Federal Tax Institute of New England

Connecticut Bar Association

Presented by the Connecticut Bar Association
Estates and Probate Section and Tax Section

Sessions

National speakers will present on cutting edge tax and estate planning issues. The seminars will address the future of estate planning, as well as significant tax issues faced by today's businesses.

Schedule

8:00 a.m. **Registration Opens**
Networking Breakfast

8:55 a.m. **Opening Remarks**
Monte Frank, Connecticut Bar Association President, New Britain
Deborah J. Tedford, Tedford Law Firm PC, Mystic

9:00 a.m. **Opening Plenary Session: The New Game — Planning for Increased Cost Basis**
Paul Lee, Northern Trust, New York, NY

10:00 a.m. **Break**

10:15 a.m. **Concurrent Session 1A: Choosing Wisely Among Charitable Income Plans**
Patricia R. Beauregard, Cummings and Lockwood LLC, Stamford

Concurrent Session 1B: Connecticut Income Tax and Estate Tax Domicile and Residency Audits
Louis P. Bucari, Department of Revenue Services, Hartford
Luke T. Tashjian, Whitman Breed Abbott & Morgan LLC, Greenwich

11:20 a.m. **Break**

11:30 a.m. **Concurrent Session 2A: Never Pay Estate Taxes: The Annual Taxable Gifts Approach with a CLAT Remainder**
Richard S. Franklin, McArthur Franklin PLLC, Washington, DC
Lester Law, Abbot Downing, Naples, FL

Concurrent Session 2B: Business Succession Planning
Morris W. Banks, Pullman & Comley LLP, Hartford
Constance E. Shields, Withers Bergman LLP, New Haven

12:30 p.m. **Break**

12:40 p.m. **Luncheon**
Presentation of Achievement Award

1:25 p.m. **Luncheon Plenary Session: Capital Developments after the Election**
Ronald D. Aucutt, McGuireWoods LLP, Tysons, VA

2:25 p.m. **Break**

2:35 p.m. **Concurrent Session 3A: The Bad and the Ugly of Trust Drafting**
Marissa Dungey, Withers Bergman LLP, Old Greenwich
Stephen Liss, UBS Financial Services Inc, New York, NY

Concurrent Session 3B: Introduction to the ACTEC Commentaries on the Rules of Professional Conduct
Richard G. Convicer, Convicer & Percy LLP, Glastonbury
Christopher H. Gadsden, Gadsden Schneider & Woodward LLP, Radnor, PA
Peter T. Mott, Brody Wilkinson PC, Southport

3:35 p.m. **Break**

3:45 p.m. **Closing Plenary Session: The Top Ten Issues in Fiduciary Income Tax**
Charles D. Fox, McGuireWoods LLP, Charlottsville, VA

4:45 p.m. **Closing Remarks**
Deborah J. Tedford, Tedford Law Firm PC, Mystic

CLE Credit: 6.0 Hours

To register, visit ctbar.org/2016FTINE, call (860)357-5992 or complete the included registration form

The Sixth Annual Federal Tax Institute of New England
Registration Form

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Early Registration (for registrations received by September 23)

- ☐ Member: $209
- ☐ Non-member: $284
- ☐ Law and Paralegal Student Member: $109

Standard Registration (for registrations received between September 24 and October 21)

- ☐ Member: $259
- ☐ Non-member: $334
- ☐ Law and Paralegal Student Member: $159

Late Registration (for registrations received after October 21)

- ☐ Member: $310
- ☐ Non-member: $385
- ☐ Law and Paralegal Student Member: $210

Please choose your sessions:

10:20 a.m. - 11:20 a.m. Concurrent Session

- ☐ Charitable Planning Issues
- ☐ Connecticut Income Tax and Estate Tax Domicile and Residency Audits

11:30 a.m. - 12:30 p.m. Concurrent Session

- ☐ Never Pay Estate Taxes. The Annual Taxable Gifts Approach and Testamentary CLAT Remainder
- ☐ Business Succession Planning

2:35 p.m. - 3:35 p.m. Concurrent Session

- ☐ The Bad and the Ugly of Trust Drafting
- ☐ Introduction to the ACTEC Commentaries on the Rules of Professional Conduct

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