

Tax Section of the Florida Bar

February 2018 E-Newsletter

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TOP NEWS:

[February 7, 2018, at 12:00 p.m. Telephone CLE - An Overview of Tax Procedure](#)

[February 15, 2018 – Submission Deadline – Tax Section Bulletin – Spring 2018 Edition](#)

[February 21, 2018, at 12:00 p.m. Telephone CLE - An Overview of Transfer Taxes](#)

[March 21, 2018 DOR/Tax Section Liaison Meeting](#)

MEETINGS

DOR/Tax Section Liaison Meeting

The Florida Department of Revenue and the Tax Section have scheduled a liaison meeting for **Wednesday, March 21, 2018.**

The meeting will take place from **9:00 a.m. to 12:00 p.m.** at **DOR Headquarters in Tallahassee.** Address: 2450 Shumard Oak Blvd, Tallahassee, FL 32311.

All Tax Section members are invited. There are many affordable hotels in the area.

You can contact Steve Hogan (shogan@ausley.com) with any questions.

2018 Annual Meeting

April 18-21, 2018

Ritz-Carlton, Sarasota

[Click Here to Reserve Your Room](#)

2018 Organizational Meeting

July 4-8, 2018

Omni Plantation Resort, Amelia Island

[Click Here to Reserve Your Room](#)

2018 Fall Meeting

September 20-23, 2018

JW Marriott, Washington DC

September 20-23 the Section travels to Washington D.C. for its Fall Meeting. Tax lawyers will be in high demand as the country analyzes the short-term and long-term impact of the new tax law. There, we will meet with our Florida legislative delegation and various agencies that we interact with as tax practitioners or that affect tax legislation and policy. This is a unique and important opportunity for the Section to engage on the federal level at a time when it couldn't be more important for us to do so. The timing of this meeting coincides perfectly to voice our thoughts and concerns related to new tax legislation and have input into any patch or glitch legislation that may be necessary. Section members will also have unique sightseeing opportunities on this trip, such as tours of D.C. monuments at night and behind the scenes tours of the Smithsonian!

Our room block for this trip is now open at the JW Marriott and reservations can be made through the link below. Plan to join us and book now! More information on the meeting itinerary will follow as the meeting approaches.

[Click Here for Hotel Reservations](#)

PHONE CLE'S

Topic: An Overview of Tax Procedure

The presenters will be providing a review of tax procedure for the board certification exam in tax. This will cover topics including the assessment and collection process, appeal rights, tax court litigation, statutes of limitations, penalties, innocent spouse relief, withholding obligations, offshore voluntary disclosures and more.

Division: Fed Tax Division of the Tax Section of the Florida Bar

Date: February 7, 2018, at 12:00 p.m.

Speaker: Micah Fogarty and Brian Harris

The CLE will be free and worth 1 credit.

[Click Here to Register](#)

Topic: An Overview of Transfer Taxes

The teleconference is geared towards applicants for the 2018 Tax Certification Exam or any attorney just wanting a basic understanding of Federal transfer taxes. The teleconference is provided as a free service of the Florida Bar Tax Section and dial-in information with access to an accompanying PowerPoint presentation will be available. Taso is a Board Certified Tax Lawyer and serves on the Executive Council of the Florida Bar Tax Section and as Co-Director of the Federal Tax Division.

Division: Fed Tax Division of the Tax Section of the Florida Bar

Date: February 21, 2018, at 12:00 p.m.

Speaker: Taso Milonas

The CLE will be free and worth 1 credit.

[Click Here to Register](#)

THE FLORIDA BAR TAX SECTION
2018 MARVIN C. GUTTER OUTSTANDING
PUBLIC SERVICE AWARD

The Florida Bar Tax Section wishes to recognize a government employee in the area of State or Federal Taxation for Outstanding Public Service over the past year. We will present this award at the Tax Section Organizational Meeting at Amelia Island, Florida, to be held July 4 - July 8, 2018.

Please take a few moments to consider the following standards for excellence and nominate one or more individuals for the 2018 Marvin C. Gutter Outstanding Public Service Award. Please send your nominations to the Tax Section via e-mail to Michael D. Minton at mminton@deanmead.com, as well as his assistant Christine Jeffreys at cjeffreys@deanmead.com no later than March 30, 2018.

