Federal Tax Institute of New England

Connecticut Bar Association

October 18

St. Clements Castle, Portland

8:00 AM - 4:30 PM

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

Join us for this comprehensive education event with national speakers on cutting edge tax and estate planning issues.

Schedule

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

8:55 a.m. **Welcome**
Jonathan M. Shapiro, Shapiro Law Offices PC, Middletown
Deborah J. Tedford, Tedford Law Firm PC, Mystic

9:00 a.m. **Opening Plenary**
Creditor Protection Considerations and Strategies for the Estate Planner
Alan S. Gassman, Gassman Crotty & Denicolo PA, Clearwater, FL

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

10:20 a.m. **Concurrent Session 1A**
Elder Finanicial Abuse: The Crime of the Twenty First Century
Keith Bradoc "Brad" Gallant, Day Pitney LLP, New Haven
Kristen M. Lewis, Smith Gambrell & Russell LLP, Atlanta, GA
Mary F. Radford, Georgia State University College of Law, Atlanta, GA

Concurrent Session 1B
Qualified Opportunity Funds
Stephen A. Baxley, Bessmer Trust, New York, NY

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

11:30 a.m. **Concurrent Session 2A**
Taming Tax Planning for Trusts - and Owning It
Steven M. Fast, Day Pitney LLP, West Hartford
Edward F. Krzanowski, Day Pitney LLP, West Hartford

Concurrent Session 2B
The Qualified Business Income Deduction and Choice of Entitiy
Daniel L. Gottfried, Hinkley Allen Hartford
Michael P. Spiro, Finn Dixon & Herling LLP, Stamford

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

12:40 p.m. **Luncheon**

1:25 p.m. **Luncheon Plenary**
Capitol Update
Ronald D. Aucutt, McGuireWoods LLP, Tysons, VA

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

2:35 p.m. **Concurrent Session 3A**
Estate Planning and Tax Issues Raised byBitcoin and other Cryptocurrencies
Suzanne Brown Walsh, Murtha Cullina LLP, Hartford

Concurrent Session 3B
Tax Planning in a World of Higher Exemptions and Portability
T. Randolph Harris, McLaughlin & Stern, New York, NY

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

3:45 p.m. **Afternoon Plenary**
Tax Ethics Panel
Luke T. Tashjian, Whitman Breed Abbott & Morgan LLC, Greenwich - Moderator
Scott D. Jackson, State of Connecticut Department of Revenue Services, Hartford
David E. Novick, United States Attorney's Office District of Connecticut, New Haven
Lisa E. Perkins, Green & Sklarz LLC, Hartord
Cecil J. Thomas, Greater Hartford Legal Aid Inc., Association, Hartford

CLE Credit:

CT: 6.0 CLE Credits (5.0 General/1.0 Ethics)
NY: 7.0 CLE Credits (6.0 AOP/1.0 Ethics)

The Eighth Annual Federal Tax Institute of New England
Registration Form

Please Choose Your Registration Type:

Early-Bird Registration (for registrations received by September 14

- ☐ Member $259
- ☐ Non-member $409
- ☐ Student Member $159

Regular Registration (for registrations received between September 14 and October 8)

- ☐ Member $279
- ☐ Non-member $429
- ☐ Student Member $179

Late Registration (for registrations received after October 8)

- ☐ Member $310
- ☐ Non-member $460
- ☐ Student Member $210

Please Choose Your Sessions:

10:20 a.m. - 11:20 a.m. Concurrent Session 1

- ☐ 1A Elder Financial Abuse: The Crime of the Twenty First Century
- ☐ 1B Qualified Opportunity Funds

11:30 a.m. - 12:30 p.m. Concurrent Session 2

- ☐ 2A Taming Tax Planning for Trusts - and Owning It
- ☐ 2B The Qualified Business Income Deduction and Choice of Entity

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

- ☐ 3A Estate Planning and Tax Issues Raised by Bitcoin and other Cryptocurrencies
- ☐ 3B Tax Planning in a World of Higher Exemptions and Portability

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Refunds
No reservations will be made without payment. Cancellations made less than one week before the event are non-refundable. If you are registering within three days of the event, a credit card payment is required.

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CLE materials will be e-mailed to registrants one week prior to the event for download. Note that refunds will not be granted once course materials have been sent.

The Connecticut Bar Association/CT Bar Institute is an accredited provider of New York State CLE. Financial hardship information available upon request.

Please complete this form and mail, fax, or e-mail it to the CBA. For faster registration, call (860)223-4400, or register online at cbafederaltaxinstitute.com.

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