

# The Florida Bar Tax Section 2009-2010 Organizational Meeting

TO: Tax Section Members  
FROM: Frances Sheehy, Chair-elect  
RE: Tax Section Organizational Meeting / July 2 - 5, 2009 – Amelia Island, Florida

**Hotel Room Block Deadline June 10, 2009 - CALL NOW! 1-888-261-6165**



This year will mark a quarter of a century that the Tax Section has met at Amelia Island to share the Fourth of July and to organize for the coming year. We, again, have a friendly calendar with July 4th falling on Saturday. Thus, we begin our long weekend with the Tax Section business activities, continuing legal education opportunities, and social events. To allow you additional time to plan your calendars, this notice is being sent earlier than usual.

The schedule which is attached details the three days of activities. Registration is on Thursday, July 2nd. There will be the normal Director's meeting from 4:00-6:00 pm followed by the Chair's Welcome Reception with more than enough food and fun. We have planned activities for every member of the family, and encourage you to bring your children to enjoy the weekend with family and friends. In addition to the Section events, the plantation has special Fourth of July activities for the entire family. The weekend is casual from beginning to end, so dress accordingly.

On Friday we will have the New Tax Attorneys' meeting and breakfast, the Section Division Meetings and the Tax Section Executive Council Meeting and Lunch. The afternoon will be free time, with the evening activities to include Kids' Programs, divided by age-group and a Cocktail Reception with Dinner and Entertainment for the adults.

Saturday will begin with personal time to enjoy the resort, golf, the spa, etc. Then, for the first time, we are offering a Section Leadership Training session to familiarize those interested in the opportunities to advance within the Section. We are again honored to be able to follow this training with the spectacular Ullman Year in Review. Sam has promised a comprehensive CLE, including tax updates in over ten areas of tax law. This program is always well-attended and has been approved for CLE credit and tax certification credit. Sam will serve his normal refreshments during the CLE. Following Sam will be a cocktail reception with a family dinner and the patriotic fireworks display.

The Tax Section want to thank all of the sponsors of the Section, who support our activities with their time, talent and treasures. Through these partnerships we are able to provide quality programs and acquaint our members with services that enhance our practices and help our clients. The sponsors are the reason we can enjoy the many extra-curricular activities provided during this weekend. And we appreciate them. Our 2009-2010 sponsors are:

#### Platinum

Bessemer Trust      Management Planning, Inc.      PCE Investment Bankers

#### Gold

GenSpring Family Offices      Udell Associates, Inc.

#### Silver

Ashar Group, LLC      Bernstein Global Wealth Management  
Community Foundations of Florida      Kaufman, Rossin & Co., P.A.      Key Private Bank  
Life Insurance Settlements, Inc.      Newman Cohen      Smith Barney      UBS Financial Services, Inc.  
Wilmington Trust

Last, but not least, Mike Jorgenson and Ian White are the Co-chairs of this annual event. Without them we would not have the hospitality suites that provide a home away from home for the Tax Section attendees and their families during this weekend. Come join us for breakfast and of course late night get-togethers. We look forward to seeing you and thank you for your service to the Tax Section.



Please read carefully. Complete the request form and return by fax or mail. Keep this section for your information.

Reservation Policies:

CHECK-IN TIME AFTER 4:00 p.m. CHECK-OUT TIME BEFORE 11:00 a.m. (Late check-outs subject to a fee)

Rates: The rates listed are nightly and based on accommodation size and location. If one person arrives or departs early, the full rate will be charged to the person occupying the accommodations. All rates are subject to 7% sales tax and 2% local bed tax.

Confirmation: Accommodations will be confirmed upon receipt of an advance deposit equal to ONE (1) nights stay. The confirmation will be sent to the address below.

Service Fee: A resort service fee, currently \$10.00 per adult, (16 years of age and older), per night plus 7% sales tax is charged to cover daily housekeeping gratuities, transportation drivers on-property transportation, in-room coffee service, unlimited use of health and fitness center, self parking, 1 hour of tennis court usage (individual play only), 1 bucket of range balls, meeting concierge

staff and 24/7 public safety staff. Service fee and tax are subject to change.

