SUNDAY OCTOBER 28, 2018

1:30pm – 2:20pm **Board of Director's Meeting**

3:00pm – 4:00pm **Registration**

4:00pm – 6:00pm **Federal Tax Updates**
Gary Zwick
Walter Haverfield, LLP
Cleveland, OH

6:00pm – 8:00pm **Reception**

MONDAY OCTOBER 29, 2018

7:30am – 8:30pm **Breakfast (provided)**

8:30am – 9:20am **Estate planning for the Childless Couple or Childless Single Client**
Missia Vaselaney
Tatt, Stettinius & Hollister LLP
Cleveland, OH

9:20am – 10:10am **New Pooling Rules**
Floyd "Kin" Sayre
Bowles Rice LLP
Martinsburg, WV

10:10am – 10:20am **Break**

10:20am – 11:10am **Choice of Entity**
David Croft
Spilman, Thomas & Battle
Wheeling, WV
John Allevato
Spilman, Thomas & Battle
Charleston, WV

11:10am – 12:10pm **New Section 199A**
Jose Carasco
Grant Thornton
Washington, DC

12:10pm – 1:15pm **Lunch (provided)**

1:15pm – 2:00pm **Loss Disallowance Rules Changes**
Greg Fairbanks
Grant Thornton
Washington, DC

2:00pm – 2:30 pm **Recent Laws in International Tax**
Pat Donahoe
Donahoe & Associates, Inc
Charleston WV

2:30pm – 2:40pm **Break**

2:40pm – 3:30pm **The Distributional Impact of WV Taxes**
Carl Davis
Research Director, Institute on Taxation and Economic Policy
Washington, DC

3:30pm – 4:20pm **Primer on Ethics and Circular 230 Issues**
Catherine Karayan Wilbur
Rodriguez, Horii, Choi & Cafferate
Los Angeles, CA

4:20pm – 5:10pm **Individual Tax Planning**
Marlin Witt
Arnett Carbis Toothman
Charleston, WV

5:10pm - 5:30pm **Break**

5:30pm – 6:30pm **Social Hour**

6:30pm – 8:00pm **Dinner**

TUESDAY OCTOBER 30, 2018

7:00am – 8:00am **Breakfast (Provided)**

8:00am – 8:25am **Welcome by the Secretary of Revenue - Overview of the Department & Current Programs, Goals & Plans**
Dave Hardy
WV Secretary of Revenue

8:25am – 8:45am **Recent Accomplishments & Current Programs, Goals & Plans of the Tax Department**
Dale Steager
WV Tax Commissioner

8:45am – 9:10am **WV State Budget Issues and Outlook**
Mark Muchow
Deputy Secretary of Revenue

9:10am – 9:35am **State Tax Developments Relating to Federal Tax Reform**
Jared Walczak
Senior Policy Analyst, Center for the State Tax Policy, Tax Foundation

9:35am – 10:15am ***South Dakota v. Wayfair, Inc.* – Developments and Implications**
Lindsay Galvin
PricewaterhouseCoopers,
Pittsburg, PA

10:15am – 10:35am **State & Local Economic Development Tax Incentives – Advantages & Perils**
Ted Boettner
Co-Founder & Executive Director, WV Center on Budget & Policy

10:35am – 10:55am **Break**

10:55am – 11:20am **WV Economic Development Progress, Programs & Plans**
Todd Hooker
Senior Manager, Financial Programs & national Accounts, WV Development Office

11:20am - 11:35am **WV Economic Development Tax Incentives**
Rebecca Rodak
Attorney, Legal Division, WV Tax Department

11:35am – 11:55am **Legislative, Regulatory & Tax Policy Developments**
Stephen B. Stockton
Managing Attorney, Technical Section, Legal Division WV Tax Department

11:55am – 12:15pm **WV Office of Tax Appeals Cases Decided over the Last 12 Months**
A. M. "Fenway" Pollack
Chief Administrative Law Judge, WV Office of Tax Appeals

12:15pm – 12:45pm **WV Circuit Court & Supreme Court Cases Decided over the Last 12 Months and Pending Cases of Interest**
L. Wayne Williams
Assistant Attorney General, Office of the WV Attorney General