

Jeremiah Long Memorial

26th Annual National Conference

LIKE-KIND EXCHANGES UNDER SECTION 1031 I.R.C.

October 27 – 28, 2022 • Scottsdale, Arizona

Westin Kierland Resort and Spa

PRESENTED BY:

1031 Advanced Seminar LLC



WHO SHOULD ATTEND?

Attorneys, accountants, qualified intermediaries, tax advisors and anyone dealing with clients owning investment real estate or other business assets. Come meet with other professionals involved with 1031 exchanges.

Participants should be familiar with the basics of I.R.C. Section 1031 for this Advanced Two-Day Program. No preparation is required prior to the conference.

We welcome your sponsorship! For a list of sponsorship opportunities, please email sheila1031advancedseminar@gmail.com.

OUR SPEAKERS

The speakers participating at this conference are the country's leading authorities on Section 1031 I.R.C. and current exchange issues.

Mary B. Foster, Co-Chair
1031 Services, Inc.

Christopher A. Cunningham
Elliott, Thomason & Gibson, LLP

David Shechtman
Drinker Biddle & Reath LLP

Louis S. Weller, Co-Chair
Weller Partners LLP

Todd D. Keator
Thompson & Knight

Kevin Thomason
Elliott, Thomason & Gibson, LLP

Michael Alfano
Computershare Corporate Trust

Richard M. Lipton
Baker & McKenzie LLP

Martin E. Verdick
RSM US LLP

Anne E. Andrews
PricewaterhouseCoopers LLP

Matthew E. Rappaport
Falcon Rappaport & Berkman PLLC

Joyce L. Welch
Deloitte Tax LLP

Stephen M. Breitstone
Meltzer, Lippe, Goldstein & Breitstone

Robert Schachat
BDO, USA LLP

Speakers are subject to change.



WHAT YOU WILL LEARN

An Advanced Seminar with the Leading Authorities on Section 1031

- Overview of Recent Cases, Legislation and Rulings
- Like-Kind Issues With Options & Other Non Fee Interests In Real Property
- Select Partnership LKE Issues Including Synthetic Drop & Swaps
- Federal and State Tax Audits of Exchanges: Reports from the Field
- Combining Exchanges with Partnership Rollups; Planning and Implementing the 1031/721 Transaction
- Structuring Exchange First QEAA Transactions
- Tax and Practical Aspects of Using TICs and DSTs as Replacement Property
- Multiple Property Exchanges: when do you have them and how do they work?
- Primer on Net Lease Properties in Exchanges
- Review of State Law Issues Affecting Exchanges
- Dealing with Personal Property in Exchanges
- Ethical Issues for QIs and Advisors in Like-Kind Exchanges

SCHEDULE

VISIT OUR WEBSITE FOR A COMPLETE AGENDA

www.1031advancedseminar.com

THURSDAY, OCTOBER 27 (breakfast, breaks and lunch included)

ADVANCED PROGRAM

8:00 a.m. 9:00 a.m. – Noon	Registration and Breakfast Buffet TOPICS OF DISCUSSION: <ul style="list-style-type: none"> • Recent Developments • Like Kind Issues with Options & Other Non Fee Interests in Real Property • Select Partnership LKE issues: Synthetic Drops & Swaps, Structuring Swaps & Drops
Noon – 2:00 p.m.	Luncheon with Faculty (Networking Opportunity)
2:00 p.m. – 5:00 p.m.	TOPICS OF DISCUSSION: <ul style="list-style-type: none"> • Federal and State Tax Audits of Exchanges: Reports from the Field • Combining Exchanges with Rollups; Planning and Implementing the 1031/721 Transaction • Structuring Exchange First QEAA Transactions
5:30 p.m.	RECEPTION FOR ALL ATTENDEES - SPONSORED BY: Computershare Corporate Trust

FRIDAY, OCTOBER 28 (breakfast and breaks included - lunch on your own)

ADVANCED PROGRAM CONTINUED

7:30 a.m.	Registration and Breakfast Buffet
8:30 a.m. – 12:15 p.m. (Lunch on your own from 12:15 p.m. to 2:00 p.m.)	TOPICS OF DISCUSSION: <ul style="list-style-type: none"> • Tax and Practical Aspects of using DSTs and TICs as Replacement Property • Multiple Property Exchanges: when do you have them and how do they work? • Primer on Net Lease Properties in Exchanges • Annual Review of State Law Issues Affecting Exchanges
2:00 p.m. – 4:30 p.m.	GENERAL SESSION <ul style="list-style-type: none"> • Dealing with Personal Property in Exchanges • Annual Review of Ethical Issues for QIs and Advisors in Like-Kind Exchanges • General Session: Questions and Wrap Up on all Topics Adjourn



