

THE TAXATION SECTION OF THE STATE BAR OF CALIFORNIA

2014 ANNUAL MEETING OF THE CALIFORNIA TAX BAR & THE CALIFORNIA TAX POLICY CONFERENCE

November 6-8, 2014 — Coronado

2014 REGISTRATION FORM

For those not registering online, complete the Registration Form and Course Selector. Keep a photocopy for your records. Mail or fax the Registration Form and Course Selector. Use a separate Registration Form and Course Selector for each registrant.

ONLINE HTTP://TAXATION.CALBAR.CA.GOV

FAX 415-538-2368. Credit card registrations only.

If pre-registration is faxed, do not mail original form. Fax registrations cannot be confirmed by telephone. Keep a copy of your forms.

MAIL Program Registrations, State Bar of California, 180 Howard Street, San Francisco, CA 94105-1639.

Name _____ CA State Bar # (if applicable) _____
 (Please print or type name as it should appear on your name badge. Badges cannot be changed onsite.)

Firm/Company/Organization _____

Address _____

City, State _____ Zip _____

Telephone _____ E-mail Address (REQUIRED) _____

Non-Attorney Spouse/Guest name: _____

Your name and contact information may be disclosed to other 2014 Annual Meeting attendees and sponsors. Check here, if you don't want your information disclosed.

REGISTRATION FEE Check one. Registration fee includes Friday and Saturday continental breakfasts and Thursday and Friday receptions.

	Early-Bird Fee (on/before Oct. 16)	Pre-Registration Fee (Oct. 17-Oct. 30)
<input type="checkbox"/> Tax Section Members	\$525	\$595
<input type="checkbox"/> Non-Section Members*	\$600	\$670
<input type="checkbox"/> Tax Section Young Lawyer (1 to 5 years practice)	\$325	\$395
<input type="checkbox"/> Non-Section Young Lawyer (1 to 5 years practice)*	\$400	\$470
<input type="checkbox"/> Tax Section Government Attorney/Non-attorney	\$125	\$195
<input type="checkbox"/> Non-Section Government Attorney/Non-attorney*	\$200	\$270
<input type="checkbox"/> Law School Faculty/Staff/Students	\$125	\$195

*Fee includes \$75 membership fee for 2015

SUBTOTAL FOR REGISTRATION FEES

\$ _____

TICKETED EVENTS

Thursday, November 6, 2014

	# in party	Cost	Total
<input type="checkbox"/> Thursday Luncheon (Keynote/Awards) [40]	_____	\$45 ea	\$ _____
<input type="checkbox"/> Thursday Reception [41]	_____	FREE	\$0
<input type="checkbox"/> Young Tax Lawyers Reception [42]	_____	\$25 ea	\$ _____

Friday, November 7, 2014

<input type="checkbox"/> Continental Breakfast [43]	_____	FREE	\$ 0
<input type="checkbox"/> Compensation & Benefits Committee Lunch [44]	_____	\$40 ea	\$ _____
<input type="checkbox"/> Corporate & Pass-Through Entities Committee Lunch [45]	_____	\$40 ea	\$ _____
<input type="checkbox"/> Estate & Gift Tax Committee Lunch [46]	_____	\$40 ea	\$ _____
<input type="checkbox"/> Income & Other Taxes Committee Lunch [47]	_____	\$40 ea	\$ _____
<input type="checkbox"/> International Tax Committee Lunch [48]	_____	\$40 ea	\$ _____
<input type="checkbox"/> State & Local Tax Committee Lunch [49]	_____	\$40 ea	\$ _____
<input type="checkbox"/> Tax Procedure & Litigation Committee Lunch [50]	_____	\$40 ea	\$ _____
<input type="checkbox"/> Friday Reception [51]	_____	FREE	\$ 0
<input type="checkbox"/> Annual Meeting and CTPC Dinner [52]	_____	\$70 ea	\$ _____
<input type="checkbox"/> Friday Night—Late Night-Vegas Style [53]	_____	FREE	\$0

Saturday, November 8, 2014

<input type="checkbox"/> Saturday Continental Breakfast [54]	_____	FREE	\$0
<input type="checkbox"/> Saturday Luncheon (Keynote/Awards) [55]	_____	\$45 ea	\$ _____

SUBTOTAL FOR TICKETED EVENT FEES

\$ _____

EDUCATION COURSE MATERIALS (See previous page for detailed information.) Electronic versions are complimentary. Printed materials are available for \$50, and may not be available if ordered after October 16, 2014.

<input type="checkbox"/> Printed CTPC Set ONLY Course #s 2, 8, 12, 16 & 27-39 [56]	_____	\$50 ea	\$ _____
<input type="checkbox"/> Printed Annual Meeting Set ONLY Course #s 1-26 [57]	_____	\$50 ea	\$ _____

SUBTOTAL FOR COURSE MATERIALS

\$ _____

TOTAL AMOUNT ENCLOSED/TO BE CHARGED

\$ _____

PAYMENT METHOD Fees may be paid by check (payable to The State Bar of California), or by VISA or MasterCard.

CREDIT CARD INFORMATION

Select VISA MasterCard

I authorize the State Bar of California to charge my credit card. We only accept Visa or MasterCard.

