



UNIVERSITY of
WISCONSIN
LAW SCHOOL

Continuing Legal Education for Wisconsin

47th Annual **CLEW** **Tax** **Workshop**

Excellent faculty of tax professionals will provide a comprehensive update of tax, estate planning, elder law developments, and tax aspects of the Affordable Care Act.

October 3 - 4, 2013 – Appleton

October 23 - 24, 2013 – Brookfield

October 29 - 30, 2013 – Madison

November 5 - 6, 2013 – Wisconsin Rapids

Earn up to 12.0 CLE Credit Hours and 1.5 Ethics Credits

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

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 for First Day

FIRST DAY

8:00 - 8:30	Registration	
8:30 - 10:00	Preparation of the Estate and Gift Tax Returns	R. Christian Davis
	<ul style="list-style-type: none">* The new tax rates and exemptions* Portability filing requirements, rules and implications* What's new in the tax forms* Common mistakes in estate tax return preparation	
10:00 - 10:15	Break	
10:15 - 11:45	Fiduciary Accounting and Taxation: Review and Update	Ronald C. Berman
	<ul style="list-style-type: none">* Recent developments* Distribution Issues for Estates and Trusts* Income with Respect to a Decedent Issues	
11:45 - 12:45	Luncheon (provided)	
12:45 - 2:00	What Planners Need to Know about Elder Law Issues	Jennifer E. Annen Brenda Haskins
	<ul style="list-style-type: none">* Impact of New Affordable Care Act provisions on Medicaid* Strategies for Modified Adjusted Gross Income Planning	
2:00 - 3:00	Estate and Gift Taxation: Selected Recent Developments	Shannon L. Brusda, (Madison and Wisconsin Rapids locations) Jennifer M. Olk (Brookfield location) Jeffrey S. Billings (Appleton location)
	<ul style="list-style-type: none">* A review of the key provision of the American Taxpayer Relief Act of 2012, signed into law on January 2, 2013* An in depth review of the new 3.8% Medicare Surtax as it relates to Trusts and Estates, including a discussion of the regulations promulgated by IRS in December 2012* A review of the Department of the Treasury 2012-2013 Priority Guidance Plan and the Obama Administration's Fiscal Year 2014 Revenue Proposals (the "Greenbook")* A significant discussion regarding how changing tax laws will affect future planning	
3:00 - 3:15	Break	
3:15 - 4:40	2013 Ethics: Practical Guidance for Practitioners	Michael M. Berzowski Barry R. White
	<ul style="list-style-type: none">* Recent developments* Practice tips* Selective Risk Management techniques	

Second Day Schedule and Faculty

SECOND DAY

8:30 - 9:30	Wisconsin Tax Update: Legislation and Income Tax Return Preparation	Andrea Walworth
	<ul style="list-style-type: none">* Review of legislative changes for franchise, income, withholding, and sales and use taxes* Administrative and procedural issues	
9:30 - 10:30	Wisconsin Tax Update: Case Law, Rulings, and Planning Tips	Timothy G. Schally
	<ul style="list-style-type: none">* An update concerning proposed federal legislation that would significantly expand the ability of states to require Internet and mail order sellers to collect sales and use tax* A discussion concerning sales tax on "digital goods," including Wisconsin's unique category of "additional digital goods"* Discussion of significant court decisions and trends in other states with respect to income and sales taxes of interest to Wisconsin taxpayers	
10:30 - 10:45	Break	
10:45 - 11:50	Federal Income Tax Update: Legislation, Rulings and Cases	Patricia A. Hintz
	<ul style="list-style-type: none">* Important Review and Tax Considerations of the new Affordable Care Act	
11:50 - 12:05	Question and Answer Period	

Faculty

Jennifer E. Annen
Annen Roetter, LLC

Ronald Berman
Neider & Boucher, S.C.

Michael M. Berzowski
Weiss Berzowski Brady LLP

Jeffrey S. Billings
Godfrey & Kahn, S.C.

Shannon L. Brusda
Godfrey & Kahn, S.C.

R. Christian Davis
U.S. Bank, NA

Brenda Haskins
Haskins Law LLC

Patricia A. Hintz
Quarles & Brady LLP

Jennifer M. Olk
Godfrey & Kahn, S.C.

Timothy G. Schally
Michael Best & Friedrich LLP

Andrea Walworth
Wisconsin Department of Revenue

Barry R. White
Weiss Berzowski Brady LLP

General Registration Information

Dates and Locations:

October 3 & 4, 2013 - APPLETON

Radisson Paper Valley Hotel
333 W College Avenue
Appleton, WI 54911
Phone: (920) 733-8000
Phone: Toll Free: (800) 967-9033

October 23 & 24, 2013 - BROOKFIELD

Best Western Plus Midway Hotel
1005 S Moorland Road
Brookfield, WI 53005
Phone: (262) 786-9540
Phone: Toll Free: (800) 780-7234

October 29 & 30, 2013 - MADISON

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

November 5 & 6, 2013 - WISCONSIN RAPIDS

Hotel Mead
451 E Grand Avenue
Wisconsin Rapids, WI 54494
Phone: (715) 423-1500
Phone: Toll Free: (800) 843-6323

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) have been applied for. Members of bars in other mandatory CLE states are requested to contact the CLEW office for information on obtaining credit in their states.

Fee: \$265.00 per registrant; \$245.00 for paralegal or professional assistant. The fee includes instruction, course materials, lunch (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 November 6, 2013.**

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; email: smhumphr@wisc.edu
Program Manager: Lynn F. Thompson; email: LFThomp1@wisc.edu

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/seminars>

Registration Form: 3 Easy Ways to Register



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



Online: www.law.wisc.edu/clew/seminars



Phone: (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:	
<input type="checkbox"/> Enroll me in the 2013 CLEW Tax Workshop . <input type="checkbox"/> I request a vegetarian meal.			
<input type="checkbox"/> October 3 - 4, Appleton		<input type="checkbox"/> October 23 - 24, Brookfield	
<input type="checkbox"/> October 29 - 30, Madison		<input type="checkbox"/> November 5 - 6, Wisconsin Rapids	
Payment Information			
Fee: \$265.00 per registrant; \$245.00 for paralegal or professional assistant (includes program materials, full luncheon on first day, and refreshment 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/seminars			
<input type="checkbox"/> 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			
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