59th ANNUAL SOUTHERN FEDERAL TAX INSTITUTE — October 21-25, 2024

KEEP THIS SCHEDULE FOR YOUR RECORDS

(Please check all that apply)			Minutes	Enter minutes attended for each session
		Monday, October 21, 2024 (455 minutes available including Mid-day program)		
☐	9:00-10:30	Recent Federal Income Tax Developments	90	________
☐	10:45-12:00	Recent Federal Income Tax Developments (cont.)	75	________
☐	12:15-1:05	Mid-Day Program: The Taxman Cometh - Hot Topics in Tax Controversy (sponsored by Chamberlain Hrdlicka)	50	________
☐	1:15-2:15	Tax Legislative Outlook	60	________
☐	2:15-3:15	The Practical Tax Implications of the Supreme Court's 2024 Administrative Law Decisions	60	________
☐	3:30-4:30	*Moore v. United States* and the Sixteenth Amendment	60	________
☐	4:30-5:30	International Tax Controversy: Notable Cases, Rulings and Developments	60	________
		Tuesday, October 22, 2024 (450 minutes available)		
☐	8:30-9:20	Hot Topics in Partnership and Real Estate Taxation	50	________
☐	9:20-10:10	Schedule K-2 and K-3: the Why, the What and the How	50	________
☐	10:25-11:15	Self-Employment Tax Issues of Limited Partners, "As Such"	50	________
☐	11:15-12:15	This Way to the Exit: Partnership Disposition Considerations	60	________
☐	1:15-2:15	The Economic Substance Doctrine: Evolution of the Doctrine and a Look at Its Current Application	60	________
☐	2:15-3:15	Current Topics in Corporate Taxation	60	________
☐	3:30-4:30	From Cradle to Grave: The Lifecycle of an LBO	60	________
☐	4:30-5:30	Navigating Uncertain S Corporation Status	60	________
		Wednesday, October 23, 2024 (485 minutes available including Mid-day program)		
☐	8:30-9:45	Hot Topics in Employment Taxes and Fringe Benefits	75	________
☐	9:45-10:45	SECURE 2.0: What's Happening and What's on the Horizon for Retirement Plans?	60	________
☐	11:00-12:00	An Overview and Analysis of the Latest Guidance Addressing the Treatment of R&D Costs under Section 174	60	________
☐	12:15-1:05	Mid-Day Program: Bridging Comfort Levels with Tax Insurance (sponsored by Alliant Insurance)	50	________
☐	1:15-2:15	Update on IRS Enforcement Efforts for Partnerships and High-Net Worth Individuals	60	________
☐	2:15-3:15	Oh BOI! Staying Compliant with Beneficial Ownership Reporting Under the Corporate Transparency Act	60	________
☐	3:30-4:30	Ethics of Using Artificial Intelligence in Tax Practice *(submitted for 1.0 hour of ethics credit)*	60	________
☐	4:30-5:30	IRS Operations: Past Practices and the Path Ahead	60	________
		Thursday, October 24, 2024 (515 minutes available including Mid-day program)		
☐	8:00-9:30	Recent Federal Wealth Transfer Tax Developments	90	________
☐	9:30-10:30	Here Comes the Sun(set): Getting Ready for the Avalanche of Complicated Gift Tax Returns	60	________
☐	10:45-12:00	Choice of Fiduciary: Governance Issues, Successors and Tax Impacts	75	________
☐	12:15-1:05	Mid-Day Program: Hot Topics at the Intersection of Estate Planning and Business Valuation (sponsored by MPI)	50	________
☐	1:15-2:15	Current Developments in Estate and Gift Tax Audits and Litigation	60	________
☐	2:15-3:15	Trustee Conundrums: Practical Drafting Approaches from a Fiduciary's Perspective	60	________
☐	3:30-4:30	Is an LLC for Me? Formation and Operation of a Family Investment Company	60	________
☐	4:30-5:30	The SECURE Act and Other Recent Developments in Estate Planning with Retirement Assets	60	________
		Friday, October 25, 2024 (285 minutes available)		
☐	8:00-9:00	Tax Strategies for Transferring Closely-Held Businesses to 501(c)(3) and 501(c)(4) Organizations	60	________
☐	9:00-10:00	To Whom and When Does an Estate Planner Owe Duties? *(submitted for 1.0 hour of ethics credit)*	60	________
☐	10:15-11:30	Estate Planning for Modest Estates: Practical Tools Every Estate Planner Should Know	75	________
☐	11:30-1:00	Secrets of Successful Families: Creating a Lasting Legacy	90	________
			TOTAL MINUTES ATTENDED	________

Total minutes for program including Mid-days: 2,190 (Mon-455 min; Tues-450 min; Wed-485 min; Thurs-515 min; Fri-285 min)
Total minutes for program (not including Mid-days): 2,040 (Mon-405 min; Tues-450 min; Wed-435 min; Thurs-465 min; Fri-285 min)