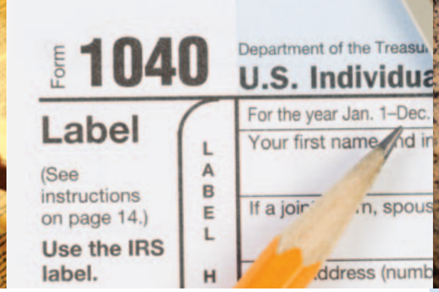


Course Credit

The 2022 Delaware Tax Institute program has been approved for a total of 6 CLE credits (including 1 ethics credit) in Delaware and Pennsylvania and up to 7.2 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 2022 Delaware Tax Institute program.

Payment Information

Registration fee $199
Students . . . . Free

Registration Information

Please register online at
delawarelaw.widener.edu/delawaretax

Registrants must adhere to Delaware Law School's health safety guidelines and show proof of vaccination upon arrival. If health concerns prevent holding an in-person, live program, the program will be held entirely online via ZOOM.

For More Information

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

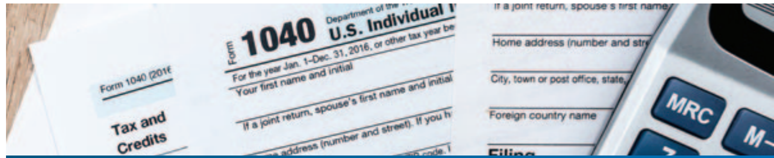
Contact: Carol Perrupato
Phone: 302-477-2178
E-mail: caperrupato@widener.edu

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

2022 Delaware Tax Institute

2022: The IRS, Inflation, a Tax on Book Income: An Interesting Year in Review

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



Presentations on 2022 Income Tax Developments; Estate Planning and Gift Tax Update; Advanced Tax Planning; Ethics

Friday, December 2, 2022

8:00 am–3:45 pm

Widener University Delaware Law School
4601 Concord Pike
Polishook Hall, Room 104
Wilmington, DE 19803

Widener University
Delaware Law


2022 Delaware Tax Institute

2022: The IRS, Inflation, a Tax on Book Income: An Interesting Year in Review

Presentations on 2022 Income Tax Developments; Estate Planning and Gift Tax Update; Advanced Tax Planning; Ethics

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/Internet Based

Course Materials

Will be provided electronically

Location

Widener University Delaware Law School
4601 Concord Pike
Polishook Hall, Room 104
Wilmington, DE 19803

Refund Policy

Requests for refunds must be received in writing by November 30, 2022. No refunds will be granted after November 30, 2022.

Agenda for:

Friday, December 2, 2022

8:30–8:35 am — **Welcome**
Alicia B. Kelly
Interim Dean & Professor of Law
Co-Director Family Health Law & Policy Institute

8:35–10:05 am — **2022 Income Tax Developments**
Moderator:
Kathy S. Schultz, CPA, AEP
Belfint Lyons & Shuman, P.A.

Panelist:
Michael D. Kelly, CPA
Belfint Lyons & Shuman, P.A.

10:05–10:15 am — **Break**

10:15–11:45 am — **Recent Developments in Estate and Gift Planning**
Moderator:
Daniel F. Hayward, Esquire
Gordon Fournaris & Mammarella, P.A.

Panelist:
Joseph Bosik IV, Esquire
Gordon Fournaris & Mammarella, P.A.

11:45 am–12:30 pm — **Lunch – Polishook Hall**

12:30–1:30 pm — **Income Tax Fundamentals for Trusts**
Moderator:
Jocelyn Margolin Borowsky, Esquire
Duane Morris LLP

Panelist:
Jeremiah W. Doyle, Esquire
Senior Vice President & Senior Wealth Strategist – BNY Mellon Wealth Management

1:30–2:30 pm — **Advanced Tax Planning for Trusts**
Moderator:
Jocelyn Margolin Borowsky, Esquire
Duane Morris LLP

Panelist:
Kevin M. Barry, CFP
Principal & Director of Fiduciary Tax Consulting – Bessemer Trust

2:30–2:45 pm — **Break**

2:45–3:45 pm — **Ethics**
Panelists:
Jessica L. Tyler, Esquire
Disciplinary Counsel — Office of Disciplinary Counsel

Kathleen M. Vavala, Esquire
Disciplinary Counsel — Supreme Court of the State of Delaware

3:45 pm — **Adjourn**