4 0 T H   A N N U A L

Tax and Business Planning Seminar

Thursday, November 16, 2017

RETURNING TO:
Houston Marriott Westchase
2900 Briarpark Drive
Houston, TX 77042

Chamberlain Hrdlicka
Attorneys at Law

HOUSTON • ATLANTA • PHILADELPHIA • SAN ANTONIO

Chamberlain Hrdlicka
Attorneys at Law

40TH ANNUAL

Tax and Business Planning Seminar

CLE/CPE CREDIT RECOMMENDED
Texas CPAs: 6 hours recommended
Texas Attorneys: 5 hours recommended

Register online: www.chamberlainlaw.com/news-eventsrsvp-205.html

ADVANCE REGISTRATION: $150

Additional $25 for On-Site Registration

Written materials, including outlines of all workshops, will be provided:

11:00am	Registration Begins
11:30am – 1:00pm	Complimentary Lunch
Noon – 1:00pm	Luncheon Presentation
1:05pm – 5:30pm	Workshops
5:30pm – 6:30pm	Reception

Our sound business understanding and comprehensive legal experience work for you and your clients. For over 50 years, Chamberlain, Hrdlicka, White, Williams & Aughtry has been producing results in all areas of practice.

AREAS OF PRACTICE INCLUDE:

ADMIRALTY LAW
CIVIL RIGHTS
COMMERCIAL LITIGATION
CONSTRUCTION LAW
CORPORATE, SECURITIES & FINANCE
EMPLOYEE BENEFITS
ENERGY
ERISA
ESTATE PLANNING
EXEMPT ORGANIZATIONS
IMMIGRATION
INTELLECTUAL PROPERTY
LABOR AND EMPLOYMENT LAW
REAL ESTATE
TAX LITIGATION AND CONTROVERSY
TAX PLANNING
WHITE COLLAR CRIMINAL DEFENSE

HOUSTON
1200 Smith Street
Suite 1400
Houston, TX 77002
800.342.5829

ATLANTA
191 Peachtree Street, NE
Forty-Sixth Floor
Atlanta, GA 30303
800.800.0745

PHILADELPHIA
300 Conshohocken State Rd.
Suite 570
West Conshohocken, PA 19428
610.772.2300

SAN ANTONIO
112 East Pecan St.
Suite 1450
San Antonio, TX 78205
210.253.8383

FACULTY

BRETT T. BERLY

University of Texas at Austin (B.A., *cum laude*, 2001); University of Texas School of Law (J.D., *cum laude*, 2005)

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University of Texas at Austin (B.A., with honors, 2005); University of Houston Law Center (J.D., *cum laude*, 2010); Georgetown University Law Center (LL.M. in Taxation, with honors, 2011)

GEORGE W. CONNELLY

Northwestern University (B.S., B.A., 1967); Northwestern University (J.D., 1971)

JESSICA N. CORY

Southern Nazarene University (B.S., summa cum laude, 2009); University of Oklahoma College of Law (J.D., *summa cum laude*, 2012); New York University School of Law (LL.M., Taxation, 2015)

JACK ECKELS

Texas A&M University (B.B.A., 1969); University of Texas School of Law (J.D., 1972); New York University (LL.M, Taxation, 1974)

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University of Texas at Austin (B.A. in Economics, 2003); South Texas College of Law (J.D., *cum laude*, 2011); Georgetown University Law Center (LL.M. in Taxation, with distinction, 2012)

RENESHA N. FOUNTAIN

Louisiana State University (B.S., *summa cum laude*, 2001); Paul M. Hebert Law Center, Louisiana State University (J.D./B.C.L., 2004); Georgetown University Law Center (L.L.M., Taxation, 2005)

PHYLLIS A. GUILLORY

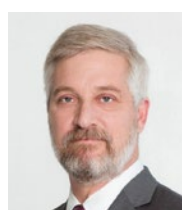
Louisiana State University (B.S., *summa cum laude*, 1991); University of Texas (J.D., with honors, 1994)

MICHAEL B. OVERSTREET

Texas A&M University (B.B.A., *cum laude*, Accounting, 2009); Texas A&M University (M.S., Accounting, 2009); University of Texas School of Law (J.D., 2012)

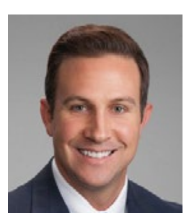
LAWRENCE SHERLOCK

Stony Brook University (N.Y.) (B.S., 1972); Brooklyn Law School (J.D., *cum laude*, 1978)



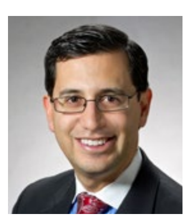
JOSHUA A. SUTIN

Lewis & Clark College (B.A., Philosophy, 1991); University of New Mexico School of Law (J.D., 1997); University of Florida College of Law (LL.M., Taxation, 1998)



JUSTIN E. VANDENBOUT

University of Texas at Austin (B.S., 2004); South Texas College of Law (J.D., 2007)



JUAN F. VASQUEZ, JR.

