



17th Annual ABA/IPT Advanced Seminars Preliminary Program

Income Tax Seminar
March 10-11, 2008

Sales/Use Tax Seminar
March 11-12, 2008

Property Tax Seminar
March 13-14, 2008

The Ritz-Carlton, New Orleans, Louisiana



ABA/IPT Advanced Income, Sales/Use & Property Tax Seminars

The Ritz-Carlton, New Orleans, Louisiana
March 10 – March 14, 2008

Sponsors:

American Bar Association, Section of Taxation and the Institute for Professionals in Taxation

Please join us! The American Bar Association, Section of Taxation and the Institute for Professionals in Taxation have joined forces again to present another key opportunity for continuing professional education in one of America's most vibrant cities.

Chair, ABA Section of Taxation:

Stanley L. Blend, Esq.

Oppenheimer, Blend, Harrison and Tate, Inc.
San Antonio, TX

President, Institute for Professionals in Taxation:

Rolston A. Dyer, CMI

The Coca-Cola Company, Atlanta, GA

ABA State & Local Taxes Committee Chairperson:

Philip M. Tatarowicz, Esq., CPA

Ernst & Young LLP, Washington, DC

ABA Liaison to IPT:

William B. Prugh, Esq.

Shughart Thomson & Kilroy, P.C., Kansas City, MO

Local Host:

William M. Backstrom, Jr., Esq.

Jones Walker LLP, New Orleans, LA

ADVANCED INCOME TAX SEMINAR COMMITTEE

IPT Co-Chairs

June Summers Haas, Esq.

Honigman Miller Schwartz and Cohn LLP, Lansing, MI

Janette M. Lohman, Esq., CMI, CPA

Thompson Coburn LLP, St. Louis, MO

Margaret C. Wilson, Esq.

Verizon, Basking Ridge, NJ

ABA Co-Chairs

William M. Backstrom, Jr., Esq.

Jones Walker LLP, New Orleans, LA

Stephanie Anne Lipinski Galland, Esq.

Thompson Coburn LLP, Washington, DC

Erica L. Horn, Esq., CPA

Stites & Harbison, PLLC, Frankfort, KY

ADVANCED SALES TAX SEMINAR COMMITTEE

IPT Co-Chairs

Barbara A. Britt, CMI, CPA

Deloitte Tax LLP

Kenneth W. Helms, CMI

United Technologies Corporation, Farmington, CT

H. Michael Madsen, Esq.

Vickers Madsen & Goldman, LLP, Tallahassee, FL

ABA Co-Chairs

William M. Backstrom, Jr., Esq.

Jones Walker LLP, New Orleans, LA

J. Whitney Compton, Esq.

Compton & Associates, LLP, Marietta, GA

Stephanie Anne Lipinski Galland, Esq.

Thompson Coburn LLP, Washington, DC

William B. Prugh, Esq.

Shughart Thomson & Kilroy, P.C., Kansas City, MO

Stewart M. Weintraub, Esq.

Schnader Harrison Segal & Lewis, LLP, Philadelphia, PA

ADVANCED PROPERTY TAX SEMINAR COMMITTEE

IPT Co-Chairs

C. Stephen Davis, Esq.,

Cahill, Davis & O'Neill, LLP, Los Angeles, CA

Jerrold F. Janata, Esq., ASA

International Appraisal Company Inc.

Upper Saddle River, NJ

Edward Kliewer, III, Esq.

Fulbright & Jaworski L.L.P., San Antonio, TX

ABA Co-Chair

Mark A. Engel, Esq.

Bricker & Eckler LLP, West Chester, OH

Alan Poe, Esq.

Holland & Hart LLP, Greenwood Village, CO

Stewart M. Weintraub, Esq.

Schnader Harrison Segal & Lewis, LLP, Philadelphia, PA

SCOPE AND PURPOSE

The ABA/IPT Advanced Income, Advanced Sales/Use, and Advanced Property Tax Seminars are designed for attorneys, accountants, tax directors, state and local tax managers, government tax officials, appraisers, property tax managers, commercial and industrial property managers, and others interested in sales, use, ad valorem taxation of property, and income.

