The University of Akron
G. W. Daverio School of Accountancy

National Tax Conference

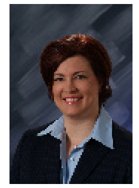
Speakers

Thomas I. Hausman, JD
Thomas Hausman joined Schneider, Smeltz, Ranney & LaFond in 2010 as an Of Counsel member of the firm. He specializes in tax, partnership and corporate practice, and estate planning. Mr. Hausman represents taxpayers in tax controversy matters before the Internal Revenue Service, the Ohio Board of Tax Appeals, and in the United States Tax Court. Mr. Hausman has taught tax law at Case Western Reserve University School of Law. From 1994 to 2005, he was a full-time faculty member of the Law School, and was the Administrative Director of the School's Graduate Tax (LL.M.) Program. He continues to be an adjunct professor at the Law School, teaching courses in Estate Planning and Partnership Tax.

David J. Lewis, CPA, JD
David Lewis, a partner with the regional law firm of Buckingham, Doolittle & Burroughs, LLP, is a tax specialist, but regularly counsels service, manufacturing, food ingredients, farming, processing, transportation, distribution and technology companies on a variety of business needs. He represents taxpayers on tax shelter audits including listed transactions, off-shore trusts, intermediary tax shelters, and foreign and Swiss accounts. His experience includes applying business and tax analysis to mergers and acquisitions, and practicing corporate, individual, partnership, and excise tax law. He teaches Tax Practice and Procedure for The University of Akron Master of Taxation Program. David earned his Juris Doctorate from Cleveland-Marshall College of Law and maintains a CPA license in Ohio.

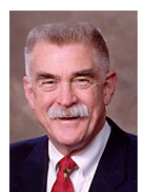
Jon R. Stefanik II, JD, MT
Jon Stefanik, an associate with the regional law firm of Buckingham, Doolittle & Burroughs, LLP, focuses his practice on tax planning for a variety of business transactions, as well as on federal and state tax controversies. Mr. Stefanik assists clients with entity formations, contract drafting and an array of other diverse business transactions. His experience includes analysis of a wide range of tax issues, including issues related to LLC and partnership taxation, estate and gift taxation, corporate taxation and state and local taxation. Mr. Stefanik earned his Juris Doctorate from The University of Akron School of Law. He earned his Master of Taxation and Bachelor of Science in Accountancy from The University of Akron.

Cathy C. Godshall, JD
Cathy Godshall, a partner with the regional law firm of Buckingham, Doolittle & Burroughs, LLP, represents professionals, corporations and other business entities providing them with advice concerning general corporate tax, organizational and transactional matters, including mergers and acquisitions. She specializes in the area of non-qualified executive compensation and tax exempt organizations. Ms. Godshall earned her Juris Doctorate from Case Western Reserve University School of Law. She earned her Bachelor of Arts degree from Kenyon College. Ms. Godshall has taught Non-qualified Executive Compensation for The University of Akron's Master of Taxation Program.

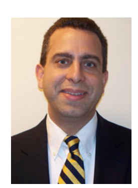


Karen M. McCarthy, CPA
Karen McCarthy is Director of the Personal Tax Advisory Group for Meaden & Moore. Her practice focuses on tax planning and compliance services for individuals and executives. With over 19 years of experience working in the areas of individual, trust, gift tax and international taxation, Ms. McCarthy is skilled in managing the complex tax issues and transactions that her clients encounter when making financial and business decisions. Ms. McCarthy works closely with her client's investment advisors to formulate and execute a financial plan that takes advantage of the best tax savings strategies available.

Uma M. Rajeshwar, CFA, CTFA
Uma Rajeshwar is first vice president and senior portfolio manager for Glenmede Investment and Wealth Management working primarily in Glenmede's Cleveland office. In this role, Mr. Rajeshwar provides investment counsel and wealth advisory services to high net worth individuals and families. In addition, he serves on the Company's Investment Policy and Stock Selection Committees. Mr. Rajeshwar brings twenty-four years of investment and trust experience to this position. He graduated from the University of Delhi, India, with a B. A. in economics and earned an M.B.A. from the University of Michigan. Mr. Rajeshwar is a Certified Trust Financial Advisor and a holder of the Chartered Financial Analyst designation.