University of Texas at Austin, McCombs School of Business (B.B.A., 1998); University of Houston Law Center (J.D., 2001); New York University School of Law (LL.M. in Taxation, 2002)

AGENDA

WORKSHOPS

Customize your experience by choosing four afternoon workshops. Choose two workshops from Group I and two workshops from Group II and indicate your selections on your registration form.

Group I (Select 2 options)

GROUP IA

In God We Trust; All Others Must Pay Cash: Best Practices for Intra-Family Loans

This presentation will review and discuss best practices, as well as identify common traps, when dealing with loan arrangements between related parties.

Presenter: Brett T. Berly

GROUP IB

When the IRS Comes to Collect: Tales from a Tax Attorney's Desk

Many individuals and businesses find themselves with an IRS tax debt they are unable to pay in full on demand. This presentation will focus on IRS collection actions and alternatives and offer real life examples of unique collection cases we have handled over the years.

Presenters: Lawrence Sherlock and Renesha Fountain

GROUP IC

Judicial Highlights

A timely review of tax developments in the courts over the last year.

Presenter: Juan F. Vasquez, Jr.

GROUP ID

Hurricane Harvey: Advising Clients Through the Flood of Legal and Tax Issues

This presentation will address the legal and tax issues following one of the worst flooding events in US history, including pursuit of claims through flood insurance, FEMA grants and aid, homeowners policies, business interruption coverage, and inverse condemnation claims against governmental entities. We will sort through the mass of information and provide practical information for you and your clients and address tax issues related to federally declared disasters, including casualty losses, insurance reimbursements, charitable donations, crowd funding and relief granted by the IRS.

Presenters: Sebastien Chain and Justin VandenBout

LUNCHEON

Concerns and Issues for Harris County Residents

Presenter: Senator Paul Bettencourt

Group II (Select 2 options)

GROUP IIE

Finding Out You Have Given Bad Tax Advice: Circle the Wagons or Be Transparent?

This presentation addresses some of the legal issues, ethical rules, professionalism considerations, and practical problems that arise when a tax practitioner discovers that bad tax advice has been given. Sometimes, we have clear answers and rules; other times, the proper direction to follow is more difficult to discern. By examining some circumstances we have seen in our 85 years of practice, we hope to help you focus on your own moral compass.

Presenters: George W. Connelly and Larry A. Campagna

GROUP IIF

Current Employee Benefit Issues Every CPA Should Know

This presentation will provide the most current employee benefit issues impacting employers and how CPAs can help their clients avoid the pitfalls of noncompliance. Notwithstanding a new administration and direction to federal governmental agencies, the IRS, DOL and OCR are still empowered and enforcing employee benefit plan compliance.

Presenter: Joshua Sutin

GROUP IIG

2017 Tax Reform – What do we get, and when? Or something else?

Not since the enactment of the Tax Reform Act of 1986 has the prospect been greater for Congress enacting real "tax reform." If by early November there is a bill pending in Congress for significant, broad-based tax law changes, this presentation will explore the bill and its impact on taxpayers.

Presenters: Jack Eckels, Nima Farzaneh and Michael Overstreet

GROUP IIH

Not Cheap As Dirt – The Tax Implications of Foreign Ownership of Real Property

Many foreign persons look to the Houston area as a place to purchase a second home. Foreign individuals and foreign businesses also look to the United States for real estate investment opportunities, whether directly or through a US corporation. Any foreign person has to contemplate the application of FIRPTA, the special income tax rules that apply to a foreign person's ownership and sale of US real property interests. Furthermore, foreign individuals also have to be concerned with the application of the US estate and gift taxes. We will address these rules, the advantages of various holding structures for an investment in US real estate, and what may be done if your client is in a tax-disadvantageous ownership structure.

