

Tax Section of the Florida Bar

March 2018 E-Newsletter

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TOP NEWS:

DOR Liaison Meeting- March 21, 2018

Register Now for the [2018 Annual Meeting](#), [Estate Planning CLE](#), and Tax Attorney of the Year Dinner, April 19-21, 2018. Discounted Registration through March 20th

Reserve your Hotel Rooms for Upcoming Meetings:

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

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

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 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, click Meetings/CLE Events and scroll to the desired course. Course No. 2636R, Live and Webcast Presentation.

[Or Click Here for CLE Registration](#)

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](#)

PARTICIPATE IN PHONE CLE

The Section is organizing a series of telephone CLEs on the 2017 Tax Cut and Jobs Act and solicits your interest in joining its faculty. The proposed schedule for the telephone CLE series is below. We would like 2-3 volunteers for each program and anticipate that each program would last 90 to 120 minutes.

March 7 – Remains open / TBD

March 21 - Estate and Gift

April 25 – Pass Through and Corporations

May 9 – International

Please email James Schmidt (jas@schmidtlawoffice.com) and advise as to which, if any, of the programs you would like to assist with.

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.
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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 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.

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 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.

Tax Section Hall of Champions Interview: Bill Townsend

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 second interview in the series is with Bill Townsend, a living legend in Florida and Multi-State SALT.

Mr. Townsend practices with the Dean Mead law firm. His contact information can be found here: <http://www.deanmead.com/deanmead-attorney-profiles/william-d-townsend/>

Interviewed by Steven Hogan (www.ausley.com)

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

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. **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. 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. For Tallahassee, please contact Jami Coleman at 850-222-0013 or jcoleman@williamscoleman.law.

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