31st Annual Tax Symposium

FEATURED SPEAKERS AND TOPICS

I. INTRODUCTION — **Ronald A. Sollish** — **8:30 – 8:40**

II. I KNOW IT WHEN I SEE IT – VALUATION ISSUES — **Robert D. Kaplow** — **8:40 – 9:00**

- Uses of Valuations
- Valuation Requirements
- Accountant Assistance

III. ACCOUNTING MALPRACTICE LITIGATION: WHAT YOU (HOPEFULLY) NEVER NEED TO KNOW — **David M. Saperstein** — **9:00 – 9:20**

- Retention Agreements and the Statute of Limitations
- Common Liability Issues: Standard of Care and Comparative Fault
- Common Damages Issues: Tax Liability and Interest

IV. ALLOCATION OF PURCHASE PRICE — **Stuart M. Bordman** — **9:20 – 9:40**

- Allocation to Personal Goodwill
- Requirements of IRS §1060
- Issues in Completing IRS Form 8594

Question and Answer — **9:40 – 9:50**

Break — **9:50 – 10:00**

V. ROUNDUP OF RECENT TAX DEVELOPMENTS — **William E. Sigler** — **10:00 – 10:40**

- New Laws, Cases and Rulings
- Hot Topics and Pending Legislation
- Practice Pointers

VI. TAX TREATMENT OF LITIGATION WINDFALLS AND LOSSES — **Jordan B. Segal** — **10:40 – 11:00**

- When are Litigation Recoveries Taxable?
- When are Litigation Losses Deductible?
- Practical Advice for Interfacing with the Litigators

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Question and Answer	**11:00 – 11:10**
Break	**11:10 – 11:20**

VII. <u>TRUST ADMINISTRATION: THE GRANTOR HAS DIED AND YOU ARE SUCCESSOR TRUSTEE: NOW WHAT? (HINT: CALL YOUR LAWYER)</u> — **Geoffrey N. Taylor**, **11:20 – 11:40**

- What Must You Do?
- What Should You Do?
- What Shouldn't You Do?

VIII. <u>THE CPA PRIVILEGE AND RESPONDING TO A SUBPOENA FOR CLIENTS' TAX RETURNS, EMAILS AND NOTES</u> — **Rita M. Lauer**, **11:40 – 12:00**

- Michigan Law MCLA 339.732 – the Purpose Behind the Statute
- What Information are You Required to Provide?
- How Do You Exercise the Privilege?

IX. <u>A CHANGING RETIREMENT PLAN ENVIRONMENT</u>: <u>THINGS I NEVER THOUGHT I'D SEE</u> — **Charles M. Lax**, **12:00 – 12:20**

- New IRS Pre-Examination Pilot Program
- Retroactive Adoption of New Retirement Plans
- Update on Cryptocurrency in Retirement Plans

Question & Answer — **12:20 – 12:30**