The increasing burden of state and local income, sales, use, and property taxes throughout the country requires an increasingly greater knowledge and understanding by those professionals who are responsible for managing and minimizing this burden. In addition, businesses must now focus more on the process for evaluating and selecting professionals who are needed to contest state and local tax matters. Over the course of five days comprising of three seminars, a distinguished and multidisciplinary faculty, including appraisers, government and private sector tax officials, tax managers, and state and local tax attorneys, will lead you in the practical examination of current state and local tax issues facing different businesses and industries. The program devotes substantial time to current issues in the field and to practical solutions to recurring difficulties in handling and winning a state and local tax appeal.

The faculty will address issues common to income, sales, use, and property tax cases in all jurisdictions with an emphasis on those issues that apply generally to state and local tax appeals throughout the country. Audience participation will be strongly encouraged, and some working knowledge of state and local tax matters is important for those who wish to get the full benefit of the program.

TUITION

Tuition includes admission to the program, written materials, reception, lunches, and continental breakfasts. Register early and save! **In advance:** \$475 per seminar, \$875 for two seminars and \$1,325 for all three seminars; **on-site:** \$495 per seminar, \$895 for two seminars and \$1,350 for all three seminars. All registrations must be accompanied by tuition payment in the form of a check or credit card number. Mail this form along with your credit card number or check made payable to the ABA Section of Taxation at: ABA/IPT Advanced Income, Sales/Use & Property Tax Seminars, ABA Section of Taxation, 740 15th Street, NW, Washington, DC 20005; or fax to ABA Section of Taxation, (202) 662-8682.

REGISTRATION DEADLINE

All seminar registrations must be received by **February 28, 2008**. Please note that registrations are limited and will be granted on a first-come, first-served basis.

COURSE MATERIALS

Written course materials will be distributed to all registrants at the meeting. A limited supply of extra copies will be available for purchase after the meeting.

REFUND POLICY

All cancellations and requests for refunds or substitutions must be received in writing and postmarked or faxed by **February 28, 2008**. No refunds will be approved after that date; however, substitute registrants are welcome. All refund requests will incur a \$50 cancellation fee. **Absolutely no refunds will be granted at the meeting.** To request a refund or a substitution, please send your written request to the ABA Registrar by fax to 202-662-8682 or e-mail at salmont@staff.abanet.org.

HOTEL ACCOMMODATIONS

Reservations requested after the room block is filled or beyond the final cut-off date, January 31, 2008, whichever comes first, are subject to availability. Rooms may still be available after the room block is filled or after the cut-off date, but not necessarily at the negotiated rate. Requests for accommodations after that date, or sooner if the block sells out, cannot be ensured. A block of sleeping rooms has been reserved for the ABA/IPT program at The Ritz-Carlton, 921 Canal Street, New Orleans; Louisiana's only AAA Five Diamond Luxury hotel. You may make reservations directly with the hotel by phone at 504-524-1331 (making sure to mention that you are with the ABA/IPT seminar for our negotiated room rates) or you may fax the form found at the back of this brochure to 504-670-2864. You may reserve your accommodations online by visiting the following website: <http://www.ritzcarlton.com/corporate/reservations/default.asp> and use Group Code: IPTIPTA (King Bed) or IPTIPTD (Double Bed).

PARKING:

Valet parking is available at a rate of \$32.00 per day.

TRANSPORTATION:

If you require transportation assistance, or if you have other personal requests, please call Concierge Services at (504) 524-1331 ext. 4200.

IMPORTANT: We cannot be responsible for hotel charges incurred due to no-shows, late arrivals or early departures. You may incur a penalty if you do not make the hotel aware of your change of plans at least 24 hours prior to your scheduled time of arrival. It is very important that you arrive on the arrival date indicated on your reservation form or you will be charged one night's stay and your reservations will be canceled. Also, please remember to confirm your departure dates upon arrival.

CONTINUING EDUCATION CREDIT

Continuing education credit for this program is available for tax professionals, attorneys, accountants, and appraisers who register and attend.

