



### Course Credit

The 2012 Delaware Tax Institute program has been approved for a total of 7 CLE credits in Delaware and Pennsylvania (no ethics credit) and up to 8 CPE credits in tax. 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.



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### 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:

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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](mailto:cmsweeney@widener.edu)

*Contact Connie Sweeney at 302-477-2177 at least one week in advance for accessibility and special needs requests.*

*No prerequisite or advance preparation is required for the 2012 Delaware Tax Institute program.*



Widener University  
School of Law

4601 Concord Pike  
Wilmington, DE 19803

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# The Calm Before the Storm:

## Expiring Tax Cuts and Tax Reform

### Distinguished Speaker:

**Eric Solomon**

Director of National Tax Services, Ernst & Young; and Former Assistant Secretary for Tax Policy, U.S. Treasury

**Friday, November 16, 2012**

**8:30 a.m.—5:00 p.m.**

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

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# Delaware Tax Institute

## The Calm Before the Storm: Expiring Tax Cuts and Tax Reform

### Distinguished Speaker

Eric Solomon  
Co-Director of Ernst & Young's National Tax Department  
and Former Assistant Treasury Secretary for Tax Policy

### Other Topics

Income and estate and gift tax updates

- 2012 Income Tax Developments
- Discussion of recent developments in Estate Planning
- Discussion on The Impending Cliff—the expiration of the Bush tax cuts, and Tax Controversies: Trends in Federal and State Audits

### 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 2012 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 9, 2012. A full refund will be  
granted for cancellations received on or before  
November 9, 2012. No refunds will be granted  
after November 9, 2012.



### Agenda

- 8:30–8:35 am Welcome**
- 8:35–10:05 am 2012 Income Tax Developments**  
Panelists:  
**Charles J. Durante, Esq.**  
Connolly Gallagher LLP  
**Kathryn S. Schultz, CPA**  
Belfint Lyons & Shuman, P.A.
- 10:05–10:20 am Break**
- 10:20–11:50 am Recent Developments in Estate Planning**  
Panelists:  
**Jocelyn Margolin Borowsky, Esq.**  
Duane Morris LLP  
**Kimberly Gill, Esq.**  
Morris, Nichols, Arsht & Tunnell LLP  
**A. David Hansen, Esq.**  
Young Conaway Stargatt & Taylor, LLP  
**Richard J. A. Popper, Esq.**  
Young Conaway Stargatt & Taylor, LLP  
Panel Chair:  
**Thomas R. Pulsifer, Esq.**  
Morris, Nichols, Arsht & Tunnell LLP
- 11:50 am–12:35 pm Luncheon, Barristers' Club**
- 12:45–1:45 pm Distinguished Speaker**  
**Eric Solomon**  
Director of National Tax Services,  
Ernst & Young; and Former Assistant  
Secretary for Tax Policy, U.S. Treasury
- 1:45–2:00 pm Break**

- 2:00–3:30 pm The Impending Cliff**  
Panelists:  
**Robert S. Smith, CPA**  
Santora CPA Group  
**Harold W. T. Purnell II, Esq.**  
Archer & Greiner, P.C.  
Panel Chair:  
**Peter S. Gordon, Esq.**  
Gordon, Fournaris & Mammarella, P.A.
- 3:30–5:00 pm Tax Controversies:  
Trends in Federal and State Audits**  
Panelists:  
**Patrick T. Carter**  
Director of Revenue, State of Delaware  
**Jared Szychter**  
Senior Manager, Tax Services, Grant  
Thornton LLP  
**Thomas D. Greenaway**  
Managing Director, Tax Controversy  
Services, KPMG LLP  
Panel Chairs:  
**John P. Garniewski Jr., CPA**  
Senior Managing Director, Wilmington  
Family Office, Inc.  
**Jennifer R. Noel, Esq.**  
Noel Legal Services, LLC
- 5:00 pm Adjourn**

## Delaware Tax Institute—The Calm Before the Storm:

### Expiring Tax Cuts and Tax Reform

Friday, November 16, 2012

### Registration Form

Name \_\_\_\_\_  
Attorney ID# \_\_\_\_\_  
Law Firm or Organization \_\_\_\_\_  
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