

The Income and Other Taxes Committee along with the State and Local Tax Committee, the Corporate and Pass-Through Entities Committee, and the Tax Procedures and Litigation Committee of the Taxation Section of the State Bar of California present

## 2011 ANNUAL INCOME TAX SEMINAR



Friday, June 17, 2011  
8:30 a.m. - 5:05 p.m.  
Whittier Law School  
3333 Harbor Boulevard Costa Mesa, California



**SPONSORED BY:**  
Whittier Law School

Co-sponsored by:  
**California Society of Certified Public Accountants**  
~ Los Angeles Chapter ~ Orange County-Long Beach Chapter ~ San Diego Chapter ~  
~ Inland Empire Chapter ~

**California Association of Attorney-Certified Public Accountants**

The Program qualifies for 9 hours of CPE for CPAs; 9 hours of continuing education credit for enrolled agents;  
and  
7.5 hours of MCLE and tax specialization credit for attorneys (including 1 hour of ethics).

### PROGRAM SCHEDULE

- 8:00 a.m. - 8:30 a.m.      **Registration**
- 8:30 a.m. - 8:35 a.m.      **Introduction/Opening Remarks**
- 8:35 a.m. - 10:15 a.m.    **The IRS 2011 Offshore Voluntary Disclosure Initiative: FBAR, FATCA and the Future of Global Information Reporting**  
Patrick J. Martin, Procopio, Cory, Hargreaves & Savich LLP, San Diego  
Jon P. Schimmer, Procopio, Cory, Hargreaves & Savich LLP, San Diego  
Eric D. Swenson, Procopio, Cory, Hargreaves & Savich LLP, San Diego
- 10:25 a.m. - 12:05 p.m.   **California Property Tax "Change of Ownership" (Including when to Report Entity Change of Ownership to BOE)**  
Richard S. Moon, Tax Counsel IV, California State Board of Equalization
- 12:05 p.m. - 12:30 p.m.   **Lunch**
- 12:30 p.m. - 1:30 p.m.    **Developments in the Office of Professional Responsibility: Practice before the IRS**  
Speaker TBA
- 1:35 p.m. - 3:15 p.m.     **Mergers & Acquisitions of Passthrough Entities: S corporations, Partnerships & LLCs**  
Douglas A. Schaaf, Paul, Hastings, Janofsky & Walker LLP, Costa Mesa  
Erika Mayshar, Paul, Hastings, Janofsky & Walker LLP, Costa Mesa
- 3:25 p.m. - 5:05 p.m.    **2011 Income Tax Update**  
Stuart A. Simon, Buchalter Nemer, A Professional Law Corporation, Los Angeles  
Geoffrey A. Weg, Valensi Rose, PLC, Los Angeles



**Friday, June 17, 2011**  
**8:30 a.m. - 5:05 p.m.**  
**Whittier Law School**  
 3333 Harbor Boulevard Costa Mesa, California



**Registration Form**

**DEADLINE:** Form and payment **must be received** by June 16, 2011.  
**REGISTER ONLINE:** [www.calbar.ca.gov/taxation](http://www.calbar.ca.gov/taxation)  
**FAX REGISTRATION FORM:** 415-538-2368

**2011 Annual Income Tax Seminar**  
**Whittier Law School** **Costa Mesa, California**

*Please note:* One registrant per form. Photocopies may be used.

**Bar No.** \_\_\_\_\_  
**Name** \_\_\_\_\_  
**Firm** \_\_\_\_\_  
**Address** \_\_\_\_\_  
**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip Code** \_\_\_\_\_-\_\_\_\_\_  
**Phone** \_\_\_\_\_ **Email** \_\_\_\_\_

(Required for email confirmation)

- \_\_\_\_\_ **\$100.00** Pre-paid registration.
- \_\_\_\_\_ **\$120.00** On-site registration. *(Space available basis)*
- \_\_\_\_\_ **\$50.00** Written materials **only**. *(Includes shipping and handling)*

**CREDIT CARD INFORMATION (VISA/MASTERCARD ONLY) - FAX FORM TO: 415-538-2368**  
**AMOUNT TO BE CHARGED** \$ \_\_\_\_\_

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_  
 Cardholder's Name \_\_\_\_\_  
 Cardholder's Signature \_\_\_\_\_

*I authorize the State Bar of California to charge my program registration to my VISA/MasterCard account.*  
 (NO OTHER CREDIT CARDS ACCEPTED)

**MAIL TO:** Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to: The State Bar of California.

**QUESTIONS:** For registration information, please call 415-538-2508. For program content and/or Section information, please call 415-538-2580.

**REFUNDS:** All requests for refunds **must be in writing and received** by June 16, 2011.

**SPECIAL ASSISTANCE:** For special assistance, please call 415-538-2580.