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Chamberlain Hrdlicka to Host 42nd Annual Houston Tax and Business Planning Seminar on October 30th at Norris Conference Center at City Centre

October 30, 2019

Chamberlain Hrdlicka 42nd Annual Houston Tax and Business Planning Seminar

Chamberlain Hrdlicka's 42nd Annual Houston Tax and Business Planning Seminar will take place on **Wednesday, October 30, 2019** at the **Norris Conference Center** at City Centre, 816 Town and Country Blvd., Suite 210. Anyone is welcome to register to attend. Free parking is available.

Schedule

11:00 a.m. - On-Site Registration begins

11:45 a.m. - 1:00 p.m. - Luncheon Presentation

1:05 - 5:30 p.m. - Workshops

5:30 - 6:30 p.m. - Reception

Location - **Norris Conference Center** at City Centre, 816 Town and Country Blvd., Suite 210

Detailed Schedule:

GROUP IA | Circular 230
Tax Practitioner Duties and Obligations
A presentation reviewing the ethical and disciplinary environment for busy tax professionals, including an overview of Circular 230 and the three-level disciplinary regime in which tax practitioners practice their profession.
Presenters: George W. Connelly and David N. Calvillo

GROUP IB | International
GILTI and the Acronyms:
The International Tax Tour
This session will provide a high-level overview of the TCJA's changes to the international tax provisions. It will focus primarily on GILTI, FDII, and Section 245A, and it will touch on the changes to the foreign tax credit, Section 267A, and the Section 962 election. The discussion will also include examples.
Presenter: Sebastien N. Chain

Chamberlain Hrdlicka to Host 42nd Annual Houston Tax and Business Planning Seminar on October 30th at Norris Conference Center at City Centre, Continued

GROUP IC | Family Office Planning

Tax Planning and Audit Issues for Family-Office Expenses

Its an age-old question: is managing investment assets a trade or business? The IRSs answer has often been No. Recent litigation offers a way to a more favorable outcome; but, going forward, the TCJAs temporary repeal of Sec. 212 will affect the result of those pre-2018-tax-year cases.

Presenters: Lawrence Sherlock and Habeeb Hobbs Gnaim

GROUP ID | Trust, Estate, and Guardianship Litigation Update

A survey of recent cases and issues currently being litigated to be considered in advising clients on how to identify potential current or future trouble spots and strategies to best protect them from creditors, predators and other dangers to their assets and family harmony.

Presenter: James McNeel

GROUP IIE | Estate Planning

When Parting Isnt Sorrow: A Discussion of Disclaimers in Estate Planning We will review the new Texas disclaimer statutes, address some practical issues in making effective disclaimers, and examine the role of disclaimers in estate planning.

Presenters: Brett T. Berly and Julie G. Edelman

GROUP IIF | CDP Litigation

The Fight Against the IRS Continues: A Look at Collection Due Process Litigation in the Tax Court

There are several types of CDP cases that may end up in the Tax Court. This presentation will include a discussion on recent Tax Court decisions involving interesting CDP cases.

Presenter: Renesha N. Fountain

GROUP IIG | Employee Benefts (or/and Tax-exempt)

Top Employee Benefits Tax/ERISA Issues for Every CPA to Know

Top Employee Benefit issues will cover what every CPA should know and understand about current developments in the areas of welfare plans, qualified retirement plans, non-qualified deferred compensation plans, and fringe benefit plans. This course will cover what is relevant to these plans from the perspective of the Internal Revenue Code, ERISA, and other related state and federal laws that are creating compliance demands on employers sponsoring any type of employee benefit plan. CPAs will be provided a presentation that is intended to be a checklist to help sponsors of employee benefit plans be current and ahead of the curve as it relates to best practices with employee benefit plans and the agencies that regulate such plans, IRS, DOL, EBSA, PBGC, HHS, etc. Additionally, the latest in case law around benefit plans will be provided to help plan settlors avoid hazards that are playing out in our court systems today relating to employee benefit plans.

Presenter: Joshua A. Sutin

GROUP IIH | Judicial Highlights

Tax Controversy Update: Judicial Highlights and Taxpayer First Act of 2019

We will provide a timely review of important tax cases from the last year. We will also discuss new taxpayer rights added to the Code by the Taxpayer First Act signed into law in July 2019.

Presenters: Juan F. Vasquez, Jr. and Alissa Gipson