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

National Tax Conference

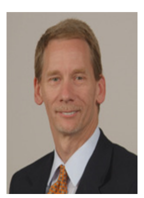
Speakers

Andrew Cordonnier, CPA

Andrew Cordonnier is a partner and the Corporate Tax Practice Leader in Grant Thornton's National Tax Office in Washington D.C. Mr. Cordonnier provides firm-wide tax consultation regarding various corporate and transactional tax matters. Mr. Cordonnier graduated from the University of Texas, Austin, with a Masters of Professional Accounting in 1991 as a Sord Scholar and a member of the Dean's List for Academic Excellence. He is a certified public accountant and a member of the AICPA. Mr. Cordonnier is currently a member of the AICPA's Tax Executive Committee and the AICPA's Economic Substance Tax Force.

Steven A. Dimengo, JD, CPA

Steven A. Dimengo, a partner with the regional law firm of Buckingham, focuses his practice on consultation and representation with respect to Federal and Ohio tax law matters. Mr. Dimengo presently serves as department head of the Taxation Section of the Business Practice Group. Mr. Dimengo routinely engaged to structure proposed transactions in a manner to obtain optimum tax minimization and is actively involved in representation before the Ohio Tax Commissioner, Board of Tax Appeals of Ohio and the Ohio Supreme Court, as well as before the Internal Revenue Service. Mr. Dimengo earned his Juris Doctorate from The University of Akron School of Law. He also earned his Masters of Taxation and Bachelor of Art degrees from The University of Akron. In addition, Mr. Dimengo is a Certified Public Accountant.

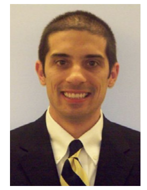


Douglas L. Klein, CPA, EA

Douglas L. Klein has more than 15 years experience in public and industry accounting and eight years with the Internal Revenue Service. As Associate Director at SS&G, Mr. Klein specializes in international tax and IRS and state/local tax dispute resolution. Mr. Klien earned a Bachelor's degree from Ashland College. He is a member of the American Institute of Certified Public Accountants (AICPA), the Ohio Society of Certified Public Accountants (OSCPA), the National Association of Enrolled Agents and the Ohio Society of Enrolled Agents. Mr. Klein is a Board member and Audit Committee Chair of Goodwill Industries of Akron. In addition, Mr. Klein is a member of the Executive Board and Endowment Committee for the Boy Scouts of America, Great Trail Council of Akron.

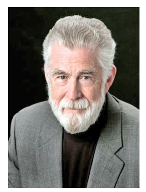
Michael Kolk, CPA, MS, JD

Michael Kolk is the Partner-in-Charge of Cohen & Company's Private Client Services Group. Most of Mr. Kolk's professional services are concentrated in the area of advising owners of closely-held businesses concerning a wide variety of tax areas and business issues. He has developed specific expertise in planning with multiple varied entities to achieve the income tax, estate tax, and business succession goals of his clients. He also is involved in the firm's hedge fund and private equity practices. Mr. Kolk received his bachelor's degree from Case Western Reserve University, where he has been a member of the Accounting Department Advisory Board for many years, his Masters of Taxation from the University of Cincinnati, and his Juris Doctorate from Cleveland State University. He has been very active in a number of civic organizations and has held board and often executive positions.



Gregg G. Muresan, CPA

Gregg G. Muresan of PricewaterhouseCoopers, LLP has over 10 years of public accounting experience and provides practical tax, business and legislative advice for privately held businesses and their owners around the country. His specialty areas include mergers and acquisitions, corporate taxation, compliance services, and federal tax policy. Mr. Muresan also serves as the Private Company Services practice liaison to Washington, D.C., where he provides tailored analysis and tax planning advice to clients through interaction with Washington decision makers and the firm's extensive team of federal tax specialists. Mr. Muresan is a graduate of John Carroll University, and holds a Masters of Taxation from the University of Denver. He is a member of the American Institute of Certified Public Accountants and the Ohio Society of Certified Public Accountants.



