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Phoenix Tax Workshop

November 17, 2018

WORKSHOP FOCUS

CURRENT DEVELOPMENTS/DEDUCTIONS/TAX PLANNING/TICs VS DSTs

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

IRA FELDMAN, CPA, CEP, CVA— *Co-Chairman, Phoenix Tax Workshop*
ira@aztax.org

B. HOW TO SALVAGE THOSE MISC. (investment) ITEMIZED DEDUCTIONS. ALSO THOSE ESTATE/TRUST DEDUCTIONS. Our Advisory Board member will remind us of the even more important election to salvage those deducts, and explain which they are. Also, he will discuss the recent IRS guidance under the TCJA for estate/trust deductions.

STEPHEN HART, CPA --- Stephen Hart PLLC
shart6@gmail.com

C. 9th CIRCUIT SAYS NIX TO TC IN SLONE V COMMR AND TAXES A COMPLEX CORPORATE SALE TAX AVOIDANCE SCHEME. Our speaker has spent the last six years trying this case which has wide implications for seemingly “flawless” tax planning.

STEPHEN SILVER — Silver Law PLC
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D. 1031s AND FRACTIONAL OWNERSHIP INTERESTS – TICs VS DSTs. How they are used to perfect a 1031 exchange of fractional ownership interests

JAMES POLESE — Gamage & Burnham
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DANIEL MERCER — Gamage & Burnham
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2018-19 Workshop Dates: Jan. 19 – Feb. 16 – Apr. 27

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