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Name:

Full Name: [provided]

Profession: [provided]

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Alexander Blewett III School of Law
University of Montana
Attn: Tax Institute Registration
32 Campus Drive (MLA002)
Missoula, MT 59812-6552

For credit card payment, we accept Visa, MasterCard, American Express, and Discover.

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SATURDAY 10/26

John H. Brown, Managing Director of Brown Advisory, fmr. global head of tax at T. Rowe Price. John focuses on professional business owners and families. After ten years at T. Rowe Price focusing on business services, John joined Brown Advisory in 2018 to lead the Business Services Group. John is also a member of the Board of Directors of the Corporate Financial Officers’ Association (CFOA) and the American Institute of CPAs (AICPA).

David J. Dietrich graduated from Wayne College with a B.S degree in finance in 1979. He entered in the Peace Corps in Cuba, later he attended the University of Minnesota, and completed his undergraduate studies in finance in 1984, and a Master of Science in Taxation in 1987. He also completed the Master of Business Administration (M.B.A.) program in 1995.

Lester B. Law graduated cum laude from the University of Montana with a B.A in American Government in 1978, and a B.A. in music from Ithaca College School of Music. He continues his passion for music through the composition and performance of contemporary works, and composition for the University of Montana Wind Ensemble.

Elaine Gagliardi, a 2018 graduate of the University of Arizona College of Law, and recipient of the Arizona Estate Planning and Probate Handbook Award, is a recipient of the ABA-RPTE leadership, and frequently lectures on fiduciary topics. Dana earned a J.D. from George Washington University Law School, and a Certificate in Estate Planning from Georgetown University, his J.D. from Chapman University, and a B.S. from the University of Arizona. He is a shareholder in the firm.

John J. Mendenhall, is a partner of KPMG’s Federal Tax practice. John began his career at Price Waterhouse in 1985 and has held a variety of responsibilities in corporate and international tax service. He has held a variety of responsibilities in corporate and international tax service. He has been a leader in the national tax practice as a CPA and is currently the National Tax Practice Leader for Consulting Services and Business Services.

Friday’s Session: Current Developments in Corporate and Partnership Income Tax

Spokesperson: John H. Brown

9:00 a.m. - 10:00 a.m.

The Land of Oz: Opportunity Zones, Balloon or Bust?

James M. Delaney, Howard Distiguished Professor of Law at the University of Virginia College of Law, is the author of the book “The Making of the Modern Corporation” (2012). His research areas include corporate law, business organizations, and the history of business. He is a member of the American Law Institute, and has also served as a visiting professor at the Columbia Law School, the University of Buenos Aires School of Law, and the University of Buenos Aires School of Law.

Dana K. Gagliardi, a 2018 graduate of the University of Arizona College of Law, and recipient of the Arizona Estate Planning and Probate Handbook Award, is a recipient of the American Bar Association's (ABA) RPTE leadership, and frequently lectures on fiduciary topics. He is a member of the Montana Bar Association (MBA) and the American College of Tax Counsel (AFTS).

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FRIDAY 10/25

Welcome and Introduction – Co-Professor and Director Elaine Gagliardi, Alexander B. Wettick III School of Law

Review of the Past Year’s Significant, Curious, or Overneath Fascinating Fiduciary Cases – Danita Elder, Elder Law Attorney and Mediator

Married, Divorced and Remarried, Planning for Changes – John H. Brown

Registration and Continental Breakfast

9:00 - 10:00 a.m.
Annual Estate Planning Update – Samantha A. Donaldson

9:00 - 10:00 a.m.
Current Developments in Corporate and Partnership Taxation – Bruce A. McGovern

10:15 - 11:45 a.m.
Annual Income Tax Update – Samuel A. Donaldson

10:15 - 11:45 a.m.
Taxation – Bruce A. McGovern

11:00 a.m. - 12:30 p.m.
SPEAKERS – James M. Delaney

11:00 a.m. - 12:30 p.m.
The Land of 50 Opportunity Zones, Bailout or Bailout? – Ramya R. Shetty

12:30 - 1:15 p.m.
Lunch

12:30 - 1:15 p.m.
Tax Planning Opportunities in Business Exit Planning – John H. Brown

1:30 - 3:00 p.m.
Conservation Easements Sold and Given: Tax and Practical Considerations in Bargain and Donated Easements – David A. Senn and Christian Donnell

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Conservation Easements Sold and Given: Tax and Practical Considerations in Bargain and Donated Easements – David A. Senn and Christian Donnell

2:00 - 3:00 p.m.
Current Developments in Corporate and Partnership Taxation – Bruce A. McGovern

2:00 - 3:00 p.m.
Taxation – Bruce A. McGovern

3:15 - 4:15 p.m.
Annual Estate Planning Update – Samantha A. Donaldson

3:15 - 4:15 p.m.
Current Developments in Corporate and Partnership Taxation – Bruce A. McGovern

3:15 - 4:15 p.m.
Taxation – Bruce A. McGovern

5:00 p.m.
Adjourn

Saturday 10/26

6:00 a.m. - 9:00 a.m.
Continental Breakfast

7:00 - 7:50 a.m.
BETTR Law Section of the State Bar of Montana Annual Business Meeting of the Section at the Annual Meeting of the Association of the State Bar of Montana

