MARCH VIRTUAL PROGRAM

"Current Issues in Estate and Gift Tax Audits and Litigation"

Tuesday, March 16, 2021
12:30 – 12:45 p.m. Opening Remarks
12:45 –1:45 p.m. Webinar Presentation

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.

Zoom Log-In Information
Log-in information will be sent to all registered attendees the day prior to the program.

We have reviewed several video communications services and have chosen Zoom for this event. Unfortunately, not all firms permit the use of Zoom so if you are prevented from using it to attend this event due to company restrictions, please join us using a personal computer or cellular phone or by simply dialing in and listening to the event from a telephone. If you will be using a personal device, please test your connection early; an app or registration may be needed the first time Zoom is used.

This program is being sponsored by

MARCH 16, 2021 VIRTUAL LUNCHEON PROGRAM
Registration Form

As a special member benefit during the pandemic, current PEPC members will receive complimentary registration to our March 16, 2021 virtual luncheon program. Continuing education credits not included.

Luncheon Program Fee:

PEPC Members	$0	Non-Members	$25

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

No-shows will be billed. No refunds after March 12, 2021.

ATTENDEE INFORMATION:

Name: ______________________________ Discipline: ______________________

Company: ____

Address: ____

City, State, Zip: ____

Phone: ____________________________ Email: __________________________

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 Certificates will be emailed to attendees after the webinar 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. **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

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