



Course Credit

The 2017 Delaware Tax Institute program has been approved for a total of 7 CLE credits 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 2017 Delaware Tax Institute program.

Payment Information

Registration (before Nov. 20) \$205.
Registration (on or after Nov. 20) \$255.

Widener Delaware Law Alumni:

(before Nov. 20) \$175.
(after Nov. 20) \$255.

Students (no luncheon) 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

Delaware Tax Institute

2017: Tax Developments and Planning Opportunities in an Unstable Environment

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



Friday, December 1, 2017

8:30 am–5:00 pm (5:00–6:00 pm Reception)

Distinguished Speaker:
Dr. Mark J. Mazur, Robert C. Pozen Director, Urban-Brookings Tax Policy Center, Washington, D.C.

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

Widener University 
Delaware Law



Delaware Tax Institute

2017: Tax Developments and Planning Opportunities in an Unstable Environment

Presentations on 2017 Income Tax Developments; Recent Developments in Estate Planning; Update on Federal Tax Legislative Developments; Protect Your Clients/Protect Yourself: Avoiding a Professional Nightmare from Data Compromises; State Tax Developments and Planning Considerations; Transfers of Foreign Funds to the U.S.: Opportunities and Risks for Delaware Trusts and Alternative Entities

Distinguished Speaker

Dr. Mark J. Mazur

Robert C. Pozen Director, Urban-Brookings Tax Policy Center, Washington, D.C.

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 2017 Delaware Tax Institute will be held at Widener University Delaware Law School, 4601 Concord Pike, Wilmington, DE 19803.

Refund Policy

Requests for refunds must be received in writing by November 24, 2017. A full refund will be granted for cancellations received on or before November 24, 2017. No refunds will be granted after November 24, 2017.

Agenda

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

8:35–10:05 am 2017 Income Tax Development
Moderator:
Kathy S. Schultz, CPA, AEP
Belfint Lyons & Shuman, P.A.

Panelists:
Charles J. Durante, Esquire
Connolly Gallagher LLP

Karly Laughlin, CPA
Belfint Lyons & Shuman, P.A.

10:05–10:15 am Break

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

Jennifer E. Smith, Esquire
Cooch & Taylor, P.A.

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

11:45 am–12:25 pm Luncheon, Barristers’ Club

12:30–1:30 pm Distinguished Speaker - Update on Federal Tax Legislative Developments

Dr. Mark J. Mazur
Robert C. Pozen Director, Urban-Brookings Tax Policy Center, Washington, DC

1:30–1:40 pm Break

1:40–2:40 pm Protect Your Clients/Protect Yourself: Avoiding a Professional Nightmare from Data Compromises

Moderator:
Kenneth W. Stewart, CPA
Stephano Slack LLC

Panelist:
Richard G. Furlong, Jr.
Senior Stakeholder Liaison; Mid-Atlantic Area Stakeholder Liaison Field; IRS Communications & Liaison Division

2:40–2:50 pm Break

2:50–3:50 pm State Tax Developments and Planning Considerations

Moderator:
Jerome K. Grossman, Esquire
Young Conaway Stargatt & Taylor, LLP

Panelists:
Thomas M. Forrest, CPA
President & CEO, U.S. Trust Company of Delaware

Janice M. Matier, Esquire
Richards Layton & Finger, P.A.

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

3:50–4:00 pm Break

4:00–5:00 pm Transfers of Foreign Funds to the U.S.: Opportunities and Risks for Delaware Trusts and Alternative Entities

Co-Moderators:
Peter S. Gordon, Esquire
Gordon Fournaris & Mammarella, P.A.

W. Donald Sparks II, Esquire
Richards Layton & Finger, P.A.

Panelists:
Stephanie L. Chapman, CPA
Belfint Lyons & Shuman, P.A.

Daniel F. Lindley, Esquire
The Northern Trust Company

5:00 pm Adjourn

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