar No. _____
 Check if any information has changed

> **Program Choice**

Registration must be received one week prior to program date for Early Bird tuition

Live Program

May 22–24 Kiawah Island, SC #587TSW
 ( May 15)


> **Can't Attend?**

Buy the Materials!

Add 6.75% Sales Tax to all items except books ordered before the live program date. Please allow 2–4 weeks from live program date or order date for delivery.

Book Order—Member \$115.75
 Book Order—Non-Member \$135.75
 Book Order—CLE Passport Participant \$82.75

> **Tuition**

	Early Bird Rec'd  1 week before program	Regular Rec'd less than 1 week before program
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The following categories include the MCLE fee and materials.

<input type="checkbox"/> NCBA Member Only	\$385	\$455
<input type="checkbox"/> SC Bar Member Only	\$385	\$455
<input type="checkbox"/> NCBA and SC Bar Member	\$385	\$455
<input type="checkbox"/> Non-Member	\$445	\$510
<input type="checkbox"/> CLE Passport Participant	No Charge	

The following categories do not include any MCLE fee. You must attend to receive the materials.

<input type="checkbox"/> Judge (NCBA Member)		\$25
<input type="checkbox"/> Law Professor (NCBA Member, full-time at ABA accredited law school)		\$25
<input type="checkbox"/> NCBA Law Student Division Member		\$25
<input type="checkbox"/> NCBA Paralegal Student Member		\$25

To ensure credit in South Carolina, please register accordingly.

> **Payment Options** *Registration is processed only after payment is received*

Total \$ _____
 Check Enclosed *Payable to NC Bar Foundation* Visa/MC/AmEx
 Acct. # _____ Exp. Date _____
 Signature _____

**4 ways
to register:**

Phone CLE
 (919) 677-8745
 (800) 228-3402
 Credit card only

Web site
www.ncbar.org/CLE
 Credit card only

Fax CLE
 (919) 677-1774
 Credit card only

Mail
 Attn: Accounting • NCBAF
 PO Box 3688, Cary, NC 27519

Fri.–Sun., May 22–24, 2009 Kiawah Island, SC

TAX SECTION ANNUAL MEETING Program HIGHLIGHTS

- Roundtable on tax and non-tax aspects of bankruptcies and workouts
- North Carolina Secretary of Revenue Kenneth Lay
- SC Department of Revenue Director Ray Stevens
- How to serve as tax counsel in lawsuit settlements and judgments
- Ethics and Circular 230

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