**2018 MARVIN C. GUTTER OUTSTANDING PUBLIC SERVICE AWARD
STANDARDS FOR EXCELLENCE**

1. Demonstrates a positive attitude when dealing with taxpayers and representatives.
2. Communicates well with taxpayer and representatives.
3. Maintains professional decorum and courtesy in dealing with taxpayers and representatives.
4. Participates in continuing Legal Educational Programs sponsored by the Tax Section or related CLE organizations.
5. Resolves matters competently and quickly.
6. Demonstrates personal candor as to the government's positions in communicating with taxpayers, representatives or opposing counsel.
7. Acknowledges material facts that are favorable to taxpayers.
8. Is willing to consider alternative theories under existing law.
9. Makes requests for only information and documents that are reasonable and relevant to the issued involved.
10. Promotes the practice of tax law through education of taxpayers and representatives regarding substantive and procedural rules of tax law.

Florida Bar Journal Articles

The Florida Bar Journal has openings for tax articles from December 2018 (September 15, 2018 deadline) onward. Please email Charlotte Erdmann at charlotte@erdmannlaw.com if you are interested.

Florida Bar Tax Section Bulletin

The Spring Edition of the Florida Bar Tax Section Bulletin will be published and circulated in March. Articles for the Spring Edition of the Florida Bar Tax Section Bulletin are due by **February 15, 2018**. There is still availability for one article slot. Please contact Michael Bruno at michael.bruno@bakermckenzie.com as soon as possible to secure a spot.

Tax Reform Study Committee

The Federal Tax Division has created a Tax Reform study committee to analyze and report on any tax reform legislation that is enacted by the Federal government. Leaders from the areas of international tax, business organizations, estate planning, tax procedure and controversy, and employee benefits and qualified plans are cued-up and ready to jump into action if and when reform comes. The study committee and the Tax Section will aim to educate Section members on the changes in the law and the impact of such reform on their practice areas through phone CLEs, live CLEs, lunch-and-learns, and articles in Section publications. The committee also will look for opportunities to address reform-related issues with government and IRS representatives during the Section's trip to Washington D.C. in September 2018.

Tax Section Hall of Champions Interview: Sam Ullman

The purpose of the Florida Bar Tax Section's "Hall of Champions" Interview Series is to record and preserve the wisdom of those lawyers who have meant so much to the development of tax law and policy in Florida. Our first interview is with Sam Ullman, one of the most respected and well-known tax lawyers in our state.

Mr. Ullman practices with the Bilzin Sumberg law firm while teaching at the University of Florida LLM Program. Contact information for Sam Ullman: <https://www.bilzin.com/we-are-focused/people/u/ullman-samuel-c>

Interviewed by Steven Hogan (www.ausley.com)

Listen:

[Click here to listen on your iPhone](#)

[Click here to listen on your Android phone or web browser](#)
[Click here to listen on YouTube](#)

Tax Section Comments on IRS Regulation Projects

Let your voice be heard. The Tax Section provides comments on proposed treasury regulations that are of interest to its members. If you see proposed regulations and would like to work together with other Tax Section members on comments, contact Brian Harris at brian.harris@akerman.com.

Pro Bono Volunteer Opportunities

Florida's Low Income Taxpayer Clinics (LITCs) assist low income taxpayers with IRS controversies, including, collections, liability disputes and Tax Court petitions. Studies show that representation significantly increases positive outcomes for low income taxpayers. If interested in representing a low income taxpayer, please directly contact the LITC nearest you (for a complete list of the LITCs in Florida, go to www.lsgmi.org and click on Low Income Taxpayer Clinic under Quick Links).

Volunteers needed for the U.S. Tax Court Pro-Bono Calendar Call Program. The Program is designed to have local tax practitioners volunteer their time to pro se taxpayers during calendar call sessions without entering their name as the attorney of record. If you are interested in participating in the Calendar Call Program: For Miami, please contact Karen J. Lapekas at 305-600-1485 or karen@lapekaslaw.com. For Tampa, please contact Mitchell Horowitz at 813-222-1105 or mitchell.horowitz@bipc.com. For Jacksonville, please contact Harris L. Bonnette, Jr. at (904) 356-2600 or hbonnette@fishertousey.com. The Program will soon be expanding to include calendar call sessions held in Tallahassee.

Sponsors

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