

# 22nd Annual Oregon Tax Institute

Cosponsored by the Taxation Section

Register now at [osbar.org/seminars](http://osbar.org/seminars) (search for OTI22)



The Oregon Tax Institute returns for its 22nd year as a hybrid event, offering both in-person and remote attendance. During the two days, explore estate planning topics with George Karibjanian and Paul Lee, while Professor Bruce McGovern reviews the most recent federal tax developments. Larry Brant revisits choice of entity in light of tax law changes likely on the horizon, and Professor Howard Abrams shares his thoughts for handling partnership/book tax disparities. Take a look at tax planning hot topics for real estate assets and receive a Metro tax update. A session on Oregon's mandatory abuse reporting requirements includes financial elder abuse.

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.

\*\* The Oregon State Bar requires that all attendees at in-person events sign and return a [Release and Assumption of Risk Form](#) and a [Vaccination Attestation Form](#) prior to attending the event. Please complete the forms in advance of the event (an electronic signature will suffice) and submit to the OSB CLE Service Center at [cle@osbar.org](mailto:cle@osbar.org).

## IN-PERSON

EcoTrust Building, 721 NW 9th Ave, Portland  
or

## LIVE WEBCAST

Thursday, June 2, 9 a.m.–4:15 p.m. PDT

Friday, June 3, 9 a.m.–3:45 p.m. PDT

CLE credits: 9.75 General and 1 Abuse Reporting  
Eligible for CPE credit

MCLE ID#: 89886

## IN-PERSON EVENT \*\*

\$380 ONLD member

\$460 Regular registration

*Thursday and Friday lunches and electronic materials are included with your registration.*

## [Register for the IN-PERSON EVENT](#)

## LIVE WEBCAST

\$380 ONLD member

\$460 Regular registration

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

## [Register for the LIVE WEBCAST.](#)

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 this seminar.



## Questions or need help with registration?

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## Thursday, June 2 (All times are Pacific DT)

- 8:00** Registration and Continental Breakfast
- 9:00** Testamentary Planning with IRAs  
George Karibjanian, *Franklin Karibjanian & Law PLLC, Boca Raton, FL*
- 10:00** The Road Between Subchapter C and Subchapter S—It May Be A Well-Traveled Two-Way Thoroughfare, But It Isn't Free of Potholes  
Larry Brant, *Foster Garvey, Portland, OR*
- 10:45** Break
- 11:00** Partnership Book/Tax Disparities: How to Recognize, Create, and Exploit Them  
Professor Howard Abrams, *Harvard Law School, Cambridge, MA*
- 12:15** Lunch and Presentation of the Taxation Section Award of Merit (included with registration)
- 1:30** Hot Topics in Real Estate  
Richard Lipton, *Baker & McKenzie LLP, Chicago, IL*
- 2:30** Break
- 2:45** Finding Gems in the Ashes of the Dumpster Fire  
Paul Lee, *Northern Trust, New York, NY*
- 4:15** Adjourn to hosted reception

## Friday, June 3 (All times are Pacific DT)

- 8:30** Late Registration and Continental Breakfast
- 9:00** Mandatory Abuse Reporting for Oregon Attorneys  
Nik Chourey, *Oregon State Bar, Tigard, OR*
- 10:00** Break
- 10:15** Metro Tax Update  
Jennifer Young, *Moss Adams, Portland, OR*
- 11:30** Lunch (included with registration)
- 12:30** Federal Tax Developments  
Professor Bruce McGovern, *South Texas College of Law, Houston, TX*
- 2:00** Break
- 2:15** Federal Tax Developments (Cont.)  
Professor Bruce McGovern, *South Texas College of Law, Houston, TX*
- 3:45** Adjourn



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## Planning Committee

**Caitlin Wong**, *Planning Chair, CW Law LLC, Portland, OR*

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

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

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

**Jeff Patterson**, *Lynch Murphy McLane LLP, Bend, OR*

## Products

Audio CDs will be available 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.

**OTI22.CD** Audio CDs with electronic course materials.....\$460

This seminar will be available on-demand after the live program. Please visit [www.osbar.org/seminars](http://www.osbar.org/seminars) and search for OTI22. On-demand access is available for 60 days after the date of purchase.

## 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) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.

**THANK YOU**  
to our Reception Sponsors

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