

**58<sup>th</sup> ANNUAL SOUTHERN FEDERAL TAX INSTITUTE — October 30-November 3, 2023**

**RETAIN THIS SCHEDULE FOR YOUR RECORDS**

		Enter minutes attended for each session
(Please check all that apply)		Minutes
<b><u>Monday, October 30, 2023 (455 minutes available including Mid-day program)</u></b>		
<input type="checkbox"/>	9:00-10:30 Recent Federal Income Tax Developments	90 _____
<input type="checkbox"/>	10:45-12:00 Recent Federal Income Tax Developments (cont.)	75 _____
<input type="checkbox"/>	12:15-1:05 Mid-Day Program: Increased Enforcement in a Post Inflation Reduction Act World (sponsored by Chamberlain Hrdlicka)	50 _____
<input type="checkbox"/>	1:15-2:15 Tax Legislative Outlook	60 _____
<input type="checkbox"/>	2:15-3:15 What Federal Income Tax Advisors Need to Know about SALT Issues	60 _____
<input type="checkbox"/>	3:30-4:30 Self-Employment (SECA) Taxes Applicable to LLPs, Hedge Funds, Private Equity & Venture Capital	60 _____
<input type="checkbox"/>	4:30-5:30 Tax Treatment of Cryptocurrency Losses	60 _____
<b><u>Tuesday, October 31, 2023 (485 minutes available including Mid-day program)</u></b>		
<input type="checkbox"/>	8:30-9:30 Hot Topics in Partnership and Real Estate Taxation	60 _____
<input type="checkbox"/>	9:30-10:30 Clean Energy Tax Incentives in the Inflation Reduction Act of 2022: How to Maximize Benefits	60 _____
<input type="checkbox"/>	10:45-12:00 Tax Issues Facing Distressed Partnerships and Corporations	75 _____
<input type="checkbox"/>	12:15-1:05 Mid-Day Program: Investment Banking & Wealth Management Perspectives (sponsored by Wilmington Trust)	50 _____
<input type="checkbox"/>	1:15-2:15 FIRPTA: A General Refresher and Discussion of Common Planning Considerations	60 _____
<input type="checkbox"/>	2:15-3:15 Hot Topics in Corporate Tax	60 _____
<input type="checkbox"/>	3:30-4:30 M&A Tax Structuring: Tips and Traps	60 _____
<input type="checkbox"/>	4:30-5:30 Transaction Structures Involving Subchapter C and Subchapter K	60 _____
<b><u>Wednesday, November 1, 2023 (485 minutes available including Mid-day program)</u></b>		
<input type="checkbox"/>	8:30-9:45 Payroll Tax and the Supersized IRS Budget: New Challenges for Employers	75 _____
<input type="checkbox"/>	9:45-10:45 Equity Incentives in the Executive Compensation Setting	60 _____
<input type="checkbox"/>	11:00-12:00 Accounting for Liabilities in M&A Transactions	60 _____
<input type="checkbox"/>	12:15-1:05 Mid-Day Program: Eligibility for the ERC: Who CARES (sponsored Synergi)	50 _____
<input type="checkbox"/>	1:15-2:15 The Latest and Greatest on the BBA	60 _____
<input type="checkbox"/>	2:15-3:15 Where's My Refund? IRS Scrutiny of R&D, ERC and Other Tax Credit Refund Claims	60 _____
<input type="checkbox"/>	3:30-4:30 Tax Implications of Conservation Easement Donations: Recent Developments	60 _____
<input type="checkbox"/>	4:30-5:30 Fixing Federal Tax Mistakes (submitted for 1.0 hour of ethics credit)	60 _____
<b><u>Thursday, November 2, 2023 (515 minutes available including Mid-day program)</u></b>		
<input type="checkbox"/>	8:00-9:30 Recent Federal Wealth Transfer Tax Developments	90 _____
<input type="checkbox"/>	9:30-10:30 Surprise! Redefining Family in the Wild West of DNA Test Kits and Assisted Reproductive Technology	60 _____
<input type="checkbox"/>	10:45-12:00 Post-Mortem Tax Planning and Estate Administration	75 _____
<input type="checkbox"/>	12:15-1:05 Mid-Day Program: Estate Planning Case Study: Cecil v. Commissioner (sponsored by MPI)	50 _____
<input type="checkbox"/>	1:15-2:15 Estate Planning with Cryptocurrency and Other Digital Assets	60 _____
<input type="checkbox"/>	2:15-3:15 Over-Rated: How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning	60 _____
<input type="checkbox"/>	3:30-4:30 What We Don't Talk About When We Talk About Estate Planning	60 _____
<input type="checkbox"/>	4:30-5:30 Income Tax and Estate Tax Planning for Encumbered Real Estate Using the Preferred Partnership	60 _____
<b><u>Friday, November 3, 2023 (285 minutes available)</u></b>		
<input type="checkbox"/>	8:00-9:00 The Current Landscape of Estate and Gift Tax Audits and Litigation	60 _____
<input type="checkbox"/>	9:00-10:00 The Times They Are A-Changin' - Trust Modification in the Modern World	60 _____
<input type="checkbox"/>	10:15-11:30 Judicial Anti-Abuse Doctrines in Estate Planning Transactions	75 _____
<input type="checkbox"/>	11:30-1:00 Goblins' Lamentation List: Unscrambling "Installment Obligations"	90 _____

**TOTAL MINUTES ATTENDED** \_\_\_\_\_

**Total minutes for program including Mid-days: 2,225 (Mon-455 min; Tues-485 min; Wed-485 min; Thurs-515 min; Fri-285 min)  
Total minutes for program (not including Mid-days): 2,025 (Mon-405 min; Tues-435 min; Wed-435 min; Thurs-465 min; Fri-285 min)**