Course Credit

The 2011 Delaware Tax Institute program has been approved for a total of 7 CLE credits in Delaware and Pennsylvania (including 1 ethics credit).
CPE credit—up to 8 CPE credits in tax or up to 7 CPE credits in tax and 1 in behavioral ethics. Insurance credit pending. Financial planning credit pending.

NASBA Credits

In accordance with the standards of the national Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

Widener University School of Law is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417.
NASBA website: **www.nasba.org.**

No prerequisite or advance preparation is required for the 2011 Delaware Tax Institute program.

Payment Information

Registration	$195.
Widener Law Alumni	$150.
Students (no lunch)	Free

You can pay by check. Make check payable to **Widener University.**

Please return the completed registration form with your check to:

Widener University School of Law
Attn: Constance Sweeney
4601 Concord Pike
Wilmington, DE 19803

or

Fax the completed registration form with credit card information to Constance Sweeney, fax: 302-477-2282

For More Information

on registration, refund, complaint, and/or program cancellation policies, please contact:

Contact: Constance Sweeney
Phone: 302-477-2177
E-mail: cmsweeney@widener.edu

To Register Online

Please visit **www.widener.cle.com/registration.html**

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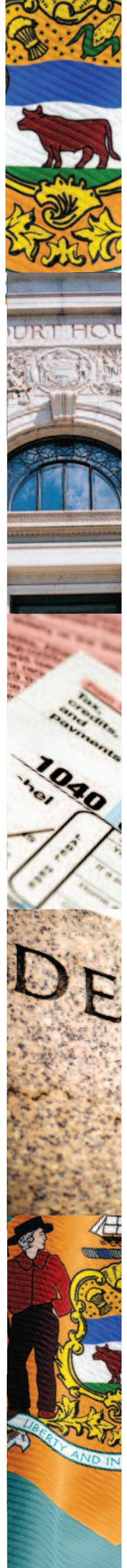

Delaware Tax Institute

Windows of Opportunity: Tax Planning in Times of Transition

Co-sponsored by
Society of Financial Service Professionals, Delaware Chapter and
Newton One Advisors, LLC

Friday, November 18, 2011
8:30 am–5:00 pm

Widener University School of Law
Ruby R. Vale Moot Courtroom
Wilmington, Delaware

Widener Law
law.widener.edu

Delaware Tax Institute
Windows of Opportunity:
Tax Planning in Times of Transition

Distinguished Speaker

Maya MacGuineas
President, Committee for a Responsible Federal Budget;
Director, Fiscal Policy Program, New America Foundation

Other Topics

Income and estate and gift tax updates

- 2011 Income Tax Developments
- Discussion of recent developments in Estate Planning
- Breakout Sessions on Estate Planning for Taxes in Transition, Business Tax Planning, Captive Insurance Planning and Fiduciary Duties of Officers, Directors, and Trustees

Learning Objectives

- Define the changes and new developments in current legislative, regulatory, and judicial income, estate, and gift tax.
- Identify recent federal and state income, estate, and gift tax planning considerations.
- Differentiate a business perspective from a tax perspective on business transactions encountered in a tax and/or legal practice.

Who should attend?

Accountants, CPAs, Tax Professionals, Attorneys, Tax Attorneys, Educators, Financial Institutions/Banking/Insurance/Financial Services Professionals

Program Level — Basic

Delivery Method — Group-Live

Location

The 2011 Delaware Tax Institute will be held at Widener University School of Law, Delaware Campus, 4601 Concord Pike, Wilmington, DE 19803.

Refund Policy

Requests for refunds must be received in writing by November 10, 2011. A full refund will be granted for cancellations received on or before November 10, 2011. No refunds will be granted after November 10, 2011.

Agenda

8:30–8:35 am — **Welcome**

8:35–10:05 am — **2011 Income Tax Developments**
Moderator: **Kathryn S. Schultz, CPA**
Director, Belfint, Lyons & Shuman, P.A.
Brian M. Menzel, CPA
Senior Manager, Tax Services, ParenteBeard LLC
Stanford L. Stevenson III, Esq.
Richards, Layton & Finger, P.A.

10:05–10:20 am — **Break**

10:20–11:50 am — **Recent Developments in Estate Planning**
Jocelyn Margolin Borowsky, Esq.
Duane Morris LLP
Scott D. Goodwin, Esq.
Morris, Nichols, Arsht & Tunnell LLP
William H. Lunger, Esq.
Martin & Lunger, P.A.
Richard J. A. Popper, Esq.
Young Conaway Stargatt & Taylor, LLP

11:50 am–12:35 pm — **Lunch**

12:40–2:10 pm — **Breakout Sessions A**

A-1: Making Two Years Last A Lifetime—Tax Planning Under the 2010 Tax Act
Moderator: **Peter S. Gordon, Esq.**
Gordon, Fournaris & Mammarella, P.A.
Michael M. Gordon, Esq.
Gordon, Fournaris & Mammarella, P.A.
Elizabeth W. King, Esq.
The Northern Trust Company of Delaware
Todd A. Flubacher, Esq.
Morris, Nichols, Arsht & Tunnell LLP

A-2: Business Tax Planning
Moderator: **Jennifer R. Noel, Esq.**
Young Conaway Stargatt & Taylor, LLP
Jay M. Stevens, CPA, PFS
Jefferson, Urian, Doane & Sterner, P.A.
Violet O. Fisher
Internal Revenue Service

2:10–2:20 pm — **Break**

2:20–3:20 pm — **Distinguished Speaker**
Maya MacGuineas
President, Committee for a Responsible Federal Budget; Director, Fiscal Policy Program, New America Foundation

3:20–3:30 pm — **Break**

3:30–5:00 pm — **Breakout Sessions B**

B-1: Captive Insurance Companies for the Small to Middle Business Markets: From Concept to Claims
Moderator: **William F. Denney, CLU**
Executive Vice President, Newton One Advisors, LLC
Jeffrey K. Simpson, Esq.
Director, The Stewart Law Firm
Richard F. Klumpp, JD, CPA
President, CEO, and Division Manager, Wilmington Trust SP Services, Inc.

B-2: Fiduciary Duties of Officers—The Changing Landscape*
Moderator: **W. Donald Sparks II, Esq.**
Richards, Layton & Finger, P.A.
Mary B. Hopkins, JD
Senior Vice President for Development, Delaware Community Foundation
Carol G. Kroch, Esq.
Managing Director and Head of Wealth and Financial Planning, Wilmington Trust Company
John Mark Zeberkiewicz, Esq.
Richards, Layton & Finger, P.A.

5:00 pm — **Adjourn**

**Breakout Session B-2 will yield ethics credit.*

Delaware Tax Institute—Windows of Opportunity:
Tax Planning in Times of Transition
Friday, November 18, 2011

Registration Form

Name ____________________

Attorney ID# ____________________

Law Firm or Organization ____________________

Address ____________________

City __________ State __________ Zip __________

Business Phone ____________________

E-mail Address ____________________

Please choose one breakout session from A: ❑ A-1 ❑ A-2
Please choose one breakout session from B: ❑ B-1 ❑ B-2

Payment Choice

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