



## MARCH LUNCHEON PROGRAM

### “CURRENT ISSUES IN ESTATE AND GIFT TAX AUDITS AND LITIGATION”

TUESDAY, MARCH 17, 2020

THE UNION LEAGUE  
140 SOUTH BROAD STREET  
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION  
12:00 – 12:30 P.M. LUNCHEON  
12:30 – 1:45 P.M. PROGRAM

This discussion will address current issues and trends in the transfer tax controversy arena at the audit level, appeals and in litigation. It will include issues related to the valuation and transfer of interests in closely-held entities, the use of formula clauses, positions taken by the IRS and ways to address them at the planning level.

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.**

**Speaker:**

John Porter is a Senior Partner in the Houston office of the law firm of Baker Botts L.L.P. and a member of the firm's Tax Department.

John handles federal gift, estate, and income tax litigation and controversy work. He is nationally recognized for his expertise in representing taxpayers before and against the IRS in estate and gift tax controversies, especially those involving hard-to-value assets. John has served as lead counsel for taxpayers in numerous cases in the United States Tax Court, the Court of Federal Claims, and Federal District Court and has represented taxpayers in many other federal tax audits and appeals. John also has a substantial practice in fiduciary litigation.

**COFFEE MEET AND GREET:**

The Professional Women's Network Committee has organized a meet and greet coffee station prior to our February luncheon program. It will be located in the Farragut Room from 11:30 a.m.-12:00 p.m.

All meeting attendees are welcome to join us!

*This meeting is being sponsored by*



The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

# MARCH 17, 2020 LUNCHEON PROGRAM REGISTRATION FORM

## Luncheon Program Fee:

PEPC Members	\$45	Non-Members	\$65
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## Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

*\$5 additional charge for walk-in registrations at the door without pre-registration.*

**No-shows will be billed. No refunds after March 13, 2020.**

## ATTENDEE INFORMATION:

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PEPC Member (\$45 per person)       Non-Member (\$65 per person)

Please select your lunch entrée:

Roasted Salmon, Spinach Quinoa, Roasted Fennel and Pepper Compote, Herb Oil

Stuffed Roasted Pepper, Ratatouille "Dirty Rice", Blackened Tofu

Special Dietary Needs: \_\_\_\_\_

## CONTINUING EDUCATION INFORMATION:

(Fee: \$15 per Credit)

Continuing Legal Education (1 credit).....Attorney ID: \_\_\_\_\_

Insurance Continuing Education (1 credit).....License Number: \_\_\_\_\_

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: \_\_\_\_\_

*CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.*

## PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at [www.philaepc.org](http://www.philaepc.org). **Members must be logged into the site to receive the discounted member pricing.**

**Return by Mail:** Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

**Return by Fax:** 856-727-9504      **Register Online:** [www.philaepc.org](http://www.philaepc.org)

**Questions:** 215-486-6215 (*Registrations will not be accepted via phone*)