



**February 14-16, 2024**

**Tampa, Florida**

**JW Marriott Tampa Water Street &  
Tampa Marriott Water Street**

**REGISTER ONLINE**

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

# ABOUT

This annual conference, sponsored by the Florida Tax Education Foundation, Inc., has been organized by graduates and professors of the University of Florida, Levin College of Law, home of one of the top tax law programs in the United States.

The 3 day Institute features programming devoted to individual income tax, entity tax, and estate planning. It is designed to be practical, informative, engaging, and state of the art. This program is developed by practicing tax professionals for other tax professionals and strives to deliver presentations on the most current issues and planning ideas.

The Institute will draw attorneys, trust officers, accountants, insurance and financial planners, and planned giving professionals from across Florida and the United States. Attendees also have the opportunity to meet and network with current University of Florida Levin College of Law students.

## 11th Annual Florida Tax Institute SPONSORS

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# PRESENTERS

**Ronald D. Aucutt**

Bessemer Trust

**Brad Bedingfield**

Hemenway & Barnes LLP

John C. Bovay

Salter Feiber, P.A.

**Scott A. Bowman**

McDermott Will & Emery

**Prof. Cassady V. Brewer**

Georgia State University College of Law

**Andrew R. Comiter**

Comiter, Singer, Baseman & Braun

**Carla DeLoach**

DeLoach, P.L.

**Samy Dwek**

The Family Office Doctor

**Jordan Hurlburt**

DeLoach, P.L.

**Bradley Kay**

Houlihan Lokey

**Cristin C. Keane**

Carlton Fields, P.A.

**Prof. Bruce A. McGovern**

South Texas College of Law Houston

**Justin Miller**

Evercore Wealth Management and  
Evercore Trust Company, N.A.

**Fred F. Murray**

IRS

**Charles P. Rettig**

Former Commissioner of IRS

**Qian (Bonita) Wang**

Bush Ross, P.A.

**Prof. Steven J. Willis**

University of Florida Levin College of  
Law

**WEDNESDAY, FEBRUARY 14, 2024**

All times are Eastern Time

7:00 – 7:55 am

**Registration and Breakfast**

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 &amp;

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

10:00 – 10:30 am

**Visiting with Sponsors**

10:30 – 11:30 am

**Corporate Transparency Act**

Panel Discussion, Fred F. Murray, IRS (Moderator)

11:30 – 12:00 pm

**Lunch and Visit with Sponsors**

12:00 – 1:00 pm

**Traps for the Unwary in Charitable Bequests**

Prof. Steven J. Willis, University of Florida Levin College of Law

1:10 – 2:10 pm

**Tax Controversy**

Ian M. Comisky, Fox Rothschild

2:15 – 3:15 pm

**International Tax Topics**

Panel Discussion, Fred F. Murray, IRS (Moderator)

3:15 – 3:45 pm

**Visiting with Sponsors**

3:45 – 4:45 pm

**Topic TBD**

Charles P. Rettig, Former Commissioner of IRS

4:45 – 6:00 pm

**Sponsor and Attendee Mingle****REGISTER NOW**[floridataxinstitute.org/registration](https://floridataxinstitute.org/registration)

# THURSDAY, FEBRUARY 15, 2024

All times are Eastern Time

7:00 - 7:55 am

Breakfast with Sponsors

7:55 am

Opening Remarks

8:00 - 9:00 am

**Charitable Planning Opportunities and Risks Pre-Sale**

Brad Bedingfield, Hemenway & Barnes LLP

9:05 - 10:05 am

**Transfer Tax - Planning for the Sale of the Family Business**

Andrew R. Comiter, Comiter, Singer, Baseman & Braun

10:05 - 10:30 am

**Visiting with Sponsors**

10:30 - 11:30 am

**State and Local Tax Issues in M&A - The Forgotten Tax**

Bradley Kay, Houlihan Lokey

11:30 - 12:30 pm

**Student Networking Luncheon and Visit with Sponsors**

12:40 - 1:40 pm

**409A Discussion**

Cristin C. Keane, Carlton Fields, P.A. & Qian (Bonita) Wang, Bush Ross, P.A.

1:45 - 2:45 pm

Topic and Speaker TBD

2:45 - 3:15 pm

**Visiting with Sponsors**

3:15 - 4:15 pm

**What is the Family Office**

Carla DeLoach, DeLoach, P.L. & Jordan Hurlburt, DeLoach, P.L.

4:15 - 5:15 pm

**Trouble Shooting Family Office Issues**

Samy Dwek, The Family Office Doctor

5:15 - 6:00 pm

Sponsor and Attendee Mingle

6:00 - 8:00 pm

**50th Anniversary of the UF Levin College of Law Graduate Tax Program (TICKETED DINNER)**

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# You're Invited!

