

March 31 - April 2, 2027

The Ritz-Carlton Orlando, Grande Lakes



calfeetaxinstitute.org

ABOUT

The 3-day Institute features programming delivered by nationally recognized speakers devoted to individual income tax, entity tax, and estate/gift tax. It is designed to be practical, informative, engaging, and innovative. The Institute draws attorneys, accountants, trust officers, estate planners, insurance and financial planners, appraisers, and planned giving professionals from across Florida and the United States. The Institute continues to build on the success of the previous events and this year will be no exception.

This program is developed **by** practicing tax professionals
for other tax professionals.

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BizTx Law

Edward F. Smith III
Beller Smith

Yoshimi O. Smith
Beller Smith

Christopher A. Steele
Bernstein

WEDNESDAY, MARCH 31

All times are Eastern

DAY 1 AGENDA

MORNING

8:30 am Registration Opens

8:30 - 9:15 am Breakfast

9:20 am Opening Remarks

9:30 - 11:30 am

Recent Developments in Federal Income Taxation

Prof. Bruce A. McGovern, South Texas College of Law Houston

11:30 am - 1:00 pm Lunch
and Mingle with Sponsors



AFTERNOON

1:05 - 1:55 pm

DC Update

Beth Shapiro Kaufman, Lowenstein Sandler

2:00 - 2:50 pm

Beyond the Fee: What Lender Management Means for Family Office Design

Christopher A. Steele, Bernstein

2:50 - 3:30 pm **Mingle with Sponsors**

3:30 - 5:00 pm

Loan Rangers: Navigating Promissory Notes, Trust Debt, and Tax Risk in Planning

Carsten Hoffman, Stout

Stephanie Loomis-Price, Perkins Coie LLP

Benetta Y. Park, Bessemer Trust

5:00 - 6:00 pm **Welcome Reception** - Visit with fellow attendees and sponsors

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THURSDAY, APRIL 1

All times are Eastern

DAY 2 AGENDA

MORNING

8:15 - 9:00 am **Samuel C. Ullman Memorial Breakfast** sponsored by The Florida Bar Tax Law Section and **Mingle with Sponsors**

9:05 am **Opening Remarks**

9:10 - 10:40 am
Partnership Playbook - Strategies in Transactions
Ryan Dobens, KBF Advisory
Adam J. Smith, BizTx Law

10:50 - 11:40 am **TBD**

11:45 am - 1:00 pm **Student Networking Luncheon** sponsored by A. Brian Phillips, P.A. and **Mingle with Sponsors**

AFTERNOON

1:00 - 1:50 pm
Representing Minority Members in LLCs
Adi Rappoport, Gunster

1:55 - 2:45 pm
AI and Ethics in Estate and Tax Planning
Edward F. Smith III, Beller Smith
Yoshimi O. Smith, Beller Smith

2:45 - 3:25 pm
Mingle with Sponsors

3:30 - 5:00 pm
Biggest Tax Questions Answered Panel
Cristin Keane, Trenam Law
Paul S. Lee, Consiglio Advisors LLC

5:00 - 6:30 pm
March Madness Mingle Reception

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FRIDAY, APRIL 2

All times are Eastern

MORNING

8:15 - 9:00 am
Breakfast and Mingle
with Sponsors

9:05 am Opening Remarks

9:10 - 10:00 am
The New Normal for Charitable Tax Planning
Justin Miller, Evercore

10:05 - 10:55 am
Trust Me, It's Taxable: DNI Another Day -
A Tour of Subchapter J
Mark R. Parthemer, Glenmede

10:55 - 11:15 am Mingle with Sponsors

11:15 am - 12:05 pm
Federal Wealth Transfer Tax Update
Samuel A. Donaldson, Georgia State University
College of Law

AFTERNOON

12:10 - 1:00 pm **Lunch and
Mingle with Sponsors**

1:00 - 1:50 pm
Cross Border Trust Planning
Christopher R. Callahan, Fox Rothschild LLP

1:55 - 2:45 pm
Ethics topic
A. Stephen McDaniel, Harkavy McDaniel
Kaplan and Salomon PLLC

2:45 pm **Closing Remarks**



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FEES & REGISTRATION

REGISTER ONLINE

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FEES	Early Bird (before 10/15/26)	Regular (10/16/26-1/15/26)	Last Chance (1/16/27-3/30/27)
Full Conference	\$1,100	\$1,200	\$1,300
Two Days (Choose any 2)	\$1,000	\$1,050	\$1,100
Single Day	\$500	\$550	\$600

\$100 discount available at any time to UF Graduate Tax Program Classes of 1977, 1987, 1997, 2007, 2017

University of Florida Levin College of Law professors receive complimentary registration. A 50% discount is available to full time professors from other Colleges and Universities.

Cancellation/Transfer A request for a cancellation/transfer must be sent via email to info@calfeetaxinstitute.org.

A full refund for a cancellation will be granted if notice is received on or before March 10, 2027. Those who cancel between March 11 and March 30, 2027, will forfeit a \$200 administrative fee. No refunds will be granted after March 31, 2027, for any reason. Requests to transfer registration to another individual will be accommodated.

CONTINUING EDUCATION CREDIT

Legal credit (CLE) will be available in all states. Accounting (CPE), Certified Financial Planner® (CFP), Certified Trust and Fiduciary Advisor (CTFA), and Enrolled Agent (EA) credit will be available nationwide. Continuing Judicial Education (CJE), Florida Legal Specialty areas, ethics and technology credit may also be available for selected sessions.

The Institute offers up to 17.5 hours of continuing education credit. Individual states and disciplines determine the total number of credits awarded. (Approval status will be communicated as it becomes available.)

License numbers are required in order to receive credit.

Continuing education credit is administered by the [National Association of Insurance and Financial Advisors](#).

OVERNIGHT ACCOMMODATIONS

We are excited to be back in Orlando, Florida at The Ritz-Carlton Orlando, Grande Lakes this year. Inspired by the opulent era of Florida's historic hotels, this luxury hotel stands as a premier resort destination. Unparalleled opportunities for relaxation, recreation, and adventure beckon families, couples, groups, and all travelers. Nestled amidst 500 acres of pristine natural landscapes, tranquil lakes and a thriving far, The Ritz-Carlton Orlando, Grande Lakes transcends the conventional notion of a mere luxury hotel - it is an exceptional escape.



The Calfee Tax Institute room rate is \$369 (single/double occupancy, before taxes) plus a \$40/night resort fee that provides mountain bike rental, access to tennis courts, pickleball courts, and the Grande Lakes Waterpark, and transportation to SeaWorld, Universal Studios, and Disney theme parks.

Reservations for overnight accommodations should be made by Monday, March 1, 2027, at our [reservations website](#) or by calling 888-707-9325 and letting the reservationist know you are attending the Calfee Tax Institute.

Please contact the CalfeeTax Institute office at info@calfeetaxinstitute.org or 866-225-5040 if you experience any trouble during the booking process.

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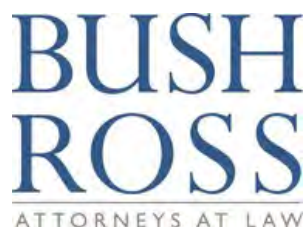


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