



**April 8 – 10, 2026**

**Orlando, Florida**

**The Ritz-Carlton Orlando,  
Grande Lakes**

**REGISTER ONLINE**

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

# ABOUT

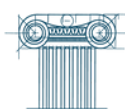
The 3-day Institute features programming delivered by nationally recognized speakers devoted to individual income tax, entity tax, and estate/gift tax. It is designed to be practical, informative, engaging, and innovative. The Institute draws attorneys, accountants, trust officers, estate planners, insurance and financial planners, appraisers, and planned giving professionals from across Florida and the United States. The Institute continues to build on the success of the previous events and this year will be no exception.

THIS PROGRAM IS DEVELOPED BY  
PRACTICING TAX PROFESSIONALS FOR  
OTHER TAX PROFESSIONALS.

## 13th Annual Florida Tax Institute SPONSORS

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**TAX SECTION**  
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# PRESENTERS

**Scott A. Bowman**  
McDermott Will & Schulte

**Prof. Cassady V. Brewer**  
Georgia State University  
College of Law

**Lauren Y. Detzel**  
Dean Mead

**Samuel A. Donaldson**  
Georgia State University  
College of Law

**Patrick Harney**  
Mishcon de Reya LLP

**Brant J. Hellwig**  
New York University School of Law

**Paul Lee**  
Northern Trust

**Stephanie Loomis-Price**  
Perkins Coie LLP

**Professor Bruce A. McGovern**  
South Texas College  
of Law Houston

**Benetta Y. Park**  
Bessemer Trust

**A. Brian Phillips**  
A. Brian Phillips, P.A.

**Gregg D. Polsky**  
New York University  
School of Law

**Claudia Ray**  
Kirkland & Ellis LLP

**Alexander L. Reid**  
BakerHostetler

**Matthew J. Scheer**  
Gunster

**James B. Sowell**  
KPMG LLP



**Tuesday, April 7, 2026**

All times are Eastern Time

4:00 – 6:00 pm **Registration Open**

4:30 – 6:00 pm **International Alumni Reception** – Visit with former professors and fellow alumni from the Graduate Tax Program in International Taxation

## **MORNING**

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8:00 – 8:45 am **Registration and Breakfast**

8:45 – 10:15 am **Opening Remarks and Panel on International Tax Issues**

10:30 – 11:30 am

**Considerations and Strategies in Coordinating International Estate Plans**

Scott A. Bowman, McDermott Will & Schulte

11:30 am – 12:00 pm **Get Lunch and Visit with Sponsors**

## **AFTERNOON**

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12:00 – 1:00 pm **Recent Developments in Federal Income Taxation – Part 1**

Prof. Cassady V. Brewer, Georgia State University College of Law &

Prof. Bruce A. McGovern, South Texas College of Law Houston

1:00 – 1:30 pm **Visit with Sponsors**

1:30 – 2:30 pm **Recent Developments in Federal Income Taxation – Part 2**

Prof. Cassady V. Brewer, Georgia State University College of Law &

Prof. Bruce A. McGovern, South Texas College of Law Houston

2:35 – 3:35 pm **Understanding and Drafting Partnership Allocation Provisions**

James B. Sowell, KPMG LLP

3:35 – 4:00 pm **Visit with Sponsors**

4:00 – 5:00 pm **Federal Wealth Transfer Tax Update**

Samuel A. Donaldson, Georgia State University College of Law

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

**Wednesday, April 8, 2026**

# Thursday, April 9, 2026

All times are Eastern Time

## MORNING

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8:00 – 8:45 am **Samuel C. Ullman Memorial Breakfast** sponsored by  
The Florida Bar Tax Law Section and **Visiting with Sponsors**

8:45 am **Opening Remarks**

8:50 – 9:50 am **Presentation on Exempt Organizations**  
Alexander L. Reid, BakerHostetler

9:55 – 11:25 am **Presentation on Criminal Tax**  
A. Brian Phillips, A. Brian Phillips P.A.