Account Number _____ Expiration Date _____

Cardholder's Name _____ Cardholder's Signature _____

For registration information please call 415-538-2508. For program content information please call 415-538-2580.

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COURSE SELECTOR

Check one box in each time slot below. The CTPC courses are separated for your convenience (with cross-over CTPC courses listed in both columns). The numbers in brackets following the course titles are used by the State Bar to record MCLE. Retain a copy of this form for your records, and send the original with your Program Registration form.

Name: _____ CA State Bar # (if applicable) _____

ANNUAL MEETING COURSES

(includes CTPC Cross-over Courses in Green)

Thursday, November 6, 2014

10:00 am-11:30 am

- Estate & Gift Tax Update [1]
- A Discussion Toward Better Use of Tax Credits and Incentives [2]

11:40 am-12:40 pm

- Why Every Estate Planner Must Understand Fiduciary Income Tax [3]
- Statute of Limitation Issues - 6501(c)(8) and Beyond and Tax Doctrines including Claim of Right, Tax Benefit Rule and Mitigation [4]

2:40 pm-3:55 pm

- The Big Picture: Coordinating Estate Planning with Retirement Benefits [5]
- How Do We Plan Around that Pesky 3.8% NIIT Tax? [6]
- Tax Attributes: To Share or Not to Share from a Unitary Theory Perspective [29]

4:05 pm-5:35 pm

- Advanced Topics in Estate Planning [7]
- Privacy and Tax Administration – Policy Considerations in the Twilight e-Zone [8]

Friday, November 7, 2014

8:30 am-9:45 am

- Current and Unresolved Charitable Remainder Trust Issues [9]
- TPL Hot Topics [10]

9:55 am-10:55 am

- Estate Planning Paralysis: Getting Your Clients to Act [11]
- Business Purpose and Economic Substance Tax Avoidance Transactions: The Good, The Bad, and The Ugly [12]

11:05 am-12:20 pm

- Global Tax Planning for Multi-National Families: Coming and Going! [13]
- Summons Enforcement [14]

1:25 pm-2:25 pm

- Fixing a Trust [15]
- Can You Really Buy a Hotel Without A Property Reassessment? [16]

2:35 pm-4:05 pm

- California Residents Using Foreign Jurisdictions in Estate Planning--Risks and Rewards [17]
- Tax Court Litigation Boot Camp - Part 1: My Tax Court Case is Calendared. Now What Do I Do? [18]

4:15 pm-5:30 pm

- Venn Diagrams: The Intersection of Estate and Income Tax [19]
- Tax Court Litigation Boot Camp - Part 2: My Tax Court Case is Calendared. Now What Do I Do? [20]

Saturday, November 8, 2014

8:30 am-9:30 am

- Life Insurance is Still Part of the Plan [21]
- Criminal Tax - Overview and Introduction [22]

9:40 am-10:55 am

- Tax Director Forum: What's Keeping Them Up At Night? (336(e) Regs and Beyond) [23]
- Choice of Venue: Tax Court, District Court, Court of Federal Claims or Bankruptcy Court [24]

11:05 am-12:35 pm

- So Long Stateless Income: The G20 Coordinated Action Plan and IRS Enforcement [25]
- Federal Procedural Roundtable [26]

CALIFORNIA TAX POLICY CONFERENCE COURSES

Thursday, November 6, 2014

10:00 am-11:30 am

- A Discussion Toward Better Use of Tax Credits and Incentives [2]
- Surfing 2014 SALT Controversies Across the USA [27]

11:40 am-12:40 pm

- The Highlights and Hazards of Expanding the Sales Tax Base [28]

2:40 pm-3:55 pm

- Tax Attributes: To Share or Not to Share from a Unitary Theory Perspective [29]

4:05 pm-5:35 pm

- Privacy and Tax Administration – Policy Considerations in the Twilight e-Zone [8]
- SA_T - May I Have an 'L'? Don't Forget Those Local Taxes [30]

Friday, November 7, 2014

8:30 am-9:45 am

- The Income Tax Hazards to Employers and Executives of 24/7 Multitasking When Traveling to California for Mixed Purposes [31]

9:55 am-10:55 am

- Business Purpose and Economic Substance Tax Avoidance Transactions: The Good, The Bad, and The Ugly [12]
- Don't Escheat on Me! Unclaimed Property Exposé [32]

11:05 am-12:20 pm

- State Budget and Legislation: 2014 in Review [33]

1:25 pm-2:25 pm

- Can You Really Buy a Hotel Without A Property Reassessment? [16]
- The Art of Compromise: Dispute Resolution Alternatives at FTB and BOE [34]

2:35 pm-4:05 pm

- We're Here to Help! Legislation, Policy and Review: The Guide to California Tax Agency Legislative Analysis, Rulemaking and Administrative Guidance [35]

4:15 pm-5:30 pm

- Uniform or Unique? An Update on the Uniformity Efforts by the Multistate Tax Commission and the States [36]

Saturday, November 8, 2014

8:30 am-9:30 am

- Seeking Apportionment for a Fair Reflection of Business Activity? Which is the Fairest of Them All? [37]

9:40 am-10:55 am

- Finding Yourself in California: California Nexus Standards for "Doing Business" [38]

11:05 am-12:35 pm

- A View From the Chiefs: FTB and BOE Chief Counsel Roundtable [39]