Check Cashing and Charging: Upon check-in, guests receive a charge card which must be presented at the time the guest makes use of any facility or service. All charges are payable at check-out by cash, check, or major credit card. Guests may cash personal checks up to \$50 per day at the Front Desk.

Food & Beverage: Service charge and sales tax is added to all food and beverage checks.

Airport Transportation: Roundtrip service from Jacksonville International may be arranged in advance by completing the section below or by calling Amelia Island Plantation at (800) 874-6878 or (904) 277-5920. Reservations required at least 10 days in advance.

Reservation Request

Please return this form, with deposit, to Amelia Island Plantation, Group Reservations Department, P.O. Box 3000, Fernandina Beach, FL 32035-3000 or with credit card deposit, you may fax to: (904) 277-5945. Phone reservations are accepted by calling 1-888-261-6165.

All requests for accommodations must be received by June 10, 2009 after which space and rates cannot be guaranteed.

Florida Bar, Tax Section

July 2, 2009 - July 5, 2009

8B53X6

Please reserve accommodations for: (Please print or type)

Number of villas or rooms: \_\_\_\_\_

Name: (First and last): \_\_\_\_\_ Number of adults: \_\_\_\_\_ Children: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Company Name: \_\_\_\_\_ Telephone: \_\_\_\_\_ Fax #: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Sharing room with 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

Arrival day & date: \_\_\_\_\_ Departure day & date: \_\_\_\_\_

Your estimated time of arrival: \_\_\_\_\_ How will you be arriving? \_\_\_\_\_ (Fill out the Airport Transportation section if you require transportation)

Please make a selection below:

- Checkboxes for room types and prices: OCEANVIEW ROOM \$196.00, OCEANVIEW 1 BEDROOM SUITE \$256.00, OCEANVIEW 2 BEDROOM VILLA \$411.00, OCEANVIEW 3 BEDROOM VILLA \$471.00, RESORT VIEW ROOM \$159.00, RESORT VIEW 1 BEDROOM SUITE \$179.00, RESORT VIEW 2 BEDROOM VILLA \$311.00, RESORT VIEW 3 BEDROOM VILLA \$351.00

\$12.00 Resort Service Fee, tax 7% and occupancy 3%, per person, per night

Deposit: Amelia Island Plantation requires an advance deposit equal to ONE (1) nights stay per villa reserved to accompany the individual reservation form. Deposit guarantees accommodations for the scheduled arrival day. Failure to show will result in loss of deposit. Deposits may be made by personal check or credit card.

Refunds: Notice of cancellation must be received by the reservations department fourteen (14) days prior to the arrival date.

Circle one: Visa Master Card Discover American Express Diners Club Amount of deposit: \$ \_\_\_\_\_

Card #: \_\_\_\_\_ Expiration date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Airport Transportation Request

Florida Bar, Tax Section

8B53X6

Airport Fare One-Way: \$50/person; Round-Trip: \$100/person

Name: \_\_\_\_\_ Arrival date: \_\_\_\_\_ Arrival time: \_\_\_\_\_

Airline: \_\_\_\_\_ Flight number: \_\_\_\_\_

Number of adults: \_\_\_\_\_ Children 12 & older: \_\_\_\_\_ Under 12: \_\_\_\_\_ Car seat required: Y/N \_\_\_\_\_

After you claim your luggage, check in at the Transportation Booth located just outside Baggage Claim. Shuttle departs at the top of the hour based on advance reservations.

Departure date: \_\_\_\_\_ Departure time: \_\_\_\_\_

Number of adults: \_\_\_\_\_ Children 12 & older: \_\_\_\_\_ Under 12: \_\_\_\_\_ Car seat required: Y/N \_\_\_\_\_

Note: Shuttle departs the Reception Area 1.5 - 2 hours prior to your flight. Call ext. 5920 to confirm your departure time.

Deposit: No deposit is required. All charges will be applied to your resort account.

