



UNIVERSITY of
WISCONSIN
LAW SCHOOL

Continuing Legal Education for Wisconsin

The 46th Annual

CLEW Tax Workshop

Thursday & Friday, September 27 & 28, 2012 – Stevens Point

Thursday & Friday, October 4 & 5, 2012 – Green Bay

Wednesday & Thursday, October 17 & 18, 2012 – Brookfield

Wednesday & Thursday, October 24 & 25, 2012 – Madison

12.0

CLE Credit Hours

Register online at:
www.law.wisc.edu/clew/

Continuing Legal Education for Wisconsin (CLEW) refers to the continuing education activities of the University of Wisconsin Law School and University of Wisconsin - Extension.

Schedule

FIRST DAY

8:00 - 8:30 a.m.	Registration	
8:30 - 9:45 a.m.	Wisconsin Tax Update: Legislation and Tax Return Preparation	Marilyn Getlinger, <i>WI Department of Revenue</i> Valeah Foy, <i>WI Department of Revenue</i>
9:45 - 10:00 a.m.	Break	
10:00 - 11:15 a.m.	Wisconsin Tax Update: Case Law, Rulings, and Planning	Timothy G. Schally, <i>Michael Best & Friedrich LLP</i>
11:15 - Noon	What Tax and Estate Planners Need to Know About Elder Law Issues	Heather A. Wilson, <i>Hill, Glowacki, Jaeger & Hughes LLP</i>
Noon - 1:00 p.m.	Luncheon (provided)	
1:00 - 2:10 p.m.	Fiduciary Accounting and Taxation: Review and Update	Ronald Berman, <i>Neider & Boucher, S.C.</i>
2:10 - 3:10 p.m.	Estate and Gift Taxation: Selected Recent Developments and Planning Considerations	Jennifer M. Olk, <i>Godfrey & Kahn, SC</i> (Stevens Point and Brookfield locations) Shannon L. Brusda, <i>Godfrey & Kahn, SC</i> (Green Bay location) Jeffrey S. Billings, <i>Godfrey & Kahn, SC</i> (Madison location)
3:10 - 3:25 p.m.	Break	
3:25 - 4:40 p.m.	2012 Ethics for Lawyers	Michael M. Berzowski, <i>Weiss Berzowski Brady LLP</i> Barry R. White, <i>Weiss Berzowski Brady LLP</i>

SECOND DAY

8:30 - 10:00 a.m.	Preparation of the Estate and Gift Tax Returns	R. Christian Davis, <i>U.S. Bank, NA</i>
10:00 - 10:15 a.m.	Break	
10:15 - 11:50 a.m.	Federal Income Tax Update: Legislation, Cases and Rulings	Patricia A. Hintz, <i>Quarles & Brady LLP</i>
11:50 a.m. - 12:05	Question and Answer	

Faculty

Ronald Berman is a shareholder with the Madison law firm of Neider & Boucher, S.C., where he practices in tax, estate planning and corporate law. Mr. Berman received his law degree with honors from the University of Illinois where he was elected to Order of the Coif.

Michael M. Berzowski is a partner with the law firm of Weiss Berzowski Brady LLP in Milwaukee, where he practices business, corporate, tax and employment law. He is a certified public accountant and retired with the rank of major general from the U.S. Army Reserve after 32 years of service.

Jeffrey S. Billings is an associate with the law firm of Godfrey & Kahn, S.C., and a member of the estate planning practice group in the Milwaukee office. Mr. Billings graduated with a degree in philosophy, *summa cum laude*, from Lawrence University and received his law degree, *cum laude*, from the University of Michigan Law School.

Shannon L. Brusda is an associate with the law firm of Godfrey & Kahn, S.C., and a member of the estate planning practice group in the Milwaukee office. Ms. Brusda earned her degrees in legal studies and political science, *with distinction*, from the University of Wisconsin-Madison and earned her law degree, *cum laude*, from the University of Wisconsin Law School, where she completed an Estate Planning concentration, *with honors*, and where she was elected to Order of the Coif.

