



**February 5 - 7, 2025**

**Tampa, Florida**

**JW Marriott Tampa Water Street**

**REGISTER ONLINE**

**[floridataxinsitute.org/registration](https://floridataxinsitute.org/registration)**

# ABOUT

The 3-day Institute features programming delivered by nationally recognized speakers devoted to individual income tax, entity tax, and estate/gift tax. It is designed to be practical, informative, engaging, and innovative. The Institute draws attorneys, accountants, trust officers, estate planners, insurance and financial planners, appraisers, and planned giving professionals from across Florida and the United States. The Institute continues to build on the exceptional success of the previous Institutes.

This program is developed by practicing tax professionals  
**for**  
other tax professionals.

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**TAX SECTION**  
**of The Florida Bar**

# PRESENTERS

**Jolyon D. Acosta**

Bush Ross, P.A.

**Prof. Cassady V. Brewer**

Georgia State University  
College of Law

**Paul M. Caspersen**

Planned Giving Interactive, LLC

**Andrew R. Comiter**

Comiter, Singer, Baseman & Braun

**Carla A. DeLoach**

Cypress Row Advisors

**Samuel A. Donaldson**

Georgia State University  
College of Law

**Philip S. English**

ArentFox Schiff LLP

**Sarah B. Jacobson**

Day Pitney LLP

**Paul Lee**

Northern Trust

**Charles R. Levun**

Levun, Goodman & Cohen, LLP

**Stephanie Loomis-Price**

Perkins Coie LLP

**Stephen R. Looney**

Dean Mead

**Prof. Bruce A. McGovern**

South Texas College of  
Law Houston

**A. Stephen McDaniel**

Williams McDaniel, PLLC

**Jeffrey H. Paravano**

Baker Hostetler

**Thomas J. Pauloski**

Bernstein

**Mark Prater**

PricewaterhouseCoopers LLP

**Charles M. Ruchelman**

Caplin & Drysdale

**Matthew J. Scheer**

Gunster

**Michel R. Stein**

Hochman Salkin Toscher Perez P.C.

**James Trainor**

Aon

# WEDNESDAY, FEBRUARY 5, 2025

All times are Eastern Time

## AGENDA | DAY 1

### MORNING

7:00 - 7:55 am

**Registration and Breakfast with Sponsors**

7:55 am

**Opening Remarks**

8:00 - 10:00 am **Recent Developments in**

**Federal Income Taxation** Prof. Cassady V. Brewer, Georgia State University College of Law & Prof. Bruce A. McGovern, South Texas College of Law Houston

10:00 - 10:45 am

**Visiting with Sponsors**

10:45 - 11:45 am

**Planning for the Modern International Family**

Sarah B. Jacobson, Day Pitney LLP

11:45 am - 12:15 pm **Get Lunch**

**and Visit with Sponsors**

### AFTERNOON

12:15 - 1:15 pm **Lunch Speaker: Federal Wealth Transfer Tax Update**

Samuel A. Donaldson, Georgia State University College of Law

1:20 - 2:20 pm **Navigating the Cyber Threat Landscape: Insights and Strategies for 2025**

James C. Trainor, Aon

2:25 - 3:00 pm **Visiting with Sponsors**

3:00 - 4:00 pm **Recent Cases in Complex Charitable Planning**

Paul M. Caspersen, Planned Giving Interactive, LLP

4:00 - 5:00 pm **Partnership Planning & Structuring Techniques That Every Professional Dealing with Business Transactions and Estate Planning Should Know**

Charles R. Levun, Levun, Goodman & Cohen, LLP

5:00 - 6:00 pm **Welcome Reception** - Visit with fellow attendees and sponsors

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# THURSDAY, FEBRUARY 6, 2025

All times are Eastern Time

## AGENDA | DAY 2

### MORNING

7:00 – 7:55 am **Samuel C. Ullman Memorial Breakfast** sponsored by The Florida Bar Tax Law Section and **Visiting with Sponsors**

7:55 am  
**Opening Remarks**

8:00 – 9:00 am **IRS's Top Targets on Transfer Tax Returns**  
Stephanie Loomis-Price, Perkins Coie LLP

9:05 – 10:05 am **Tax Implications of the Supreme Court's Decisions in Moore, Loper Bright, and Corner Post**  
Jeffrey H. Paravano, Baker Hostetler

10:05 – 10:30 am  
**Visiting with Sponsors**

10:30 – 11:30 am **Recent Developments in Tax Court Litigation - What You Need to Know**  
**Charles M. Ruchelman**, Caplin & Drysdale & **Michel R. Stein**, Hochman Salkin Toscher Perez P.C.

11:30 am – 12:30 pm **Student Networking Luncheon and Visit with Sponsors**  
Sponsored by A. Brian Phillips, P.A.

