



THE MISSISSIPPI BAR



Estates & Trusts



Taxation

The Mississippi Bar's Estates & Trusts Section and Taxation Section present:

Estates and Trusts Section and Taxation Section Joint CLE Seminar

Wednesday, June 12, 2019

Supreme Court Courthouse - 450 High Street - Jackson

6.0 Hours CLE Credit, including 1 Ethics Hour

About the Seminar

The Estates & Trusts Section and the Taxation Section of The Mississippi Bar are pleased to host their 2019 Joint CLE Seminar to be held on Wednesday, June 12, 2019, at the Mississippi Supreme Court Courthouse in Jackson. The goal of this CLE seminar is to provide a quality 6 hour educational seminar featuring knowledgeable and experienced practitioners and experts as presenters. The variety of hot topics presented at this year's seminar will include business valuation issues for lawyers by Charles Rafferty, CPA; an overview of the Opportunity Zones and Tax incentives from Brandon Dixon, Esq. and Gray Edmonson, Esq.; State and Local Tax issues following Wayfair decision and developing issues in its aftermath by John Fletcher, Esq.; Insights of the intersection of Bankruptcy laws and taxation from Sylvie Robinson with the MS Department of Revenue; Issues related with distributions from IRA's and Qualified Plans by David Martin, Senior VP of Trustmark; and an ethics hour with insights into Estate challenges for attorneys from Retired Rankin County Chancellor John S. Grant III. You will find attendance at this seminar to be an efficient and cost-effective method of obtaining continuing legal education. We look forward to seeing you there.

Registration Form

Estates and Trusts Section and Taxation Section Joint CLE Seminar

Wednesday, June 12, 2019 - Supreme Court Courthouse - 450 High Street - Jackson

\$150 for Section Members / \$180 for Non-Section Members

Full Name: _____ Bar #: _____

Preferred First Name for Badge: _____ City: _____

Email (required to register): _____

Check: Make check payable to **The Mississippi Bar** and return with this registration form to:

The Mississippi Bar, Attn: Rene' Garner, P.O. Box 2168, Jackson, MS 39225-2168

Credit Card: Card #: _____

Expiration Date: _____ Security Code: _____

Return registration form via email at rgarner@msbar.org or fax to (888) 497-8305.

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Agenda

- 8:30 – 8:45** **Registration Check-in and Breakfast**
- 8:45 – 9:45** **Business Valuation Basics for Lawyers**
Charles P. Rafferty, CPA, CFE, CVA, ABV, CFF
GranthamPoole, PLLC
- 9:45 – 10:45** **Distributions from IRA's and Qualified Plans**
David Martin, CPA, CFP, ChFC, MSFS
Senior Vice President/Trust Sales Manager with Trustmark National Bank
- 10:45 – 11:00** **Break**
- 11:00 – 12:00** **Bankruptcy and Tax Issues**
Sylvie Robinson, Esq.
Mississippi Department of Revenue
- 12:00** **Lunch will be provided**
- 12:45 – 1:45** **Opportunity Zones and Tax Incentives**
Brandon Dixon, Esq.
Gray Edmonson, Esq.
Edmonson Sage Dixon, PLLC
- 1:45 – 2:45** **Wayfair and Other Developing SALT issues**
John Fletcher, Esq.
Jones Walker, LLP
- 2:45 – 3:00** **Break**
- 3:00 – 4:00** **Ethics and Challenges in Estate Law**
Retired Rankin County Chancellor John S. Grant, III
Of Counsel and Certified Mediator with the Shows Law Firm, PLLC

Notes

Registration:

The registration fee is \$150 for Section Members and \$180 for Non-Section Members.

Written Materials:

Written materials will be distributed electronically to each attendee the day prior to the seminar.

Cancellations:

Cancellations made prior to the seminar will receive a refund less a \$25 administrative fee. Cancellations on the day of the seminar and “no shows” will receive no refund.

Questions:

Contact Rene' Garner at The Mississippi Bar at rgarner@msbar.org with any questions you might have.

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