R. Christian Davis is a vice president specializing in probate with the Private Client Group of U.S. Bank, NA in Madison. He received his bachelor's degree from Northwestern University in 1972 and his law degree from the University of Wisconsin Law School in 1975. He has been with U.S. Bank since 1977.

Valeah Foy is a Revenue Supervisor at the Wisconsin Department of Revenue. She holds a Masters of Business Administration in Finance and International Management from Ellis College of NYIT. She earned a B.S. in Business Administration from Bemidji State University.

Marilyn Getlinger is a corporation franchise/income tax auditor in the Wisconsin Department of Revenue's Office Audit Section. She received a Bachelor of Science degree in pharmacy from Butler University in 1990. After completing coursework at Milwaukee Area Technical College and Upper Iowa University, she recently passed all parts of the CPA exam.

Patricia A. Hintz is a partner with the law firm of Quarles & Brady LLP, and practices with the tax group. Ms. Hintz received her law degree, *magna cum laude*, from the University of Wisconsin Law School, was elected to Order of the Coif, and served as an editor of the Wisconsin Law Review. She also earned a master's degree in taxation from the University of Wisconsin-Milwaukee and a bachelor's degree in accounting, *magna cum laude*, from Marquette University. She is a certified public accountant.

Jennifer M. Olk is a member of the estate planning practice group at Godfrey & Kahn, S.C. Ms. Olk received her law degree, *cum laude*, from the University of Wisconsin Law School. Ms. Olk is the Section Chair of the Estate and Trust Section of the Milwaukee Bar Association, co-chair of the Association of Women Lawyers Estate Planning Group and is a member of the Milwaukee Estate Planning Forum.

Timothy G. Schally is a partner with the law firm of Michael Best & Friedrich LLP, and is coordinator of the taxation group. Mr. Schally received his bachelor's degree from Marquette University and his law degree, *cum laude*, from the University of Wisconsin Law School and served as an editor of the Wisconsin Law Review.

Barry R. White is a partner in the Milwaukee office of Weiss Berzowski Brady LLP. Mr. White's practice includes business litigation and commercial law, with a significant emphasis on construction law. He is a graduate of Albion College (B.A., *cum laude*, 1987) and of the University of Michigan Law School (J.D., 1989).

Heather A. Wilson is an associate attorney with the Madison law firm of Hill, Glowacki, Jaeger & Hughes LLP. Ms. Wilson received her law degree, with honors, from the University of Wisconsin Law School in 2006. She also earned a B.A. in Latin American Studies from the University of Illinois at Urbana-Champaign and a Masters of Library and Information Science from the University of Texas at Austin.

General Registration Information

Dates and Locations:

September 27 & 28, 2012 - STEVENS POINT

Holiday Inn & Convention Center
1001 Amber Avenue
Stevens Point, WI 54482
Phone: (715) 344-0200
Phone: Toll Free: 800-315-2621

October 4 & 5, 2012 - GREEN BAY

Best Western
780 Armed Forces Drive
Green Bay, WI 54304
Phone: (920) 499-3161
Phone: Toll Free: 800-482-3885

October 17 & 18, 2012 - BROOKFIELD

Best Western Plus Midway Hotel & Suites
1005 S Moorland Road
Brookfield, WI 53005
Phone: (262) 786-9540
Phone: Toll Free: 877-537-2062

October 24 & 25, 2012 - MADISON

Radisson Hotel
517 Grand Canyon Drive
Madison, WI 53719
Phone: (608) 833-0100
Phone: Toll Free: 800-967-9033

CLE Credit: This program is worth up to **12.0 hours** of Wisconsin CLE credit of which 1.5 hours of EPR (Ethics and Professional Responsibility) has been approved by the Board of Bar Examiners. Members of bars in other mandatory CLE states are requested to contact the CLEW office for information on obtaining credit in their states.

Fee: \$269.00 per registrant; \$249 for paralegal or professional assistant. The fee includes instruction, course materials, lunch on Thursday (please indicate on the enrollment form if you desire a vegetarian meal), and refreshment breaks. Fees should be made payable to **UW Law School**.