11:25 am – 12:25 pm **Student Networking Luncheon and Visit with Sponsors**  
Sponsored by A. Brian Phillips, P.A.

## AFTERNOON

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12:25 – 1:25 pm **Presentation on Economic Trends and Effects on Florida**  
Speaker TBD

1:30 – 2:30 pm **Presentation on 1202 Planning**  
Gregg D. Polsky, New York University School of Law

2:30 – 3:00 pm **Visit with Sponsors**

3:00 – 4:00 pm **Presentation on Generative AI**  
Claudia Ray, Kirkland & Ellis LLP

4:05 – 5:05 pm **Presentation on Corporate Reorganizations**  
Gregg D. Polsky, New York University School of Law

5:05 – 6:30 pm **Attendee Mingle Reception**  
Connect with fellow attendees over unique food and conversation

# Friday, April 10, 2026

All times are Eastern Time

## MORNING

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8:00 – 8:45 am **Breakfast with Sponsors**

8:45 am **Opening Remarks**

8:50 – 9:50 am **Presentation on IRS**

**Collection Efforts Topic**

Stephanie Loomis-Price, Perkins Coie LLP

9:55 – 10:55 am **The Great Unknown: What**

**Really Happens When Partners Die?**

Paul Lee, Northern Trust

11:00 am – 12:00 pm **Presentation on Family Office Structures and**

**Lender Management Planning**

Benetta Y. Park, Bessemer Trust & Matthew J. Scheer, Gunster

## AFTERNOON

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12:00 – 12:45 pm **Get Lunch and Visit with Sponsors**

12:45 – 1:45 pm **Presentation on Tax Consequences of Termination of**

**Grantor Trust Status at Death**

Brent J. Hellwig, New York University School of Law

1:50 – 2:50 pm **Presentation on Trust Modifications and Decantings**

Lauren Y. Detzel, Dean Mead

2:50 pm **Closing Remarks**

3:00 pm **Dennis Calfee's Birthday Party**

Come celebrate with us! Join fellow attendees  
in wishing Professor Calfee  
a very Happy Birthday

REGISTER NOW



[floridatixinstitute.org/registration](https://floridatixinstitute.org/registration)

# FEES & REGISTRATION

## REGISTER ONLINE

[floridataxinstitute.org/registration](http://floridataxinstitute.org/registration)

| <b>FEES</b>                | <b>Early Bird</b><br>(before 12/31/25) | <b>Regular</b><br>(01/01/26-3/15/26) | <b>Last Chance</b><br>(03/16/25-04/07/26) |
|----------------------------|----------------------------------------|--------------------------------------|-------------------------------------------|
| Full Conference            | \$940                                  | \$990                                | \$1,040                                   |
| Two Days<br>(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, 2025

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 March 18, 2026. Those who cancel between March 19, 2026, and March 31, 2026, will forfeit a \$200 administrative fee. No refunds will be granted after April 1, 2026, 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 18 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 excited to be moving to Orlando, Florida and The Ritz-Carlton Orlando, Grande Lakes this year. Inspired by the opulent era of Florida's historic hotels, this luxury hotel stands as a premier resort destination. Unparalleled opportunities for relaxation, recreation, and adventure beckon families, couples, groups, and all travelers. Nestled amidst over 500 acres of pristine natural landscapes, tranquil lakes and a thriving farm, the Ritz-Carlton Orlando, Grande Lakes transcends the conventional notion of a mere luxury hotel - it is an exceptional escape.



**The Florida Tax Institute room rate is \$359 (single/double occupancy, before taxes and fees) plus a \$40/night resort fee that provides several amenities. Reservations should be made by March 10, 2026, at our [reservations website](#) or by calling 888-707-9325 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.

# BOARD MEMBERS

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Lauren Y. Detzel  
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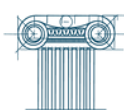
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