CLE:

CLE accreditation will be requested for this program from every state with Mandatory Continuing Legal Education (MCLE) requirements for attorneys. Questions concerning CLE (continuing legal education) credit for attendance at this or any ABA program should be directed to the ABA Section of Taxation Office at 740 15th Street NW, Washington, DC 20005, telephone (202) 662-8670.

CPE:

Questions concerning continuing professional education (CPE) credit should be directed to IPT, telephone (404) 240-2300.

Registrants attending the Income Tax Seminar will receive approximately 12 continuing education credits; those attending the Sales and Use Tax Seminar will receive approximately 12 and those attending the Property Tax Seminar will also receive approximately 12.5 continuing education credits for full attendance based on a 50-minute credit hour.

The Advanced Sales Tax Seminar has 60 minutes of ethics, the Advanced Income Tax Seminar has 105 minutes of ethics, and the Advanced Property Tax Seminar has 60 minutes of ethics. These will be applicable for the CMI Continuing Education requirement and may be applicable for other continuing education requirements.

The Institute's designated members (CMIs) will receive hour-for-hour continuing education credits towards their requirements for actual session attendance (based on a 50-minute credit hour).

As required by regulatory agencies, IPT must verify individual attendance at sessions in order to grant Continuing Education Credits. Each attendee's name badge has a unique barcode that identifies that individual. In order to obtain CE credit, the individual must have his or her

bar-coded badge scanned during the first 15 minutes of each session. No credit for the session will be given to un-scanned attendees.

CMIs will receive hour for hour continuing education credits for actual session attendance and no longer need to submit a form.

The Institute is also registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org.

Prerequisites: None

Program Level: Multiple

Field of Study: Taxation

Instructional Method: Group Live

Advance Preparation Required: None

CMI DESIGNATION

IPT's designation, "Certified Member of the Institute" (CMI), is available to individuals who meet the certification requirements and have been a member of the Institute in good standing. The purpose of this certification program is to further the professional development of IPT members. The major requirements are income, property, or sales tax administration experience, attendance at IPT tax schools plus other educational coursework, and successful completion of both written and oral examinations.

Audio Recordings Available

The ABA and IPT are pleased to offer audio recordings of the seminar proceedings for purchase. To purchase onsite, visit the Digital Conference Providers (DCP) booth. After the program, please contact DCP at 630/963-8311 or at <https://dcporder.com/abatx/>.

VISIT US ON THE WEB!

For the latest schedule and information about upcoming activities, visit us on the Web:

ABA Section of Taxation: www.abanet.org/tax/

Institute for Professionals in Taxation: www.ipt.org/

AGENDA FOR ADVANCED INCOME TAX SEMINAR

Monday, March 10, 2008

7:30am-8:30am Registration & Continental Breakfast

8:30am-8:45am Welcome and Introduction:

President, Institute for Professionals in Taxation:

Rolston A. Dyer, CMI
The Coca-Cola Company
Atlanta, GA

ABA SALT Committee Chairperson:

Philip M. Tatarowicz, Esq., CPA
Ernst & Young LLP
Washington, D.C.

Local Host:

William M. Backstrom, Jr., Esq.
Jones Walker LLP
New Orleans, LA

8:45am-10:15am

**Update on Recent State Tax System Reforms
(Case Studies: Ohio, Texas and Michigan)**

Moderator:

June Summers Haas, Esq.
Partner
Honigman Miller Schwartz and Cohn LLP
Lansing, MI

Speakers:

Glenn R. White
Administrator, Tax Policy Division
Michigan Department of Treasury
Lansing, MI

Janet Spies

Franchise Tax Policy Analyst
Office of the Comptroller of Public Accounts
Austin, TX

Thomas M. Zaino, Esq., CPA
Chair-Multistate Practice Group
McDonald Hopkins LLC
Columbus, OH

10:15am-10:30am Break

10:30am-12:00 Noon

**Apportionment Issues Affecting Affiliated
Entities**

Moderator:

Margaret C. Wilson, Esq.
Assistant General Counsel - State & Local Tax
Verizon
Basking Ridge, NJ

Speakers:

Gregg D. Barton, Esq.
Partner
Perkins Coie LLP
Seattle, WA

Brandee A. Tilman, Esq.