E. Lynn Nichols, CPA

E. Lynn Nichols provides tax consulting services, tax practice quality reviews, and documentation of quality control systems to CPA firms. He is the founder of Nichols Patrick CPE, Inc., for whom he presents CPE seminars sponsored by state societies of CPAs, CPA firms, and associations of CPAs. Mr. Nichols is a regular contributor to Bisk Education's nationally syndicated "CPE Network" audio and video tax updates and a featured speaker at several major tax conferences. Mr. Nichols is a member of the American Institute of CPAs, Ohio Society of CPAs and past chair of the Board of Visitors of the University Of Oklahoma School Of Accounting. Mr. Nichols was awarded The Ohio Society of CPA's Gold Medal for meritorious service to the accounting profession in 2005 and selected as one of Ohio's Most Influential CPAs in 2008.

Patricia A. Pacenta, JD

Patricia A. Pacenta is a partner with the regional law firm of Buckingham. She has extensive experience in the areas of estate planning, business succession planning, charitable gift planning, and estate and trust administration. Ms. Pacenta received her Juris Doctorate from Marquette Law School and her MA from The Ohio State University. In addition, Ms. Pacenta earned her Bachelor of Arts degree from Marquette University. She is a member of American Bar Association, Real Property, Probate and Trust Law Section; the Ohio State Bar Association, Probate and Trust Law Section;and the Akron Bar Association, Probate Section.

Uma M. Rajeshwar, CFA, CTFA

Uma M. 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 Bachelor of Arts degree in Economics and earned a Master of Business Administration degree from the University of Michigan. Mr. Rajeshwar is a Certified Trust Financial Advisor and a holder of the Chartered Financial Analyst designation.

Radd L. Riebe, JD, ASA

Radd L. Riebe is a Managing Director in the Valuation & Financial Opinions Group at Stout Risius Ross (SRR). He heads the Cleveland office and the firm's Trust and Estate Advisory Services group. Mr. Riebe's concentration is in business valuation and litigation advisory services. Mr. Riebe holds a Juris Doctorate and Master of Business Administration (Finance) from Case Western Reserve University. He received a Bachelor of Arts degree in Political Science from The College of Wooster. Mr. Riebe is a Senior Member of The American Society of Appraisers, President of The Estate Planning Council of Cleveland (2010-2011), and a member of the Society of Financial Service Professionals, The ESOP Association, National Center for Employee Ownership, and the Cleveland Metropolitan Bar Association.

Ronald F. Wayne, JD

Ronald F. Wayne, partner with the regional law firm of Buckingham, routinely engaged to design and implement multigenerational family estate and business succession plans. Mr. Wayne is actively involved in representing individuals before the Internal Revenue Service in estate, gift and personal income tax controversies. He is certified by the Ohio State Bar Association as a Specialist in Estate Planning, Trust & Probate Law under guidelines established by the Supreme Court of Ohio's Commission on Certification of Attorneys as Specialists. Mr. Wayne received his Juris Doctorate from the Cleveland-Marshall College of Law. He earned his Bachelor of Arts degree from Cleveland State University. Mr Wayne is a member of the Ohio, New Jersey and Florida Bars. In addition, Mr. Wayne is a member of the United States District Court, Northern District of Ohio; the United States Tax Court; and the United States Supreme Court.

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2011 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

Reservation Deadline:
Monday, September 19, 2011

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

REGISTER TODAY!

SEATING IS LIMITED.

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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REGISTER TODAY!
Seating is limited.

2011 National Tax Conference

In Honor of Alvin H. Lieberman

Thursday, September 22, 2011

Featuring Guest Speakers:

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

Andrew Cordonnier
Grant Thornton, Washington, D.C.