Refund Policy: Refunds will be paid in full if requested three days before each program.

Materials: If you cannot attend the *CLEW Tax Workshop*, you can order the materials for \$85 plus applicable sales tax. Please see the enrollment form for the amount due, including sales tax. Check the appropriate box on the enrollment form and include a check made payable to **UW Law School**. **Materials will be sent out after the final Workshop on October 25, 2012.**

Overnight Accommodations: A block of rooms has been set aside at each site for the night before the program. Reserved rooms are limited, so be sure to make your room reservation at least three weeks ahead. All rooms not reserved at least *three weeks* ahead of the program date will be released. In order to receive the discounted rate, please refer to the "UW Law School Room Block" when making your reservation.

For More Information: Call (608) 262-3833 or (800) 355-5573 or fax (608) 263-3472; visit our Website for more information on CLEW programs or publications at: www.law.wisc.edu/clew/

Program Attorney: Sheri Moore Humphrey

Program Manager: Lynn F. Thompson

The University of Wisconsin provides equal opportunities in employment and programming, including Title IX requirements. Please advise the CLEW office at the time of registration if you are handicapped and desire special accommodations. Your request will be kept confidential.

♻️ *This brochure was printed on recycled paper with a vegetable-base ink.*

Easy to Register online at: <http://law.wisc.edu/clew/>

Registration Form — Please register early!



Mail: To register or order by mail, please clip, fill out, and mail this form together with check payable to “UW Law School” to **CLEW Tax Workshop**, CLEW, 975 Bascom Mall, Room 2348, Madison, WI 53706-1399



Online: Register online by visiting the CLEW web site at www.law.wisc.edu/clew/



Phone: For registration questions, please call (800) 355-5573 or (608) 262-3833

Participant’s Name:	E-mail Address:
<input type="checkbox"/> Attorney <input type="checkbox"/> Nonattorney <input type="checkbox"/> Paralegal or professional assistant	
Firm/Company:	Daytime Telephone:
Street Address:	P.O. Box:
City/State/Zip: <input type="checkbox"/> Check here if this is a new address	Fax Number:

Enroll me in the 2012 CLEW Tax Workshop. I request a vegetarian meal.

September 27 & 28, Stevens Point October 4 & 5, Green Bay
 October 17 & 18, Brookfield October 24 & 25, Madison

Payment Information

Fee: \$269.00 per registrant; \$249.00 for paralegal or professional assistant (includes program materials, luncheon on first day, and breaks)

To pay by check: Enclose check (Payable to the UW Law School) and mail to **CLEW Tax Workshop**, CLEW, 975 Bascom Mall, Room 2348, Madison, WI 53706-1399.

To pay by credit card: Register online at www.law.wisc.edu/clew/

I cannot attend. Please send me the program materials for \$85.00 plus tax:

(1) Counties with .5% county sales tax - \$89.68; (3) Racine or Waukesha County - \$89.34;
 (2) Ozaukee, Milwaukee or Washington County - \$89.76; (4) All other counties - \$89.25.

Voluntary information collected to enhance UW programming

Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female	Occupation/Organization: <input type="checkbox"/> Agriculture/Forestry (01) <input type="checkbox"/> Public Administration or Government (08) <input type="checkbox"/> Transportation, Communications, Utilities (11) <input type="checkbox"/> Law (13) <input type="checkbox"/> Other (13) _____ <small>(please specify)</small>	Age: <input type="checkbox"/> Under 18 (A) <input type="checkbox"/> 18-34 (B) <input type="checkbox"/> 35-49 (C) <input type="checkbox"/> 50-64 (D) <input type="checkbox"/> 65+ (E)	Race/Ethnicity: <input type="checkbox"/> African American (A) <input type="checkbox"/> Asian or Pacific Islander (B) <input type="checkbox"/> American Indian or Alaskan Native (C) <input type="checkbox"/> Hispanic/Latino (D) <input type="checkbox"/> Caucasian (E)
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Enrollment in this program is for career-related reason?
 Yes No

Easy to Register online at: <http://law.wisc.edu/clew/>