Manager, State Tax Controversies & Tax Counsel
The Walt Disney Company
Glendale, CA

Brian W. Toman, Esq.

Partner
Reed Smith LLP
San Francisco, CA

12:00 Noon-12:30pm Lunch

12:30pm-1:00pm

**Rewriting UDITPA and the Multistate Tax
Compact – A Sensible Debate Between
Adversarial but Amiable Colleagues**

Introduction by:

Janette M. Lohman, Esq., CMI, CPA
Partner
Thompson Coburn LLP
St. Louis, MO

Speakers:

Joe B. Huddleston, Esq.
Executive Director
Multistate Tax Commission
Washington, DC

Charles A. Trost, Esq.

Partner
Waller Lansden Dortch & Davis, LLP
Nashville, TN

1:30pm-3:00pm

**State Attacks on Related Party Transactions –
Add-Back Statutes and REITs**

Moderator:

Erica L. Horn, Esq., CPA
Partner
Stites & Harbison, PLLC
Frankfort, KY

Speakers:

Michael Gray, CPA
Director of Tax Accounting
AutoZone
Memphis, TN

Kimberley M. Reeder, Esq.

Partner
Baker & McKenzie LLP
Palo Alto, CA

Debra Silverman Herman, Esq.

Counsel
Roberts & Holland LLP
New York, NY

3:00pm-3:15pm Break

**Income Tax Seminar
Monday, March 10, 2008, continued**

3:15pm-4:45pm

Is there Life after Lanco and MBNA?

Moderator:

Stewart M. Weintraub, Esq.
Partner
Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

Speakers:

Harley T. Duncan
Executive Director
Federation of Tax Administrators
Washington, D.C.

Philip M. Tatarowicz, Esq., CPA
National Director of State & Local Tax Technical
Services
Ernst & Young LLP
Washington, DC

5:00pm-6:30pm Reception for Attendees

Income Tax Seminar ~ Tuesday, March 11, 2008

8:00am-8:30am Registration & Continental Breakfast

8:30am-10:00am

**The Top Ten Most Unconstitutional State
Income Tax Statutes, or “Don’t Ever Let the
Constitution Get in the Way of a Good Tax
Law”**

Moderator:

William M. Backstrom, Jr., Esq.
Partner
Jones Walker LLP
New Orleans, LA

Speakers:

Annabelle B. Canning, Esq.
Vice President, State Tax Policy
Verizon Communications
Philadelphia, PA

Sarah McGahan, Esq.
Partner
KPMG LLP
Washington, DC

Diann L. Smith, Esq.
Counsel
Sutherland Asbill & Brennan, LLP
New York, NY

10:00am-10:15am Break

10:15am- 12:00 Noon

**The Top Ten Most Awful Things that Get
Attorneys, CPAs, CMIs and Other Tax
Professionals in Trouble for Malpractice**

Moderator:

Janette M. Lohman, Esq., CMI, CPA
Partner
Thompson Coburn LLP
St. Louis, MO

Speakers:

Aaron E. Hoffman, Esq.
Senior Vice President – Loss Prevention
Attorneys’ Liability Assurance Society, Inc.
Chicago, IL

Paul M. Koning, Esq.
Partner
Hughes & Luce, LLP
Dallas, TX

Christopher S. Rizek, Esq.
Member
Caplin & Drysdale Attorneys
Washington, DC

12:00 Noon-12:30pm

**Joint Luncheon: Income Tax and Sales & Use
Tax**

12:30pm-1:00pm

**Turning the Clock Back to the Future: The
Regressive Rush to Gross Receipts Tax**

Introduction by:

Stephanie Anne Lipinski Galland, Esq.
Partner
Thompson Coburn LLP
Washington, DC

Speaker:

Richard D. Pomp, Esq.
Alva P. Loiselle Professor of Law
University of Connecticut Law School
Hartford, CT

1:00pm Adjourn

AGENDA FOR ADVANCED SALES/USE TAX SEMINAR

Tuesday, March 11, 2008

11:00am-12:00 Noon Registration

12:00 Noon-12:30pm

Joint Luncheon: Income Tax & Sales/Use Tax

12:30pm-1:00pm

Turning the Clock Back to the Future: The Regressive Rush to Gross Receipts Tax

Introduction by:

Stephanie Anne Lipinski Galland, Esq.