## **UF Law Tax Program 50th Anniversary Dinner**

**Thursday, February 15, 2023 | 6:00 – 8:00 pm**

**JW Marriott Tampa Water Street**

Featuring Emcee: Professor Dennis Calfee

Join the Florida Tax Institute and Levin College of Law as we honor all faculty members who have taught in the tax program, with particular spotlight on the founding faculty.

Celebrate the more than 3,000 tax lawyers trained by the tax program and learn about opportunities to support the graduate tax program. The Stephen A. Lind eminent Scholar Chair will be one such opportunity.

Individual: \$125

Individual Practicing Less than 5 Years: \$85

Table of 8: \$750

Registration available with conference registration or separately.

FRIDAY, FEBRUARY 16, 2024

All times are Eastern Time

7:00 - 7:55 am

**Breakfast with Sponsors**

7:55 am

**Opening Remarks**

8:00 - 9:00 am

**Transfer Tax Update**

Prof. Samuel A. Donaldson, Georgia State University College of Law

9:05 - 10:05 am

**Private Wealth Topic**

Scott A. Bowman, McDermott Will &amp; Emery

10:05 - 10:30 am

**Visiting with Sponsors**

10:30 - 11:30 am

**Common Drafting Mistakes from a Corporate Trustee**

Panel Discussion, John C. Bovay, Salter Feiber, P.A. (Moderator)

11:30 - 12:00 pm

**Lunch and Visit with Sponsors**

12:00 - 1:00 pm

**Capital Report**

Ronald D. Aucutt, Bessemer Trust

1:10 - 2:10 pm

**Don't Guess and Make a Mess with QSBS**

Justin Miller, Evercore Wealth Management and Evercore Trust Company, N.A.

2:15 - 3:15 pm

**Multijurisdictional Issues Discussion**

Panel Discussion, Fred F. Murray, IRS (Moderator)

3:15 pm

**Closing Remarks**

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# FEES & REGISTRATION

## REGISTER ONLINE

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

<b>FEES</b>	<b>Early Bird</b> (before 12/1/23)	<b>Regular</b> (12/1/23-1/31/24)	<b>Last Chance</b> (2/1/24-2/13/24)
Full Conference	\$895	\$945	\$995
Two Days (Choose any 2)	\$695	\$745	\$795
Single Day	\$425	\$450	\$475

\$100 discount available at any time to  
Classes of 1984, 1994, 2004, 2014

### Cancellation/Transfer

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

- A full refund for a cancellation will be granted if notice is received on or before January 31, 2024.
- Those who cancel between February 1, 2024, and February 7, 2024, will forfeit a \$100 administrative fee.
- No refunds will be granted after February 7, 2024, for any reason.
- Requests to transfer registration to another individual will be accommodated.

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.

## CONTINUING EDUCATION CREDIT

**Legal credit (CLE)** will be available in all states. **Accounting, Certified Financial Planner™, Certified Trusts and Financial Advisor, and Enrolled Agents PACE credit** will be available nationwide.

The Institute offers up to 20 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 Society of Financial Service Professionals.



## PROGRAM LOCATION

Education sessions will take place at the **JW Marriott Tampa Water Street**, and overnight accommodations are available at the Tampa Marriott Water Street. A convenient pedestrian bridge connects the two properties.

## OVERNIGHT ACCOMMODATIONS

We are delighted to return to Tampa, Florida and Tampa Marriott Water Street. The hotel has a wealth of amenities to offer. Take a dip in the rooftop pool, featuring stunning city and water views and cabanas. Work out in the state-of-the-art fitness center, stroll by the Tampa waterfront, or dine in the inviting restaurants. Unwind in spacious, pet-friendly hotel rooms with modern layouts, sophisticated décor- and private balconies with views of the water or downtown Tampa skyline. They also offer 35 rooms featuring Stay Well™ technology to optimize your physical and emotional well-being.



**The Florida Tax Institute room rate is \$289 (single/double occupancy, exclusive of tax). Reservations for overnight accommodations should be made by Friday, January 26, 2024, at our [reservations website](#) or by calling 813-221-4900 and letting the reservationist know you are attending the Florida Tax Institute.**

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

# BOARD MEMBERS

## Operating Board

- Jolyon D. Acosta
- Matthew Ahearn
- John C. Bovay
- David E. Bowers
- Scott A. Bowman
- Yariv Brauner
- Michael Burns
- Dennis A. Calfee
- Richard B. Comiter
- Carla DeLoach
- Michael L. Kohner
- Kateena Manners
- Fred F. Murray
- Louis Nostro
- A. Brian Phillips
- Star Sansone
- Matthew Scheer
- Abraham "Hap" Shashy



## Emeritus Board

- Ronald D. Aucutt
- Bruce H. Bokor
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- Michael K. Friel
- Cristin C. Keane
- Charlene Luke
- David Pratt
- John J. Scroggin

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