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10:00 - 10:20 a.m.
Welcome and Introduction

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10:30 a.m. - 12:00 p.m.
Taxation – Bruce A. McGovern

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12:00 - 1:00 p.m.
The Tax Cuts and Jobs Act: A Generously Spotted Opportunity

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1:00 - 2:00 p.m.
Annual Estate Planning Update – Samantha A. Donaldson

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5:00 p.m.
Adjourn

SPEAKERS

John H. Brown
John H. Brown is a partner with the law firm of Barlow & Wiencke, PLLC. Mr. Brown has been practicing in the area of estate planning for over 30 years and has focused his practice on helping clients and their families manage the distribution of wealth while minimizing taxes and other costs. Mr. Brown has been involved in numerous high-profile and complex estate planning transactions, including negotiations with the IRS and the state of Montana on issues related to the transfer of wealth. He has led the firm’s efforts in developing innovative tools, services and strategies, including tax minimization strategies, to help its Exit Planning owners, prospects, John eventually attended law school and co-founded a Denver, Colorado law practice specializing in federal and state income tax, estate and gift tax law. He is also a contributing author to a number of tax publications, including the University of Denver Tax Law Review, Tax Notes, and the American Bar Association Journal of Taxation. He is a member of the Montana Bar

David J. Drlich
David J. Drlich is a Partner with the law firm of Drlich and Little, LLC. Mr. Drlich is a University of Montana Law School graduate and has been practicing law for over 30 years. He is a member of the Montana Bar Association and has been recognized as a Super Lawyer in the areas of tax law and estate planning. Mr. Drlich has been involved in numerous high-profile and complex estate planning transactions, including negotiations with the IRS and the state of Montana on issues related to the transfer of wealth. He has led the firm’s efforts in developing innovative tools, services and strategies, including tax minimization strategies, to help its Exit Planning owners, prospects, and John eventually attended law school and co-founded a Denver, Colorado law practice specializing in federal and state income tax, estate and gift tax law. He is also a contributing author to a number of tax publications, including the University of Denver Tax Law Review, Tax Notes, and the American Bar Association Journal of Taxation. He is a member of the Montana Bar

March 27, 2023

The Speaker Welcome Dinner is generously sponsored by:

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MAKING THE BLACK AND WHITE

This presentation is sponsored by CNW Group, CDN Media, and NAI NABOR Group.

The annual meeting of the BETTR Law Section of the State Bar of Montana is a premier event for legal professionals throughout the state. This year, we are proud to host a number of distinguished speakers who will provide valuable insights into the latest developments in the field of trust and estate planning. The event will feature a keynote speech, a panel discussion, and a variety of breakout sessions, all designed to help attendees stay up-to-date on the latest trends and best practices in the field. Whether you are a seasoned practitioner or just starting out in the field of trust and estate planning, this event is an essential opportunity to network with colleagues and learn from the experts. Registration is open now, so mark your calendars and join us for an afternoon of professional development and valuable insights.
SATURDAY 10/26

8:00 - 9:00 a.m.
Annual Estate Planning Update - Charles ‘Clay’ Redd

10:15 - 11:15 a.m.
Current Developments in Corporate and Partnership Taxation - Bruce A. Mcgovern

11:15 a.m. - 12:15 p.m.
How to Run Your Business So You Can Leave It In Style - Nick Donnalson

12:15 p.m. - 1:15 p.m.
Lunch

1:15 - 2:15 p.m.
Current Developments in Corporate and Partnership Taxation - Bruce A. Mcgovern

2:15 - 3:15 p.m.
Estate Planning Opportunities in Business Exit Planning - John H. Brown

3:15 - 4:15 p.m.
Estate Planning in the Era of Opportunity Zones - Ramsay H. Slugg

4:30 - 5:30 p.m.
Estate Planning: The Definitive Guide - C. Stephen Leimberg

5:30 - 6:30 p.m.
Song Fest - Richard J. Grover
67th ANNUAL MONTANA TAX INSTITUTE

OCTOBER 25 - 26, 2019 • DOUBLETREE HOTEL • MISSOULA, MONTANA

SPEAKERS

Ramsey M. Stugg is Managing Director and member of the National Wealth Management Board of Directors. Previously, he was the National President of the Northwest Area of the Institute of Management Accountants of America, and has been involved in tax policy and tax planning issues at both the state and national level.

Amy Sullivan is Director of the Montana Office of Gift Planning of the Montana State Bar Foundation. Prior to her position as Co-chair of the Montana History Foundation’s Board of Directors, she served as a community grantmaker specializing in the field of education for 15 years. Amy earned a BA in English from the University of Montana in 1996.

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LEARN FROM SOME OF THE NATION’S TAX EXPERTS!

Learn from some of the nation’s tax experts!

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Montana Grizzlies vs Eastern Washington Eagles

Opening Football game of the 2019 season, Saturday, October 26, 2019, at Washington-Grizzly Stadium, for the "Pride & Tradition (Maroon & Silver) game. Tickets are on sale July 13, 2019; visit www.umt.edu/Tax-Institute to register online.

Hotel Accommodations

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