Partner
Thompson Coburn LLP
Washington, DC

Speaker:

Richard D. Pomp, Esq.

Alva P. Loiselle Professor of Law
University of Connecticut Law School
Hartford, CT

1:15pm-1:20pm Welcome & Introduction

President, Institute for Professionals in Taxation:

Rolston A. Dyer, CMI

The Coca-Cola Company
Atlanta, GA

ABA SALT Committee Chairperson:

Philip M. Tatarowicz, Esq., CPA

Ernst & Young LLP
Washington, DC

Local Host:

William M. Backstrom, Jr., Esq.

Jones Walker LLP
New Orleans, LA

1:20pm-1:30pm

Introduction to Sales & Use Tax Seminar

J. Whitney Compton, Esq.

Director
Compton & Associates, LLP
Marietta, GA

Stewart M. Weintraub, Esq.

Partner
Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

1:30pm-2:30pm

The Top Ten Things that Get Tax Lawyers, CPAs, CMIs and Other Tax Professionals in Trouble for Malpractice

Moderator:

Janette M. Lohman, Esq., CMI, CPA

Partner
Thompson Coburn LLP
St. Louis, MO

Speakers:

Aaron E. Hoffman, Esq.

Senior Vice President – Loss Prevention
Attorneys' Liability Assurance Society, Inc.
Chicago, IL

Paul M. Koning, Esq.

Partner
Hughes & Luce, LLP
Dallas, TX

Christopher S. Rizek, Esq.

Member
Caplin & Drysdale Attorneys
Washington, DC

2:30pm-3:30pm

Sales Taxes on Services and Mixed Transaction Issues

Moderator:

Erica L. Horn, Esq., CPA

Partner
Stites & Harbison, PLLC
Frankfort, KY

Speakers:

Kimberley M. Reeder, Esq.

Partner
Baker & McKenzie LLP
Palo Alto, CA

Debra Silverman Herman, Esq.

Counsel
Roberts & Holland LLP
New York, NY

3:30pm-3:45pm Break

3:45pm-4:45pm

Local Taxes and Administration Issues

Moderator:

J. Whitney Compton, Esq.

Director
Compton & Associates, LLP
Marietta, GA

Speakers:

William M. Backstrom, Jr., Esq.

Partner
Jones Walker LLP
New Orleans, LA

Carolynn S. Iafrate, Esq., CPA

Chief Operating Officer
Industry Sales Tax Solutions, LLC
Exton, PA

5:00pm-6:30pm Reception for Attendees

SALES TAX SEMINAR CONTINUED
Wednesday, March 12, 2008

8:00am-8:30am Continental Breakfast

8:30am-9:45am

Hot Topics and Sizzling Issues

Moderator:

William B. Prugh, Esq.

Attorney

Shughart Thomson & Kilroy, P.C.
Kansas City, MO

Speakers:

Paul H. Frankel, Esq.

Partner

Morrison & Foerster LLP
New York, NY

Richard D. Pomp, Esq.

Alva P. Loisel Professor of Law
University of Connecticut Law School
Hartford, CT

9:45am-10:30am

Recent and Future Nexus Developments

Moderator:

Arthur R. Rosen, Esq.

Partner

McDermott Will & Emery LLP
New York, NY

Speakers:

Richard J. Prem, CPA

Vice President - Indirect Taxes & Tax Reporting
Amazon.Com
Seattle, WA

William P. Waltman, CPA

Director, State and Local Tax
PricewaterhouseCoopers LLP
Houston, TX

10:30am-10:45am Break

10:45am-12:00 Noon

Sourcing, Characterization and Sales of Electronic Items

Moderator:

Arthur R. Rosen, Esq.

Partner

McDermott Will & Emery LLP
New York, NY

Speakers:

Barbara N. Barton Weiszhaar

Director, State and Local Taxation
Electronic Data Systems Corp.
Plano, TX

Carolynn S. Iafrate, Esq., CPA

Chief Operating Officer
Industry Sales Tax Solutions, LLC
Exton, PA

Stephen P. Kranz, Esq.

