Course Credit

The 2019 Delaware Tax Institute program has been approved for a total of 7 CLE credits (including 1 ethics credit) in Delaware and Pennsylvania and up to 8 CPE credits in tax.

NASBA Credits

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

Widener University Delaware Law School is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. NASBA website: **www.nasba.org.**

No prerequisite or advance preparation is required for the 2019 Delaware Tax Institute program.

Payment Information

Registration (before or on Nov. 22) . . . . . . $225.
Registration (Nov. 23 and after) . . . . $275.

Widener Delaware Law Alumni:
(before or on Nov. 22) . . . . $175.
(on or after Nov. 23) . . . . $275.

Students . . . . Free

Registration Information

Please register online at
delawarelaw.widener.edu/delawaretax

For More Information

on registration, refund, complaint, program cancellation policies, accessibility, and special needs requests, please contact:

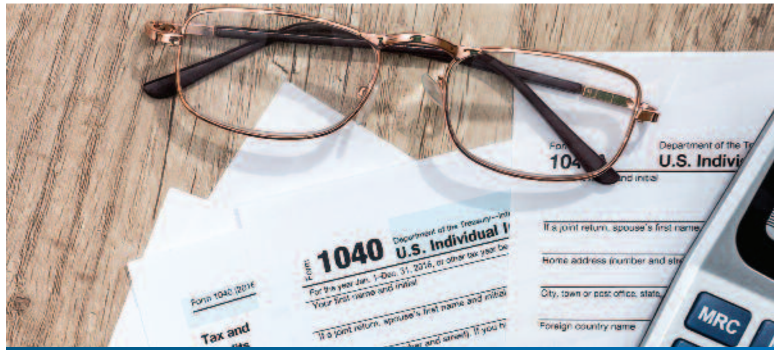
Contact: Carol Perrupato
Phone: 302-477-2178
E-mail: caperrupato@widener.edu

Widener University
Delaware Law School
4601 Concord Pike, Wilmington, DE 19803-0406

Delaware Tax Institute

2019: Tax Developments & Planning
Thinking Forward: Strategies & Opportunities

Co-sponsored by Widener University Delaware Law School, Society of Financial Service Professionals–Delaware Chapter, and the Delaware State Bar Association



Friday, December 6, 2019
8:30 am–4:45 pm *(4:45–5:30 pm Reception)*

Distinguished Speaker:
Jared Bernstein, Senior Fellow, Center on Budget and Policy Priorities; Former Chief Economist and Economic Adviser to Vice President Joseph Biden in the Obama Administration

Widener University
Delaware Law


Delaware Tax Institute

2019: Tax Developments & Planning
Thinking Forward: Strategies & Opportunities

Presentations on 2019 Income Tax Developments; Recent Developments in Estate Planning; Preferred Partnership Interests; Federal and State Income Tax Rules; Maintaining Civility and Fidelity in a Changing Environment

Distinguished Speaker

Jared Bernstein
Senior Fellow, Center on Budget and Policy Priorities; Former Chief Economist and Economic Adviser to Vice President Joseph Biden in the Obama Administration

Learning Objectives

- Define the changes and new developments in current legislative, regulatory, and judicial income, estate, and gift tax.
- Identify recent federal and state income, estate, and gift tax planning considerations.
- Differentiate a business perspective from a tax perspective on business transactions encountered in a tax and/or legal practice.

Who Should Attend?

Accountants, CPAs, Tax Professionals, Attorneys, Tax Attorneys, Educators, Financial Institutions/Banking/Insurance/Financial Services Professionals

Program Level

Basic

Delivery Method

Group-Live

Course Materials

Will be provided electronically

Location

The 2019 Delaware Tax Institute will be held at Widener University Delaware Law School, 4601 Concord Pike, Wilmington, DE 19803-0406.

Refund Policy

Requests for refunds must be received in writing by November 29, 2019. A full refund will be granted for cancellations received on or before November 29, 2019. No refunds will be granted after November 29, 2019.

Agenda

8:30–8:35 am — **Welcome—Rodney A. Smolla**
Dean & Professor of Law,
Widener University Delaware Law School

8:35–9:20 am — **Opportunity Zone**
Brad A. Molotsky, Esquire
Duane Morris LLP

9:20–10:05 am — **Recent Developments in Estate Planning**
Moderator:
Jocelyn Margolin Borowsky, Esquire
Duane Morris LLP

Panelists:
Eric R. Hague, Esquire
Duane Morris LLP

Kimberly Gill McKinnon, Esquire
Gordon, Fournaris & Mammarella, P.A.

10:05–10:15 am — **Break**

10:15–11:45 am — **Recent Developments in Income Tax**
Moderator:
Kathryn S. Schultz, CPA, AEP
Belfint Lyons & Shuman, P.A.

Panelists:
Charles J. Durante, Esquire
Connolly Gallagher LLP

Laura A. Lloyd, CPA
Albero, Kupferman & Associates, LLC

11:45 am–12:30 pm — **Luncheon, Barristers' Club**

12:30–1:40 pm — **Planning Opportunities Under Federal and State Income Tax Rules**
Daniel F. Hayward, Esquire
Gordon, Fournaris & Mammarella, P.A.

Vincent C. Thomas, Esquire
Young Conaway Stargatt & Taylor, LLP

1:40–2:30 pm — **Planning with Preferred Partnership Interests**
N. Todd Angkatavanich, Esquire
Ernst & Young LLP

2:30–2:40 pm — **Break**

2:40–3:40 pm — **Distinguished Speaker**
Jared Bernstein
Senior Fellow, Center on Budget and Policy Priorities; Former Chief Economist and Economic Adviser to Vice President Joseph Biden in the Obama Administration

3:45–4:45 pm — **Maintaining Civility and Fidelity to Facts, Law and Procedure in a Changing Environment: What Lawmakers, the Media and Others Could Learn From the Ethical Practice of Law**
Luke W. Mette, Esquire
Chief Disciplinary Counsel for the Office of Disciplinary Counsel, Supreme Court of Delaware

4:45 pm — **Adjourn**

4:45–5:30 pm — **Wine and Cheese Reception**