



Arizona Society of Certified
Public Accountants

4801 E. Washington St. Ste. 180
Phoenix, AZ 85034

(602) 252-4144
AZ toll free (888) 237-0700
Fax (602) 252-1511
www.ascpa.com

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Phoenix Tax Workshop

October 20, 2018

WORKSHOP FOCUS

CURRENT DEVELOPMENTS/LIFE INSURANCE/HIDDEN TAX/FAMILY OFFICE

A. DISCUSSION OF CURRENT DEVELOPMENTS. Current tax issues, recent significant tax and business events, and practitioner comments will be reviewed and discussed.

STEVE RODIS, CPA — *Co-Chairman, Phoenix Tax Workshop*

Wallace, Plese + Dreher, L.L.P.

steve@wpdcpa.com

B. LIFE INSURANCE BENEFICIARY DESIGNATIONS. Our speaker will discuss the perils of naming the life insurance beneficiary including matters such as policy owner, effected person, beneficiary, first to die, debtors, and what interest is being protected.

Philip R. Rupprecht, Esquire

Aiken Schenk

prr@aikenschenk.com

C. A HIDDEN LAND TRANSFER TAX. Our advisory board member will provide us with a good grasp of the speculative builder tax and its mechanics, including available deductions and credits (the speculative builder tax provides a credit for any city sales tax paid by the construction contractor that built the project). We will also take a look at what constitutes "improved real property" and the exclusions for a homeowner's bona fide sale of a family residence, the sale of partially improved real property by one speculative builder to another speculative builder, and the value of in-place leases. We will wrap up with a discussion of recent issues.

Pat Derdenger, Esquire

Step toe & Johnson, LLP

Pderdenger@step toe.com

D. FAMILY OFFICES. Our speaker will walk us through what a family office is and why it applies to "normal" people.

James P. Dew, CFP, MBA, ChFC, CDFA, CPWA

Dew Wealth Management

Jim@dewwealth.com

2018-19 Workshop Dates: Nov. 17 – Jan. 19

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