Attorney

Sutherland Asbil & Brennan
Washington, DC

12:00 Noon-12:30pm

Luncheon

12:30pm-1:00pm

Transactional Tax Departments in a Global Economy

Speaker:

Kenneth W. Helms, CMI

Manager – Transactional Tax Planning
United Technologies Corporation
Farmington, CT

1:15pm-2:00pm

Procedural Issues in Handling Sales and Use Tax Legal and Administrative Appeals

Moderator:

Stewart M. Weintraub, Esq.

Partner

Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

Speakers:

Trisha Fortune, CMI, CPA

Principal

Ryan
Austin, TX

Michael W. McLoughlin, Esq.

Of Counsel

Morrison & Foerster LLP
New York, NY

2:00pm-2:30pm

E-Discovery in State and Local Tax Audits; Response to Fishing Expedition Requests and Other Issues – A Case Study

Moderator:

Stewart M. Weintraub, Esq.

Partner

Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

Speakers:

Stephanie Anne Lipinski Galland, Esq.

Partner

Thompson Coburn LLP
Washington, DC

John Wertz, Esq.

Vice President, Senior Tax Counsel
State and Local Tax
Viacom, Inc.
New York, NY

2:30pm-3:15pm

Agency Issues in Sales and Use Transactions

Moderator:

William M. Backstrom, Jr., Esq.

Partner
Jones Walker LLP
New Orleans, LA

Speakers:

Janette M. Lohman, Esq., CMI, CPA

Partner
Thompson Coburn LLP
St. Louis, MO

Erica L. Horn, Esq., CPA

Partner
Stites & Harbison, PLLC
Frankfort, KY

3:15pm-3:30pm Break

3:30pm-4:30pm

Current Developments and Hot Topics in Taxation

Moderator:

H. Michael Madsen, Esq.

Partner
Vickers Madsen & Goldman, LLP
Tallahassee, FL

Speakers:

William B. Prugh, Esq.

Attorney
Shughart Thomson & Kilroy, P.C.
Kansas City, MO

Philip M. Tatarowicz, Esq., CPA

National Director of State & Local Tax Technical Services
Ernst & Young LLP
Washington, DC

4:30pm-4:45pm

Summary and Recap of Program

J. Whitney Compton, Esq.

Director
Compton & Associates, LLP
Marietta, GA

Stewart M. Weintraub, Esq.

Partner
Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

4:45pm

Adjourn

AGENDA FOR ADVANCED PROPERTY TAX SEMINAR

Thursday, March 13, 2008

7:30am-8:30am Registration & Continental Breakfast

8:30am-8:45am Welcome and Introduction

ABA Co Chair

Stewart M. Weintraub, Esq.
Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

President, Institute for Professionals in Taxation:

Rolston A. Dyer, CMI
The Coca-Cola Company
Atlanta, GA

ABA SALT Committee Chairperson:

Philip M. Tatarowicz, Esq., CPA
Ernst & Young LLP
Washington, DC

Local Host:

William M. Backstrom, Jr., Esq.
Jones Walker LLP
New Orleans, LA

8:45am-10:15am

Personal Property vs. Real Property in the Audit Context

Moderator:

Mark A. Engel, Esq.
Partner
Bricker & Eckler LLP
West Chester, OH

Speakers:

J. Whitney Compton, Esq.
Director
Compton & Associates, LLP
Marietta, GA

Randy L. Ochs, CPA
President
Cornerstone Consulting, Inc.
St. Louis, MO

10:15am-10:30am Break

10:30am-12:00 Noon

Recent Developments

Moderator:

Alan Poe, Esq.
Partner
Holland & Hart LLP
Greenwood Village, CO

Speakers:

Oklahoma:

John Brusniak, Jr., Esq.
Shareholder
Brusniak / Blackwell PC
Dallas, TX

Minnesota:

Jeffery J. McNaught, Esq.
Attorney
Lindquist & Vennum PLLP
Minneapolis, MN

Connecticut:

