60th ANNUAL SOUTHERN FEDERAL TAX INSTITUTE — October 27-31, 2025

KEEP THIS SCHEDULE FOR YOUR RECORDS

(Please check all that apply)

	Time	Session	Minutes	Enter minutes attended for each session
		Monday, October 27, 2025 (455 minutes available including Mid-Day program)		
☐	9:00-10:30	Recent Federal Income Tax Developments	90	
☐	10:45-12:00	Recent Federal Income Tax Developments (cont.)	75	
☐	12:15-1:05	Mid-Day Program: Resolving Tax Issues in the Current IRS Environment (sponsored by Chamberlain Hrdlicka)	50	
☐	1:15-2:15	Tax Policy and Legislative Update: The View from Washington	60	
☐	2:15-3:15	International Tax Landscape: Global (BEPS Pillar 2) and U.S. Tax Update	60	
☐	3:30-4:30	Understanding and Using IRS and State DOR e-Services	60	
☐	4:30-5:30	Navigating the Current Tax Enforcement Environment	60	
		Tuesday, October 28, 2025 (500 minutes available including Mid-Day program)		
☐	8:30-9:20	Current Trends in Real Estate Debt Workouts	50	
☐	9:20-10:10	Exiting a Partnership the “Right” Way: How to Exit a Partnership in a Tax Efficient Manner	50	
☐	10:25-11:15	Current Developments for Real Estate Partnerships and Investors	50	
☐	11:15-12:15	Structuring Considerations for 1031 Exchanges	60	
☐	12:15-1:05	The Future of Taxation (sponsored by Alliant Insurance Services)	50	
☐	1:15-2:15	Corporate Tax and Cross-Border Hot Topics	60	
☐	2:15-3:15	Sales of Closely Held Businesses: Avoiding Pitfalls and Planning Ahead for the Best Outcome	60	
☐	3:30-4:30	Why Do We Roll This Way? Tax Deferred Transactions in the Private Context	60	
☐	4:30-5:30	Structuring Investments in Tech, Life Sciences and Other Private Companies	60	
		Wednesday, October 29, 2025 (490 minutes available including Mid-Day program)		
☐	8:30-9:45	Employee Benefits: Updates to Laws, Regulations, and IRS Operations in the New Administration	75	
☐	9:45-10:45	Income Tax Accounting Methods: More Than Just Timing	60	
☐	11:00-12:00	ESOP as an Option for Ownership Transition: What You and Your Clients Need to Know	60	
☐	12:15-1:05	Mid-Day Program: Sales Tax Considerations in Asset and Equity Acquisitions (sponsored by McGuireWoods)	50	
☐	1:15-2:30	Partnership Audit Rules: Traps for the Unwary	75	
☐	2:30-3:25	Resolving Tax Controversies with the IRS Independent Office of Appeals: What’s New and What’s Next	55	
☐	3:40-4:35	International Information Return Penalties: Current Developments and Effective Strategies	55	
☐	4:35-5:35	Safeguarding Privilege: Navigating *Kovel* Engagements *(submitted for 1.0 hour of ethics credit)*	60	
		Thursday, October 30, 2025 (515 minutes available including Mid-Day program)		
☐	8:00-9:30	Recent Federal Wealth Transfer Tax Developments	90	
☐	9:30-10:30	Four Weeks and a Funeral: Considerations for the Two Weeks Before Death and the Two Weeks After Death	60	
☐	10:45-12:00	SECURE-ly Planning for Retirement Assets	75	
☐	12:15-1:05	Mid-Day Program: Hot Topics at the Intersection of Estate Planning and Business Valuation (sponsored by MPI)	50	
☐	1:15-2:15	IRS Transfer Tax Targets and Trials: What Were They Thinking?	60	
☐	2:15-3:15	Expecting the Unexpected: Flexible Planning for 2025 and Beyond	60	
☐	3:30-4:30	It’s English to Me: Non-U.S. Trust Law for U.S. Lawyers	60	
☐	4:30-5:30	Using Generative AI Ethically & Responsibly in an Estate Planning Practice *(submitted for 1.0 hour of ethics credit)*	60	
		Friday, October 31, 2025 (285 minutes available)		
☐	8:00-9:00	Planning with Life insurance LLCs after *Connelly* and *Huffman*	60	
☐	9:00-10:00	Review of the Past Year’s Significant, Curious, or Downright Fascinating Fiduciary Cases	60	
☐	10:15-11:30	Tax Consequences of Trust Modifications and Early Terminations	75	
☐	11:30-1:00	The Great Unknown: What Really Happens When Partners Die?	90	
		TOTAL MINUTES ATTENDED		

Total minutes for program including Mid-Days: 2,245 (Mon-455 min; Tues-500 min; Wed-490 min; Thurs-515 min; Fri-285 min)

Total minutes for program (not including Mid-Days): 2,045 (Mon-405 min; Tues-450 min; Wed-440 min; Thurs-465 min; Fri-285 min)