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

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.

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

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

4001 Concord Pike, Wilmington, DE 19803-0406
Delaware Law
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. Molotolsky, 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