

ADVANCED PROGRAM DAY ONE

Westin Kierland, Scottsdale

Thursday, October 27, 2022

8:00 am	Registration & Breakfast Buffet
9:00 am	Program Overview: <i>Louis S. Weller</i>
9:10 am (20 min)	Recent Developments: Overview of Cases, Legislation and Rulings in the past year: <i>Mary Foster</i>
9:30 am (60 min)	Like Kind Issues with Options & Other Non Fee Interests in Real Property? <i>Mary Foster, Dave Shechtman, Dick Lipton, Todd Keator [1]</i>
10:30 am	Break
10:45 am (75 min)	Select Partnership LKE issues: Synthetic Drops & Swaps, Structuring Swaps & Drops: <i>Kevin Thomason, Chris Cunningham, Steve Breitstone, Lou Weller [2]</i>
12:00 pm	Luncheon with Faculty: Networking Opportunity
2:00 pm (60 min)	Federal and State Tax Audits of Exchanges: Reports from the Field: <i>Ann Andrews, Joyce Welch, Marty Verdick [3]</i>
3:00 pm	Break
3:15 pm (60 min)	Combining Exchanges with Rollups; Planning and Implementing the 1031/721 Transaction: <i>Kevin Thomason, Dick Lipton, Bob Schachat, Lou Weller [4]</i>
4:15 pm (45 min)	Structuring Exchange First QEAA Transactions: <i>Dave Shechtman, Joyce Welch, Matt Rappaport, Todd Keator [5]</i>
5:00 pm	Adjourn
5:30 pm	Reception for All Attendees - <i>Sponsored by Computershare Corporate Trust</i>

ADVANCED PROGRAM DAY TWO

Westin Kierland, Scottsdale

Friday, October 28, 2022

7:30 am	Breakfast Buffet
8:30 am (60 min)	Tax and Practical Aspects of using DSTs and TICs as Replacement Property; <i>Chris Cunningham, Mary Foster, Lou Weller [6]</i>
9:30 am (60 min)	Multiple Property Exchanges: when do you have them and how do they work? <i>Dick Lipton, Dave Shechtman, Ann Andrews, Bob Schachat [7]</i>
10:30	Break
10:45 am (45 min)	Primer on Net Lease Properties in Exchanges: <i>Kevin Thomason, Bob Schachat, Lou Weller [8]</i>
11:30 am (45 min)	Annual review of state law issues affecting exchanges: <i>Mary Foster, Matthew Rappaport, Marty Verdick, Joyce Welch [9]</i>
12:15 pm	Lunch on your own.
2:00 pm (60 min)	Dealing with Personal Property in Exchanges <i>Steve Breitstone, Todd Keator, Matthew Rappaport [10]</i>
3:00 pm (60 mins)	Annual Review of Ethical Issues for QIs and Advisors in Like-Kind Exchanges: <i>Michael Alfano, Mary Foster, Steve Breitstone, Dave Shechtman [11]</i> <i>This session qualifies for 1.0 hours Ethics Credits for CPE and CES®</i> <i>This session qualifies for 1.0 hour Ethics for MCLE</i>
4:00 pm	Break
4:15 pm (45 mins)	General Session: Questions and Wrap Up on all Topics. <i>All Faculty</i>
5:00 pm	Adjourn