

# 17th Annual Oregon Tax Institute

Cosponsored by the Taxation Section

**REGISTER NOW!**

[osbar.inreachce.com](http://osbar.inreachce.com)  
(search for TAX17)

**Thursday, June 1, 2017, 9 a.m. – 4:45 p.m.**

**Friday, June 2, 2017, 8:30 a.m. – 4:30 p.m.**

## Multnomah Athletic Club

1849 SW Salmon Street., Portland

**CLE credits:** 11.25 General, 1 Ethics. Eligible for CPE credits

With each new administration comes the discussion of “tax reform.” Whether or not that ever happens, tax practitioners always need to be in top form to provide the most current tax advice to clients. This year’s stellar lineup of speakers cover a gamut of topics for today’s tax professionals, including trends in compensation benefits, using partnerships in estate planning, a state and local tax update, and the latest in federal income tax developments. You’ll also receive insight regarding IRS enforcement hot topics, while the legal ethics session will focus on data privacy and your ethical obligations.

The Tax Institute welcomes back:

- Mary “Handy” Hevener, *Morgan Lewis*
- Professor Bruce McGovern,  
*South Texas College of Law Houston*
- Bahar Schippel, *Snell and Wilmer LLP*
- Dayna Underhill (with Calon Russell),  
*Holland & Knight LLP*
- Andres Vallejo (with Priscilla Parrett),  
*Reed Smith LLP*

And extends a warm welcome to:

- George Karibjanian, *Franklin, Karibjanian & Law*
- Paul Lee, *Northern Trust*
- Kenneth Levinson, *Faegre Baker Daniels*
- Charles Rettig, *Hochman Salkin Rettig Toscher  
& Perez PC*

## LIVE EVENT



### Early registration discount

Register by 5/12/17 and save \$30

- \$380 ONLD member (*Includes lunches*)
- \$460 Regular registration (*Includes lunches*)
- \$25 Print course materials  
(*Electronic materials are included with registration*)

The Taxation Section will present its Award of Merit during the lunch on Thursday. Following the conclusion of Thursday’s program, please join your colleagues at the Institute’s hosted reception. This is a great opportunity to renew relationships, make new acquaintances, and connect with other tax professionals.

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### Questions or need help with registration?

Call the OSB CLE Service Center:

(503) 431-6413 or (800) 452-8260, ext. 413

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the live seminar.

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## THURSDAY, JUNE 1

- 8:00** Registration and Continental Breakfast
- 9:00** **An Oxymoron? The Deathbed Lifetime QTIP for Basis Adjustment and Asset Protection**  
**George Karibjanian,**  
*Franklin Karibjanian & Law, Boca Raton, FL*
- 10:00** Break
- 10:15** **U.S. International Tax and Tax Treaties: Key Principles, Key Issues**  
**Kenneth Levinson,** *Faegre Baker Daniels,*  
*Minneapolis, MN*
- 11:30** Lunch (included with registration)
- Presentation of the Taxation Section Award of Merit to Oregon Tax Court Presiding Magistrate Jill Tanner (Ret.)**
- 1:00** **Hot Topics in IRS Enforcement: Tips from the Tax Trenches**  
**Charles Rettig,** *Hochman Salkin Rettig Toscher & Perez PC, Beverly Hills, CA*
- 2:30** **The State of the State and Local Tax World (With an Emphasis on the West Coast)**  
**Priscilla Parrett,** *Reed Smith LLP,*  
*San Francisco, CA*  
**Andres Vallejo,** *Reed Smith LLP,*  
*San Francisco, CA*
- 3:30** Break
- 3:45** **Where's the Data? Data Privacy and Your Ethical Obligations**  
**Calon Russell,** *Holland & Knight LLP,*  
*Portland, OR*  
**Dayna Underhill,** *Holland & Knight LLP,*  
*Portland, OR*
- 4:45** Adjourn to hosted reception

## FRIDAY, JUNE 2

- 8:00** Late Registration and Continental Breakfast
- 8:30** **Trends in Compensation Benefits**  
**Mary Hevener,** *Morgan Lewis,*  
*Washington, DC*
- 9:45** Break
- 10:00** **Modern Uses of Partnerships in Estate Planning**  
**Paul Lee,** *Northern Trust, New York, NY*
- 11:15** **Boiler Plate Tax Distribution Provisions Can Get You into Hot Water**  
**Bahar Schippel,** *Snell and Wilmer LLP,*  
*Phoenix, AZ*
- 12:15** Lunch (included with registration)
- 1:15** **Recent Federal Income Tax Developments**  
**Professor Bruce McGovern,**  
*South Texas College of Law Houston,*  
*Houston, TX*
- 2:45** Break
- 3:00** **Recent Federal Income Tax Developments (continued)**
- 4:30** Adjourn

## Thank you to our reception sponsors



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## Planning Committee

Heather Kmetz, *Chair, Sussman Shank LLP, Portland*

Jonathan Cavanagh, *Cable Huston LLP, Portland*

## Products

CDs will be available approximately two weeks after the live program. Please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, to place your order.

**TAX17.KCDE** Audio CDs with electronic course materials ..... \$460

## General Information

**Cancellations:** Cancellation requests must be received at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee. To cancel, please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413.

**Tuition Assistance:** Email a request stating your financial situation to [cle@osbar.org](mailto:cle@osbar.org) or call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, no later than one week before the seminar.

**Dietary Restrictions or Accessibility Accommodations:** Please call (503) 431-6352 or (800) 452-8260, ext. 352, at least 72 hours before the date of the seminar.



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OSB CLE  
Seminars

## Upcoming Seminars

### May 10

Lunch and Learn Series: Quantifying Economic Damages (DAM117)

### May 12

Becoming Media Savvy: Getting the Press You Want; Managing the Press You Don't Want (NEWS17)

### May 17

Lunch and Learn Series: Economic Damages and Risk Assessment (DAM217)

### May 19

37th Annual Northwest Securities Institute (NWSI17)

### May 24

Lunch and Learn Series:  
Calculating Economic Damages (DAM317)

### May 28

Investigating Employee Misconduct (IEM17)

### May 31

Lunch and Learn Series: Economic Damages in Employment Cases (DAM417)

### June 9

Advanced Estate Planning

### June 22

Practicing Law in Oregon

Register now at [osbar.inreachce.com](http://osbar.inreachce.com) and search by program code.