COURSE INFORMATION

– EARLY BIRD RATES VALID UNTIL SEPTEMBER 15, 2022 –

Date and Location

OCTOBER 27 – 28, 2022 • Westin Kierland Resort and Spa, Scottsdale, Arizona

TUITION: The registration fee covers all conference sessions, meeting materials and scheduled meal functions.

CES CREDITS: Attendees will receive CES® (Certified Exchange Specialist) credits.

MCLE CREDITS: Prior Section 1031 seminars have been approved for MCLE accreditation by various State Bar Associations. Attendees should arrange for credits through their local jurisdiction. An application requesting MCLE credit for this activity is pending for approval by the State Bar of Texas. MCLE credits should also be available for state bar associations that have reciprocity for Approved Jurisdictions.

CPE CREDITS: 1031 Advanced Seminar LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



CPE AREA OF STUDY: Taxes and Ethics

DELIVERY METHOD: Group Live

COURSE LEVEL: Advanced Participants should be familiar with the basics of I.R.C. Section 1031 for this Advanced Two-Day Program. No preparation is required prior to the conference.

RECORDING: Tape or video recording of this seminar is strictly prohibited without prior written approval of 1031 Advanced Seminar LLC.

REFUND POLICY: Full tuition refund, less a \$50 administration charge, will be made to registrants if cancellation notice is received by 5 p.m. PDT on or before September 27, 2022. Full tuition refund, less \$400 administration charge, will apply for all cancellations received after September 27, 2022, but on or before October 7, 2022. Substitutions / transfers allowed.

QUESTIONS: Sheila Nilsby at 425.646.4020 or email at sheila1031advancedseminar@gmail.com.

FOUR WAYS TO REGISTER

1

ONLINE: www.1031advancedseminar.com

2

PHONE: 425-646-4020

3

FAX: 206-728-0935

4

MAIL: 2001 Western Avenue #330, Seattle, WA 98121

WESTIN KIERLAND IN SCOTTSDALE, ARIZONA

By special arrangement, the Westin Kierland has reserved a block of rooms for conference registrants at the nightly rate of \$339 (additional Resort Service Charge reduced to \$20 per room per night for those staying in the room block). Reservations must be made on or before October 4, 2022, to guarantee availability and special attendee pricing. To make reservations, please contact the hotel's Reservations Department at 1-888-627-9076.



When making reservations, you must state that you are attending the "Like-Kind Exchanges" conference, to be held October 27 – 28, 2022.

EASY WAYS TO REGISTER



ONLINE: www.1031advancedseminar.com
PHONE: (425) 646-4020 **FAX:** (206) 728-0935
MAIL: 1031 Advanced Seminar LLC
2001 Western Avenue #330, Seattle, WA 98121

QUESTIONS



EMAIL:
sheila1031advancedseminar@gmail.com
CALL:
(425) 646-4020

Please fill out a separate form for each registrant.

Two Day Advanced Seminar (October 27 – 28)

☐ EARLY BIRD RATE \$1,595 (On or before Sept 15) / ☐ STANDARD RATE \$1,895

Course Materials Only - ☐ Advanced material @ \$100

Course materials will be sent after the conference. WA State Residents please add 9.5% sales tax.

Are you a prior attendee? - ☐ Yes **OR** ☐ No

Total Amount Enclosed: \$ _____ EMAIL: _____

NAME: _____

FIRM: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____ PHONE: _____

Please indicate method of payment.

☐ Check Enclosed - Make payment to: 1031 Advanced Seminar LLC ☐ VISA ☐ MASTERCARD ☐ AMEX

Credit Card #: _____ Expiration Date: _____

Name on Card (Please Print): _____

Signature: _____

Billing Address: _____ City: _____ State: _____ Zip: _____

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1031 ADVANCED SEMINAR LLC

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Seattle, WA 98121
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RETURN SERVICE REQUESTED

Register Now for Early Bird Rates!

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