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4601 Concord Pike
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Delaware Tax Institute

Current Developments,
Planning Ideas, and Hot Topics



January 30, 2009

8:00 a.m.—5:00 p.m.

Ruby R. Vale Moot Courtroom

Delaware Campus

Co-sponsored by:

- Society of Financial Service Professionals,
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- Wilmington Family Office

Widener Law

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AGENDA

- 8:00 a.m. Registration, Continental Breakfast**
- 8:30 a.m. Welcome**
Linda L. Ammons, JD
*Associate Provost and Dean,
Widener University School of Law*
- 8:35 a.m. 2008 Income Tax Developments**
Mary Elizabeth M. Browder, Esquire
*Monzack, Mersky, McLaughlin and
Browder, P.A.*
- Steven R. Director, Esquire
Bayard, P.A.
- John P. Garniewski Jr., CPA/PFS, CFP
Wilmington Family Office
- Kathryn Schultz, CPA
Belfint, Lyons & Shuman, PA
- 9:35 a.m. Recent Developments in Estate Planning and Recent Legislation Affecting Delaware Trusts**
F. Peter Conaty Jr., Esquire
Richards, Layton & Finger, P.A.
- Charles J. Durante, Esquire
Connolly Bove Lodge & Hutz LLP
- Jocelyn Margolin Borowsky, Esquire
Richards, Layton & Finger, P.A.
- 10:35 a.m. Break**
- 10:50 a.m. Distinguished Address**
(introduced by
Jerome K. Grossman, Esquire
Young Conaway Stargatt & Taylor, LLP)
- Lee A. Sheppard, Esquire
Contributing Editor, Tax Analysts
- 12:00 p.m. Lunch (included with registration)**
- 1:00 p.m. Tax Preparer Penalty Rules and "Know Your Client" Disclosure Initiative**
Peter S. Gordon, Esquire
Gordon, Fournaris & Mammarella, P.A.
- Miguel D. Pena, Esquire
Fox Rothschild LLP
- 2:05 p.m. Break**

The following are breakout sessions. The first two sessions are from 2:15 p.m. to 3:25 p.m., and the next two sessions are from 3:35 p.m. to 4:45 p.m.

- 2:15 p.m. Breakout Session A: Making the Most of Retirement Assets: Roth Conversions & Other Strategies**
Charles Aulino, JD, LLM
The Glenmede Trust Company, N.A.
- Nancy F. Blumberg, CPA/PFS, CFP(R), AEP
Master, Sidlow & Associates, P.A.
- Richard J. A. Popper, Esquire
Young Conaway Stargatt & Taylor, LLP
- Breakout Session B: Developments in Case Law Affecting Trusts**
Todd A. Flubacher, Esquire
Morris Nichols Arsht & Tunnell LLP
- Collins J. Seitz Jr., Esquire
Connolly Bove Lodge & Hutz LLP
- Gregory J. Weinig, Esquire
Connolly Bove Lodge & Hutz LLP
- 3:25 p.m. Break**
- 3:35 p.m. Breakout Session C: Exempt Organization Update: IRS Requiring Massive Amounts of New Information in Revised Form 990**
Kimberly L. Gill, Esquire
Morris Nichols Arsht & Tunnell LLP
- Joseph A. Giordano, CPA
Whisman Giordano & Associates, LLC
- Daniel J. Protokowicz, CPA
Belfint, Lyons & Shuman, PA
- Breakout Sessions D: Developments Affecting Discharge of Indebtedness and Utilization of Net Operating Losses**
Annette M. Ahlers, Esquire
Pepper Hamilton LLP
- Nicholas A. Mirkay III, Esquire
Widener University School of Law
- Jennifer R. Noel, Esquire
Young Conaway Stargatt & Taylor, LLP

Delaware Tax Institute: Current Developments, Planning Ideas, and Hot Topics Friday, January 30, 2009 Registration Form

Please choose two breakout sessions.
(Choose one from each column):

- A – Retirement Assets C – Exempt Organizations
 B – Case Law & Trusts D – Discharge of Indebtedness

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