

23rd Annual Oregon Tax Institute

Cosponsored by the Taxation Section

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Popular presenters and some fresh faces will be part of this year's Oregon Tax Institute. Paul Lee returns with a new discussion on installment obligations and Professor Bruce McGovern will once again share federal tax developments. You'll hear an update from the Taxpayer Advocate Office of the IRS, explore equity compensation concerns, and learn about current tax issues in bankruptcy. Other topics will cover PTE, Secure Act 2.0, and drafting partnership agreements for law or accounting firms. The legal ethics session will address conflicts, confidentiality, and the obligation to report bad actors.

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.

Planning Committee

Peter Evalds, *Foster Garvey PC, Portland, OR*

Andrew Ginis, *Four Point Legal PC, Portland, OR*

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

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

Kate Roth, *Tonkon Torp LLP, Portland, OR*

Caitlin Wong, *Attorney at Law, Portland, OR*

Thursday, June 1, 2023

9:45 a.m.–5 p.m. PDT

Friday, June 2, 2023

9 a.m.–4:15 p.m. PDT

Oregon State Bar Center

16037 SW Upper Boones Ferry Road, Tigard

CLE Credits: 10.25 General and 1 Ethics
Eligible for CPE credit

MCLE ID #: 100474

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LIVE EVENT

\$380 ONLD member

\$460 Regular registration

Thursday and Friday lunches and 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 this seminar.



Questions or need help with registration?

Call or email the OSB CLE Service Center:
(503) 431-6413 or **(800) 452-8260, ext. 413**
or cle@osbar.org

Thursday, June 1

- 9:00 Registration and Enhanced Continental Breakfast**
- 9:45 To PTE, or Not to PTE—That is the Question**
Nikki Dobay, *Greenberg Traurig LLP, Portland, OR*
Shail Shah, *Greenberg Traurig LLP, San Francisco, CA*
- 10:45 Networking Break**
- 11:00 Navigating the Tax Impact of Equity Compensation, Alternative Phantom Equity Structures and Related Compliance Issues**
Jeffrey Kroh, *Groom Law Group, Chartered, Washington, DC*
- 12:00 Lunch (included with registration)**
- 1:15 Taxing Ethical Issues for Practitioners**
David Elkanich, *Buchalter, Portland, OR*
- 2:15 Transition Break**
- 2:20 Taxpayer Advocate Service Updates**
Erin Collins, *National Taxpayer Advocate, Taxpayer Advocate Office, Internal Revenue Service, Washington, DC*
- 3:35 Networking Break**
- 3:45 Goblins Lamentation List: Unscrambling “Installment Obligations”**
Paul Lee, *Northern Trust, New York, NY*
- 5:00 Adjourn to Hosted Reception**

Friday, June 2

- 8:30 Late Registration and Enhanced Continental Breakfast**
- 9:00 Secure 2.0: 90+ Changes . . . What Happens Now?**
David Levine, *Groom Law Group, Chartered, Washington, DC*
- 9:45 Transition Break**
- 9:50 Current Issues in Bankruptcy Tax**
Anthony Sexton, *Kirkland & Ellis LLP, Chicago, IL*
- 10:50 Networking Break**
- 11:00 Clark Raymond: How NOT to Draft a Partnership Agreement for a Law or Accounting Firm (and Other Partnership Tax Developments)**
Richard Lipton, *Baker McKenzie, Dallas, TX*
- 12:00 Lunch (included with registration)**
- 1:00 Federal Tax Developments**
Professor Bruce McGovern, *South Texas College of Law, Houston, TX*
- 2:30 Networking Break**
- 2:45 Federal Tax Developments (Continued)**
- 4:15 Adjourn**



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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.

OTI23.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 and search for OTI23. 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 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.

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to our Reception Sponsors

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