E. Lynn Nichols, CPA
A practicing CPA for forty years, Lynn is also the founder of Mares Nichols CPE, Inc., a developer of continuing education programs for CPAs. He is a regular contributor to Bisk Education's CPE Network, co-moderator of the Taxation Discussion Groups for accountantsworld.com, a volunteer member of the Tax Division of the AICPA, and past Chair of the Board of Visitors of the School of Accounting at the University of Oklahoma. He is the 2005 recipient of The Ohio Society of CPAs' Gold Medal for service to the accounting profession, and was selected in 2008 as one of Ohio's outstanding CPAs. Lynn serves as an advisor to CPA firms across the U.S. on matters of federal income taxation, tax practice quality control, and IRS procedures. He has developed an intimate knowledge of tax law and regulation of tax practice which he shares with CPAs in clear, dynamic CPE presentations. He is consistently rated an exceptional CPE program leader and conference speaker.



M. Andrew Prior
Andrew Prior is a Director in the Washington National Tax Services (WNTS) office of PricewaterhouseCoopers LLP. As a member of the Legislative & Regulatory Services group, Mr. Prior assists companies, associations, and coalitions with monitoring and analyzing federal tax legislative developments. He also assists with lobbying and advocacy initiatives on behalf of clients before Congress, the U.S. Department of Treasury, and the IRS. Mr. Prior received a Bachelor of Arts degree in Political Science and Economics from The Johns Hopkins University and an M.A. in Public Policy from Georgetown University.

Charles F. Mullen, CPA, CMA, MT
Charles Mullen is a principal and the Director of Tax Services at Apple Growth Partners. He provides tax and accounting services to closely held companies and individuals, manages review services and assists with financial planning. Mr. Mullen earned his Master of Taxation and Bachelor of Science degree in Accountancy from The University of Akron. Mr. Mullen is a Certified Public Accountant and Certified Management Accountant.

William M. Smith, JD
William Smith, Managing Director of CBIZ MHM National Tax Office, is responsible for complex tax issues for offices throughout the country and consulting on risk management issues in local offices (including compliance and professional obligations). Mr. Smith is the Firm expert on professional responsibilities and ethical duties of accountants, as well as standards for issuing tax advice or opinions. He is the primary resource for CBIZ General Counsel on tax and audit related liability issues. Mr. Smith leads CBIZ Tax Technical Community on C Corporations, including overlap with all international tax issues. He is the primary resource for all tax matters related to Health Care Reform legislation for CBIZ MHM, LLC.

Robert W. Malone, JD
Rob Malone is a Partner with Buckingham, Doolittle & Burroughs, LLP and serves as Chair of the Business Practice Group. He focuses his practice on a variety of tax matters and mergers and acquisitions, as well as trusts & estates. Rob has served on the committees which drafted the Ohio statutes establishing a "bright-line" test for residency and authorizing Limited Liability Companies. He continues to serve on the committee that monitors and proposes amendments for Ohio's Limited Liability Company legislation. Rob currently serves on the faculty of The University of Akron Master of Taxation Program. He has taught and spoken on a number of subjects, including mergers and acquisitions and federal and state taxation issues, at various universities, colleges and professional organizations. Rob earned his Juris Doctorate from The Ohio State University College of Law and his Bachelors degree from Mount Union College.

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National Tax Conference

In Honor of Alvin H. Lieberman

REGISTRATION

FEES: $150.00 PER PERSON
$75.00 FOR ADDITIONAL ATTENDEES FROM SAME ORGANIZATION
LUNCH INCLUDED WITH REGISTRATION

REGISTER TODAY!

SEATING IS LIMITED.

Reservation Deadline:
Monday, September 20, 2010

Internet Registration:
http://mtax.uakron.edu/

U.S. Mail or Fax Registration:
Please complete the form below and mail or fax it to:
Alvin H. Lieberman
George W. Daverio School of Accountancy
The University of Akron
Akron, OH 44325-4802
(330) 972-6229 (phone)
(330) 972-8597 (fax)

Checks to be made payable to The University of Akron

Registrant Name	Professional Designation
1. ______	______
2. ______	______
3. ______	______
4. ______	______

Organization ______

Address ______

City, St, Zip ______

Phone ______

E-Mail Address ______

First Attendee: 1 @ $150 Total: $150.00

Additional Attendees from same firm _____ @ $75.00 Total: ______

TOTAL REGISTRATION FEES ENCLOSED: ______

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_____ Check enclosed payable to The University of Akron

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Card Number ______ Exp. Date ______

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Seating is limited.

