



61st Annual Cleveland Tax Institute 2018

**WEDNESDAY,
NOVEMBER 14
& THURSDAY,
NOVEMBER 15**

**CMBA CONFERENCE
CENTER**

One Cleveland Center
1375 East 9th Street, Floor 2
Auditorium
Cleveland, Ohio 44114

Registration: 8:30 a.m.
Institute: 8:50 a.m. – 5:15 p.m.

Up to 13.00 CLE Hours

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Michael K. Gall
Calfee, Halter & Griswold LLP

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& Lewis*

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61ST ANNUAL CLEVELAND TAX INSTITUTE 2018

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Institute: 8:50 a.m. – 5:15 p.m.

Wednesday, November 14, 2018

6.00 hours CLE, plus 0.50 hour optional lunch

8:30 a.m. Breakfast & Registration

8:50 a.m. Opening Remarks

Michael K. Gall, *Calfee, Halter & Griswold LLP*

9:00 a.m. Current Developments

David R. Tavolier, *Taft Stettinius & Hollister LLP*,

Panel Chair

Michelle M. Hervey, *BakerHostetler LLP*

Adam J. Hill, *Cohen & Company*

Todd C. Lady, *Taft Stettinius & Hollister LLP*

10:30 a.m. Break

10:45 a.m. Washington Update

Matthew F. Kadish, *Kadish, Hinkel & Weibel*, *Panel Chair*

Adam Gropper, *Joint Committee on Taxation*

12:15 p.m. Lunch

1:15 pm View from the Northern District

Justin E. Herdman, *United States Attorney for the Northern District of Ohio*

1:45 p.m. Break

2:00 p.m. Disposition of Partnership Interests

Thomas I. Hausman, *Law Office of Thomas I. Hausman*, *Panel Chair*

Stephen L. Kadish, *Kadish, Hinkel & Weibel*

Edward G. Ptaszek, *BakerHostetler LLP*

Paul H. Speyer, *Maloney + Novotny*

3:30 p.m. Break

3:45 p.m. Breakout Sessions

Navigating US International Tax Rules Post TCJA

Melinda L. Reynolds, *Eaton Corporation*, *Panel Chair*

John Bates, *Deloitte*

Mitch Thompson, *Squire Patton Boggs (US) LLP*

Choice of Entity Following Tax Reform: Case Studies

Edmund G. Kauntz, *Singerman, Mills, Desberg & Kauntz Co., L.P.A.*, *Panel Chair*

Larry D. Friedman, *Barnes Wendling*

Patrick O. Mullin, *Skoda Minotti*

5:15 p.m. Adjourn

Thursday, November 15, 2018

6.00 hours CLE, plus 0.50 hour optional lunch

8:30 a.m. Breakfast & Registration

8:50 a.m. Opening Remarks

Michael K. Gall, *Calfee, Halter & Griswold LLP*

9:00 a.m. Tax Procedure and Controversy

Terry W. Vincent, *Brouse McDowell LPA*, *Panel Chair*

J. Scott Broome, *Bender, Alexander & Broome Co., L.P.A.*

David J. Lewis, *Krugliak Wilkins Griffiths & Dougherty*

Michael J. Shapiro, *Michael J. Shapiro, Inc.*

10:30 a.m. Break

10:45 a.m. Corporate Tax & Related Topics

Peter A. Igel, *Tucker Ellis LLP*, *Panel Chair*

Sean Kelly, *PricewaterhouseCoopers*

Eric Myszka, *Grant Thornton*

12:15 p.m. Lunch

1:15 p.m. Corrigan: How We Challenged the Constitutionality of an Ohio Tax Statute

Donald J. Mottley, *Taft Stettinius & Hollister LLP*

1:45 p.m. Break

2:00 p.m. State and Local Tax Update

Edward J. (Ted) Bernert, *BakerHostetler LLP*

Matt Chafin, *Ohio Department of Taxation*

Kelvin M. Lawrence, *BakerHostetler LLP*

Bill Nolan, *Ernst & Young LLP (EY)*

3:30 p.m. Break

3:45 p.m. Breakout Sessions

Accounting for Income Taxes after Tax Reform

John Carey, *BDO USA LLP*, *Panel Chair*

Daniel Newton, *BDO USA LLP*

Eric L. Harrington, *Ernst & Young LLP (EY)*

Brent R. Thompson, *Meaden & Moore*

Doing Deals Post Tax Reform

Dave Godenswager, *BDO USA LLP*, *Panel Chair*

Steve McCullough, *BDO USA LLP*

Benjamin R. Egel, *Ernst & Young LLP (EY)*

Angela Alexander, *Barnes Wendling*

Michelle Rood Gearity, *Meyers, Roman, Friedberg & Lewis*

5:15 p.m. Adjourn

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Book materials available in your choice of **print** or **electronic format**


-  **Registration fee for ELECTRONIC MATERIALS:**
 (Registrants will receive a link to download or print materials in advance, or view online using a mobile device)
- \$390 CMBA Members \$440 Non-Members
 \$320 Government, Non-Profit and New Lawyers (less than one year) \$285 Affiliate (No CLE)


-  **Registration fee for PRINTED MATERIALS:**
 (Registration must be received NO later than 11/1/18 to guarantee print materials):
- \$420 CMBA Members \$470 Non-Members
 \$350 Government, Non-Profit and New Lawyers (less than one year) \$310 Affiliate (No CLE)


Check here to meet with a IRS Taxpayer Advocate Service case advocate for a 30 minute session to discuss a vexing case. We will contact you prior to the Institute to make arrangements.

Individual Session Registrations – includes lunch

-  Wednesday only, November 14 **ELECTRONIC MATERIALS**
- \$230 CMBA Members \$255 Non-Members
 \$180 Government, Non-Profit and New Lawyers (less than one year) \$150 Affiliate (No CLE)

-  Wednesday only, November 14 **PRINTED MATERIALS**
- \$245 CMBA Members \$270 Non-Members
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-  Thursday only, November 15 **ELECTRONIC MATERIALS**
- \$230 CMBA Members \$255 Non-Members
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-  Thursday only, November 15 **PRINTED MATERIALS**
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- I have submitted a membership application within the last 30 days.
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Registration must be pre-paid by cash, check or credit card to qualify for the advance registration price.

Registration the Day of Seminar: Add an Additional \$15.00 On-Site Fee

NOTE: Please keep a copy of the registration form. No tickets or confirmation will be sent for this seminar.

Make checks payable to: Cleveland Metropolitan Bar Association. Mail to P.O. Box 931891, Cleveland, Ohio 44193, or fax your reservation form to (216) 696-2129 (fax reservations must include credit card payment). Cancellations must be received in writing three business days prior to the program. Refunds are charged a \$15 administrative fee. Substitutions or transfers to other programs are permitted with 24 hours written notice. (Transfer is to a single program and the funds may be transferred only once) Persons needing special arrangements to attend this program are asked to contact CMBA CLE at (216) 696-2404 at least one week prior to the program.



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