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

2011 National Tax Conference

In Honor of Alvin H. Lieberman

September 22, 2011

Holiday Inn
6001 Rockside Road
Independence, OH 44131
216.524.8050

PURPOSE OF CONFERENCE:
The 2011 National Tax Conference (33rd 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 Aspects of Succession Planning for Closely Held Businesses* and the afternoon session will address a number of *Current Development* topics of 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.

CONTINUING EDUCATION CREDIT:
The National Tax Conference qualifies for 8 hours of Continuing Professional Education (CPE) credit (from the Accountancy Board of Ohio) and 6.75 hours of Continuing Legal Education (CLE) credit (from the Ohio Supreme Court Commission on Continuing Legal Education).

REGISTRATION:
The George W. Daverio School of Accountancy at The University of Akron presents this program as a public service to the professional 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 lunch, provided by Glenmede.

The deadline for registration is September 19, 2011.

EVENT SPONSORS

Apple Growth Partners – Certified Public Accountants & Business Advisors
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The Ohio Society of CPAs – www.ohioscpa.com
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SRR – Stout | Risius | Ross
Skoda Minotti – CPAs, Business & Financial Advisors – Delivering on the Promise.
SS&G – Certified Public Accountants and Advisers

2011 National Tax Conference

In Honor of Alvin H. Lieberman

Thursday, September 22, 2011

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 • Akron, OH

MORNING SESSION: TAX ASPECTS OF SUCCESSION PLANNING FOR THE CLOSELY HELD BUSINESS

8:30 A.M. - 9:00 A.M.
Valuation of Closely Held Businesses
Radd L. Riebe, JD, ASA • Stout Risius Ross • Cleveland, OH

9:00 A.M. - 9:30 A.M.
General Background on Estate, Gift and Generation Skiping Taxation and the Role of Gifting in Succession Planning
Ronald F. Wayne, JD • Buckingham • Cleveland, OH

9:30 A.M. - 10:15 A.M.
Freezing the Value of a Closely Held Business
Patricia A. Pacenta, JD • Buckingham • Akron, OH
Michael Kolk, CPA, MS, JD • Cohen & Company • Akron, OH

10:15 A.M. - 10:30 A.M. Break

10:30 A.M. - 12:00 P.M.
Panel: Discussion on Succession Planning for the Closely Held Business
Michael Kolk, CPA, MS, JD • Cohen & Company • Akron, OH
Patricia A. Pacenta, JD • Buckingham • Akron, OH
Radd L. Riebe, JD, ASA • Stout Risius Ross • Cleveland, OH
Ronald F. Wayne, JD • Buckingham • Cleveland, OH

12:05 P.M. - 1:00 P.M.
Investment Outlook for 2012 Presentation & Lunch
(included with registration)
Uma M. Rajeshwar, CFA, CTFA • Glenmede • Cleveland, OH
Luncheon Sponsor: Glenmede

AFTERNOON SESSION: CURRENT DEVELOPMENTS

1:15 P.M. - 2:00 P.M.
Federal Tax Update
E. Lynn Nichols, CPA • Nichols Patrick CPE, Inc. • Hubbard, OH

2:00 P.M. - 2:30 P.M.
Circular 230 and Taxpayer and Practioner Penalties
Douglas L. Klein, CPA, EA • SS&G • Akron, OH

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

2:45 P.M. - 3:30 P.M.
Ohio's Business Friendly Tax Landscape, Including Opportunities in Recent Legislation
Steven A. Dimengo, JD, CPA • Buckingham • Akron, OH

3:30 P.M. - 4:15 P.M.
Codification of the Econmic Substance Doctrine
Andrew Cordonnier, CPA • Grant Thornton • Washington, DC

4:15 P.M. - 5:00 P.M.
Federal Tax Policy and Legislation Outlook
Gregg G. Muresan, CPA • PricewaterhouseCoopers, LLP • Cleveland, OH

5:00 P.M. Adjourn