The University of Akron
G. W. Daverio School of Accountancy
Akron, OH 44325-4802

NATIONAL TAX CONFERENCE

In Honor of Alvin H. Lieberman

Featuring Guest Speakers:

E. Lynn Nichols, CPA
Nichols Patrick CPE, Inc., Hubbard, Ohio

M. Andrew Prior
PricewaterhouseCoopers LLP, Washington, DC

William M. Smith, CPA, JD
CBIZ MHM, LLC, Bethesda, Maryland

THURSDAY, SEPTEMBER 30, 2010

7:45 a.m. - 8:25 a.m. REGISTRATION
8:30 a.m. - 5:00 p.m. PRESENTATIONS

Crowne Plaza Hotel, Independence, Ohio
5300 Rockside Road
Independence, OH 44131

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NATIONAL TAX CONFERENCE

In Honor of Alvin H. Lieberman

September 30, 2010

Crowne Plaza Hotel, Cleveland South
5300 Rockside Road
Independence, OH 44131
216.524.0700

PURPOSE OF CONFERENCE

The 2010 National Tax Conference (32nd annual), hosted by the George W. Daverio School of Accountancy at The University of Akron, is designed to update tax practitioners in the accounting, legal, business, and governmental sectors. New developments, tax-saving ideas, current issues, and changes in the federal, state and local tax laws will be discussed by prominent tax specialists. The morning session of this year's conference will focus on tax related issues related to compensation and the afternoon session will address a number of topics of current interest to practitioners.

WHO SHOULD ATTEND THIS CONFERENCE?

Accountants, attorneys, business people, financial planners, and others who desire to learn about recent developments in the various tax areas will gain much from this conference.

CPE AND CLE CREDIT

The National Tax Conference qualifies for 8 hours of Continuing Professional Education (CPE) credit (from the Accountancy Board of Ohio) and is pending approval for 7 hours of Continuing Legal Education (CLE) credit (from the Ohio Supreme Court Commission on Continuing Legal Education). Forms will be available at the Conference to validate attendance.

REGISTRATION

The George W. Daverio School of Accountancy at The University of Akron presents this program as a public service to the tax community. The registration fee is $150 per attendee and $75 per additional attendees from the same organization. The fee covers participation in the conference, course materials, in-depth outlines, breakfast and refreshments. Lunch is being provided by Glenmede Investment and Wealth Management. **The deadline for registration is September 20, 2010.**

MASTER OF TAXATION PROGRAM

The Master of Taxation Program at The University of Akron, the only one in Ohio at an AACSB accredited School of Accountancy, was introduced in January 1980. It is a professional degree program that provides the substantive, technical and professional knowledge and training needed to function as a taxation specialist. Though it is primarily intended for practicing accountants and attorneys who wish to further or pursue a career in taxation, other individuals with an interest in a specialized taxation degree may find the program valuable.

The School of Law and the College of Business Administration's School of Accountancy offer a joint degree program in legal and taxation studies (J.D. and MTax). With careful planning, joint JD/MTax students may complete both degrees in the equivalent of one semester longer than it takes to complete only the JD.

Graduate taxation courses are offered during the evenings by the School of Accountancy to serve students who are employed full-time or doing a joint degree. Part-time students may complete the program in 21 months by taking classes one night per week during the regular semester and twice each week during summer sessions. Full-time students with backgrounds in accounting may complete the program in as little as two regular semesters. The program is offered on the main campus as well as in Brecksville. See http://mtax.uakron.edu for more information about the Brecksville program.

For more information regarding the requirements for admission to the Master of Taxation and Joint Degree programs, please write or phone: Dr. Thomas G. Calderon, Chair, School of Accountancy, College of Business Administration, The University of Akron, Akron, Ohio 44325-4802, (330) 972-6228.