Cancellation: If your plans change, please call us. 48 hours notice of cancellation is required. There is a minimum one-way charge for late cancellations or no-show reservations.

# Tax Section 2009-2010 Organizational Meeting Registration Form

**Amelia Island Plantation - Amelia Island - July 2, 2009 - July 5, 2009**

**Meeting Registration Fee Per Section Member is \$175 plus Cost Per Event Per Person as Listed Below**

Name (on name badge) \_\_\_\_\_ Florida Bar # \_\_\_\_\_

Address/City/Zip: \_\_\_\_\_

E-mail Address: (Please fill out to receive timely updates): \_\_\_\_\_

Spouse / Guest(s) Name(s): \_\_\_\_\_

Children: Name \_\_\_\_\_ Age \_\_\_\_\_ • Name \_\_\_\_\_ Age \_\_\_\_\_

Name \_\_\_\_\_ Age \_\_\_\_\_ • Name \_\_\_\_\_ Age \_\_\_\_\_

Date & Time	Function	# Attending	Cost Per Person	
<b><u>Thursday, July 2, 2009</u></b>				
4:00 p.m. - 6:00 p.m.	Directors Meeting	_____ Adult	N/C	
7:00 p.m. - 8:00 p.m.	Chair's Welcome Reception	_____ Adult	N/C	8190007
		_____ Child	N/C	8190007
8:30 p.m. - 1:00 a.m.	Poker Night	_____ Adult	N/C	
<b><u>Friday, July 3, 2009</u></b>				
7:30 a.m. - 8:30 a.m.	New Tax Attorneys' (Breakfast Served; All members invited)	_____ Adult	N/C	8190008
8:00 a.m. - 12:15 p.m.	Section Division Meetings	_____ Adult	N/C	
12:15 p.m. - 2:00 p.m.	Tax Section Executive Council Meeting with Lunch (Members & Sponsors Only)	_____ Adult	N/C	8190009
6:30 p.m. - 10:00 p.m.	Kids Program (ages 3-7) Pajama-rama	_____	\$30 (\$28.04+1.96)	8190010
6:30 p.m. - 10:00 p.m.	Kids Program (ages 8-12) "Dance Dance Revolution"	_____	\$30 (\$28.04+1.96)	8190011
6:30 p.m. - 10:00 p.m.	Teens Program (ages 13-17) Beach Party	_____	\$40 (\$37.38+2.62)	8190012
6:30 p.m. - 7:15 p.m.	Cocktail Reception	_____ Adult		8190013
7:15 p.m. - 10:00 p.m.	Dinner & Entertainment	_____ Adult	\$50 (\$46.73+3.27)	8190014
<b><u>Saturday, July 4, 2009</u></b>				
8:00 a.m.	Golf ( <i>one tee time per registrant</i> ) Handicap _____	_____ Adult	\$40 (\$37.38+2.62)	8190015
10:00 a.m. - 2:00 p.m.	Spa Treatments ( <i>Discount: \$50 off</i> ) Limited to the first 50 Tax Members, immediate family and Sponsors <u>only</u> . <i>*Call 877-843-7722 and ask for Sherica to make your appointment*</i>			
1:00 p.m. - 2:30 p.m.	Tax Section Leadership Training	_____ Adult	N/C	
2:30 p.m. - 5:30 p.m.	Ullman Year in Review (CLE)	_____ Adult	N/C	8190017
6:30 p.m. - 7:15 p.m.	Cocktail Reception	_____ Adult		8190018
		_____ Child		8190018
7:30 p.m. - 10:00 p.m.	Dinner & Family Fireworks Show	_____ Adult	\$30 (\$28.04+1.96)	8190019
	<i>*Please Do Not Allow Your Children on the Golf Course*</i>	_____ Child	\$15 (\$14.02+0.98)	8190019
<b>Section Member Registration Fee</b>		_____ <b>\$175 (MEMBER)</b>		8190006
<b>TOTAL MONEY ENCLOSED</b>		<b>\$ _____</b>		

**METHOD OF PAYMENT (CHECK ONE):**

\_\_\_\_ Check enclosed made payable to the Florida Bar OR Credit Card: Mastercard \_\_\_\_\_ Visa \_\_\_\_\_ AMEX \_\_\_\_\_ Discover \_\_\_\_\_

Card No.: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

Please return this form no later than 6/10/09. Written cancellation is required one week prior to events for refunds. Mail this form with check or credit card information to The Florida Bar-Tax Section, 651 E. Jefferson St., Tallahassee, FL 32399-2300 or Fax 850-561-5825. Call Christina Sykes at 850-561-5624 with questions.

