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Tax Institute Registration
32 Campus Drive
Missoula, MT 59812-6552

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Name: ___________________________ Signature: ___________________________
Date: ________________

Other: ___________________________
FRIDAY 10/19
Registration and Continental Breakfast
12:00 – 10:00

Welcome and Introduction – Dean Paul Kerger, Alexander Bellow School of Law
10:00 – 10:15

Use of Family Limited Liability Entities in 2018 and Beyond – Michael Brill and Jan Gurr
10:15 – 11:00

Partnership Audit Rules and Their Impact – Steve Conn
11:00 – 11:45

Review of the Past Year’s Significant, Curious, or Decorative Phoenix Tax Court Cases – Darla Fife-Popan
11:45 – 12:00

FRIDAY 10/20
10:00 – 10:15

Use of Charitable Organizations in Tax Planning – Reid Grosenick
10:15 – 11:00

The 2017 Act Made a number of changes affecting both income and estate tax matters which have led to a significant decline in charitable giving. This presentation discusses all of the Act’s changes, including the $10,000 cap on deductions for state and local taxes and the tax on retained profits of S corporations.
11:00 – 11:45

Tax Advice on the Green Horizon: Marijuana Businesses in Montana – Mary Radford
11:45 – 12:00

- Jonathan Blattmachr

12:00 – 10:00

Annual Meeting in the back of the seminar room.

10:00 – 10:45

CROWLEY FLECK &\nThe Trust and Estate Practice Group

10:45 – 11:30

- Mary Radford

11:30 – 12:00

 continental breakfast

12:00 – 1:00

Annual Income Tax Update

- Mary Radford

- Cassady V. Brewer

1:00 – 2:00

2018 Developments in Corporate and Partnership Taxation – Bruce Kugler and Cass Brewer

2:00 – 3:00

Effective Uses of Non-Grantor Trusts for Individual Taxpayers – Jonathan Blattmachr

3:00 – 4:00

Break

4:00 – 5:00

Annual Estate Planning Update – Clay Riedl

5:00 – 6:00

Continental Dinner

6:00 – 8:00

Reception

7:00 – 8:00

- Mary Radford

12:00 – 2:00

- Cassady V. Brewer

8:00 – 9:00

Break

9:00 – 10:00

Advantages, Dangers, and Decisions in Representing Clients with Diminishing Capacity – Mary Radford

10:00 – 11:00

Efficiency Challenges in Recognizing and Representing Clients with Diminishing Capacity – Mary Radford

11:00 – 12:00

Tax Advice on the Green Horizon: Marijuana Businesses in Montana – Mary Radford

12:00 – 2:00

- Mary Radford

- Cassady V. Brewer

2:00 – 3:00

Tax Advice on the Green Horizon: Marijuana Businesses in Montana – Mary Radford

3:00 – 4:00

Break

4:00 – 5:00

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SATURDAY 10/21
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11:00 – 12:00

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12:00 – 2:00

- Mary Radford

- Cassady V. Brewer

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66TH ANNUAL MONTANA TAX INSTITUTE

TAX INSTITUTE

OCTOBER 19 - 20, 2018 • DOUBLETREE HOTEL • MISSOULA, MONTANA

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Badge Name (if different): _______________
Firm or Organization: ___________________
Address: _______________________________
City: ___________________ State: ___________
Zip: ___________________________ Daytime Phone: ____________________
Email: ____________________________
Profession: ___________________________

Please check if you would like to receive communications from our sponsors.

Payment Information

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Name: ____________________________
Signature: _________________________
Date: _____________________________

Note: For multiple registrations, a separate form must be completed for each registrant.

Please register in advance. A limited number of walk-in registrations will be accommodated, with course materials not available until after the program.

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