For more information regarding the requirements for admission to the School of Law and Joint Degree program, please write or phone: Ms. Lauri S. Thorpe, Assistant Dean of Admission and Financial Aid, School of Law, The University of Akron, Akron, Ohio 44325-2901, (330) 972-7331

NATIONAL TAX CONFERENCE

In Honor of Alvin H. Lieberman

Thursday, September 30, 2010

Crowne Plaza Hotel
5300 Rockside Road
Independence, OH 44131
216.524.0700

This seminar qualifies for 8 hours of CPE credit for Certified Professional Accountants and is pending approval for 7 hours of CLE credit for Attorneys.

AGENDA

7:45 A.M. - 8:25 A.M. Registration and Continental Breakfast

8:25 A.M. - 8:30 A.M. Welcome
Alvin H. Lieberman, THE UNIVERSITY OF AKRON, G.W. Daverio School of Accountancy

MORNING SESSION: TAX ISSUES RELATED TO COMPENSATION

8:30 A.M. - 9:00 A.M. **Self - Employment Taxation of Owners of Pass Through Entities**
Thomas I. Hausman, JD, SCHNEIDER, SMELTZ, RANNEY & LAFOND PLL, Cleveland, Ohio

9:00 A.M. - 9:30 A.M. **Classification of Workers as Employees or Independent Contractors**
David J. Lewis, CPA, JD, BUCKINGHAM, DOOLITTLE & BURROUGHS, LLP, Akron, Ohio

9:30 A.M. - 10:00 A.M. **Taxation of Carried & Profits Interest**
Jon R. Stefanik II, JD, MT, BUCKINGHAM, DOOLITTLE & BURROUGHS, LLP, Akron, Ohio

10:00 A.M. - 10:15 A.M. Break

10:15 A.M. - 10:45 A.M. **Compliance with IRC Section 409A**
Cathy C. Godshall, JD, BUCKINGHAM, DOOLITTLE & BURROUGHS, LLP, Akron, Ohio

10:45 A.M. - 11:30 A.M. **Roth IRA Conversions - Tax Strategy & Planning**
Karen M. McCarthy, CPA, MEADEN & MOORE, Cleveland, Ohio

11:30 A.M. - 12:00 P.M. **Investment Outlook for 2011**
Uma M. Rajeshwat, CFA, CTFA, GLENMEDE INVESTMENT & WEALTH MANAGEMENT, Cleveland, Ohio

12:05 P.M. - 12:55 P.M. **Lunch** (included with registration)
Luncheon Sponsor: GLENMEDE INVESTMENT & WEALTH MANAGEMENT

AFTERNOON SESSION: HOT TOPICS

1:00 P.M. - 1:45 P.M. **Pass Through Entities Tax Update**
E. Lynn Nichols, CPA, NICHOLS PATRICK CPE, INC., Hubbard, Ohio

1:45 P.M. - 2:30 P.M. **Federal Tax Policy & Legislation Outlook**
M. Andrew Prior, PRICEWATERHOUSECOOPERS LLP, Washington, DC

2:30 P.M. - 2:45 P.M. Break

2:45 P.M. - 3:30 P.M. **Year End Tax Savings Strategies**
Charles F. Mullen, CPA, CMA, MT, APPLE GROWTH PARTNERS, Akron, Ohio

3:30 P.M. - 4:15 P.M. **Take Two Aspirin and Call Me In the Morning ... Explaining the Tax Provisions of Health Care Reform**
William M. Smith, JD, CBIZ MHM, LLC, Bethesda, Maryland

4:15 P.M. - 5:00 P.M. **Qualifying Gifts of Interests in Family Companies for the Annual Exclusion**
Robert W. Malone, JD, BUCKINGHAM, DOOLITTLE & BURROUGHS, LLP, Akron, Ohio

5:00 P.M. Adjourn

DIRECTIONS TO THE CROWNE PLAZA HOTEL

FROM I-480, I-80 OR I-90 TAKE I-77 TO EXIT 155 (ROCKSIDE RD.) TURN WEST ON ROCKSIDE RD. AT 1ST LIGHT TURN LEFT ONTO SUMMIT DR. THEN MAKE IMMEDIATE LEFT INTO HOTEL DRIVEWAY AND FOLLOW UP THE HILL TO HOTEL ENTRANCE. HOTEL IS LOCATED ON THE HILL BEHIND THE BP GAS STATION AND IN THE SUMMIT AND LIBERTY OFFICE PARK.