Course Credit

The 2018 Delaware Tax Institute program has been approved for a total of 7 CLE credits in Delaware and Pennsylvania, 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 2018 Delaware Tax Institute program.

Payment Information

Registration (before or on Nov. 23) . . . . . . $205.
Registration (Nov. 24 and after) . . . . $255.

Widener Delaware Law Alumni:
(before or on Nov. 23) . . . . $175.
(on or after Nov. 24) . . . . $255.

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:

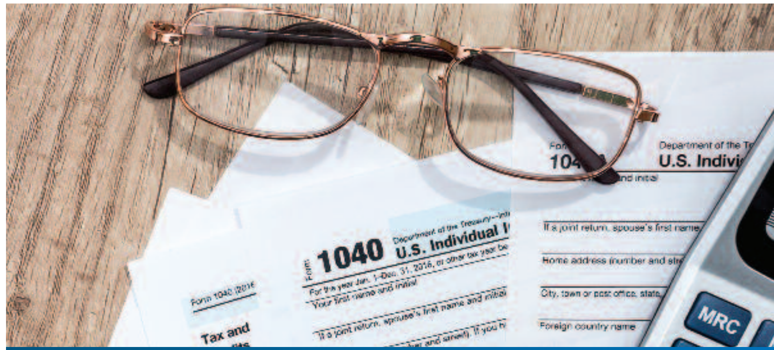
Contact: Carol Perrupato
Phone: 302-477-2178
E-mail: caperrupato@widener.edu

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

Delaware Tax Institute

2018: Tax Developments & Planning: Where Are We After TCJA?

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



Friday, December 7, 2018
8:30 am–5:00 pm (*5:00–6:00 pm Reception*)

Distinguished Speaker:
George Callas, Managing Director of Government Affairs for Steptoe & Johnson, LLP, and former Senior Tax Counsel for Speaker of the House of Representatives, Paul D. Ryan Jr.

Widener University Delaware Law School
Ruby R. Vale Moot Courtroom
Wilmington, Delaware

Widener University
Delaware Law

Delaware Tax Institute

2018: Tax Developments & Planning: Where Are We After TCJA?

Presentations on 2018 Income Tax Developments; Recent Developments in Estate Planning; Section 199A and Choice of Entity Planning and Developments; Federal and State Fiduciary and Related Income Tax Issues and Charitable Planning

Distinguished Speaker

George Callas

Managing Director of Government Affairs for Steptoe & Johnson, LLP; Former Senior Tax Counsel for Speaker of the House of Representatives, Paul D. Ryan Jr.

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 2018 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 30, 2018. A full refund will be granted for cancellations received on or before November 30, 2018. No refunds will be granted after November 30, 2018.

Agenda

8:30–8:35 am — **Welcome—Stephen Friedman,**
Associate Dean for Academic Affairs & Professor of Law, Widener University Delaware Law School

8:35–10:05 am — **2018 Income Tax Developments**
Moderator:
Kathy S. Schultz, CPA, AEP
Belfint Lyons & Shuman, P.A.

Panelists:
Charles J. Durante, Esquire
Connolly Gallagher LLP

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

10:15–11:45 am — **Recent Developments in Estate Planning**
Moderator:
Jocelyn Margolin Borowsky, Esquire
Duane Morris LLP

Panelists:
David M. Brown, Esquire
Duane Morris LLP

Kimberly Gill McKinnon, Esquire
Morris Nichols Arsht & Tunnell LLP

Scott E. Swenson, Esquire
Connolly Gallagher LLP

11:45–11:55 am — **Break**

11:55 am–12:55 pm — **Distinguished Speaker**
George Callas
Managing Director of Government Affairs for Steptoe & Johnson, LLP

Former Senior Tax Counsel for Speaker of the House of Representatives, Paul D. Ryan Jr.

12:55–1:35 pm — **Luncheon, Barristers' Club**

1:45–3:15 pm — **Section 199A and Choice of Entity Planning and Developments**
Moderator:
Jerome K. Grossman, Esquire
Young Conaway Stargatt & Taylor, LLP

Panelists:
Jordon N. Rosen, CPA, MST, AEP
Belfint Lyons & Shuman, P.A.

Bruce W. Tigani, Esquire
Morris James LLP

3:15–3:30 pm — **Break**

3:30–5:00 pm — **Federal and State Fiduciary and Related Income Tax Issues and Charitable Planning**
Moderator:
Co-Moderator:
W. Donald Sparks II, Esquire
Richards Layton & Finger, P.A.

Co-Moderator:
John "Jack" P. Garniewski Jr.,
CPA/PFS, CFP, AEP
Family Office Solutions, LLC

Panelists:
Daniel F. Hayward, Esquire
Gordon Fournaris & Mammarella, P.A.

Carol G. Kroch, Esquire
Wilmington Trust Company

5:00 pm — **Adjourn**

5:00–6:00 pm — **Wine and Cheese Reception**