Presenters: Phyllis Guillory and Jessica Cory

REGISTRATION FORM

40TH ANNUAL TAX AND BUSINESS PLANNING SEMINAR Thursday, November 16, 2017

Registration may be completed online at
www.chamberlainlaw.com/news-eventsrsvp-205.html

Alternatively, you may fill out the form below and mail it along with a check/money order payable to:

Chamberlain Hrdlicka, Attention: Tiffiny Fayle, 1200 Smith Street, Suite 1400, Houston, Texas 77002

Forms may also be faxed with credit card information to: 713.658.2553

REGISTRATION FEES

Early registration (prior to November 15, 2017): $150 • On-site registration: $175

Mr./Ms. ______________________ Firm ______________________

Title ______________________ ☐ CPA ☐ Attorney ☐ CFP

Address ______________________

City ______________________ State __________ Zip ______________________

Telephone ______________ Fax ______________ Email ______________

☐ VISA ☐ MC ☐ AMEX ☐ DISCOVER Card Number ______________________

Exp. Date ______________ Signature ______________________

WORKSHOPS

You are able to attend four 60-minute afternoon workshops. Please indicate your selections by:

1. Choose two workshops and a third/alternate workshop from Group I.
2. Choose two workshops and a third/alternate workshop from Group II.
3. Indicate your choices by ranking them (place a "1" next to your first choice; a "2" next to your second choice; and a "3" next to your third/alternate choice).

Group I

☐ **A. In God We Trust; All Others Must Pay Cash: Best Practices for Intra-Family Loans**
Presenter: Brett T. Berly

☐ **B. When the IRS Comes to Collect: Tales from a Tax Attorney's Desk**
Presenters: Lawrence Sherlock and Renesha Fountain

☐ **C. Judicial Highlights**
Presenter: Juan F. Vasquez, Jr.

☐ **D. Hurricane Harvey: Advising Clients Through the Flood of Legal and Tax Issues**
Presenters: Sebastien Chain and Justin VandenBout

Group II

☐ **E. Finding Out You Have Given Bad Tax Advice: Circle the Wagons or Be Transparent?**
Presenters: George W. Connelly and Larry A. Campagna

☐ **F. Current Employee Benefit Issues Every CPA Should Know** Presenter: Joshua Sutin

☐ **G. 2017 Tax Reform – What do we get, and when? Or something else?** Presenters:
Jack Eckels, Nima Farzaneh and Michael Overstreet

☐ **H. Not Cheap As Dirt – The Tax Implications of Foreign Ownership of Real Property**
Presenters: Phyllis Guillory and Jessica Cory

We will make every effort to schedule you in your top two choices in each group; however, seating is limited and workshops will be filled on a first-come, first-served basis. Your workshop schedule will be provided at the seminar. No telephone reservations can be taken and no written workshop confirmations will be sent.

If you have any questions, please contact Tiffiny Fayle at 713.658.1818 and tiffiny.fayle@chamberlainlaw.com.

JOIN OUR TAX FORUM!

Our Tax Forums include breakfast, an informative discussion of tax topics, and a current events update. A written outline of the discussion is always provided. Our Tax Forums meet at two locations in the Houston area. Sign up below and we will regularly e-mail you a notice before each meeting. You may then make a reservation if you plan to attend. It's easy!

MONTHLY TAX FORUMS

Begin at 7:15 am – 2 hours of CPE Credit Recommended

1.75 hours of CLE Credit Recommended

☐ **WEST LOOP AREA**

Houstonian Hotel

111 N. Post Oak Lane, Houston

Meets second Wednesday: $45

☐ **WEST HOUSTON AREA**

Lakeside Country Club

100 Wilcrest Drive, Houston

Meets fourth Wednesday: $45

Mr./Ms. ______________________________ Firm ______________________________

Title ______________________________ ☐ CPA ☐ Attorney ☐ CFP

Address ____

City ______________________________ State __________ Zip ____________________

Telephone ____________________ Fax ____________________ Email ____________________

Register Online: www.chamberlainlaw.com

Please mail checks/money orders payable to, and mail to:

Chamberlain, Hrdlicka, White,
Williams & Aughtry
1200 Smith Street, Suite 1400
Houston, TX 77002

713.658.1818

Attention: Tiffiny Fayle at tiffiny.fayle@chamberlainlaw.com

Fax to: 713.658.2553

Please duplicate this form if necessary.

Chamberlain Hrdlicka
Attorneys at Law

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