Elliott B. Pollack, Esq.
Partner
Pullman & Comley, LLC
Hartford, CT

12:00 Noon-12:30pm Lunch

12:30pm-1:30pm

Going Green 2008 – How to Make Green in a Changing Market Place Economic and Real Estate Outlook

Moderator:

Edward Kliewer, III, Esq.
Counsel
Fulbright & Jaworski L.L.P.
San Antonio, TX

Speaker:

Ted C. Jones, Ph.D.
Senior Vice President - Chief Economist
Stewart Title Guaranty Company
Houston, TX

1:30pm-3:00pm

Legal and Valuation Issues Involved with Natural and Man-Made Disasters

Moderator:

Stewart M. Weintraub, Esq.
Partner
Schnader Harrison Segal & Lewis, LLP
Attorneys at Law
Philadelphia, PA

Speakers:

William E. Banfield, Esq.
Senior Partner
Podell, Schwartz, Schechter & Banfield, LLP
New York, NY

Randall Bell, MAI (Invited)

Principal
Bell Anderson & Sanders, LLC
Laguna Beach, CA

Lawrence E. Chehardy, Esq., CLA

Assessor
Jefferson Parish
Gretna, LA

Jay A. Foucheux, CMI

Manager-Property Tax
Shell Oil Company
Houston, TX

3:00pm-3:15pm Break

3:15pm-4:45pm

Leased Fee vs. Fee Simple Legal and Valuation Issues

Moderator:

Mark A. Engel, Esq.

Partner
Bricker & Eckler LLP
West Chester, OH

Speakers:

Patrick J. Cullerton, Esq.

Attorney
Thompson Coburn Fagel Haber
Chicago, IL

Thomas A. Jaconetty, Esq.

First Assistant Commissioner
Cook County Board of Review
Chicago, IL

Michael J. Kelly, MAI, SRPA

President
Real Estate Analysis Corporation
Chicago, IL

5:00pm-6:30pm Reception for Attendees

Property Tax Seminar Continued
Friday, March 14, 2008

7:30am-8:10am Continental Breakfast

8:15am-8:30am Welcome

Jerrold F. Janata, Esq., ASA

Chief Executive Officer
International Appraisal Company Inc.
Upper Saddle River, NJ

8:30am-10:00am

Recent Developments

Moderator:

Jerrold F. Janata, Esq., ASA

Chief Executive Officer
International Appraisal Company Inc.
Upper Saddle River, NJ

Speakers:

Indiana:

Thomas M. Atherton, Esq.

Partner
Bose McKinney & Evans LLP
Indianapolis, IN

Kansas:

Brian T. Howes, Esq., CMI

Counsel
Shughart Thomson & Kilroy, P.C.
Kansas City, MO

Utah:

Steven P. Young, Esq.

Partner
Holme Roberts & Owen LLP
Salt Lake City, UT

10:00am-10:15am

Break

10:15am-11:15am

Cross Examination of the Expert Witness- USPAP Compliance

Moderator/Speaker:

C. Stephen Davis, Esq.

Partner
Cahill, Davis & O'Neill, LLP
Los Angeles, CA

Speakers:

Peter D. Bowes, MAI, CRE

President
Bowes and Company
Denver, CO

John D. "Don" Dorchester, MAI, CRE, FRICS

Member
The Dorchester Group, LLC
Prescott, AZ

11:15am-12:15pm

Ethics

Moderator:

Alan Poe, Esq.

Partner
Holland & Hart LLP
Greenwood Village, CO

Speaker:

Laurie L. Levenson, Esq.

Professor of Law
William M. Rains Fellow and
Director of the Center for Ethical Advocacy
Loyola Law School
Los Angeles, CA

12:15pm Adjournment

INCOME TAX SEMINAR

Moderators, Panelists, & Speakers

William M. Backstrom, Jr., Esq.

Partner
Jones Walker LLP
New Orleans, LA

Gregg D. Barton, Esq.

Partner
Perkins Coie LLP
Seattle, WA

Annabelle B. Canning, Esq.

Vice President, State Tax Policy
Verizon Communications
Philadelphia, PA

Donna Donovan, Esq.

Deputy State Treasurer – Tax
Administration
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