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NATIONAL TAX CONFERENCE

Tuesday, September 23, 2014

Register Today!

http://uakron.edu/cba/acct

Seating is limited.

FEATURING
E. LYNN NICHOLS, CPA
NATIONALLY RENOWNED SPEAKER ON TAX TOPICS

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The University of Akron

36th Annual

National Tax Conference

In Honor of Alvin H. Lieberman

TUESDAY SEPTEMBER 23, 2014

Doubletree Hotel Cleveland South

6200 Quarry Lane Independence OH 44131

216-447-1300

PURPOSE OF CONFERENCE: The 2014 National Tax Conference (36th 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 Real Estate Ownership & Investment 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 want to learn about current developments in various areas of taxation.

CONTINUING EDUCATION CREDIT: The National Tax Conference qualifies for 8 hours of CPE credit from the Accountancy Board of Ohio and 7 hours of CLE credit from the Ohio Supreme Court.

REGISTRATION: The George W. Daverio School of Accountancy presents this program as a public service to the professional community. The registration fee is $175 per person and $95 for each additional employee from the same organization. The fee covers the conference, course materials, and breakfast. Lunch is sponsored by:

Glenmede Investment and Wealth Management.

REGISTER BY TUESDAY, SEPTEMBER 16, 2014

FEES: $175 EA. ($95 for additional attendees from same organization.
FIND THE LINK TO REGISTER ONLINE:

http://uakron.edu/cba/acct

If you are unable to register online, please email jank@uakron.edu for instructions on mailing your check. (Credit cards can only be accepted via online registration.) Payment is due before the day of the event please. Telephone # for School of Accountancy is 330-972-7586.

September 23 2014 AGENDA

7:45 am – 8:25 am
Registration and Continental Breakfast

8:25 am – 8:30 am
Welcome
University of Akron Dr. Ravi Krovi, Dean, CBA / Dr. Thomas Calderon, Chair, School of Accountancy

Morning Session
Tax Aspects of Real Estate Ownership & Investment

8:30 am – 9:15 am
Property Contributions and Special Allocations
Laura B. Culp, CPA, MT, CCIFP / BCG & Company, Akron, Ohio

9:15 am –10:00 am
Liability Sharing & Disguised Sales: Proposed Regulations
Jon R. Stefanik II, JD, MTax / Buckingham, Doolitte & Burroughs, LLC, Akron, Ohio

10:00 am – 10:15 am Break

10:15 am – 11:00 am
Section 263: Cost Segregation & Asset Dispositions
Rosalind M. Edwards, CPA, MT / CBIZ MHM, LLC, Akron, Ohio

11:00 am – 11:45 am
Impact of Net Investment Income & Passive Loss Rules
Mark Mussig, JD / SS&G- Akron, Ohio

Lunch
Luncheon Sponsor: **Glenmede Investment and Wealth Management**

11:45 am –1:00 pm
Presentation and Lunch *(included with registration)*
2015 Economic Outlook
Uma M. Rajeshwar, CFA, CTFA / Glenmede, Cleveland, Ohio

Afternoon Session
Hot Topics and Legislative Developments

1:00 pm – 2:00 pm
Federal Tax Developments
E. Lynn Nichols, CPA / Nichols Patrick CPE, Inc., Hubbard, Ohio

2:00 pm – 2:45 pm
Tax & Valuation Issues in Divorce and Separation
Mark B. Bober, CPA, ABV, CFF, CVA & Cindy H. Mitchell, CPA/ Bober Markey Fedorovich-Akron, OH

2:45 pm – 3:00 pm Break

3:00 pm – 3:45 pm
S Corp. Deemed Asset Sales Under Section 336E
Robert W. Malone, JD / Buckingham, Doolittle & Burroughs, LLC, Akron, OH

3:45 pm – 4:30 pm
2014 Tax Legislative Outlook
Gregg Muresan, CPA & Jason Palus, CPA/ PWC-Cleveland, OH

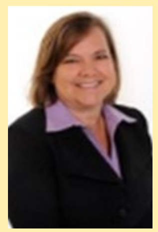
4:30 pm Adjourn

2014 National Tax Conference Guest Speakers

Mark B. Bober, CPA, ABV, CFF, CVA
Bober Markey & Fedorovich
Mark is practice leader for Bober Markey & Fedorovich's Transaction Advisory Services Group, serving private equity groups and equity sponsors throughout the country. He also leads the firm's business valuation, litigation support, and forensic accounting practice areas. In addition, he manages client relationships for closely held businesses as well as equity sponsor groups. Mark received his Bachelor of Science in Accounting from Miami University.

