



Phoenix Tax Workshop

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Rev. 8/07

The next regular monthly meeting of the Phoenix Tax Workshop will be held Saturday, **APRIL 26, 2008** from 9:00 a.m. until 12:00 noon. *Guests/Non-members are welcome with advance notice and a \$60.00 fee.*

TODAY'S FOCUS

§79 BENEFITS/S CORP. PERMITTED SHAREHOLDERS/ATTORNEY CONFIDENTIALITY

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

Robert H. Feldman, Esq.
Robert.Feldman@azbar.org

NOTE: please e-mail any topics of a current event nature to Bob if you would like to have it included in the discussion.

- B. PREPARE FOR ATTACK ON INDIRECT RELATED PARTY EXCHANGES.** Our speaker will review the complications when a related party is one of the "exchangees."

Jack N. Rudel, Esq.
Jennings Strouss & Salmon, PLC
jrudel@jsslaw.com

- C. REVISITING AND REINVENTING §79 (GROUP TERM AND CASH VALUE LIFE INSURANCE) TO PROVIDE SPECIFIC EMPLOYER/EMPLOYEE BENEFITS.** How do these ideas help the non-qualified deferred comp issues?

Brian Hartstein, CLU
Economic Concepts, Inc.
brianh@ecico.com

- D. HOLDING S CORPORATION STOCK AFTER THE DEATH OF A SHAREHOLDER.** Our speaker will explain the intricate rules and pitfalls.

Michael J. Tucker, Esq.
Michael J. Tucker, P.C.
tucker@ppwn.com

- E. LITTLE KNOWN CONSEQUENCES ASSOCIATED WITH CONFIDENTIALITY PROVISIONS IN LEGAL DOCUMENTS.** The plaintiff always wants to hide the settlement and the defendant wants to tell everyone. Our speaker will cover the implications to all parties.

Kelly Mooney, Esq.
Gallagher & Kennedy
kcm@gknet.com

2007-2008 MEETING SCHEDULE

September 15, 2007	October 20, 2007
November 17, 2007	January 12, 2008
February 16, 2008	April 26, 2008
May 17, 2008	June 21, 2008

GENERAL INFORMATION:

Our meetings are held at the ASU Extended Learning Facility (*formerly the Mercado*) in Downtown Phoenix, at the corner of Monroe and 5th Street. Parking will be validated for parking at the Heritage Square parking lot (*same as used for the Science Center*). Enter on the south side of Monroe between 5th Street and 7th Street, just across the street from the facility. The meeting location will be posted on the marquee just inside the lobby. (*most are scheduled for Room C368/370 on the 3rd floor*).