

21st Annual Oregon Tax Institute

Cosponsored by the Taxation Section

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LIVE WEBCAST

Thursday, June 3, 2021, 8:30 a.m.–4:45 p.m.

Friday, June 4, 2021, 8:30 a.m.–3:50 p.m.

All times are Pacific Daylight Time (PDT)

CLE credits: 11.75 General and 1 Mental Health
and Substance Use

Eligible for CPE credits

MCLE ID#: 78861

\$220 ONLD member

\$320 Regular registration

Includes online access to recorded seminar for 60 days after the event. Electronic materials are included with your registration.

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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Questions or need help with registration?

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or cle@osbar.org

Thursday, June 3

8:25 Welcome

Christopher Heuer, 2021 Chair, OSB Taxation
Section

8:30 Payroll Taxes in the Pandemic and Beyond: Inside the IRS Plan to Target Corporations and Employees Earning Over \$400K to Pay for COVID Relief Programs

Handy Hevener, Morgan Lewis & Bockius LLP, New
York, NY

Steven Johnson, Morgan Lewis & Bockius LLP,
Washington, DC

9:45 Break

10:00 Inside the IRS: New Directives and Fresh Perspectives

Charles Rettig, Commissioner, Internal Revenue
Service, Washington, DC

11:00 Transition

11:05 Understanding Offshore Financial Centers

David Marchant, OffshoreAlert, Miami, FL

11:50 Lunch

12:30 Conquering Subchapter K(ryptonite): Fundamentals of Partnership Taxation for Estate Planners

Paul Lee, Northern Trust, New York, NY

2:00 Break

2:15 The “Baker’s Dozen”: 13 Things You May Not Know About Preparing a Federal Estate Tax Return

George Karibjanian, Franklin Karibjanian & Law
PLLC, Boca Raton, FL

3:30 Transition

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Thursday, June 3 (continued)

3:35 Lawyer Like an Athlete: Building Endurance, Outsmarting Burnout, and Bringing Your Best Self to Work

Amy Wood, Psy.D., Portland, ME

4:35 Adjourn to Virtual Social Hour on Remo

4:45 Virtual Social Hour on Remo with Hosted Snack Box Delivery

If you register to attend the Oregon Tax Institute, please [click here](#) for details to request a snack box (included with registration) to enjoy during the Virtual Social Hour. Please make your request by 10 p.m., Thursday, May 13.

Special thanks to our Remo sponsor, Miller Nash LLP, and to our Virtual Social Hour Snack Box sponsors



Friday, June 4

8:30 Federal Tax Update (Part I)

Professor Cassady "Cass" Brewer, Georgia State University, Atlanta

Professor James Delaney, University of Wyoming, Laramie

Professor Bruce McGovern, South Texas College of Law, Houston

10:00 Break

10:15 Federal Tax Update (Part II)

Professor Cassady "Cass" Brewer, Georgia State University, Atlanta

Professor James Delaney, University of Wyoming, Laramie

Professor Bruce McGovern, South Texas College of Law, Houston

11:45 Lunch

12:30 Oregon and Portland Administration Roundtable

Moderator: Nikki Dobay, Eversheds Sutherland, Portland, OR

Satish Upadhyay, Oregon Department of Revenue, Salem

Xaan Culver, CAT Policy Coordinator, Oregon Department of Revenue, Salem

Scott Karter, Revenue Division, City of Portland, OR

Jason McKay, Revenue Division, City of Portland, OR

Marjorie Taylor, Legislative Director, Oregon Department of Revenue, Salem

1:45 Break

2:00 An Overview of the PPP and What to Think About at the State Level

Erica Horn, Dean Dorton, Lexington, KY

Maddie Schueler, Dean Dorton, Lexington, KY

2:45 Transition

Friday, June 4 (continued)

2:50 John Doe Summonses: A Deeper Look at a Key IRS Information Gathering Tool and What Its Increased Use May Mean to Non-Compliant Taxpayers

Sandra Brown, *Hochman Salkin Toscher Perez PC, Beverly Hills, CA*

3:50 Adjourn

4:30 Virtual Wine Tasting with Women in Tax*—All are welcome. [Click here](#) for additional details under Upcoming Events on the OSB Tax Section website.

**Communication regarding this event by the Oregon State Bar, including the Taxation Section, does not constitute an endorsement of the event or affiliated event entities.*

Women in Tax is partnering with [Penner-Ash Wine Cellars](#) out of Newberg to taste some amazing Oregon wines and network with other local tax lawyers. Penner-Ash Wine Cellars has been a pioneer in the Willamette Valley for over two decades, with a team led by the first hired female winemaker in the State of Oregon, Lynn Penner-Ash.

Planning Committee

Christopher Heuer, *Chair, Stoel Rives LLP, Portland, OR*

Jonathan Cavanagh, *Cable Huston LLP, Portland, OR*

Nikki Dobay, *Evershed Sutherland, Portland, OR*

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

Jessica McConnell, *Samuels Yoelin Kantor LLP, Portland, OR*

Jeff Patterson, *Schwabe Williamson & Wyatt PC, Bend, OR*



Upcoming Seminars

May 6

What I Did During the Pandemic: New Developments in Agribusiness Receivership and Insolvency Proceedings (AGL21-1)

May 13

Update on Federal Water Storage Management in the Klamath Basin and Beyond (AGL21-2)

May 14

41st Annual Northwest Securities Institute (NWSI21)

May 20

Trends and Hot Topics in Forest-Timber Management (AGL21-3)

May 27

Ag Law Update (AGL21-4)

Register for all seminars and browse the full catalog at www.osbar.org/seminars



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Call or email the OSB CLE Service Center:
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or cle@osbar.org

Please contact us at least 24 hours before the seminar for refunds and 72 hours before the seminar for accessibility accommodations.