Laura B. Culp, CPA, MT
BCG & CO.
Laura is Construction/Real Estate Practice Leader at BCG& Co. She has expert knowledge in the areas of mergers and acquisitions, succession planning, retirement plans, estate planning, and multi-state income and sales tax compliance and planning. Recently, she was awarded 'Tax Planner of the Year'
Distinctions (2013 and 2012) at the annual PrimeGlobal Tax Conference. Laura holds a B.A.-Economics and Business from Lafayette College and MTax degree from The University of Akron.

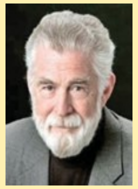
Rosalind M. Edwards, CPA, MT
CBIZ MHM, LLC
"Roz" is Senior Tax Manager at CBIZ MHM, LLC. She focuses her practice on providing advisory services to closely held companies in the construction, manufacturing, real estate, retail, and wholesale industries along with individuals and fiduciaries. Roz represents businesses and individuals before the Internal Revenue Service and other governmental agencies and manages overall tax planning, compliance and research for clients. She received both her B.S., Accounting as well as MTax from The University of Akron.



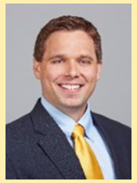
Cindy H. Mitchell, CPA
Bober Markey & Fedorovich
Cindy is Senior Manager, Taxation Services at Bober Markey Fedorovich and has extensive experience working with high net worth clients and executive groups. Her services include development of complex tax strategies covering tax and financial advisory assistance, accounting and payroll. Additionally, Cindy regularly advises clients on a host of employee benefit tax matters, including preparation of annual returns, compliance and research. She received her B.S., Accounting, summa cum laude, from The University of Akron.

Gregg Muresan, CPA
PricewaterhouseCoopers
Gregg is Tax partner at PwC and provides practical tax, business and legislative advice for privately held businesses and their owners around the country. He provides services to a wide range of clients, including companies working in the manufacturing, technology and service industries. Gregg also serves as the PCS 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.

Mark Mussig, J.D.
SS&G
Mark is Director, Tax at SS&G where he is responsible for developing the current and long-term objectives and strategies of the tax department as well as overseeing their implementation. He also represents clients in IRS examinations as well as examinations at the state and local level. He received his Juris Doctor from Cleveland-Marshall College of Law and his Bachelor of Education from the University of Toledo.



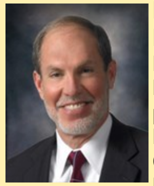
E. Lynn Nichols, CPA
Nichols Patrick, CPE, Inc.
A practicing CPA for 40 years, Lynn Nichols is also the founder of Mares Nichols CPE, Inc., a developer of continuing education programs for CPAs. He is the 2005 recipient of The Ohio Society of CPAs' Gold Medal and was selected in 2008 as one of Ohio's outstanding CPAs. Mr. Nichols serves as an advisor to CPA firms across the U.S. on matters of federal income taxation, tax practice quality control and IRS procedures. Mr. Nichols is a graduate of the University of Oklahoma.



Jason Palus, CPA
PricewaterhouseCoopers
Jason has over 10 years of professional experience and provides hands-on business and tax advice to privately held businesses and their owners. He has worked with a wide range of clients, including companies working in the manufacturing, technology and service industries. His specialties include mergers and acquisitions, pass-through entities, corporate taxation, and compliance services. Jason is a graduate of the University of Dayton. He is a member of the American Institute of Certified Public

Uma M. Rajeshwar, CFA,CTFA
Glenmede Investment and Wealth Management
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, he 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. 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.

Jon R. Stefanik II, JD, MT
Buckingham, Doolittle & Burroughs, LLC
Jon Stefanik, an associate with Buckingham, Doolitte & Burroughs, LLC, focuses his practice on tax planning for a variety of business transactions, as well as on federal and state tax controversies. 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. Jon earned his Juris Doctorate from The University of Akron School of Law. He earned his MTax and Bachelor of Science in Accountancy from The University of Akron.



Robert W. Malone, JD
Buckingham, Doolittle, & Burroughs, LLC
Rob serves as Chair of the Business Practice Group of Buckingham, Doolittle & Burroughs and teaches classes in the University of Akron Masters of Taxation program on Partnership Taxation and Mergers and Acquisitions. Rob is a Board Member of the Akron Community Foundation, the Greater Akron Chamber of Commerce and the Ohio Foundation of Independent Colleges. He received his B.A., magna cum laude, from Mount Union College and his J.D., summa cum laude, from The Ohio State University College of Law.