



Jeremiah Long Memorial

# 24<sup>th</sup> Annual National Conference

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

October 23 – 25, 2019 • 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.

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We welcome your sponsorship! For a list of sponsorship opportunities, please email [sheila1031advancedseminar@gmail.com](mailto: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.

**Louis S. Weller, Co-Chair**  
*Weller Partners LLP*

**Ciro M. Immordino**  
*California Franchise Tax Board*

**Darryl Steinhouse**  
*DLA Piper LLP*

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

**Todd D. Keator**  
*Thompson & Knight*

**Derrick M. Tharpe**  
*Wells Fargo 1031 Exchange Services*

**Anne E. Andrews**  
*PricewaterhouseCoopers LLP*

**Alan S. Lederman**  
*Gunster*

**Martin E. Verdick**  
*RSM US LLP*

**Bradley T. Borden**  
*Brooklyn Law School*

**Richard M. Lipton**  
*Baker & McKenzie LLP*

**Joyce L. Welch**  
*Deloitte Tax LLP*

**Stephen M. Breitstone**  
*Meltzer, Lippe, Goldstein & Breitstone*

**David Shechtman**  
*Drinker Biddle & Reath 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
- How to Handle Exchanges with New Construction as Replacement Property
- Dealing with Lending Issues for both the Relinquished and Replacement Property
- Opportunity Zone Investments: How do they Work? How do they Compare to 1031?
- Installment and Deferred Sales as Substitutes for 1031
- Considerations for DSTs and TICs as Replacement Property
- Using Creative Structures for Partnership Issues
- Review of State Law Issues Affecting Exchanges
- Practical Tips for Structuring Forward (Deferred) Exchanges

# SCHEDULE

VISIT OUR WEBSITE FOR A COMPLETE AGENDA

[www.1031advancedseminar.com](http://www.1031advancedseminar.com)

## WEDNESDAY, OCTOBER 23 (breakfast, break and lunch included)

OVERVIEW SESSION	CPE Credit Hours - 5
9:00 a.m.	Registration and Continental Breakfast
9:30 a.m. – 3:30 p.m. <i>(Lunch from 12:15 p.m. to 1:30 p.m.)</i>	<b>Overview Session</b> You will learn the basics of Section 1031 exchanges

## THURSDAY, OCTOBER 24 (breakfast, breaks and lunch included)

ADVANCED PROGRAM	CPE Credit Hours - 11 General / 1.0 Ethics
8:00 a.m.	Registration and Breakfast Buffet
9:00 a.m. – Noon	<b>TOPICS OF DISCUSSION:</b> <ul style="list-style-type: none"> <li>• Recent Developments</li> <li>• Improvement Exchanges</li> <li>• Lending Issues</li> </ul>
Noon – 2:00 p.m.	Luncheon with Faculty (Networking Opportunity)
2:00 p.m. – 5:00 p.m.	<b>TOPICS OF DISCUSSION:</b> <ul style="list-style-type: none"> <li>• Creative Structuring Involving Partnerships</li> <li>• Annual Review of State Law Issues Affecting Exchanges</li> <li>• Current Issues Being Considered at IRS &amp; Treasury</li> </ul>
5:30 p.m.	<b>RECEPTION FOR ALL ATTENDEES</b> <i>SPONSORED BY: Wells Fargo 1031 Exchange Services</i>

## FRIDAY, OCTOBER 25 (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. <i>(Lunch on your own from 12:15 p.m. to 2:00 p.m.)</i>	<b>TOPICS OF DISCUSSION:</b> <ul style="list-style-type: none"> <li>• TICs and DSTs as Replacement Property</li> <li>• Opportunity Zone Investments, or Down the Yellow Brick Road in the Land of OZ</li> <li>• Installment Sale Adjuncts/Substitutes to Exchanges</li> </ul>
2:00 p.m. – 4:30 p.m.	<b>GENERAL SESSION</b> <ul style="list-style-type: none"> <li>• Practical Tips for Deferred Exchange Transactions</li> <li>• Annual Review of Ethical Issues for QIs and Advisors in Like-Kind Exchanges</li> </ul> Wrap Up Adjourn

# COURSE INFORMATION

– EARLY BIRD RATES VALID UNTIL SEPTEMBER 9, 2019 –

## Date and Location

OCTOBER 23 – 25, 2019 • 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](http://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 pm PDT on or before September 23, 2019. Full tuition refund, less \$400 administration charge, will apply for all cancellations received after September 23, 2019, but on or before October 4, 2019. Substitutions /Transfers allowed.

**QUESTIONS:** Sheila Nilsby at 425.646.4020 or email at [sheila1031advancedseminar@gmail.com](mailto:sheila1031advancedseminar@gmail.com).

## FOUR WAYS TO REGISTER

1

**ONLINE:** [www.1031advancedseminar.com](http://www.1031advancedseminar.com)

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**PHONE:** 425-646-4020

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**FAX:** 206-728-0935

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