### AFTERNOON

12:35 – 1:35 pm **A "Sirius" Issue: Application of the Self-Employment Tax and Social Security Taxes to Limited Partnerships, LLCs and S Corporations**  
Stephen R. Looney, Dean Mead

1:40 – 2:40 pm **Building at 30,000 Feet: Structuring Family Offices and Family Trust Companies**  
Matthew J. Scheer, Gunster

2:45 – 3:30 pm  
**Visiting with Sponsors**

3:30 – 4:30 pm  
**Effective Succession Planning for Challenging Business Transitions**  
Andrew R. Comiter, Comiter, Singer, Baseman & Braun

4:30 – 6:00 pm  
**Super Bowl Mingle Reception**  
Sponsored by Evercore Wealth Management

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# FRIDAY, FEBRUARY 7, 2025

All times are Eastern Time

## MORNING

7:00 - 7:55 am

**Breakfast with Sponsors**

7:55 am

**Opening Remarks**

8:00 - 9:00 am **Impending Changes to Tax Policy**

Mark A. Prater, PricewaterhouseCoopers LLP

9:00 - 10:15 am **Stump the Strategist - A Q&A with Paul Lee**

Paul Lee, Northern Trust

10:15 - 10:45 am

**Visiting with Sponsors**

10:45 - 11:45 am **The Uniform Fiduciary Income and Principal Act and Its Intersection with Tax Law - A Survey**

Jolyon D. Acosta, Esq., Bush Ross, P.A. &

Carla A. DeLoach, Esq., LL.M. (taxation), DeLoach, P.L.

## AFTERNOON

11:45 am - 12:15 pm **Get Lunch and Visit with Sponsors**

12:15 - 1:15 pm **Prospects for Tax Legislation in the New Congress**

Philip S. English, ArentFox Schiff LLP

1:20 - 2:20 pm **To Halve or Have Not: Would a Potential Reduction to the Basic Exclusion Amount Really Matter All That Much?**

Thomas J. Pauloski, Bernstein

2:25 - 3:25 pm **Ethical Considerations in Estate Planning and Estate & Tax Trust Administration**

A. Stephen McDaniel, Williams McDaniel, PLLC

3:25 pm **Closing Remarks**

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# FEES & REGISTRATION

## REGISTER ONLINE

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<b>FEES</b>	<b>Early Bird</b> (before 11/30/24)	<b>Regular</b> (12/01/24-1/15/25)	<b>Last Chance</b> (1/16/25-2/04/25)
Full Conference	\$940	\$990	\$1,040
Two Days (Choose any 2)	\$695	\$745	\$795
Single Day	\$425	\$450	\$475

\$100 discount available at any time to  
Classes of 1975, 1985, 1995, 2005, 2015

University of Florida Levin College of Law professors receive complimentary registration. A 50% discount is available to full time professors from other Colleges and Universities.

**Cancellation/Transfer** A request for a cancellation/transfer must be sent via email to [conference@floridataxinstitute.org](mailto:conference@floridataxinstitute.org).

A full refund for a cancellation will be granted if notice is received on or before January 22, 2025. Those who cancel between January 23, 2025, and January 29, 2025, will forfeit a \$150 administrative fee. No refunds will be granted after January 29, 2025, for any reason. Requests to transfer registration to another individual will be accommodated.

## CONTINUING EDUCATION CREDIT

**Legal credit (CLE)** will be available in all states. **Accounting (CPE), Certified Financial Planner® (CFP), Certified Trust and Fiduciary Advisor (CTFA), and Enrolled Agent (EA) credit** will be available nationwide. **Continuing Judicial Education (CJE)** will be available for selected sessions.

The Institute offers up to 19 hours of continuing education credit. Individual states and disciplines determine the total number of credits awarded. (Approval status will be communicated as it becomes available.)

License numbers are required in order to receive credit.

Continuing education credit is administered by the [National Association of Insurance and Financial Advisors](#).

## OVERNIGHT ACCOMODATIONS

We are delighted to return to Tampa, Florida and the JW Marriott Tampa Water Street. Discover a hotel that offers just what you need, exactly when you need it. JW Marriott Tampa Water Street combines modern luxury with the sophisticated energy of Tampa's vibrant downtown district; the Tampa Riverwalk, Amalie Arena, and other attractions are right at your fingertips. Find wellness in the Spa by JW®, with its luxurious treatments and custom massages. Relax and bask in the Florida sun at our resort-style pools, which feature private cabanas and scenic water views. Catch an awe-inspiring sunset from our outdoor terrace or savor locally inspired dishes from six dining outlets, showcasing indoor and outdoor seating. After a day of exploration, unwind in sophisticated lodging with stunning city and water views, contemporary décor, and elegant touches. Spark creativity or celebrate a special occasion in nearly 100,000 square feet of artful event space. From chef-crafted specialties to holistic wellness amenities to sleek, modern rooms, our downtown Tampa hotel is dedicated to your well-being.



**The Florida Tax Institute room rate is \$339 (single/double occupancy, exclusive of tax). Reservations for overnight accommodations should be made by Friday, January 10, 2025, at our [reservations website](#) or by calling 813-221-4950 and letting the reservationist know you are attending the Florida Tax Institute.**

Please contact the Florida Tax Institute office at [conference@floridatixinstitute.org](mailto:conference@floridatixinstitute.org) or 866-225-5040 if you experience any trouble during the booking process.



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