

# Tax Section of the Florida Bar

April 2018 E-Newsletter

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## TOP NEWS:

Register Now for the [2018 Annual Meeting](#), [Estate Planning CLE](#), and Tax Attorney of the Year Dinner, April 19-21, 2018.

Register Now for the [Annual Wealth Protection 2018](#), May 4, 2018

Reserve your Hotel Rooms for Upcoming Meetings:

[2018 Organizational Meeting](#), Amelia Island, July 4<sup>th</sup>-8<sup>th</sup>

[2018 Fall Meeting](#), Washington DC, September 20<sup>th</sup>-23<sup>rd</sup>

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## 2018 Annual Meeting

April 19-21, 2018

Ritz-Carlton, Sarasota

For Meeting Registration, [Click Here](#)

[For Room Reservations, Click Here](#)  
[8 Hours of CLE/Certification Credit](#)

On April 20, 2018, The Florida Bar Continuing Legal Education Committee and the Tax Section present:

### Are Death and Taxes Still Certain? -- Tax and Non-Tax

This seminar will provide an update on estate planning in light of the Tax Cuts and Jobs Act of 2017, including estate planning opportunities (and potential risks), valuation issues, and exit strategies. The programming will also cover specific topics, including charitable planning and organizations, retirement planning, and international estate planning.

To register, log into The Florida Bar Members Portal at [www.member.floridabar.org](http://www.member.floridabar.org), click Meetings/CLE Events and scroll to the desired course. Course No. 2636R, Live and Webcast Presentation.

[Or Click Here for CLE Registration](#)

## **Annual Wealth Protection 2018**

May 4, 2018

Tampa Airport Marriott

**8 Hours of CLE/Certification Credit**

[Click Here to Register](#)

### **CLE Lunch**

**Tax Reform and Its Implications for Domestic Tax Planning**

Friday, May 4, 2018 @ 12:00 P.M.

University Club, 201 N. Franklin St., 38th Floor, Tampa, FL 33602

Please RSVP to: James A. Schmidt, Esq. via email: [jas@schmidtlawoffice.com](mailto:jas@schmidtlawoffice.com) or phone:  
813.250.3700

## **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](#)

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## **PHONE CLE**

**Topic:** Florida Legislative Update

**Division:** State Tax Division of the Tax Section of the Florida Bar

**Date:** April 11, 2018, at 12:00 p.m.

**Speaker:** French Brown, Esq.

**The CLE will be free and worth 1 credit.**

[Click Here for the Registration link](#)

**Topic:** Tax Cuts and Jobs Act - Pass Through and Business Tax Issues

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

**Date:** April 25, 2018, at 12:00 p.m.

**Speaker:** Guy Whitesman and James Schmidt

**The CLE will be free and worth 1 credit.**

[Click Here for the Registration link](#)

**Topic:** Tax Cuts and Jobs Act - International Tax Issues (90 minutes)

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

**Date:** May 9, 2018, at 12:00 p.m.

**Speaker:** Jim Barrett, Mindy Herzfeld, Javier Chipi, Daniel Hudson

**The CLE will be free and worth 1 credit.**

**[Click Here for the Registration link](#)**

**Topic:** Tax Cuts and Jobs Act - Estate and Gift Tax Issues

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

**Date:** May 23, 2018, at 12:00 p.m.

**Speaker:** Mark Brown

**The CLE will be free and worth 1 credit.**

**[Click Here for the Registration link](#)**

**Topic:** Exempt Organizations

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

**Date:** June 19, 2018, at 12:00 p.m.

**Speaker:** Jason Havens

**The CLE will be free and worth 1 credit.**

**Registration Link Coming Soon**

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## **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](mailto:charlotte@erdmannlaw.com) if you are interested.

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## **Florida Bar Tax Section Bulletin**

We intend to publish a Summer Edition of the Florida Bar Tax Section Bulletin for circulation in August 2018. Please contact Michael Bruno at [Michael.Bruno@BakerMckenzie.com](mailto:Michael.Bruno@BakerMckenzie.com) for article spots. The deadline for submission is July 1, 2018.

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## **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.

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## **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](mailto:brian.harris@akerman.com).

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## **Tax Section Hall of Champions Interview:** **Bob Panoff**

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 third interview in the series is with Bob Panoff, a living legend in Federal and Florida tax controversy and planning. Mr. Panoff practices through Robert E. Panoff, P.A., in Miami.

Information about his firm can be found on Best Lawyers at the following link:

<https://www.bestlawyers.com/lawyers/robert-e-panoff/9020>

Interviewed by Steven Hogan ([www.ausley.com](http://www.ausley.com))

### **Listen:**

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

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

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## **Sam Ullman**

The Tax Section acknowledges with great sadness the passing of its former chair, Samuel Charles Ullman, on March 11, 2018. Sam was the consummate tax attorney, and a friend and mentor to generations of Florida tax attorneys whose lives he touched.

A graduate of the University of Florida (B.A., 1965, J.D., 1967) and University of Miami (LL.M. in Taxation, 1975), Sam began his tax career clerking at the U.S. Tax Court, before moving to Miami in 1969. Sam served as Chair of the Tax Section in 1977-78, and was recognized as the Outstanding Tax Attorney of the Year in 1994. Sam taught tax law as an adjunct professor first at the University of Miami, and later at the University of Florida. The Tax Section previously named its annual summer CLE program "The Ullman Year in Review" in Sam's honor.

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## **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](http://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. **NOW SERVING TALLAHASSEE.** 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](mailto:karen@lapekaslaw.com). For Tampa, please contact Mitchell Horowitz at 813-222-1105 or [mitchell.horowitz@bipc.com](mailto:mitchell.horowitz@bipc.com). For Jacksonville, please contact Harris L. Bonnette, Jr. at 904-356-2600 or [hbonnette@fishertousey.com](mailto:hbonnette@fishertousey.com). For Tallahassee, please contact Jami Coleman at 850-222-0013 or [jcoleman@williamscoleman.law](mailto:jcoleman@williamscoleman.law).

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Questions or comments, please email Leslie Reithmiller  
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