# Celebrate July 4th!



## Thursday, July 2

### 1PM – Red, White & Blue Egg Toss

Join us on the beach for this colorful *and* messy game!

### 2PM – Red, White & Blue Crafts

Let's get patriotic! Crafts range from \$5 - \$18

### 3PM – Teen Wii Challenge

### 4PM – Talent Show

Do you sing, dance, juggle, tell jokes? Here's your chance to shine! Sign up at the Info Hut before 1pm.

### 7PM – Family Beach Fire

Complete with s'mores, marshmallows and other goodies available for purchase!

## Friday, July 3

### 11AM – Patriotic Tie Dye T-shirts. \$18/shirt

### 12PM – Cake Walk \$5/person

### 1PM – Little Miss Amelia/Mr. Muscles Contest

Ages 3-11. Pre register at the Info Hut before 11am.

### 3PM – Teen Beach Volleyball

### 4PM – Family Build your own Boat

We'll provide the supplies, you bring the creativity. Which family's boat is the most original *and* can float across the pool without sinking? \$25/family

### 5-8PM – Boardwalk Bash, Marché Burette

\$1 beer. Live entertainment. Food & Drink specials

### 5PM – Meet the Air Show Performers at Falcon's Nest!

Take home an autograph!

### 6:30PM – Just For Kids dinner program. Call for details

### 7-10PM – Teen Paintball \$70/teen

**Red, White, or Blue Sale\* July 3 – July 6**  
Shop in *Harrison's Mercantile, Resort to Home, Amelia's Signature Shop, Nature Center* and the *Amelia Shop* for 15% savings on all merchandise that has red, white or blue in it!\* certain restrictions apply.

## Saturday, July 4

### 9AM – Parade Decorating, Palm Parking Lot

We'll bring balloons & streamers... you bring your bike or island hopper to decorate! **Bikes & hoppers not included but can be rented at Amelia's Wheels.**

### 10AM – July 4<sup>th</sup> Patriotic Parade!

Smile & wave your way to *The Spa & Shops*.

### 10AM – Patriotic Pooches Parade!

Dressed in their patriotic finery, Dogs can join in the Patriotic Parade starting at the Nature Center. \$10/dog Proceeds benefit Project Chance. Register Bark Avenue Pet Boutique or by calling 261-2275.

### 2-4PM – Gourmet Food Tasting at Marché Burette.

Complimentary

### 2PM – Afternoon Air Show

An airborne extravaganza you don't want to miss!

### 4PM – Cake Cutting Ceremony at the Beach Club

Celebrate our nation's birthday!

### 5PM – BBQ Family Buffet, Conference Center

\$25\* adults, \$11.95\* children 4-12. **Reservations required, call ext. 5050. \*Plus tax & svc chg**

### 8PM – Evening Air Show

Twilight show, aerobatics and a night jump! Claim your spot on the beach and look up. Spectacular performance!

### 9:30PM – FIREWORKS!

**After the fireworks, "fly" over to Falcon's Nest for drinks & dancin'! 21 or older after 9pm**

## Sunday, July 5

### 11AM – Family Games around the Beach Club Pool

Bucket Brigade, Aqua Blast, Blind Walk, Soggy Jog, Big Splash and more!

### 2PM – Beach Balls. More family games!

### 3PM – Teen Big Splash Contest

**Kids Camp Amelia daily at 9am. ext 5236.**

**All Poolside Activities are held at the Beach Club, are FREE & open to all ages, unless otherwise noted.**